

Audience Development: Texas Symphony Orchestras

by
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A Master's Project

Presented to the Arts and Administration Program of the University of Oregon in partial fulfillment of the requirements for the Degree of Masters of Science in Arts Management
June 2012

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Abstract:

Symphony orchestras are experiencing a significant decline in audience attendance. The development of technology, the decline of music education, and the current state of our economy, are just a few challenges that symphonies are coping with. Some organizations have already found approaches to overcome these obstacles, but many are still struggling. Throughout this research the following question is explored: “*What audience development strategies are being used by Texas symphony orchestras?*” This work focuses largely on the Austin Symphony Orchestra and the San Antonio Symphony through a comparative case study analysis. This project also involves document analysis, observation and interviews.

Keywords:

Audience Development

Orchestras

Texas

Participation

Engagement

Acknowledgements

I would like to take this opportunity to thank those who have contributed to the completion of my research project, and this Master's degree. I would like to thank my research and faculty advisor, Dr. Patricia Dewey, for her wonderful guidance and support through this process, especially from a distance. I would also like to thank my husband, Adam, and my parents for encouraging me to obtain my career aspirations and goals. Lastly, I would like to thank Jack Fishman (San Antonio Symphony) and Anthony Corroa (Austin Symphony Orchestra), who graciously met with me to provide insight into their organization's audience development practices.

Renelle Bedell

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Master of Science, Arts and Administration
University of Oregon, Spring 2012

Bachelor of Science, Music, Management
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Artistic Operations Assistant San Antonio Symphony, San Antonio TX, 2012 – Present

- Managed contract administration and rider execution
- Produced weekly orchestra schedules and rehearsal orders
- Assisted in financial tracking of operational costs
- Maintained the Music Director's calendar, appointments, and other logistical affairs

Assistant Teacher Lake Hills Montessori, Austin TX, 2008 – 2010

- Worked to promote social, physical, and intellectual growth among children
- Led group music activities to children ages two through five

Music Instructor Chesterfield MI & Austin TX, 2005 – 2010

- Taught independent piano lessons
- Emphasized the fundamentals of technique and music theory through interactive games and warm-ups
- Empowered students to express their passions through music
- Organized and programmed student recitals

INTERNSHIPS

Programming Long Center for the Performing Arts, Austin TX, 2011

- Updated and maintained season calendars using EMS Enterprise
- Participated in logistical planning for current and future seasons
- Became familiar with the contract and rider process
- Organized and generated deposit and payment requests

Marketing Austin Symphony Orchestra, Austin TX, 2011

- Created and developed marketing plans for performances
- Planned and executed advertising efforts
- Produced copy for radio, news ads, online content, and press releases
- Assisted in the re-branding of BATS, Austin's young professionals group

Guest Relations Round Rock Symphony Orchestra, Round Rock TX, 2008 - 2010

- Responsible for box office duties, selling tickets, handling money and managing volunteers
- Accurately operated the computer ticketing system to sell tickets during events
- Provided information regarding the Symphony, its newly founded history and upcoming events

Public Relations Detroit Symphony Orchestra, Detroit MI, 2008

- Responsible for writing and sending press releases and media alerts
- Assisted in the production and creation of performance publications
- Employed public relations strategy and communication for guest and media relations on behalf of the symphony
- Adapted strong editing techniques
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Administrative Ann Arbor Symphony Orchestra, Ann Arbor MI, 2007

- Accountable for general office tasks associated with marketing and advertising
- Assisted in a large fundraising event
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ACTIVITIES

Member: League of American Orchestras (2011-Present)

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Chapter 1: Introduction

Problem Statement

The percentage of Americans who attend classical music performances is plummeting every year. This decline in attendance is affecting countless symphony orchestras across the United States. Potential causes as to why this is occurring are explored throughout recent literature and include causes such as: the decline in arts education, the development of technology, the decrease in leisure time, and the recent economic recession. The Ford Foundation confirmed several of these findings through a 12 US city survey of performing arts institutions. One result in particular found confirmation that audiences who attend performances are “indeed disproportionately well-to-do and well-educated” (Seaman, 2005, p.8). Although there is a vast amount of research investigating reasons for the decrease in classical music participation, there is a current gap in literature that identifies what actions are being taken at the management level in response to these potentially dire changing trends. If audience development actions are not taken, the future sustainability of symphony orchestras will remain at risk and many more symphonies will be forced to close their doors.

This research project explores audience development strategies that are being used by Texas symphony orchestras. I chose to focus this project on the state of Texas because it is the setting in which my professional experience and career aspirations lie. This project serves as a tool and guide for emerging arts leaders and arts administrators in understanding audience development initiatives in symphony orchestras. Furthermore, this project may particularly appeal to arts leaders in Texas, as research and findings may affect their own audience development programming. The following

section will draw on literature, introducing areas in which the remainder of this project will focus.

Conceptual Framework

The goal of this project is to identify audience development strategies being used by Texas symphony orchestras. In order to determine these strategies, it is essential to understand what areas in the orchestral sector currently need refinement or further support. Identifying these areas will provide the framework for the remainder of the study, as these challenging areas are likely to coincide with audience development planning and practices being implemented at the administrative level. Literature reveals several reasons for the decline in audience participation for symphony orchestras, a few include: the decline in music education, the advancement in technology, and the decrease in leisure time (see Figure 1).

Eminence of American Composers (1990) assessed University faculty perspectives on the notability of living American composers. Researchers compared this information with an analysis of symphony orchestra programming to determine the frequency of work performed by contemporary composers. The results of the study conveyed that University faculty listed many more composers as notable than were actually being programmed (Price, Yarbrough & Kinney, 1990). The conclusions drawn from the findings reveal that a larger body of literature from which to select would benefit orchestras. Providing exposure to new composers would help to expand audience variety, benefitting both the audience member and the organization.

Audience Development Texas Symphony Orchestras

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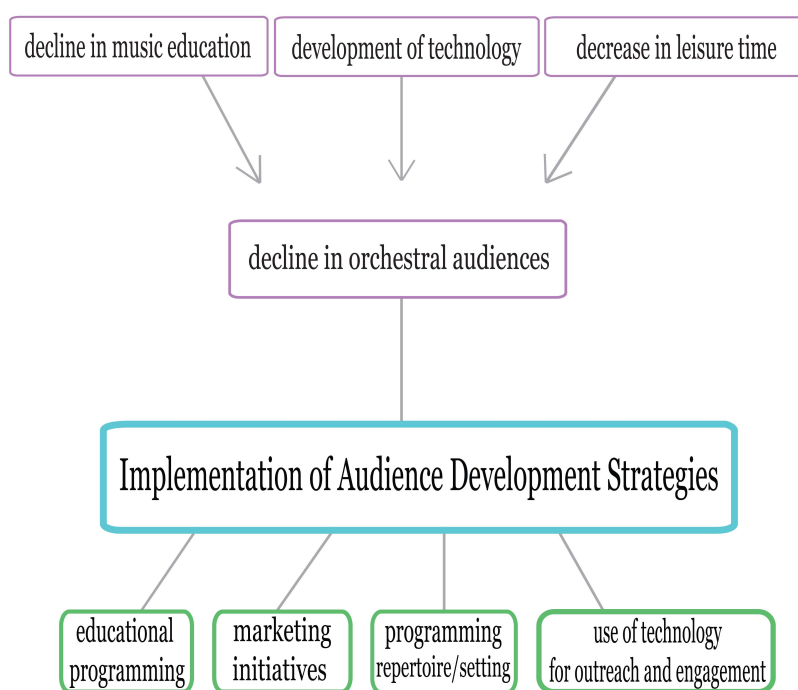


Figure 1. Conceptual Framework Schematic

Because this study took place over 20 years ago, the validity of the results would, in all likelihood, come in to question today. Would the same conclusion still stand? Would a wider variety of contemporary composers in fact be rewarding? Is this an action orchestras could take to compensate for the current decline in classical music attendance? Is this something that is already being implemented? This project looks at programming as one outlet of audience development. Although year after year traditional warhorse programming continues to draw large crowds, programming innovative and contemporary works could potentially attract a new genre of audience. In addition to looking at programming from a repertoire standpoint, I also will address programming in regards to the performance venue and location where performances are held. Scheduling performances outside of the formal concert hall may affect the number and variety of audience members.

Education is directly related to arts participation. The *2008 Survey of Public Participation in the Arts* conducted by the National Endowment for the Arts (NEA) revealed an extremely close correlation between attendance and years of formal music education (National Endowment for the Arts, 2009). This concludes that individuals with a higher level of music education are more likely to attend performances than those with little to no education. Although this study did not measure the impact that general arts education has on attendance patterns, it was reported that the percentage of Americans between the ages of 18 and 24 with a music education background has dropped a third (to 38 percent) since 1982 (Teachout, 2009). This vital statistic is a key contributor to the current decline in classical music participation.

The lack of exposure to classical music only elicits a lack of interest among younger populations. Music education is vital in retaining audiences for the future. With knowledge of music theory and history, it is likely that audiences will be more inclined to attend a live performance and their level of engagement would increase. According to Kotler and Scheff (1997), a 1996 study that evaluated the effects of arts education on participation reported that, “Arts education was found to be the strongest predictor of arts creation and consumption, stronger even than socioeconomic status, race/ethnicity, and gender. Education is the key to making art meaningful, important, and necessary” (p. 517). As generations evolve and the option for music education decreases, it becomes more difficult for orchestral organizations to attract and retain new audiences. This project explores educational initiatives within symphony organizations and their use, as a way to develop and sustain audiences for the future.

Recently, young audiences have become emerged in digital media. This is due to its popularity and accessibility. Media technology introduces many opportunities for experiencing the arts in the most inexpensive and convenient settings. YouTube has increasingly become one of the most popular websites on the Internet. Here, individuals can watch a symphony orchestra performance without ever having to set foot in a venue. Users also have the option to engage in dialogue with other guests perusing the site. This fulfills the need for social interaction that normally takes place at live performances. Although classical music enthusiasts believe there is no substitute for a live performance, this is not a priority for younger generations. In addition to open access of streaming, digital downloading is another outlet that questions authenticity of arts experiences. As Teachout (2009) explains:

The decline documented by the NEA survey is also a manifestation of the long-term consequences of the mechanical reproduction of art and more recently the emergence of digital media that make it possible to view or download at will a near infinite number of books, films, TV shows, and sound recordings (p. 40).

Because society has become progressively more dependent on mobile devices, the access to materials on laptops, mp3 players and cell phones has become an essential component in arts participation. Downloading allows for the convenience of mobility, sharing and distribution. For these constituents “live performance is not the normal condition of art but a tiresomely, inconvenient alternative to consuming art on demand” (Teachout, 2009, p. 41). In 2005, the number of downloaded classical music albums grew by 94 percent, while CDs sales decreased by 15 percent (Bernstein, 2007). Factors involved with attending a live performance seem increasingly more strenuous now that classical resources are so accessible. Because more people every year increase their level of engagement with technology, this may be a tool that orchestras are utilizing more, in attempts to connect with current and prospective audiences.

The rise and convenience of technology has especially played a significant role in younger generations when it comes to leisure time. In an article titled *Orchestra Audience Development and the Aesthetic of “Customer Comfort”* (2010) several reasons for audience development are explored. This meta-analysis focuses largely on the works of author Tim Baker. Baker identifies various sources and summarizes the four main factors that prevent society from attending classical music performances. These four areas of risk include: the nature of the art form, social factors, lack of knowledge, and competition from other activity (Sigurjonsson, 2010). These uncertainties include

minor issues, such as knowing what to wear and when to clap, to more significant arguments. For instance, being required to sit quietly and listen without necessarily understanding or relating to the music being performed. For novice classical music attendees, the option of a movie or a live rock concert is more appealing, because “one can always buy a CD with the music and listen to it on one’s own time without all the hassle and time investment of the concert situation” (Sigurjonsson, 2010, p. 271). The results from this study clearly show that the lack of attendance at the symphony is directly related to leisure time, education, and technology. Conclusions drawn from this article relay that although orchestra administrators may be attempting to diversify their audiences, further research is needed to identify the outcome of these audience development attempts.

Not only do orchestras have to battle potential risks associated with attending a performance, organizations also have to compete for audience leisure time with other forms of entertainment. This is a vulnerable matter, especially when considering the professional lifestyle of participating individuals and their lack of free time. Attendance of a live event requires the consumption of an individual’s personal and social time.

According to Boudier-Pailler (2008):

Two empirical tests show the influence of time (personal and social) on live entertainment attendance. Social time, perceived as the first parameter in the collective encounter with the work, can be a deterrent to attendance. In fact, individual aesthetic sensibility (expressed through a personal relationship with a cultural object) cannot be transposed onto the social context of live

entertainment attendance. Dimensions of personal time explain the high or low attendance frequency (p. 46).

Because live performances are no longer considered social events, it is not just personal time that an individual invests when attending a night at the symphony, but social time as well. Time is an essential factor when it comes to the relationship between audiences and classical music performances. Audiences must allocate time for ticket purchases, which usually requires advanced payment. Because concert schedules are limited to specific days and time, individuals are challenged with fitting these activities into their busy lifestyle. In addition to ticket purchasing, patrons must also commit time for the duration of the performance itself, an uncontrollable time span seated closely with all in attendance. This project considers programming, in regards to the location and atmosphere of a performance. It is likely that different settings and/or more casual formatting would appeal to those unlikely to attend otherwise.

This literature review provides insight into the issues in the performing arts sector, and identifies areas that need further research. It is clear that solutions to these problems have been explored and assessed, but some only briefly. The next step is to investigate what audience development strategies are being implemented to better understand program intent and design. The decline in music education, the advancement in technology, and the decrease in leisure time are just a few reasons for the decline in orchestral audiences. In order to overcome this decline, many organizations are exploring new audience development strategies. Strategic topics include: educational programming, marketing initiatives, programming (in regards to

repertoire and performance setting), and the use of technology for outreach and engagement. These areas will require further research.

Research Methodology

The purpose of this project is to explore audience development strategies being used by Texas symphony orchestras. The state of Texas is the focus of this project because it is where I reside, thus it is where my career aspirations lie. Furthermore, by thoroughly investigating two organizations, I hoped to better understand audience development as a whole, further identify audience development initiatives in Texas symphony orchestras, and understand the intention behind the administrative decision making process. This project serves as a tool and guide for emerging arts leaders and arts administrators in understanding audience development strategies in symphony orchestras. Furthermore, this project may particularly appeal to arts leaders across Texas, as research and findings may affect their own audience development programming based on their location, and the processes being implemented by surrounding organizations.

As I have relied on naturalistic qualitative methods (interviews, observation and analysis of existing texts) throughout my research, I have positioned myself in the interpretivist paradigm. The interpretivist/constructivist paradigm is described by O'Leary (2010) as, "Theories of knowledge that emphasize that the world is constructed by human beings as they interact and engage in interpretation" (p. 6). This research is primarily exploratory and is designed to discover audience development initiatives, focusing on organizations based on my location and area of interest. By placing myself

in the interpretivist paradigm I recognized that my research design may evolve over time as new information emerges, and that this may include features that my initial research design did not intend to incorporate. As an interpretivist, I have first explored then proceeded to develop theory, allowing for a deeper investigation, while at the same time acknowledging awareness that uncertainty exists, as each individual perceives their own reality.

In order to identify differences in audience development approaches, I have conducted a comparative case study of the Austin Symphony Orchestra and the San Antonio Symphony. The selection of these sites were chosen because of my familiarity with them, and the commonalities between them. I became involved with the Austin Symphony Orchestra during an internship in the summer of 2011. It quickly became apparent that their stance and tactics on audience development would make an intriguing case study. In January 2012, I began my position as the Artistic Operations Assistant at the San Antonio Symphony, and my assumptions of their diligent audience development initiatives were confirmed. In addition, both organizations are similar in size, budget and location. Therefore a comparison of these two groups seemed both fair and logical. In order to eliminate my personal and professional biases as a researcher, I have kept a notebook to store my subjectivities. Judgment and criticisms are impossible to eliminate, therefore I have used my opinions to shape new questions and re-examine existing perspectives.

A multitude of today's orchestras are facing a decline in audience attendance. It is for this reason that I desired to identify strategies to assist organizations in overcoming this barrier, with hopes in increasing future sustainability. This project

investigates the audience development landscape on a national level, explores audience development in the state of Texas, and includes a comparative case study of the Austin Symphony Orchestra and the San Antonio Symphony which further identify administrative goals and intentions. This project serves as a tool and guide for emerging arts leaders and arts administrators in understanding audience development initiatives in symphony orchestras. This research project, addresses the following question: What audience development strategies are being used by Texas symphony orchestras? I recognize that there are many limitations to this study as audience development is a vast topic. There is an immense amount of research that could have been explored, and many potential case studies. Because of my limited time frame, this research focuses solely on the state of Texas and elaborates on only two organizations.

Research Design

Throughout this project I have researched audience development strategies being used by symphonies in the state of Texas. I have administered my research from a qualitative perspective with secondary analysis of quantitative data. This project includes a comparative case study of the Austin Symphony Orchestra and the San Antonio Symphony. I selected these sites because of my familiarity with them, and because I expect to find very different practices in organizations that are very similar in size, budget and location. This case study incorporated document analysis, observation and interviews.

Case studies involved an examination of existing quantitative data, participant observation (during performances), and in-depth interviews with administrative

employees at both organizations. Interviews contained a series of questions relating to audience development attempts, strategies, goals and outcomes (when applicable). Interview participants included the executive director at each symphony orchestra. Because the executive director oversees all strategic and action planning for the organization, this person was best able to provide the information needed to identify audience development strategies and goals.

The study was conducted during the winter and spring terms of 2012 and was completed by June 2012 (see Appendix D). Techniques used to achieve qualitative credibility in this study include triangulation and member checks. From this project, I have found that two organizations, though similar in many ways, have vastly different landscapes, goals, intentions and outcomes when focusing on audience development. Concentrating on two organizations has allowed for a better understanding of practices and programming. This project serves as a tool and guide for emerging arts leaders and arts administrators in understanding audience development initiatives in symphony orchestras. Furthermore, this project may also appeal to arts leaders in Texas, as research and findings may affect their own audience development programming based on their location and the processes being implemented by surrounding organizations.

Data Collection and Analysis Procedures

I began my research by reviewing literature to better understand the landscape of performing arts management. I familiarized myself with audience development strategies on a national level by looking at previous case studies, and methods identified by the League of American Orchestras to discover existing strategies and learn what

other orchestras are undertaking. Next, I focused on symphonies in the state of Texas, identifying audience development on a general level to identify state wide trends, as well as issues or trends reported by the Texas Cultural Trust and the Texas Commission on the Arts. Texas symphonies discussed in this section include those that are 501(c)(3) non-profit organizations, and are members of the League of American Orchestras. Case studies focus on the Austin Symphony Orchestra and the San Antonio Symphony. I chose these organizations because of their similarities in size and budget, but also their differences in approaches and strategies to audience development, which I have discovered through preliminary investigation. During this study I identify audience development strategies that each symphony is using through several data collection techniques. Finally, I outline major findings, provide recommendations for these organizations, and suggest areas for further research.

Data collection will involve document analysis, observation and interviews. I chose these methods because I believed they would help to best answer my proposed question, allowing for an in-depth and credible case study. Prior to investigation of these sites, a recruitment letter (see Appendix A) and consent form (see Appendix B) was delivered and signed for employees participating in the interview process. Data collection and analysis was an ongoing aspect of this study. As meaningful data emerged, further data collection was required. Observation included attending performances held by the symphony to observe attendees. These participants were observed only; no physical or verbal contact was made. The purpose of observation was to gather data through the senses and align results with topics discussed during the interview process. Observations were conducted in a covert fashion, in which the nature

of the study was not disclosed. I behaved as a full observer (non-participant) in the environment, and the observation technique was unstructured. Observation was recorded through note-taking (see Appendix C).

Document analysis was also used throughout this project. I examined existing data that was created by the symphony. Analysis included digital documents (websites) and tangible documents (ticket sales reports, etc.) (See Appendix C). Analysis of tangible documents occurred on site (at the administrative office where the data is kept). I did not transport or copy any data. All research records were kept in a locked file.

Interviewing was the main data collection tool used in this project. Interviews involved a series of questions relating to audience development attempts, strategies and goals (see Appendix C). Interview participants were interviewed once, and received a follow up phone call. These situations included additional questions to allow for clarity and credibility of the study. During interviews I recorded data through note taking (on a computer), and audio recording. Participants are identified in this project. Names are used to report findings of the organization's structure relating to audience development. Each participant had the opportunity to review the content they submitted and where applicable, edit their remarks as they appear in the text. This has allowed for further credibility of the study. All data related to the project was stored on a password protected computer. After three years, all data and files will be deleted (as determined by the University of Oregon).

Once all data was collected, qualitative data analysis took place to interpret raw data into meaningful insight. Like sources were identified so that themes could emerge

and necessary improvements or changes could be made for the remainder of the study. Data was analyzed manually and thematically through deductive reasoning. Qualitative data analysis was an ongoing process throughout this project, beginning before all data was even collected. Once data was thematically organized, theories were generated and conclusions were drawn.

The research design of this project was a critical element in understanding the groundwork for audience development initiatives in symphony orchestras. The following chapter will focus on current literature surrounding audience development, and identify trends on a national level.

Chapter 2: Literature Review

Orchestral audiences continue to decline every year. Though there are many factors that have led to this, a few of the most prominent include; the decline of music education, the continuous development of technology, and the decrease of leisure time in the everyday lives of society. In order to overcome this decline, many organizations are exploring new audience development strategies. Strategic topics include: educational programming, marketing initiatives, programming (in regards to repertoire and performance setting), and the use of technology for outreach and engagement. To understand these topics more thoroughly, it was necessary to identify their use on a national level.

Audience development is an extensive and complex topic on the mind of virtually every arts leader. As audiences decline and become more difficult to attract every year, many organizations make it their sole mission to establish new and innovative strategies to increase attendance for live performances. One of the most common ways this is done is through marketing. Marketing is an elaborate process that includes not only communicating the services an organization provides, but creating those services, and delivering them. Marketing can be done in many different ways and include a variety of initiatives. Many orchestras have already implemented marketing approaches that have successfully increased audience attendance. These approaches range from traditional advertisements and direct mail, to community engagement and festival programming (League of American Orchestras, 2009).

Although some orchestras have found success in their marketing strategies, many still struggle with increasing and diversifying their audiences. According to the *Audience Demographic Review* (2009), one approach some orchestras have adopted is

combining their marketing and development departments into one unified department, “enabling more consistent messaging, broader reach, and leveraged scale from the overlap between these increasingly associated functions” (p.18). The League of American Orchestras shows their support for this merge in symphony administration by offering a Leadership Program for Development and Marketing Professionals as part of their yearly Executive Leadership Program. This program is based on the notion that a new model of revenue is emerging in US symphony orchestras. According to the League of American Orchestra’s website (2012), this new model combines ticket sales and fundraising:

More orchestras are looking at ticket buyers and donors as “members” along a similar continuum of involvement and engagement. These orchestras develop institution-wide strategies that move their “audiences” along the path toward greater involvement -- and greater revenue. They also see clearly how these strategies tie directly to artistic achievement.

Because marketing and development professionals both work with the same patron data, and research shows a high turnover rate among these employees, the League has concluded that more qualified leaders will ensure consistent, positive relationships with patrons, leading to an increase in audience retention.

Arts leaders not only have to battle the various ways to market classical music, but also the types of patrons to market to. Defining a target market of constituents is necessary in order to reach the maximum amount of audience members. Evaluating market research is a vital element in understanding the habits of the intended market. With this information, organizations can determine where to focus their marketing

tactics. Rentschler, Radbourne, Carr & Rickard (2002) explore the relationship between marketing and its implication of retaining existing audiences in performing arts organizations. Through examination of the performing arts environment, *Relationship marketing, audience retention and performing arts organisation viability* identifies marketing strategies and proposes a mathematical model, based on exploratory case study research, to aid performing arts managers in deciding where their efforts should be focused in order to maximize earned income (Rentschler et al., 2002).

Recently, arts organizations have begun to increase their focus on audience development and decrease their emphasis on product development. One way of achieving this is called relationship marketing. The goal of relationship marketing is to emphasize customer satisfaction and increase retention, rather than focusing on sales. Although maximized profit is still an ultimate outcome, an increase in profit should be targeted as long-term goal in relationship marketing. “Long-term loyalty and audience development strategies mean that the risk factor for a prospective ticket buyer or repeat buyer must be minimised by incentives and discounts. Increased participation reduces the risk factor, increases loyalty and thereby increases audiences” (Rentschler et al., 2002, p. 124-125). This shift toward relationship marketing is an extremely beneficial strategy of audience development. Creating a positive and secure relationship with patrons establishes trust and loyalty which will lead to an increase of long term retention. Another benefit to relationship marketing is the low cost associated with it. The investment of patrons in the relationship marketing model occurs only at the beginning of the relationship, thus the longer the relationship, the lower the overall cost. Relationship marketing also affects the way in which tickets are priced.

Devoted patrons of a symphony orchestra are typically subscription holders. While the subscription model has always seemed to work well in sustaining these loyal patrons, this model is becoming increasingly less significant as generations evolve. This is especially true for orchestras attempting to attract new and younger audience members. In these cases, there is a lack of time and money for an individual to commit to a subscription package of this magnitude. Orchestra managers may now need to consider the advantages and disadvantages of single-ticket sales, and decide whether a subscription or a single-ticket marketing model will evoke greater sustainability.

Figure 2 displays a dual model that shows the connection between marketing and the number of new audience members, as well as marketing and the retention of existing patrons. Although most performing arts organizations recognize the value of this model, a quantitative analysis provides further insight to the benefits that relationship marketing has on audience retention. Rentschler, Radbourne, Carr & Rickard (2002) developed a mathematical model that incorporates audience retention rate in conjunction with a number of other factors (see Figure 3). Because orchestras and other performing arts organizations are emphasizing their efforts on audience development, it is necessary to identify what types of audiences organizations should be exerting their resources on. This model offers a way for arts marketers to assess whether they should continue to building existing relationships, or reach out to new audiences.

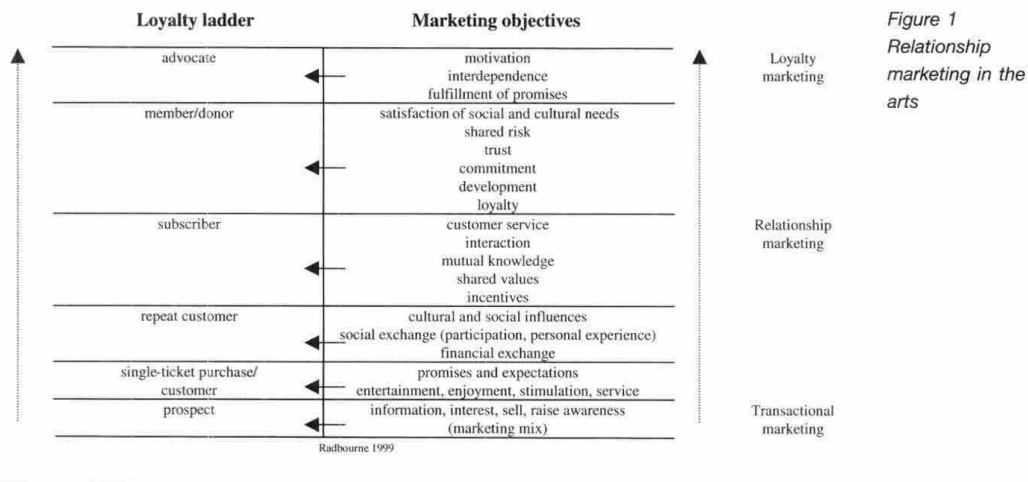


Figure 2. “Relationship marketing in the arts” (Rentschler et al., 2002, p. 125).

If the following is denoted

N_i = Number of newly attracted customers in the i th year

I_N = Income from a New customer

C_N = Cost of attracting a New customer

R_i = Number of Retained customers in the i th year

I_R = Income from a Retained customer

C_R = Cost of attracting a Retained customer

then the profit, P_i , in the i th year is given by

$$P_i = N_i(I_N - C_N) + R_i(I_R - C_R) \quad (1)$$

To determine R_i , set

α = Retention rate (= proportion of New customers that are Retained for the following year, ≥ 0)

β = Dropout rate (= proportion of Retained customers lost each year, ≥ 0)

which gives

$$R_i = R_{i-1} + \alpha N_{i-1} - \beta R_{i-1}. \quad (2)$$

Now the reasonable assumption can be made that the number of customers per year is capped, or can only grow at a set rate. So set

T_i = Total number of customers in the i th year ($T_i = R_i + N_i$)

and allow this to grow at a set rate (which may be zero): set

r = Growth rate in Total number of customers, ≥ 0

so then

$$T_{i+1} = rT_i \quad (3)$$

The number of new customers needed in the i th year to achieve the prescribed Total is then given by

$$N_i = T_i - R_i \quad (4)$$

Figure 3. “Relationship marketing in the arts” (Rentschler et al., 2002, p. 127).

Deciding whether to market to a frequent, infrequent, or a non-existent audience has been a major discussion amongst orchestra administration. Many resources advise marketing toward already active attendees. These constituents are already aware of cultural organizations, activities and performances, and thus are more likely to attend. Marketing to these audiences is also inexpensive and less time consuming. This is due to the fact that organizations already possess the information needed to communicate to these consumers and can do so directly. While this approach is proven most successful, orchestras must attempt to reach their non-existent audiences if they wish to expand their audience base. This can be an extremely challenging task.

Orchestral audiences have varied drastically over the years. Consequently, much of the existing literature surrounding audience development has focused primarily on understanding audience intentions and behaviors. In 2001, the League of American Orchestras conducted a study titled *Audience Motivation Research Project*, which involved more than 250 orchestras and sought to uncover why individuals attend live performances. This project validated many of the assumptions already made by other scholarly researchers and research institutions.

The *Audience Motivation Research Project* confirmed several key motivators that influence patrons to attend symphony performances. Understanding these motivators is critical when planning audience development for a symphony. With insight into the organization's target market, strategies and tactics that best meet audience development goals can be clearly established. One motivator identified in the *Audience Motivation Research Project* is "the frequency spiral", an inevitable circle that shows the controversy involved with attending the symphony. Surveyors asked audience members

which “traits correlate most closely to frequency of attendance” (League of American Orchestras, 2001, p. 3). The results unanimously revealed that the amount of enjoyment from the music was the sole factor audiences attended performances. Additionally, seventy-three percent of attendees believed that the amount of enjoyment they receive is heavily influenced on how knowledgeable they are about the pieces being performed (League of American Orchestras, 2001). This proves that the more familiarity, the more enjoyment, which ultimately increases the likelihood of return, and to complete this spiral, the higher the return rate, the greater the knowledge of orchestral repertoire. With this information, the League encourages arts managers to consider how they can take advantage of this spiral to increase participation.

The *Audience Motivation Research Project* also revealed factors that inhibit society from attending performances. Although 13 inhibitors were identified, three were consistent amongst most patrons: “Difficult to find time in busy schedule (29%); Can’t make a commitment ahead of time (22%); Tickets Cost too much (20%)” (League of American Orchestras, 2001, p. 3). The League explains that these inhibitors (although powerful) are ambiguous. Needless to say, those not attending performances value other forms of entertainment more than they value classical music. The League encourages organizations to create awareness, and establish expectations for classical music that will make the orchestra experience more appealing than other social and entertainment activities (League of American Orchestras, 2001).

Audience Motivation Research Project explores numerous motivators and inhibitors that influence society when making decisions about attending a symphony performance. Furthermore these motivators and inhibitors can vary greatly based on

demographics such as age, gender, and cultural background. Understanding needs and desires of the local community is the first step to creating a successful audience development plan. Using the results from this study, orchestral leaders can attempt to identify ways to enhance motivators, break down inhibitors, and attract the audiences they desire to reach.

In 2002, the John S. and James L. Knight Foundation (the Knight Foundation) commissioned the *Classical Music Consumer Segmentation Study* which deeper explored how an organization can take the concept of “the frequency spiral” (identified by the League) and use it to expand classical music knowledge amongst patrons, in hopes of increasing participation and attendance. A common educational offering for audiences today, are pre-concert lectures. These opportunities occur directly before a concert and require no extra cost to patrons. Although there are many attendees who take advantage of this option, the *Classical Music Consumer Segmentation Study* (2002) reported that, “many more people would be interested in learning more about classical music if more attractive and interactive educational mediums can be found” (p. 55). The study revealed that opportunities such as pre-concert lectures, and extensive program notes, only appeal to the audience members already knowledgeable about classical music. Those unfamiliar require a more participatory and innovative approach to classical music education.

The format of a symphony orchestra performance has become standardized over its lifetime. Prestigious concert halls, black-tie dress, and a high class atmosphere are the stereotypical characteristics of an orchestra concert. Although that may have been true in the past, today the symphony and its patrons are changing. Many organizations

are beginning to alter the structure of symphony events. As generations evolve, so must the arts. In order to compensate for societal changes, many orchestras are altering the structure and format of their programs. The Knight Foundation's *Magic of Music* programs worked to support and encourage this change. *Magic of Music* believed that transforming the performance experience would renew the relationship between orchestras and their audience members. According to *The Search for Shining Eyes* (2006), the *Magic of Music* program ran from 1994 to 2004, and encouraged orchestras to evaluate themselves, identify opportunities for institutional change, and design creative approaches to solve problems and meet goals (Wolf & John S. and James L. Knight Foundation). *Magic of Music* provided planning and implementation grants, grants for research, and technical assistance for 15 different orchestras. Two notable initiatives were those of the New World Symphony, and the Oregon Symphony Orchestra.

Through *Magic of Music*, the New World Symphony was awarded an \$800,000 grant, which “provided opportunities for its players to develop nonmusical skills essential to effective communication with audiences. At the same time, the grant helped the orchestra explore new uses of technology and incorporate them into innovative concert experiences” (Wolf & John S. and James L. Knight Foundation, 2006, p. 20). *The Search for Shining Eyes* deemed this project one of the most successful because of its achievement in combining technology with education and programming which increased the number of audience members, as well as the overall quality of those relationships. Another reason for its notability was the young age range of the orchestra

musicians. This may have contributed to the openness for change in the structure of the organization's programs.

Today the New World Symphony is still incorporating innovation and technology into their programming in numerous ways. One educational opportunity at New World consists of webcasts. These high-quality broadcasts allow teachers to bring the symphony experience into their classroom via the Internet (New World Symphony, 2012). *MusicLab* is another successful program initiative at New World. *MusicLab* consists of a 26 week residency program in which symphony musicians bring their expertise directly into the classrooms of five Miami-Dade public schools. The participating schools are those that normally do not have access to private music instruction. *MusicLab* gives students a hands-on experience and an opportunity to discover music in an in-depth setting (New World Symphony, 2012).

The Oregon Symphony also yielded great success with their original series titled *Nerve Endings*. The mission of this project was to attract a younger demographic to the concert hall. *Nerve Endings* "combined symphonic music, story lines, video and, in some cases, other musical genres (including pop)" (Wolf & John S. and James L. Knight Foundation, 2006, p. 21). This program successfully broke beyond the role of the traditional symphony orchestra, and has become the most consistently well attended event in the organization's history.

Magic of Music program was a significant contribution to the symphony orchestra field in the US. It revealed new ways of business and introduced potential innovations. It was at the forefront of groundbreaking research, programmatic experimentation and introduced funders to monumental change in the orchestra field

(Wolf & John S. and James L. Knight Foundation, 2006, p. 20). Many lessons were learned by the organizations involved, as well as those merely observing the study. The following is a list of outcomes noted in *The Search for Shining Eyes*:

- Despite predictions of the death of classical music and its audience, there is healthy support for the art form. The problems of orchestras stem not from the music they play but from the delivery systems they employ.
- An orchestra cannot be all things to all people. The mission of an orchestra needs to be clear, focused and achievable.
- Regardless of their aspirations for artistic excellence and prestige nationally and internationally, orchestras must be relevant and of service to their communities and to the people who live there if they hope to find the resources to survive.
- Transformational change in orchestras is dependent on the joint efforts of all sectors of the orchestra family – music director, musicians, administration, and volunteer leadership and trustees.
- Despite those who suggest a single magic bullet is adequate to address the serious problems that orchestras face, only a combination of many strategies will be effective.
- Free programming and outreach do not turn people into ticket buyers. They simply turn them into consumers of free programming.
- Traditional audience education efforts – targeted to the uninitiated – generally end up serving those who are most knowledgeable and most involved with orchestras.
- There is growing evidence that participatory music education – primarily instrumental lessons, ensemble and choral programs – will turn people into ticket buyers later in life.
- There is no evidence that exposure programs for children – especially the large concert format offerings for school children – will turn them into ticket buyers as adults.
- To grow their audiences, orchestras need to do more research on those who do not attend their concerts rather than focus on those who are already buying tickets (p. 6-7).

Another leading reason for the decrease in orchestral audiences is the rapid development and increased use of technological devices, such as phones, mp3 players, and online applications. Consumers are not only spending their money on these gadgets, but a vast amount of their time as well. Because of their convenience, mobility, and simplicity, these devices are favored among society today. Although many symphony orchestras are embracing the shift to digital platforms, there are still some who are not.

In a symphony orchestra, technology can be used in three main ways: to assist with administrative tasks, to facilitate communication and to enhance the delivery of performance. Technology is most commonly used for administrative purposes. Typical tasks include database management, budget and financial tracking, ticket purchases, and other computer or software related tasks. More recently, communication tactics have shifted almost exclusively to a technological platform. The use of technology in marketing has allowed for information to be relayed quickly, and more succinctly. Marketing through the Internet allows for information to be readily available to a higher number of constituents. This is especially helpful when it comes to performance or event announcements. Through the use of websites, social networks, and online newsletters, event information is easily communicated, and at zero cost. Although many organizations are incorporating technology into the communication component of their organization, this has yet to prove and increase in audience attendance (Rentschler & Potter, 1996). Lastly, technology can be used in the product, or the performance of an orchestra. This is the area that technology is the least utilized.

The article *Accountability versus artistic development, The case for non-profit museums and performing arts organizations*, Rentschler & Potter (1996) addresses the extent to which museums and performing arts organizations utilize technology. The study addresses how the use of technology impacts an organization's accountability and vitality (Rentschler & Potter, 1996). Results show that technology is least utilized in the product of an organization, and coincidentally is the area that would most significantly enhance the live music experience for the audience.

What is perhaps ironic, is that product, as the area in which the technology employed could most significantly enhance the experience of the audience/visitor (lighting/sound and direct incorporation into displays) is the same area where the interviewees saw their organizations to be in greatest need of improvement. In each instance the interviewee recognized the need for their organizations to generate interest in the community sufficient to entice potential customers through the door (p. 10).

In most cases, the only technological aspect of performance is the elements required to execute production. This is due to the high cost associated with extra equipment. Most orchestras are scraping to stay within a budget, thus any extra expenses are out of the question. No matter the amount of desire for the technological changes in an organization, funding is a significant barrier. While advanced technology is lacking in implementation of performance, it offers a high number of benefits to an organization in other administrative areas. This allows arts managers to decrease the number of routine tasks, and increase the amount of creative work, which will ultimately better the organization. Because the world is moving at an accelerated technological pace, many

supporting organizations, such as the League, are adding technology as a research area with the hopes of keeping orchestras up with the latest trends.

Chapter three will look at many of the trends identified in this section, in further detail, drawing from specific examples being implemented by Texas symphony orchestras.

Chapter 3: Texas Symphony Orchestras

This research project explores audience development strategies that are being used by Texas symphony orchestras. I chose to focus this project on the state of Texas because it is the setting in which my professional experience and career aspirations lie. It is my hope that this project will serve as a tool and guide for emerging arts leaders and arts administrators to understand audience development initiatives in symphony orchestras. Furthermore, this project may particularly appeal to arts leaders in Texas, as research and findings may affect their own audience development programming. This chapter will identify trends and findings exhibited by Texas symphony orchestras that are current members of the League of American Orchestras.

Cultural arts in the state of Texas are pivotal in maintaining a strong economy. Not only do they generate more tax revenue and create jobs, they are also the cornerstone for economic development. Texas' creative sector alone employs nearly 675,000 workers. This has increased 20% over the past five years (Texas Cultural Trust, 2008). The creative sector can be described as a set of sustainable and diverse activities that contribute to an innovative workforce. According to the Texas Cultural Trust, no other state has benefited more from the transition to the creative economy than Texas (TXP, 2008). While the global economy has grown more complicated in recent years, Texas is now counting on the benefits of the creative sector more than ever to assist with economic development initiatives. Specific strategies include, "downtown revitalization, funding museums and performing arts centers, special incentives for emerging technologies, and talent attraction marketing campaigns" (TXP, 2008, p. 16). In Austin specifically, a strong bond between the economy and the arts exists, justifiable by Austin's official motto "Live Music Capital of the World". Figure 4 shows Austin's total

economic activity in relation to the cultural arts. Symphony orchestras are included in three of these categories: music, not-for-profits, and arts-related tourism influenced by music.

| | Sales/ Shipments/ Receipts | Labor Compensation | Employment | City Tax Revenue |
|----------------------|---|-------------------------------|-------------------|-----------------------------|
| Music | \$419,208,316 | \$159,203,078 | 5,639 | \$4,731,171 |
| Film & Visual Media | \$281,021,016 | \$79,927,770 | 2,689 | \$1,072,500 |
| Not-For-Profits | \$330,220,253 | \$184,821,416 | 8,916 | \$3,758,605 |
| Visual Arts | \$201,595,212 | \$87,571,770 | 3,874 | \$2,294,580 |
| Arts-Related Tourism | \$1,032,600,716 | \$324,244,133 | 22,994 | \$36,372,276 |
| -Influenced by Music | \$580,242,172 | \$182,200,261 | 12,921 | \$20,438,421 |
| -Other | \$452,358,544 | \$142,043,872 | 10,073 | \$15,933,855 |
| TOTAL | \$2,251,745,804 | \$827,761,366 | 43,744 | \$48,075,521 |

Figure 4. “Cultural Sector-Related Total Economic Activity in Austin” (Texas Cultural Trust, 2008, p. 33).

The primary support system for symphony orchestras across North America is provided by the League of American Orchestras. The League provides professional development opportunities, conducts extensive global research and contributes an abundance of resources to the symphony orchestra field. The League has approximately 850 members comprised of symphony orchestras, community groups, festivals and youth ensembles (“About the League,” 2012). Of the 850 members, 45 of them are organizations based in the state of Texas. To contribute to the credibility of this study, I chose to include only 31 of the Texas League members. These 31 members are classified as symphony orchestras, versus the remaining 12 who classify as one of the following: youth orchestra, school orchestra, chamber orchestra, or symphony and chorale organization. I came to the conclusion that in order to assess an organization’s audience

development strategies and practices fairly, only *symphony orchestras* with similar goals, composition, and repertoire should be included.

My initial thought, when I began to assess each organization, was that it was much more difficult to be a judge of audience development initiatives than I thought it would be. Every orchestra is different. The length of existence, the size of a budget, and the size of a city, are just a few factors that have an affect on the amount of resources an orchestra is able to spend on audience development. This contrast caused me to question my accuracy and integrity when positioning each orchestra under a particular category. Another challenge I encountered during this section was the limited amount of resources available on the Internet. I am, however, aware of certain details not included on the organization's website, because of my familiarity with many of these organizations on a professional level. Thus, I was forced to omit information and act as though I was unaware of any additional details unable to access publicly.

The main resource used for judging each Texas symphony was the organization's official website, and any existing social networking sites (such as Facebook and Twitter). I chose to assess each orchestra in four different areas: their implementation of educational programming, their marketing initiatives, the amount of diversity in their programming (both in repertoire and performance setting), and their use of technology as a tool for outreach and engagement. I choose these four topics because they are the most commonly utilized areas for audience development recognized nationally. For each of these areas I rated each organization on how strong or weak they were. This scoring system consists of numbers one through four, with one being the lowest possible rating, and four being the highest. I chose a rating scale made up of an even amount of

numbers to avoid having a middle (or average) number. With an odd amount of numbers, I likely would have rated many of the organizations a median score in order to remain neutral, as neutrality is often my first instinct. The following sections summarize and explain the qualitative results of Texas symphony orchestra's audience development practices by assigning a numeric value. It should be noted that not all orchestras fit perfectly under one numerical rating, because each rating considers multiple factors. Therefore, I used my best judgment. Education was the first area of audience development that I researched.

| Orchestra | Educational Programming | Marketing Initiatives | Diverse Programming: Repertoire/ Setting | Use of Technology |
|-----------------------------------|--------------------------------|------------------------------|---|--------------------------|
| Abilene Philharmonic | 3 | 3 | 3 | 3 |
| Amarillo Symphony | 2 | 4 | 2 | 4 |
| Austin Symphony | 3 | 3 | 2 | 3 |
| Big Spring Symphony Association | 1 | 1 | 1 | 1 |
| Brazos Valley Symphony Orchestra | 1 | 2 | 3 | 2 |
| Clear Lake Symphony | 1 | 1 | 1 | 1 |
| Conroe Symphony Orchestra | 1 | 1 | 1 | 1 |
| Corpus Christi Symphony Orchestra | 4 | 3 | 3 | 3 |
| Dallas Symphony | 4 | 4 | 3 | 4 |

| Orchestra | Educational Programming | Marketing Initiatives | Diverse Programming: Repertoire/ Setting | Use of Technology |
|--------------------------------|--------------------------------|------------------------------|---|--------------------------|
| East Texas Symphony | 3 | 3 | 2 | 3 |
| El Paso Symphony | 4 | 3 | 2 | 3 |
| Irving Symphony Orchestra | 3 | 4 | 4 | 4 |
| Fort Bend Symphony Orchestra | 1 | 2 | 1 | 3 |
| Fort Worth Symphony | 3 | 3 | 4 | 3 |
| Houston Symphony | 4 | 4 | 4 | 4 |
| Kingsville Symphony Orchestra | 1 | 1 | 1 | 1 |
| Laredo Philharmonic Orchestra | 3 | 2 | 1 | 3 |
| Las Colinas Symphony Orchestra | 2 | 3 | 2 | 3 |
| Lewisville Lake Symphony | 3 | 3 | 2 | 2 |
| Marshall Symphony Orchestra | 1 | 2 | 2 | 2 |
| Mid-Texas Symphony | 3 | 2 | 2 | 2 |
| New Life Symphony Orchestra | 1 | 1 | 2 | 1 |
| Plano Symphony | 4 | 3 | 2 | 3 |

| Orchestra | Educational Programming | Marketing Initiatives | Diverse Programming: Repertoire/ Setting | Use of Technology |
|-----------------------------------|--------------------------------|------------------------------|---|--------------------------|
| Round Rock Symphony | 2 | 3 | 3 | 2 |
| San Angelo Symphony Orchestra | 3 | 3 | 2 | 3 |
| San Antonio Symphony | 3 | 4 | 3 | 4 |
| The Symphony of Southeast Texas | 1 | 2 | 1 | 2 |
| Symphony of the Hills Association | 1 | 2 | 2 | 1 |
| Victoria Symphony | 1 | 2 | 2 | 2 |
| Waco Symphony | 2 | 2 | 2 | 2 |
| Wichita Falls Symphony | 3 | 3 | 3 | 3 |

Figure 5. Texas Symphony Orchestras Website Analysis

Education

Funding for music education in the state of Texas is exemplary. Although many states across the US are eliminating their music education programs, there are several in Texas that have grown immensely. In 2011, the National Association of Music Merchants (NAMM) conducted its 12th annual “Best Communities for Music Education” (BCME) survey. This survey acknowledges schools and districts across the US for their commitment and support of music education in schools. “Established in

1999, BCME recognizes and celebrates schools, their administrators, teachers, board members, parents and students for their support of music education and their efforts to assure access to all students as part of the core curriculum.” (National Association of Music Merchants, 2011). Texas accounted for 14 of the 179 school districts named for “Best Communities for Music Education”.

- Arlington Independent School District, Arlington TX
- Carrollton-Farmers Branch ISD, Carrollton TX
- Denton Independent School District, Denton TX
- Fort Bend Independent School District, Sugar Land TX
- Frenship Independent School District, Wolfforth TX
- Garland Independent School District, Garland TX
- Hurst-Euless-Bedford Independent School District, Bedford TX
- Katy Independent School District, Katy TX
- McKinney Independent School District, McKinney TX
- Midway Independent School District, Woodway TX
- Northwest Independent School District, Justin TX
- Pasadena Independent School District, Pasadena TX
- Plano Independent School District, Plano TX
- Richardson Independent School District, Richardson TX

Two supporting organizations for music education in Texas include Texas Music Educators Association and Texas Music Project. Both groups are dedicated to promoting excellent music education initiatives throughout the state. They provide professional development and networking opportunities for music educators, as well as high-quality, sustainable music experiences for students. Established and dedicated organizations such as these help schools to foster a wealth of talented musicians in Texas. Therefore, in many areas of Texas, supplemental music opportunities (such as orchestral education programs) are not needed. In fact, eight of the school districts named above for Best Communities for Music Education, don’t even have a professional orchestra located in their community. The remaining six districts either have nearby

orchestras with little educational opportunities, or symphonic organizations that are not affiliated with the League of American Orchestras.

Educational programming in Texas symphony orchestras is broken down in the following way. A rating of one describes an organization that offers zero educational opportunities, other than the knowledge received by simply attending a classical music performance. Out of the 31 Texas League of American Orchestra members included in this study, 11 of them received a rating of one. Four orchestras received a two. A two describes an organization with some, but few educational offerings. These organizations usually provide simple options designed to generate interest in coming to performances. Typical examples include special ticket pricing for students (as a group or an individual), and pre-concert talks which give listeners a deeper look into the program by providing an informative lecture about the pieces or composers included in the evening's performance. A rating of three includes organizations that provide an average amount of educational initiatives. In addition to student ticket pricing and pre-concert lectures (which only merited a two), orchestras receiving a three will offer instrument petting zoo events, open rehearsals for students to attend, as well as concerts and events specifically programmed to attract youth and families. 11 orchestras received a three. A rating of four describes those organizations with a wide range of diverse education offerings. These orchestras may include those opportunities listed in ratings one, two and three but also offer a youth orchestra, young artist scholarships and competitions, in-school performances or clinics, and in-class music education curriculum tools for teachers. Only five Texas symphonies were rated a four (see Figure 5.)

One orchestra in particular exemplifying extraordinary educational programming was the Houston Symphony. Through its *Music Matters!* program the Houston Symphony offers free and low-cost concerts to more than 20 events per year including family concerts, and *Sounds Like Fun!*, participatory concerts that take place in a variety of engaging and informal atmospheres across Houston. The Houston Symphony also offers a variety of school programs. For example, *Symphony Explorer Concerts*, invite classrooms in grades four through eight to visit the symphony during the school day to partake in different musical activities. These programs are designed to prepare students for in-school language arts and social studies testing (Houston Symphony, 2012). Another program *Deloitte Dynamics* provides instrument donations, performances, and musicians-in-residence at local high schools. The Houston Symphony also offers a community outreach program titled *Community Connections* that is designed to broaden exposure to music, by providing opportunities for musicians to perform or coach different community members in their own personal setting (Houston Symphony, 2012). In addition to these programs, the Houston Symphony also offers concerto and young artist competitions as well as *Symphony Scouts*, an early childhood music education program aimed at ages three to six that include half hour long concerts that introduce children to the instrument families.

Overall, the symphony education trends observed throughout Texas were similar to those occurring nationally, but because Texas has such a strong support system for music education, it seemed that most organizations either had very strong education programs, or little to none at all. The second area of audience development researched was programming in regards to repertoire and performance setting.

Programming

Programming is a diverse topic in the symphony orchestra world. While many orchestras are looking to implement contemporary and innovative elements to performances, others are not. Since its existence, the symphony orchestra has consisted of classical, melodic music, performed in a majestic theatre or concert hall. As generations evolve and music continues to develop, a much more diverse pool of repertoire becomes available. Today's composers are writing new music everyday, but how often do you witness a symphony orchestra program a new piece? Today's classical music is different from the pasts classical. For this reason, many orchestras continue to program the same Beethoven and Mozart concertos that they did 20 years ago. Many researchers speculate that this is one reason the symphony orchestra is "dying". Another perspective to programming is the setting of the performance. It's possible that with the decrease in leisure time and the increase in social time, in a more casual, informal atmosphere the symphony would be better attended.

When assessing each Texas symphony's programming initiatives, I considered both the diversity of the concert setting, and the type of repertoire being performed (small works, new works, or seldom performed works). The following programming initiatives are broken down in the following way. Seven organizations received a rating of one, programming zero contemporary/chamber works and performing only in the typical concert hall. Three of these organizations received a one, simply because I was unable to appropriately assess their programming due to the fact that they didn't list programs or repertoire on their website. 14 orchestras were rated a two. These organizations programmed some contemporary works, but performed only in their

normal setting. Seven orchestras received a three, holding performances in alternative spaces, but performing no contemporary repertoire; and three organizations received a four, programming contemporary or unique works in a variety of settings (see Figure 5).

One of the evolving trends occurring amongst orchestras in the US, as well as in Texas is producing concerts with a pop artist as the special guest. In particular, singer/songwriter Ben Folds has been making his way through the US performing with countless symphony orchestras including the Houston, Dallas and Fort Worth symphonies. Folds was featured in the 2012 spring edition of *Symphony*, the magazine of the League of American Orchestras. In the article, Folds describes how both him and orchestras are benefiting as a result of this collaboration:

Fast forward, and my symphony orchestra shows are becoming an important part of my career. Working with a half-dozen fantastic arranger/composers, I now have scores for 40 of my songs, all of which went through quite a bit of revision as we look for ways to bring something new to my music for my fans, and to treat symphony-goers to a unique concert where the language of pop music and power of the orchestra complement one another. I aspire to dignify and hopefully even challenge the orchestras I work with (p. 64).

As an arts advocate and a Board Member of the Nashville Symphony, Folds works to give back to the very entity that helped him to get where he is today. He believes that the symphony is a perfect example of team work that America should look to, particularly during recent times. “My hope is that new audiences are brought into the symphony hall to hear my music and walk through a door to a lifetime of the greatest music of our culture” (League of American Orchestras, 2012, p. 64). With famed musicians, such as Folds actively participating in performances, it is likely that new and younger fans will be encouraged to attend the symphony again in the future.

The most unique example of programming in regards to repertoire discovered was by ENVISO, formerly the Irving Symphony Orchestra. The symphony, with an average age of 35 amongst its musicians, describes itself as “a different symphony for a different audience...a distinctive professional boutique symphony with a compelling and differentiated point of view” (Irving Symphony Orchestra, 2012). According to their website, ENVISO claims to offer unique presentations, as well as innovative attractors intended to reach a diverse musical audience. This was one of the only organization’s I came across throughout my research that verbalized a passion for diversifying audiences. The organization is known for producing signature, multi-sensory music experiences and “has been distinguished as the first professional symphony in the United States to dedicate its artistic ethos to the interdisciplinary staging of symphonic performances” (Irving Symphony Orchestra, 2012).

One of the reasons ENVISO is so unique is that their programs often feature soloists performing with chamber groups versus a full orchestra. This gives audiences an opportunity to connect with musicians and become more connected to the music. Furthermore, with a small ensemble, patrons are able to see the musicians communicating with each other in a way that typically doesn’t occur in a full orchestra, because in a full orchestra the conductor (with his back to the audience) does most of the communicating. Two ENVISO programs this season designed to draw in new audiences were *EPIC* and *An Evening with Clint Eastwood*. *EPIC*, which took place in October 2011, featured an *INTO THE ORCHESTRA* production for the first time. “INTO THE ORCHESTRA productions utilize multiple projection screens, media presentations highlighting information about the compositions and composers on the

playbill, personal interviews with orchestra musicians, and multiple cameras enabling patrons the rare chance to literally be INSIDE THE ORCHESTRA” (Irving Symphony Orchestra, 2012). Following this inside look, the orchestra continued the evening with a performance of Beethoven’s Symphony No. 5 and Mozart’s Eine kleine Nachtmusik, which was performed under a lit canopy portraying the night sky’s constellations and stars. *An Evening with Clint Eastwood* took place in April 2012 and marked the first time that an American orchestra would act as curator, overseeing an original film score composition of the celebrated living actor/director/composer Clint Eastwood. This production explored Eastwood’s influences and celebrated his musical works. ENVISO not only provides a great example of individualized programming, but the advanced use of technology during performances as well. Productions almost always utilize projection screens and/or media presentations.

Technology

Technology greatly affected all four of the audience development categories I planned to research throughout this project (education, marketing, programming, and technology). Because technology is advancing so rapidly, it still falls under its own category, but also falls under the marketing category (as an outlet to market to audiences), the programming category (as it’s now implemented into performance), and educational programming (through the use of online media and other interactive activities designed to educate audiences). Thus, when assessing technology as its own category, I chose to only consider online social networking sites, the amount of their activity, and the existence of web based multimedia.

Organizations with a score of one define those that do not have a Facebook, Twitter, or blog, and have little to no photos, videos, or recordings available online. Furthermore, almost all of these sites appeared to be out of date. Six Texas symphonies received a one. A rating of two describes those organizations with one or two of the following: Facebook, Twitter, blog, photos, videos, and recordings. Many of these social networking sites appeared to be out dated. Eight Texas symphonies received a two. A score of three describes symphonies with three or four of the following: Facebook, Twitter, blog, photos, videos, and recordings. Most of these social networks were updated on a regular basis. 12 Texas symphonies received a three. A score of four describes orchestras with five or more of the following: Facebook, Twitter, blog, photos, videos, and recordings. All of these social networks appeared to be updated daily (usually more than once a day), and seemed to be sparking discussion amongst visitors. Five Texas symphonies were rated a four (see Figure 5).

One unique example of social media use is the San Antonio Symphony. The San Antonio Symphony works to attract current and potential audiences through a collaborative and interactive approach to social media. These networking tools include Facebook, Twitter, and their well-known blog. The following case study chapter will examine these initiatives in further detail.

Marketing

Assessing an organization's marketing tactics was the most challenging out of the four areas researched. Due to the fact that the majority of my research occurred over the Internet, I was unable to view many of the marketing materials that each orchestra

produced. Furthermore, it was difficult to even know that additional marketing materials (other than online) even existed. Therefore, many of the marking ratings coincide with the technology ratings.

A score of one describes those organizations with websites that are difficult to read due to layout and format, little to no information on concert programs, and have few to zero social media accounts. Five symphonies received a one. A two includes orchestras, whose websites are accessible, but not very engaging, program information is frequently absent, and a small amount of social media. Nine symphonies received a two. A rating of three describes those organizations with accessible websites, with access to e-newsletters, and an average amount of social media. 12 symphonies received a three. A four includes those with accessible, aesthetically pleasing, and engaging websites with access to e-newsletters, and other social media communicating information about events, with links to social media sites. Five organizations received a four (see Figure 5).

Chapter 4: Case Studies

In order to gain a deeper understanding of audience development approaches, I decided to conduct a comparative case study of the Austin Symphony Orchestra and the San Antonio Symphony. These sites were chosen because of my familiarity with them, and the commonalities between them. I became involved with the Austin Symphony Orchestra during an internship in the summer of 2011. It quickly became apparent that their stance and tactics on audience development would make an intriguing case study. Being in the center of the “Live Music Capital of the World” I was curious to investigate particular challenges and advantages that being a symphony in such a thriving city had on orchestra operations. In January 2012, I began my position as the Artistic Operations Assistant at the San Antonio Symphony, and my assumptions of their adamant audience development initiatives were confirmed. With strong leadership and a cultured community, the San Antonio Symphony has implemented sustainable management practices likely to lead the organization down a successful path. In addition, both organizations are similar in size, budget and location. Therefore a comparison of these two groups seemed both fair and logical.

The San Antonio Symphony (SAS) was formed in 1939 by conductor Max Reiter, a native of Italy, who left Europe with a personal mission to establish a new American orchestra. By 1943 the SAS was a fully professional orchestra, performing 16 week seasons. With a budget of \$100,000, the SAS became one of America’s nineteen major orchestras, and the only one in Texas (San Antonio Symphony, 2011). The SAS had five different music directors until 2003 when it declared bankruptcy. Faced with financial difficulties, the Board of Directors began reworking the symphony’s business plan and

one year later the organization returned to work. Sebastian Lang-Lessing is currently in his second season as Music Director of the San Antonio Symphony.

Audience development for the SAS has many different meanings, but overall it describes taking action to grow their audience and their donor base. One of the ways the SAS does this is by placing a strong emphasis on subscriptions. Subscriptions create and foster long term relationships which allow for loyalty and sustainability of current and future audiences. SAS subscribers not only get the usual priority seating, but first notice on future seasons and special events. President and CEO, Jack Fishman recognizes that a perceived price barrier is a major obstacle for potential orchestra patrons, therefore first time subscribers get 50% off regular subscription pricing. After one year, if those first time subscribers renew, they receive a 30% discount. All subscribers get a discount of 10% every year. The subscription model at the SAS is a money back guarantee. In an interview on April 11, 2012 Fishman explains, “If a subscriber comes to their first symphony performance of the season and they don’t enjoy it, we give them their money back. So far no one has ever asked for their money back.” The San Antonio Symphony also offers free ticket exchanges for all of their ticket buyers. If a patron has a ticket for Saturday and they decide they would rather attend Friday, they can exchange the tickets for free. Many other orchestras charge fees for this service.

In order to account for the busy lifestyle of today’s society, the SAS offers a “you pick three” packaging option for a discounted rate. “Research shows that if a patron comes to the symphony three times, they’ll start coming more often. Once they get over that hump, most will become subscribers. They’ll want to feel important, and enjoy the

luxury of owning their own seats,” Fishman describes. In the fall of 2009, Symphony magazine featured the SAS for their “you pick three” ticket packaging option. Over the last four years the number of San Antonio Symphony subscriptions has gone up, this is partly because subscription packages are shrinking and becoming more flexible to models such as this. Single tickets are currently up for the SAS as well, especially in comparison to past years. In February 2012, the symphony broke their own record for the highest number of single tickets sold. This concert included Beethoven’s 8th and 9th symphonies. The San Antonio Symphony currently has 80% single ticket buyers and 20% subscription holders; their ultimate goal is 50-50.

The target demographic for the SAS are individuals 45 years of age and older. The symphony focuses on these patrons because they are what Fishman calls “empty nesters”. Their children are grown, and most likely out of the house. According to Fishman, this age also tends to be highly educated. “Our target demographic is those that still read newspapers, watch the news, and listen to NPR.” This is important as the SAS has a strong relationship with their local public radio station, and features guest artists on the local news stations several times a month. Although the San Antonio Symphony’s target demographic is an older generation, they still attempt to attract younger audiences through social media, as well as their education programs. As explained by Fishman, blogging in particular has become one of the symphony’s main ways of marketing. This appeals to both younger and older generations, as 50% of newspaper readers are also online.

The most significant change in audience development recently has been the social media aspect. Fishman credits this as another reason for the increase in SAS

subscribers over the last four years. As technology continues to advance, marketing becomes more word of mouth which enables audience members to begin trusting each other over expert opinions. The San Antonio Symphony's social media marketing tools include a website, Twitter, Facebook, YouTube, and their ever popular Blog. They also send out email blasts (two per concert), which are extremely effective. Each email includes a special discount offer that contains a code for patrons to use when buying their tickets online. Ticketmaster records how many times the codes are used. This helps symphony staff to track the efficiency of each discount code. Another benefit to Ticketmaster is that it also tracks first time single ticket buyers. After each performance, Ticketmaster generates a report with a list of names and contact info of the first time attendees. A staff member at the organization takes these contacts and sends them a short survey to further identify what it was that brought them to the symphony. At the end of the survey each patron is offered a one time opportunity to purchase discounted tickets for the next upcoming performance. According to Fishman, presenting a limited time offer, for the immediate future, is likely to yield action.

Another audience development strategy the SAS has adapted, is acting as an informational hub for all performing arts in San Antonio. The symphony is a strong supporter of all local arts organizations. They work to create an arts broad message through their online marketing tools. Their Twitter and Facebook accounts often reference other arts events happening in town, as well as the latest news in the performing arts industry. Twitter especially, is used to reinforce others' social media updates. As Fishman explains "we are the 800 pound gorilla in the room. We do this for several reasons, to make the community more aware of what's going on in our city, to

support other organizations, and to maintain our positive reputation.” Tweets direct followers to Facebook, the blog, news articles, and other organization’s websites to increase awareness of the cultural landscape in San Antonio. The SAS Facebook page often has group deals, giveaways for large groups, and contests. Conductor, Sebastian Lang-Lessing even uses his personal Facebook account to stimulate dialogue with audiences and encourage current Facebook friends to bring their friends and family to performances.

The blog is the most informative of all the symphony’s social networks. The blog, titled “Jack Fishman on Classical Music” is part of the San Antonio Express-News website. Fishman writes daily about upcoming concerts, recent events, and national arts topics. According to Fishman, he can’t go to a symphony event without someone approaching him about his blog. The classical music blog is the third most read blog on the San Antonio Express-News website (first is sports, second is veterinarian). Fishman attributes the blog’s success to its broad coverage of all San Antonio arts groups. It’s the community’s go-to for events happening around town. The blog is another way to connect and build relationships with audiences. According to Fishman’s blog “Post 1004 and Counting”, “Has it made a difference? ABSOLUTELY! But, the challenge with this social media stuff is that it much harder to track than direct mail and other traditional marketing practices. But, since we started all of this, the number of Symphony subscribers has increased 60%! This is during a slow economy and against the nationwide trend of decreasing subscriptions” (Fishman, 2012).

The San Antonio Symphony is not only collaborative through promotion, but also through their programming. For the past two years, the symphony has programmed a

festival during its classical season. The 2011-2012 season included a Beethoven festival, where the orchestra performed all nine Beethoven symphonies in one month's time. To add to the festival, the symphony initiated a call for proposals in which other performing arts organizations could submit their own programs (involving Beethoven), that they wished to be included in the festival. The festival then went from becoming a San Antonio Symphony festival, to a city wide festival (with the SAS still the lead organization in the project). Six other organizations participated in the Beethoven festival, which grew the festival from the SAS's five performances, to 35! As the primary organization in the project, the SAS undertook all costs associated with marketing and promotion, but each organization sold their own tickets. For the 2012-2013 season, the symphony is programming a Brahms festival, and again will allow input and collaboration from other organizations in San Antonio.

Programming has changed drastically over the last several years. For the SAS patrons, the attraction has moved from guest artists to composers. Current composers that draw a full house include Beethoven, Rachmaninoff, and Chopin. It doesn't tend to make a difference which repertoire is being performed, but which composer is included on the program. According to Fishman, after composers, the *type* of piece is second important to patrons. A piano concerto sells the best, following close behind is a violin concerto, and then a cello concerto. Several years ago the SAS tested this theory by surveying their patrons by asking simply "what pieces are being performed on this evening's concert?" 85% of audience members could not answer the question.

When it comes to seasonal programming, the San Antonio Symphony makes sure to program short, aesthetically pleasing blockbusters at the beginning of the season.

Fishman noted, “25% of a subscriber base every year is made up of new subscribers. Typically, an organization loses 50% of their new subscriber base, and in most cases those subscribers make their decision to renew after the first two performances. Therefore programming at the beginning of the season is most sensitive” (Fishman, 2012). As the season continues, all new subscribers have already experienced past performances, and longer and more contemporary works are more likely to be accepted. For the 2012-2013 season, Maestro Sebastian Lang-Lessing intends to program Mahler Symphony No. 3. This is an extravagant work (that’s rather expensive), and according to Fishman, is “a bit of a stretch for the San Antonio audience”. As a result, Fishman and Lang-Lessing decided this piece would best serve as a closer to the season.

The education department at the San Antonio Symphony serves approximately 40,000 kids every year through its Young People’s Concert and Family Concert series, open rehearsals, master classes, side by side concerts, concert previews, instrument petting zoo, scholarships and competitions, and a variety of web-based activities. In addition to these, Maestro Sebastian-Lang Lessing also leads student talks at local colleges and Universities in the San Antonio area.

The SAS is particularly interested in reaching out to more patrons that are well educated. According to Fishman, some of the most educated community members are those between the ages of 25 and 45, this age is particularly difficult to reach. Most of the current patrons in this age range include local teachers. The symphony is currently looking for new and innovative ways to attract this audience, and believes that relocation to the symphony’s new performance space in 2014 will assist a great deal with that.

Today, many of the San Antonio Symphony's audience development practices involve planning for the future. In September 2014, the symphony will relocate to a brand new performing arts center, named the Tobin Center. The Tobin Center will feature three different performance spaces with world-class acoustics, and the latest concert technology, with a prime location downtown on the infamous San Antonio Riverwalk. The \$192 million dollar space will allow for flexible and innovative changes for the symphony. As the primary resident company at the Tobin Center, the symphony will have more control over the dates and times of their performances.

The building will allow for a variety of programming not only in the H.E.B performance hall (1,750 seats), but the studio theatre (225 seats), and the outdoor plaza on the river (with flexible seating up to 600). Symphony performances will take place Friday, Saturday, and Sunday. According to Fishman, evolving research shows that Friday night performances are becoming more difficult to sell. Therefore, the SAS will schedule less Friday evening performances, and begin implementing coffee concerts on Friday mornings, and rush hour concerts beginning at 6:30 pm. They will even experiment with a Thursday evening series. In addition to this, a "Discover" series will be introduced, which will include speaking and demonstrations throughout the evening, and a performance of just one piece at the conclusion of the night. The "Discover" series is a way for the SAS to continue educating their audiences on the repertoire being performed in a casual and intriguing atmosphere. Pops concerts will be completely restructured and will include a table seating option with drinks and dessert from the comfort of patrons' seats. Although these are the symphony's current plans for the Tobin Center, Fishman stresses the importance of further research and testing before

making the move. This will be necessary to foresee the sustainability and attractiveness of these changes.

Other than programmatic changes, the Tobin Center will encompass numerous technological updates including a more simple and efficient ticketing system, double sound and light locking doors, and a unique option of a Ballroom floor which will allow for flexibility to accommodate a variety of performances and events. The Tobin Center will also have an on site parking garage. This amenity alone will allow for a more hassle free evening, as parking is currently one of the biggest inhibitors downtown for the SAS. For symphony subscribers, parking will be included in their season packages. The move to the Tobin Center will also bring forth a change in seating priority. Location of seats in the theatre will be determined based on subscription history, and generosity of annual fund donations.

Fishman believes that the move into the Tobin Center will bring forth new and exciting changes for San Antonio. This opportunity will allow the symphony to transform the concert experience, and break into niche markets. “A new concert hall is almost guaranteed to pump up your sales. This is fantastic and very exciting, but once you get through the first year of buzz; you need to sustain revenue by implementing long range artistic plans in advanced. This is our ultimate goal and what we’re currently working on.”

Only an hour and a half down the road in a similar city both in size and population is the Austin Symphony Orchestra (ASO). With comparable budgets and resources, these two organizations operate very differently. Founded in 1911, the ASO is Austin’s oldest performing arts ensemble with a mission “to enhance the cultural quality

of life for the adults and young people of Austin and Central Texas by providing excellence in music performance and educational programming” (Austin Symphony, 2012).

The ASO’s youth education programs serve as their main audience development initiative. The programs reach roughly 90,000 Austin area students every year. In an interview on April 27, 2012, Executive Director, Anthony Corroa describes, “We impact every age level from the pre-school and kindergarten ages, all the way through high school.” The ASO puts on free summer art park events every week during the summer months that include a musical clowns, an instrument petting zoo, musical demonstrations, and short kid friendly performances. Throughout the year the ASO also presents kinder concerts, Young Peoples Concerts (aimed at the middle school age), and in-school performances at area high schools. Another in-school program initiated by the ASO is called *Building Blocks*, in which four chamber groups travel to various elementary schools to perform intimate and engaging works for students. The ASO also offers video conferencing and online activities where students can actively participate and communicate with the musicians as well as Maestro Peter Bay. In addition to these routine events, the ASO also offers master classes for high school students in which a guest artist both coaches and performs for students. Part of the ASO’s educational mission is to reach a broad range of students. This is also the core of their audience development plan. According to Corroa, “Our reason for pushing education and presenting it through many broad offerings is to nurture students through their entire school age years, whether that be supplemental education or not, and ultimately create lifelong patrons of the arts, and more specifically symphony advocates.”

The second aspect of the Austin Symphony's audience development plan is to reach out to diverse segments in the community. Corroa explains, "It's not enough to just give classical concerts anymore. It hasn't been for a while. Pops were designed long ago to reach out to a different type of audience, those who might be afraid to attend a classical music performance. There's a certain aura of symphony concerts that many people are intimidated by." Because the Hispanic community makes up a majority of Austin's population, the ASO has sought to bring music to that population segment by offering free concerts at the local Mexican-American Cultural Center. Performances take place twice a year and include pieces by small chamber groups performing music influenced by Mexican culture. Corroa explained that although the venue is small, and it's a relatively new undertaking, it's been very successful. In hopes to raise attendance and awareness, the symphony is considering making it an outdoor event for future years.

Another free outreach initiative presented by the ASO is *Concerts in the Park*, a series of 12 free performances from June to August. These events are specifically designed to bring in people that are familiar with the venue. The concerts take place outside at the Harman Concert Park located on the grounds of the Long Center for the Performing Arts. This location is a typical destination for both residents and tourists of Austin, as it is a common concert location (hosting both SXSW and ACL events). It is located on the Colorado River, and has one of the best views in the city of downtown Austin. *Concerts in the Park* are performed by four different small ensembles (made up of ASO members) performing anything from jazz and show tunes, to classical and contemporary pop music. The ASO specifically programs these concerts to be very

diverse in hopes to attract different types of audiences to a casual atmosphere with high-quality music at no cost. Because 37% of everything the ASO programs is free, they were determined to find good development staff to do their absolute best to assist in funding the events. As Corroa explains, “If the funding wasn’t there, the free concerts wouldn’t happen. Our free events really add to our audience development, and we can be sure of this by the increase in tickets sales for our subscription concerts.”

When it comes to programming, the biggest challenge for the Austin Symphony is timing. “When you’re located in the ‘Live Music Capital of the World’ there is a huge amount of competition from the many events going on, thus timing is everything,” explains Corroa. On any given weekend, there is a wide variety of cultural activities occurring in Austin. Competition from other music events, museums, art galleries, festivals and more, makes marketing the ASO’s product extremely difficult. Although Corroa is aware that it’s big names such as Yo-Yo Ma and Itzhak Perlman that bring audiences through the doors, it’s too expensive for the ASO to do this on a regular basis. As a result, the ASO has begun implementing video projections into their performances in hopes to bring a new dimension to the concert experience. Thus far, audiences have been extremely receptive to this change. When it comes to repertoire, both Corroa and Maestro Peter Bay make decisions together. Bay often wishes to program lesser known works, but Corroa always makes sure to put together a program that has at least one recognizable piece. Because Bay understands programming very well, the two sides (administrative and artistic) work very well together.

The ASO performs at the Long Center for the Performing Arts. Although this has been a rewarding change, since their move from Bass Concert Hall in 2008, identity has

become an issue for the ASO. Many believe that the Long Center and the ASO are one organization. As a result, marketing plans and techniques have been altered to communicate against this assumption. For example pamphlets now read “ASO *at* the Long Center”. One of the challenges this presents, is that the opportunity for the two organizations to collaborate on specific projects or programs, reinforce the false assumption that the two organizations are one. One project the ASO and the Long Center have already begun collaborating on is the Texas Young Composers Competition. This educational opportunity allows students to submit one full original orchestral composition between 5 and 7 minutes in length. Judges review the submissions and the winner(s) get their piece performed at an ASO concert during the following season. This is a great partnering opportunity particularly for the Long Center as education is not a routine aspect of their programming. In addition to this partnership, the Long Center also utilizes the ASO as their house orchestra when touring shows come into town. For future seasons the ASO hopes to work with the Long Center to program pops concerts.

According to Corroa, the Austin Symphony’s target demographic is everyone. Because people are so busy and there are so many other opportunities in Austin, the ASO tries to reach as many people as they can. All of the competition is difficult for all Austin organizations. The more events an organization wants to present the more money they have to raise, and as Corroa explains, “At the ASO we don’t spend money that we don’t have. I believe that has been part of our success for the past 100 years. We’re very conservative. Being a part-time orchestra comes with that as well. I don’t think we’re ready to become a full time orchestra and I’m not sure we’ll ever be. If you look at what’s going on around the US, the major orchestras are going through so many

difficult situations and it's daunting." Corroa believes that overspending is a big issue in the symphony world, and when the economic environment is unstable that makes situations even more unpredictable. Because they're only part-time, the ASO is able to give their musicians raises every year, their administration never take pay cuts, and they have a low turnover rate. They believe they are a good part time model for other orchestras in the US. "Once you make the decision to go full time everything changes and it becomes more difficult to go back down to part time. We don't want to make that mistake."

The ASO makes an effort to continue marketing to the community through traditional methods. Most marketing initiatives occur through the newspaper. According to Corroa, surveys have indicated that most people find out about symphony events through the newspaper. The symphony runs an ad in the Austin American-Statesman several times a week. The ASO also has several radio spots a week through the local KLRU station. Although they do have a Facebook and Twitter page, the majority of the ASO's fans are local youth. Tickets sales for the ASO are higher than ever before, particularly in single tickets. Because they only have eight classical concerts a year, subscriptions are a huge priority for the ASO. They make sure not to offer any pick and choose packages as this would deter from their full subscriptions. Year after year the Austin Symphony attempts to add a new dimension to their concert experience. The ASO continues to become more diverse. "We take a few tiny steps every year, we're headed in the right direction, albeit slowly, but it still makes a big difference on the whole in the end."

Chapter 5: Findings and Recommendations

This project explored audience development strategies of Texas symphony orchestras, and provided an in-depth look at the programming and practices of two case study sites; the San Antonio Symphony and the Austin Symphony Orchestra. This project is meant to act as a tool and guide for emerging arts leaders and arts administrators, in understanding audience development initiatives in symphony orchestras. More specifically, this research is intended to be a source for arts leaders in the state of Texas, because results may influence their own audience development planning.

This project began with an extensive literature review in order to gain insight into the issues in the performing arts sector. It became clear that solutions to these problems had been explored and assessed in the past, but some only briefly. The next step was to investigate the various types of audience development strategies, in order to better understand program intent and design. To compensate for the shrinking classical music audience, many organizations have begun exploring new and innovative audience development strategies. These initiatives take place in the following areas: educational programming, marketing initiatives, programming (in regards to repertoire and performance setting), and the use of technology for outreach and engagement.

Throughout this research the following question was explored: “*What audience development strategies are being used by Texas symphony orchestras?*” One of the main trends I observed throughout my research was a shift towards relationship marketing. As described in Chapter Two, performing arts organizations have begun to increase their focus on audience development and decrease their emphasis on product development. Relationship marketing creates positive and secure relationships with

patrons and donors which establishes trust and loyalty, and is likely to increase long term retention. Proof of this is evident through the increased use of social media, as well as modifications in fundraising platforms. Many symphonies are beginning to implement intimate dinners hosted by board members. These events involve a small group of current and prospective donors, and are designed to support conversations surrounding the arts, in hopes to spark contribution from donors. The San Antonio Symphony, as well as others, have already begun adopting this model.

Another shift observed throughout this project is a change in administrative personnel. Recently, there has been a merge between marketing and development departments. Because employees in both of these departments work with the same patron data, and research shows a high turnover rate in these positions, it has been determined by the League that qualified leaders in both areas will ensure consistent, positive relationships with patrons, leading to an increase in audience retention. As described in Chapter Two, the League shows their support for this merge by offering a leadership program for Development and Marketing Professionals. Within the past several years, this is another modification made by the San Antonio Symphony administration and others throughout the US.

Another trend occurring nationally, and especially throughout Texas, has allowed audiences to be more involved with programmatic decisions. Orchestras are now beginning to restructure themselves to spark more interest and participation from audience members. Today's generation, a population reliant on technology, is causing many orchestras to adapt with fresh opportunities in order to keep up with a nationwide shift to participatory arts. Many symphonies are now allowing audiences to

provide input on marketing and artistic decisions. One example is the San Angelo Symphony, who initiated a call for logo submissions from community members. The organization was interested in rebranding themselves and desired a fresh, contemporary look. Community members created and designed their own logos and submitted them to the symphony's Board of Directors who chose the winner (City of San Angelo, 2012). Another orchestra actively working to grow audience participation is the Amarillo Symphony. In April 2011, the organization announced that after a year long search, they had chosen five finalists for their music director position. Each candidate was to conduct a concert during the 2011-2012 season in a small venue, to allow the audience to connect and communicate with each candidate. According to the League, "The East Texas community will get to have a say in who the next conductor will be. Symphony-goers will get to vote for their favorite conductor after the five finalist perform next season." (League of American Orchestras, 2011). In addition to these examples, many other organizations across the US are implementing similar changes into their programming with hopes to stimulate conversation within the community.

One audience development strategy I did not observe, but would have appreciated, is the programming of more contemporary repertoire. Unfortunately this was the least common trend observed. Nevertheless, this is an action the League strongly recommends to its members. *EarShot*, a partnership between the League of American Orchestras, American Composers Orchestra, American Composers Forum, American Music Center and Meet the Composer, "provides consulting, production, and administrative support for orchestras to undertake readings, residencies, performances and composer-development programs" (EarShot, 2012). The purpose of *EarShot* is to

act as a toolkit to assist symphony orchestras in planning new music programs. They assist with composer residencies, mentoring, workshops, production support, commissioning projects, accessibility for audiences, and financial support. *EarShot* also introduces new connections in the industry that will assist in providing a successful transition to contemporary programming. *EarShot* is the first ever national partnership created to support orchestras in their shift to explore new American composers. Because this partnership is only a few years old, I expect to see a future emerging trend in innovative programming.

This research project has illuminated the significance of genuinely understanding an organization's target market. Through case study analysis, two successful examples were witnessed. It is a common assumption in the symphony orchestra field that the subscription model has become outdated and is quickly deteriorating. Although this may be the case for some organizations, it is clear that subscriptions are still the focus for the San Antonio Symphony, because they continue to thrive. The SAS has intentionally structured their subscription model to accommodate their audience preference and style. Furthermore, a significant amount of time and research was conducted to identify the purchasing habits of their target market. The SAS caters to their audience in this manner and it's evident by their ticket sales.

The Austin Symphony Orchestra is located in the middle of one of the most popular live music cities in the world. It is because of Austin's active culture that a large amount of competition exists for the ASO. Administrators believe that in order to attract audiences, they need to market to as many people as they can. Although being a part of an aggressive market does not sound ideal, the ASO has taken the appropriate

actions required to exist in such a market. Another way this shows is through the ASO's decision to remain a part time orchestra. Keeping the number of performances to a minimum is the best thing for the organization, as it allows them to maintain revenue from ticket sales. According to Executive Director Corroa, they wouldn't have a chance to survive in such a busy economic environment as a full time symphony.

Examining two organizations in two very different circumstances has helped me to realize just how difficult it is to recommend the same audience development strategies to multiple organizations. One of the main differences I encountered between the Austin Symphony and the San Antonio Symphony was their marketing initiatives. The San Antonio Symphony focuses very little on marketing. In fact, according to President and CEO, Jack Fishman, advertising is the least important thing that the organization does, hence their absence of a marketing department. Other than their daily blog on the Express-News website, the only other marketing/advertising that the organization does is their annual telemarketing campaign (conducted by an outside company in Chicago), their direct mail campaign, e-newsletters, and regular appearances on KABB Fox San Antonio morning news. The Austin Symphony not only conducts these same marketing efforts, but also advertises daily on the radio, in the Austin American-Statesman newspaper, and yearly in select magazines. Furthermore, the ASO advertises through billboard advertisement for several months out of the year, an expensive endeavor, but likely to be viewed by thousands.

From this research, I have learned that organizations who wish to generate new audiences, need to first decide whether they wish to change their existing symphony experience. Those who do not desire restructuring, must investigate innovative ways to

attract unreached populations, and persuade them that classical music performances do not comply with the usual symphony stereotypes, or else face extreme challenges. Once an organization has identified how to implement change, then the appropriate audience development strategies can be further researched. The next step for further research in symphony audience development, is to take the practices and suggestions developed by the League, implement them, and collect empirical data to determine effectiveness.

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Interviews

Austin Symphony Orchestra:

- Anthony Corroa - Executive Director, 27 April 2012.

San Antonio Symphony:

- Jack Fishman - Executive Director & CEO, 11 April 2012.

Appendix A: Recruitment Letter

Dear Mr. Corroa,

My name is Renelle and I am a Master's Candidate in the Arts & Administration program at the University of Oregon. I am in my second year and am quickly approaching graduation! I am writing in hopes that you would be willing to participate in my research project on audience development for Texas symphony orchestras. Participating in this study would require an interview with me that will address audience development topics, as well as the Austin Symphony's current strategies and goals in this endeavor.

Attached is a brief description and overview of the project.

Please let me know if you'd be willing to participate in this project. If you have any questions, please feel free to contact me at any time. Thank you in advanced for your time and consideration! I look forward to hearing from you.

Sincerely,

Renelle Bedell

Master's Candidate, Arts Administration, University of Oregon
xxx@uoregon.edu
xxx-xxx-xxxx

Appendix B: Consent Form

Consent Form
University of Oregon - Arts & Administration
Informed Consent for Participation as a Subject in
 Audience Development - Texas Symphony Orchestras
Investigator: Renelle Bedell
Type of consent: Adult Consent Form

Introduction:

You are being asked to be in a research study of audience development strategies for Texas symphony orchestras. You were selected as a possible participant because of the location and size of your organization. Please read this form and ask any questions before agreeing to be in the study.

Purpose of Study:

The purpose of this study is explore audience development strategies that are being used by Texas symphony orchestras. Participants in this study are from central Texas, are mid-range orchestras (both in size and budget), and are members of the League of American Orchestras.

Description of the Study Procedures:

If you agree to be in this study, I would ask you to do the following things: be interviewed by the researcher to discuss various topics relating to audience development strategies and goals of the organization. Certain cases may require a follow up phone call, or second interview. These cases will most likely include additional questions to allow for clarity and credibility of the study. Documentation of the interview will be done using an audio recorder. Having an audio recording available will be helpful to clarify any questions from the researcher's written notes. Additionally, hearing the exact conversation on record will allow for further credibility of the study. You will be given an opportunity to review the content you've submitted before completion of the project. The interview should take no longer than an hour of your time.

In addition to an interview, analysis of organizational documents *may* be included. For example, a ticket sales report or planning document. Analysis of these documents will occur on site and will not be copied. This study will be conducted over the course of one month, but participants can expect to be involved directly with the research for no more than two weeks time over the one month period.

Risks/Discomforts of Being in the Study:

There are no reasonable foreseeable (or expected) risks. This study may include risks that are unknown at this time.

Benefits of Being in the Study:

The purpose of the study is to explore audience development strategies being used by Texas symphony orchestras. This project will serve as a tool and guide for emerging arts

leaders and arts administrators in understanding audience development strategies in symphony orchestras. Furthermore, this project may particularly appeal to arts leaders across Texas, as research and findings may affect their own audience development programming based on their location and the processes being implemented by surrounding organizations.

Payments:

There will be no payment for involvement in this study.

Costs:

There is no cost to you to participate in this research study.

Confidentiality:

If you decide to be involved in this study, it is likely that your name will be identified in the final paper when reporting findings of the organization's structure relating to audience development. Identification of your name may be used through quoting and in the references section. Before the study is completed, you will have the opportunity to review the comments you've submitted and where applicable, edit your remarks.

I wish to review the content I've submitted before completion of this project

All electronic information will be coded and secured using a password protected file. Access to the records will be limited to the researcher; however, please note that the Institutional Review Board and internal University of Oregon auditors may review the research records. Files will be deleted after three years (as determined by the University of Oregon).

Voluntary Participation/Withdrawal:

Your participation is voluntary. If you choose not to participate, it will not affect your current or future relations with the University. You are free to withdraw at any time, for whatever reason. There is no penalty or loss of benefits for not taking part or for stopping your participation.

Contacts and Questions:

The researcher conducting this study is Renelle Bedell. For questions or more information concerning this research you may contact her at xxx-xxx-xxxx or xxx@uoregon.edu. The research advisor overseeing this project is Patricia Dewey. If for any reason you wish to contact her, you may do so at xxx-xxx-xxxx or xxx@uoregon.edu.

If you have any questions about your rights as a research subject, you may contact: the Office for Protection of Human Subjects, University of Oregon at (xxx-xxx-xxxx) or xxx@uoregon.edu.

Copy of Consent Form:

You will be given a copy of this form to keep for your records and future reference.

Statement of Consent:

I have read (or have had read to me) the contents of this consent form and have been encouraged to ask questions. I have received answers to my questions. I give my consent to participate in this study. I have received (or will receive) a copy of this form.

Signature _____ Date _____

Study Participant (Print Name):

Participant
Signature _____ Date _____

Appendix C: Research Instruments**Data Collection**

Code: *PR*=program. rep.
PS=program. sett.
M=marketing
E=education
T=technology
O=other

Key Theme:**Date:****Document Location:****Document Type:** ___ Report, Article, Book, etc.

___ Cultural Statistics ___ Arts Org Written Materials

___ Online Information ___ Archival Materials

___ Notes ___ Other:

Reference Citation:

| Coding | Information | Notes |
|--------|-------------|-------|
| | | |

Appendix C: Research Instruments**Observation**

Code: *PR*=program. rep.
PS=program. sett.
M=marketing
E=education
T=technology
O=other

Key Theme:

Date: **Activity Location:**

Activity: ___ Arts Management ___ Performance ___ Special Event

Details:

| Coding | Information | Notes |
|--------|-------------|-------|
| | | |

Appendix C: Research Instruments**Interview**

Code: *PR*=program. rep.
PS=program. sett.
M=marketing
E=education
T=technology
O=other

Key Theme:**Date:****Location:****Interviewee Details:**

Consent: ___ Oral ___ Written ___ Audio Recording ___ OK to Quote
 ___ Thank you sent

Interview Context:

| Coding | Information | Notes |
|--------|-------------|-------|
| | | |

Appendix C: Research Instruments

Interview Questions

General - Audience Development

1. Define audience development from your personal perspective, and from an organizational standpoint.
2. Had you done any audience development in the past?
 - a. Why or why not?
3. In what ways do you try to connect with new audiences?

Marketing

1. Who is your target demographic?
 - a. Do you market to other audience members? If so, which target groups, and how are they being marketed to?

Programming

1. Does attendance differ based on the performance venue or location? How, and why do you think this is?
2. How does repertoire selection affect attendance?
 - a. What types of works draw in a full house, which don't?
 - b. Does past attendance directly affect which types of works are programmed in the future?

Education

1. Do you think your education programs attract young audiences to performances?
 - a. Are they intended to do this? Or are they strictly meant for exposure?

Technology

1. In what ways do you use technology that might attract or engage with audiences?

Attendance

1. What is the average number of attendees at a classical music performance?
 - a. Has this gone up or down over the past five years? Why do you think this is?
2. How do you track attendance?

Subscriptions

1. Tell me about your subscription model. Do you sell many subscriptions?
 - a. How are sales in relation to past years?
2. Do you offer any "pick and choose" subscriptions?
 - a. Are these a more popular choice than a full season subscription?

Appendix D: Research Timeline

Arts and Administration Program Master's Research Timeline, 2011-2012

Fall 2011 (2 Credits AAD 631)

- Complete full research proposal, meeting regularly with research adviser
- Draft detailed research instruments
- Draft human subjects documents and complete CITI training
- Create general outline of final document
- Submit human subjects application

Winter 2012 (AAD 503 or 601)

January

- Convert proposal into chapter drafts
- Plan with your advisor the dates that chapter drafts will be due; submission of chapter drafts will be worked out in agreement with your advisor over the next several months
- Refine research instruments as required by OPHS
- Schedule data collection as soon as HS approval in hand

February/March

- Begin data collection and analysis
- Prepare detailed outline of full document
- Begin to submit chapter drafts for feedback

Spring 2012 (AAD 503 or 601)

April

- Complete data collection
- Continue with ongoing data analysis
- Write full first draft of final document, submitting chapters to advisor for review and feedback according to plan

May

- Deadline for draft of full document to be submitted to advisor
- Feedback from advisor prior to student presentations
- Student presentations of master's research
- Deadline to submit text and images for inclusion in student research journal
- Continue revisions to full document
- Deadline for full final draft to be submitted to advisor

June

- Submit final document (two copies) and PDF