What Do People Really Think About Orchestras?

Results from the

Consumer Attitudes Toward Classical Music and Orchestras

study conducted by The Amati Foundation.

By William M. Townsend, Chairman

"I've heard Bach before so I don't need to hear it again," said John Doe, one of the 7,114 respondents to a comprehensive study conducted by The Amati Foundation to determine consumer attitudes toward classical music and orchestra attendance. To those who don't attend orchestras, Bach, Mozart, and Beethoven are songs, not composers. This shocking misunderstanding is but one element of behavior that helps identify why non-attendees have limited interest in classical music.

In an effort to apply traditional business research to the classical music industry, The Amati Foundation spent three years studying consumers; seeking to determine ways in which orchestras can attract new audiences and increase the attendance of existing season ticket holders. The results of this research provide a glimpse into the challenges facing the industry, along with insights into how the music industry can positively change consumer behavior.

It's really not difficult to see why attending orchestra events aren't high on the list of entertainment options for the average person. Such events are expensive; reserved for the cultural elite; and only attract old people. Most people don't have the time to attend such events; don't like classical music; and are simply unfamiliar with the music or musicians involved. Right or wrong, this is the prevailing opinion of 98% of the population. What about the other 2%?

Consumers in Europe attend orchestral events an average of 5 times more often than their American counterparts. Yet regardless of geographic location, common elements bring people out of their homes and into orchestra halls. The featured artist and music account for over 58% of respondents' decision to attend an orchestra event. An additional 16% have an interest in a particular instrument such as a violin or piano. Nine percent attend because they hold season passes. Six percent believe an event looks interesting and with their curiosity piqued, will attend, and 2.3% attend simply to expose their children to the arts. When asked what their favorite aspect of orchestral concerts is, over 65% state the experience of live music and the music itself. The social aspect of live events is important too with just over one in five attendees saying that interacting with friends or taking a spouse or date out for the evening is the most enjoyable part of the concert.

Yet even with these positive characteristics, making time and the ticket cost are two detriments to increasing attendance. Fully 38% of current orchestra attendees find making time for concerts the number one hindrance to attending more events and 23% feel the price of tickets limits their ability to attend more events. One in five won't attend a concert because they are not interested in the music or the featured performer; 7% find parking to be too much of a hassle; and 6% say finding and paying for childcare prevents them from attending.

Their least favorite elements of attending concerts centers around cost, unfamiliarity with the music, background noise such as coughing and mobile telephones, and parking.

Our research indicates that among current attendees, while price is an issue, consumers are willing to spend more to see featured entertainment and are readily open to orchestras taking steps to involve their customers in more programming. Taking into account all costs associated with attending a concert (admission, dinner, transportation, childcare, parking, etc.), well over half the attendees expect to spend between $150 and $200 (€123-164, £84.13-112) for an evening of music. They would pay an average of just over $10 (€8.24, £5.60) more per ticket to see a famous soloist perform; would like orchestras to promote upcoming concerts better; want to be offered more information on the programs; and would like to attend pre- and post-concert events. (Chart 1)

Non-attendees present a much different set of problems. Excluding the 17% of consumers who simply state, "I don't like classical music," ticket cost is the largest determining factor in orchestral event attendance with 23% citing cost as the primary reason they don't attend classical concerts. In the United States, a review of 12 orchestras pricing models reveals an average ticket price of $60.45, yet 60% of non-attendees expect to pay between $20 and $35 per ticket and 58% would consider a price of between $45 and $55 fair for two tickets. In fact, only 0.2% of non-attendees would consider per ticket prices above $55 a good value for their entertainment dollar. Without knowing the actual ticket costs for a concert, non-attendees' perception that classical concerts are "expensive" prevent nearly 40% from considering the orchestra as an entertainment alternative. And whereas the average attendee is willing to spend $150-$200 for an evening of classical music, the non-attendee expects to pay under $100 (36.5%) or between $100 and $125 (33.9%) for an evening's entertainment. The price differential of $25 to $75 is significant.

Beyond pricing considerations, one in five non-attendees view their unfamiliarity with a musician or music a stumbling block to attending a concert. As stated in the opening of this article, ten percent believe they've already heard the one song called "Bach, Mozart or Beethoven" and thus have no need to hear it again. Five percent believe orchestral events are reserved for the "cultural elite" and 4% believe they have better entertainment alternatives in the way of movies, sporting events, and other music venues.

There are bright spots. Of the ten percent who incorrectly identified Bach, Mozart, and Beethoven as songs instead of composers, 43% said they would like to attend an orchestral event to learn more about the composers and their music. An additional 37% said they would "probably" attend an event.

According to our survey respondents, lowering ticket prices, more effectively promoting concerts, providing more information and educational sessions, providing free parking, better seat selection, and ticket packages based on instrument types would all lead to higher attendance by those currently shunning orchestras.

The promotion of orchestral events in most cities occurs via mass media advertising, yet our respondents believe that a more focused, one-to-one approach is a more effective means to reach them. E-mail, direct mail, and Internet advertising lead the media vehicles which they expect to learn of concerts (Chart 2). Interestingly, these vehicles provide orchestras the means to provide more information, access to seating charts, and discounts on tickets for first-time attendees based on audience demographics that traditional mass media can't match.

Even the purchase of admission tickets should be reevaluated. Almost 40% of non-attendees want to purchase their concert tickets online. Sixteen percent want to purchase at the gate the night of a show; 15% via telephone; and 14% via mail. While 2.3% would expect to purchase tickets at the concert hall box office, 2.2% would like to be able to do so at their local supermarket.

This data provides multiple insights into the views of consumers and it convinced those of us at The Amati Foundation that the classical music industry needs to take a more aggressive stance in reaching out to existing and potential customers with programs that inform, encourage, and initiate action on the part of attendees.

Sidebar:

Where Does Antonio Fit Into The Public Consciousness?

While a small fraction of respondents correctly identified the vocation of Bach, Mozart, and Beethoven, Antonio Stradivari has become nearly a household name. Of the 71% of people who had hear of Stradivari, 87% correctly identified him as an instrument maker. Even though only 1% believe they've ever seen a real Stradivari instrument in concert, on television or in a photograph, 77% would like to see one and a whopping 76% would be happy to see a recreation of one. This is amazing name recognition for someone who has been dead for over 268 years.

About the survey:

7,114 consumers were surveyed. This group included 6,046 individuals from the United States and 1,068 from the European Union and United Kingdom. The average age was 40.2 years old and the gender distribution was 52% female and 48% male. Average household income was $38,211 (€ 31,479, £21,433).