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The American symphony orchestra: factors affecting concert attendance and predictions for the millennial ticketholder

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Running Head: THE AMERICAN SYMPHONY ORCHESTRA

THE AMERICAN SYMPHONY ORCHESTRA:
FACTORS AFFECTING CONCERT ATTENDANCE AND
PREDICTIONS FOR THE MILLENNIAL TICKETHOLDER

A Thesis Submitted
in Partial Fulfillment
of the Requirements for the Designation
University Honors

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May 2015

THE AMERICAN SYMPHONY ORCHESTRA

This Study by:

Hayley Graham

Entitled:

The American Symphony Orchestra: Factors Affecting Concert Attendance and Predictions for the Millennial Ticketholder

has been approved as meeting the thesis or project requirement for the Designation University Honors.

Date

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THE AMERICAN SYMPHONY ORCHESTRA

Abstract

This research investigates the perception of live orchestral music performances among members of the American millennial generation, born between 1985 and 1997. Specifically, it describes the most common factors and trends affecting attendance decisions, looking at aspects such as past musical experience, marketing strategies used, and accessibility of performances. Current programming, marketing, and educational trends in several orchestras are also considered. Information for this study was gathered from a survey of University of Northern Iowa students, as well as from case studies of orchestras. This thesis provides predictions and recommendations for how to best reach this demographic as orchestras move into the future.

Introduction

Statement of Problem

For centuries, the orchestra has been upheld as one of the pinnacles of art and expression. Yet, with the invention of various technologies in the 20th and 21st century, society has shifted its focus to instantaneous, accessible entertainment. Consequently, attendance at orchestra performances has decreased, and public perception has shifted. This change in societal viewpoint is especially evident among individuals in the millennial generation. As this generation begins to focus more on technology and experiences, orchestras are faced with a dilemma.

Attendance numbers and revenues are down for orchestras across the country, even causing several to stop existing. As orchestras move forward into the years to come, it is imperative that they find ways to continue their operations. Yet, there are a variety of opinions as to what steps must be taken in order to reach new audiences, with no concrete, indisputable direction determined. Some believe that the best course of action is to vary programming in order to reach a younger audience, others feel that children must be educated in the arts from a young age in order to appreciate orchestral music, and still others maintain that classical music's primary audience is, and will continue to be, the older population. In facing this divide, it is imperative that research be done in this area in order to gain insights into courses of action for the future.

Purpose of Study

This research will provide orchestras with an inside look at millennials' motivations, as well as predictions for the future. Specifically, recommendations for how to reach and engage this generation will be critical to attracting and sustaining a concert audience. Perspectives

gained will provide valuable insights as orchestras approach major decisions affecting the future of classical music, which rest significantly in the hands of the millennial generation. This study fills a valuable niche, as previous research has studied the behavior of the millennial generation, as well as orchestral attendance, but this will be the first study the researcher is aware of to address the relationships between these topics.

Research Question

What factors influence millennials' choices to attend orchestral performances, and what is being done to maximize the potential of these factors?

Literature Review

Decreasing Orchestral Attendance

Over the past decades, the American people have been attending dramatically fewer orchestra concerts. A 2002 Princeton study stated that approximately 16% of adults in the United States attended a classical music concert in the preceding twelve months. Even the most optimistic estimates say that attendance is increasing no more than the growth rate of the population in its entirety (Kolb, 2011). These estimates show that recent attempts to increase orchestral attendance have been unsuccessful.

According to Flanagan (2012), as the social and cultural values of society shift, this affects public perception of orchestral music and the live concert experience. While the orchestra used to be considered a pinnacle for arts and culture, it is now grouped with a wide variety of entertainment mediums that are more accessible to the public. As technology has advanced, the avenues through which entertainment, and music specifically, can be pursued have increased dramatically. It is simple now for an individual to listen to a classical piece on YouTube, iTunes,

or Spotify without ever leaving the comfort of their own home. Therefore, the motivation to attend live performances has decreased. In order to convince people to attend these performances, there must be a benefit beyond what can be gained from listening to a recorded version.

The problem of concert attendance is especially present among young populations. According to Kolb (2011), “a striking change is taking place in attendance patterns that does not bode well for future attendance at concerts. The indication is that attendance is decreasing among the young. Moreover, as these young non-attenders age, they are not acquiring the attendance habit” (p. 1).

This creates problems for orchestras for several reasons. First, the smaller the number of tickets sold, the smaller the amount of income. From a business perspective, this is a problem for finances and administration. Flanagan (2012) asserted that, even if all of the seats were filled in concert halls, there would still be financial troubles for many American orchestras. The reasons for these financial troubles are varied, and many are out of the direct control of those currently making decisions for orchestras. Yet, the impact of these economic deficiencies is vast. When there is less income, it becomes increasingly challenging for orchestras to reach out into the community to new populations. Therefore, this illustrates a Catch-22, as orchestras need to bring in new people in order to make money, but they cannot reach out to these people unless they have the money to do so (Flanagan, 2012).

The lack of young ticketholders is also a problem because it creates a bleak forecast for the future. As indicated by Kolb (2011), if concert attendance habits are not instilled when young, individuals will feel less comfortable in a concert setting as they age. As many current

orchestral patrons are older, they will need to be replaced by younger generations as time passes. Therefore, it is critical to attract and maintain young audiences that will sustain into future years.

There are numerous factors that may contribute to this change in attendance patterns. In Kolb's 2011 study, these were grouped into four main categories. These include "changes in 'practical considerations' such as supply and accessibility of events, cost, availability of leisure time, and dissemination of information on events; changes in people's knowledge of classical music through exposure to arts education; changes in tastes; and socio-demographic changes" (Kolb, 2011, p.1). The last two factors are somewhat out of the control of the orchestras, as they pertain to society on a large scale. However, the first two mentioned can be influenced by the orchestra's decisions.

Some analysts suggest that the current downturn in orchestral attendance may be part of a cyclical pattern that is not actually new. A June 13, 1969 article published in Time Magazine predicted that nearly half of the major American orchestras would fail within the next two to four years (Gavin, 2012). While this prediction did not come into fruition, it demonstrates that this is not a new problem, and indeed has been occurring for nearly half of a century. Therefore, it is evident that the courses of action that are presently being taken and have been taken in the past are not enough to alleviate this problem. If orchestras hope to gain attendance and support in a sustainable manner, it seems that new methods will need to be employed.

Debate Regarding the Purpose of the Orchestra

Many individuals advocate that the model for the orchestra moving forward must be dramatically different from the traditional understanding. Kennicott (2013) suggested that orchestras "think about their community's needs, not their traditional role as custodians of a musical tradition" (p. 2). This issue has been a topic of much discussion in recent years, and has

created a societal divide in the music community. On one side, some musicians and music advocates assert that their duty as musicians is to the sanctity of the music and its composer. In their view, if orchestras and classical musicians do not carry this torch into the future, who will? Fearing the loss of classics and standard repertoire in society, these individuals see the orchestra as the custodian of tradition. Contrastingly, other musicians and individuals affiliated with orchestras believe in the need to diversify programming in order to reach new audiences. In their viewpoint, standard classical repertoire will not entice new people to experience the orchestra. Therefore, the orchestra must adapt in order to fit what society requests. Essentially, this becomes a debate over whether the orchestra is responsible for meeting current community needs, or maintaining the sanctity of a centuries-old art form.

This conversation is not a new debate, but instead has been discussed for over twenty years. In 1993, the League of American Orchestras published a report entitled “Americanizing the American Orchestra.” In this document, orchestra leaders discussed problems similar to those faced today, including declining audiences, public perception of orchestras as elitist, and financial struggles. The creators of the report said that the orchestra was “becoming increasingly isolated from the social, political and economic realities of American society” (p. 35). Their proposed solution was to diversify programming, make the orchestra more accessible to a variety of socio-economic groups, and redefine the orchestra as a community-based organization that focuses primarily on the good of its citizens instead of the quality of its music. One specific aspect of this report referenced a need for diversity as a crucial goal, and tactics such as selecting musicians of varying races and expanding repertoire programmed were encouraged (League of American Orchestras, 1993).

However, the publication of this report sparked much debate. Critics argued that through “Americanizing” the orchestra, the central purpose of the establishment would be abandoned. In his New York Times article, Edward Rothstein argued that the approach was “thoroughly wrongheaded, an abdication of the tradition orchestras represent and a refusal to accept the responsibilities of artistic leadership” (p. 1). Further, Rothstein said that by making the orchestra a reflection of popular culture, the League of American Orchestra’s leaders were essentially ensuring the fleeting nature of the orchestra as something that would become fickle and nonessential instead of timeless and enduring (Rothstein, 1993). Those who agreed with Rothstein’s stance argued that the focus on European repertoire was in response to the comparatively long history that Western music had in these countries, versus its fairly short history in America. According to this perspective, the orchestra should not be altered to fit into popular society, but members of society should be educated to appreciate the orchestra instead.

Yet, since a plethora of problems, including strikes, bankruptcies, and lack of community support have been plaguing American orchestras, it is critical to think outside the box in order to devise a plan for the future that will allow the orchestra to survive and prosper. Instead of debating the merits of these two viewpoints in a polarizing manner, it may be necessary to find commonality and compromise. B. Wohler of the Waterloo-Cedar Falls Symphony asserts that orchestras will have to “rethink everything they think about what people know” (personal communication, October 27, 2014). Tony Woodcock, President of the New England Conservatory of Music, agrees with the need for change in order to be part of current society. “With massive declines in audiences and funding across the nation, maybe only bits of the old orchestra model are still workable,” he said. “Perhaps we are at a massive inflection point and there is a huge opportunity to reinvent the orchestra's entire interface with the community. Why

not grab this moment when we could take orchestral music and its performers to the center of our society rather than their languishing at the periphery?” (Woodcock, 2012, p. 1).

Orchestral Closures and Disputes

The problem of decreasing orchestral attendance has had serious impacts on the ability of these groups to remain in existence. In recent years, numerous orchestras across the country have faced strikes, lock-outs, and complete closures. For example, in late June of 2013, the Nashville Symphony Orchestra nearly had to face the foreclosure of its concert hall. This venue, which had cost \$123.5 million, had been built only seven years earlier, and was intended to give the orchestra an impressive home for decades to come. A confidential agreement was made with wealthy symphony supporters, preventing the foreclosure from occurring (Grannis, 2012). However, this close call demonstrates the dire nature of the financial crisis facing orchestras nationwide.

Major orchestras are by no means immune to these difficulties, as the Philadelphia Orchestra filed for Chapter Eleven bankruptcy protection. This orchestra is known as one of the “Big Five” Orchestras, so named for its position as one of the five most prestigious orchestras in the nation. The course of action taken by this orchestra has actually been recommended by some business and finance individuals, who believe this to be an acceptable way for struggling orchestras to remain afloat (Grannis, 2012). Yet, there is a significant stigma attached to the declaration of bankruptcy that may influence potential patrons’ attendance decisions.

Simultaneously, increasing numbers of orchestras are having trouble negotiating contracts between musicians and management. Notably, the Minnesota Orchestra engaged in a fifteen month labor dispute from 2012 to 2014, in which the orchestra missed an entire season. During this time, a number of musicians, including its music director, Osmo Vanska, and

principal clarinetist, Burt Hara, decided to move on to other employment. An agreement was finally reached in January of 2014, which reduced the musicians' pay fifteen percent from where it had been prior to the lockout. While this was a decrease, it was still better than the proposed cuts by orchestra management, which would have decreased musicians' pay by thirty to forty percent (Midgette, 2014).

The Minnesota Orchestra is not alone in this problem. The San Francisco Symphony encountered a very similar situation, in which new contracts with less pay were proposed for the musicians, who went on strike. While dramatically shorter in duration, this strike forced the cancellation of major performances at venues such as Carnegie Hall and the Kennedy Center. Many orchestras have not been fortunate enough to come to agreements or receive money from donors, however, and have had to close their doors indefinitely. These include the Louisville, Honolulu, Syracuse, and Albuquerque symphonies (Wakin, 2013).

Youth Education Programs

One common method of attempting to reach new and varied audiences is the implementation of educational and outreach programs to connect with the community. Quite a few orchestras have been doing this in recent years, for a variety of reasons (Kolb, 2001). Locally, the Waterloo-Cedar Falls Symphony has implemented numerous educational programs. These include special child-friendly concerts, as well as giving children a chance to try instruments. Betsy Wohlers, the orchestra's marketing director, believes that this is beneficial, saying efforts to reach youth "will trickle down and help create arts supporters for future generations" (B. Wohlers, personal communication, October 27, 2014).

The Waterloo-Cedar Falls Symphony is by no means the only organization employing such a tactic. The Los Angeles Philharmonic has established a youth orchestra to reach at-risk

young people in the city, called the Youth Orchestra LA, or YOLA. This program works to develop productive, well-adjusted young people in the underprivileged neighborhoods of Los Angeles. This both utilizes music to improve the lives of these young adults and educates them to become supporters and patrons of the arts. The program provides free instruments and musical training to over 700 students (YOLA at Expo, 2015).

In addition, concerts specifically tailored to a young audience with the purpose of acquainting them with the orchestra have existed for many years. Conductor Leonard Bernstein made the New York Philharmonic's Young People's Concerts famous in 1958, when he first became music director of the ensemble. Upon his arrival, the concerts had been in place for a substantial amount of time. During his tenure, however, he made the concerts a more central part of the orchestra, and made them accessible to a wider audience through broadcast. In his fourteen years in the position, Bernstein led fifty-three young people's concerts. These covered a variety of topics, from exposure to varied repertoire and musical cultures, to beginning music theory (Leonard Bernstein's Young People's Concerts, 2013). Today, these concerts continue to occur. The productions are divided into three distinct categories: Very Young People's Concerts, Young People's Concerts, and Young People's Concerts for Schools (New York Philharmonic, 2015). These divisions allow the orchestra to tailor programming more specifically to each group, and reach a wider audience.

However, not everyone agrees with this philosophy. Some researchers and arts administrators think that there is not necessarily a correlation between education of youth and attendance at concerts. As discussed previously, Kolb (2011) asserted that the problem with attendance is unlikely to be caused by a lack of knowledge or appreciation for classical music.

Instead, he believes that the concert environment itself must be changed in order to increase widespread accessibility.

Non-traditional Programming

Another technique that is being utilized by many orchestras today is the use of non-traditional programming. This occurs in a variety of ways, including performing at different venues, inviting guest soloists from different genres, and utilizing multi-media elements. There are a plethora of examples of this in a number of locations.

Locally, the Waterloo-Cedar Falls Symphony has implemented a number of these concepts. In 2013, they augmented a performance of Gustav Holst's *The Planets* with a short film comprised of artwork by local illustrator Gary Kelley (Groat, 2013). This added an additional visual element to the performance of a fairly standard piece of repertoire, allowing the audience to encounter it in a new way and experience something that could not be done at home. In their current season, the Waterloo-Cedar Falls Symphony invited a guest trio that performs in an eclectic genre, and also held an audience sing-along for Handel's *Messiah*. These actions demonstrate the diversity that the symphony is trying to introduce in their programming.

One controversial use of unusual programming was the Colorado Symphony Orchestra's creation of a performance experience called "Classically Cannabis." This programming decision followed the highly discussed legalization of recreational marijuana in the state. While some individuals supported this choice, the city of Denver expressed some concerns. They sent a letter to the orchestra prior to the performance urging them to cancel the show, as it was allowing people to smoke in public which was still illegal. Yet, after some changes in order to fit within the legal framework, the concert still occurred. A large amount of money was raised, but the ticket price for this event was \$100 per person (CBS, 2014). While this programming was

certainly unique and an attempt to think outside of the traditional confines of classical music, there was quite a bit of debate surrounding it. The use of recreational drugs, combined with the high ticket price, certainly made this an opportunity appealing only to a certain niche audience. This raises the question of whether this is truly helping the problem, or simply changing one small group of orchestral patrons to another small group with slightly different interests. While this may cater to millennials temporarily, there may be a problem regarding its sustainability as orchestras work to reach other populations.

An Overview of Millennials

A variety of differing estimates exist in regards to when this generation actually begins and ends. Birth years range from 1980 until 2004, depending upon the source. However, as this study will deal with college students exclusively, the millennial generation will be defined as those born between 1985 and 1997, for purposes of this research. There are about 100 million people in this generation (Howe, 2014), and they are poised to quickly become the adult workforce in America (CBS). Due to the cultural and technological conditions in which they were raised, this group thinks and interacts with other much differently than previous generations. Therefore, it is critical to understand their perspective if orchestras hope to attract them as ticketholders.

There are a variety of characteristics attributed to millennials that are relevant to their decisions as consumers. Many of the traits that they now exhibit can be largely attributed to the social and economic environment in which they were raised. Despite the portrayals frequently seen in the media, this group is actually very risk-averse. Serious violent crime, abortion, and teen pregnancy have all fallen significantly among this generation (Howe, 2014). This applies to economic decisions as well, as this group is hesitant to spend a lot of money or go into debt

(Howe, 2014). This affects orchestral marketing, as many tickets to such concerts cost quite a bit of money. If this generation does not support economic risk-taking, it is less likely that they will spend a copious amount of money to attend a concert about which they are unsure.

Socially, a focus on family, and protection of young children, was a major cultural value when they were being raised, leading to a belief that family is one of the most important things in life. This has also translated to large numbers of millennials living with their parents. Additionally, millennials are very achievement oriented, with graduation rates from both high schools and four-year universities at record highs (Howe, 2014). This emphasis on educational achievement may also have an impact on how millennials respond to classical music. Specifically, a 2002 study conducted by Princeton University indicated that individuals with a higher level of education were more likely to attend classical music performances. Those with a Bachelor's degree were more likely to attend than those without post-secondary education, and those with a graduate degree were more likely to attend than their colleagues with a Bachelor's degree.

Millennials have been raised in a culture of constantly evolving technology; therefore, they are tech-savvy. Many of the qualities that have been attributed to this generation, including self-absorption, can be partially attributed to this technological focus. One example of this is the concept of a "selfie." Tan (2014) argued that this desire for self-expression has existed throughout human history, but its feasibility has simply expanded with additional technology. A focus on technology and social media also pertains to an interest in being connected to others, which is a common characteristic attributed to this group (Atkinson, 2013).

Marketing to Millennials

As previously discussed, millennials are a unique generation, with their own set of beliefs and values. Therefore, marketing to this target audience requires specific knowledge. In a world of increasing technology and constant communication, interconnectivity is seen as a critical component. According to Atkinson (2013), “to ‘own’ millennials, marketers will need to understand how they link with each other, with brands, with influencers, with media platforms and their devices” (p.1). Sometimes, it is difficult to determine which technology to utilize, since this generation uses such a vast array for different purposes. Atkinson argued, though, that instead of focusing on the specific medium, marketers should focus on making connections. “With an insatiable need to be connected and continually validated for their level of ‘insider’ status, millennials are their own medium” (Atkinson, 2013, p.1). Therefore, instead of trying to use the correct platform, marketers should focus on how to connect people.

In relation to an arts organization such as an orchestra, this can be implemented in a number of ways. Interconnectivity can be developed and built upon through social media platforms, but marketers must thoroughly understand these platforms in order to maximize their impact. Used in a way that resonates with the public, social media can build connections with potential audience members. In addition, the performances must be both accessible and affordable to millennials. One orchestra that has implemented an innovative program to reach this group is the Cleveland Orchestra. Recently, it has seen a massive increase in orchestra attendance, with ticketholders comprised largely of children and students. Specifically student attendance has increased by 55 percent this year, reaching more than 18,000 young people. A variety of tactics have been implemented to achieve this. One is decreased cost of tickets. College students can purchase “Student Advantage” tickets for \$10, and children under the age

of eighteen can attend concerts for free. Despite the large number of discounted and free tickets, total revenue has also increased. A second tactic employed has been social media presence on Facebook and other sites. In addition, the orchestra has employed unique programming, featuring diverse combinations. These have ranged from banjo player Bela Fleck to ballet companies, rockers to world music ensembles (Cleveland Orchestra, 2013).

In conclusion, it is evident that a momentous problem is currently facing American orchestras in regards to decreasing attendance and financial struggles. This problem is especially prevalent among young people, and must be combatted in order to provide a future for orchestral performance. Yet, is critical to understand the culture and motivations of these individuals in order to effectively connect with them. As the generation thrives in atmospheres focused on experiences and high interconnectivity, the orchestras must be willing to think innovatively in order to incorporate these aspects into the concert environment.

Methodology

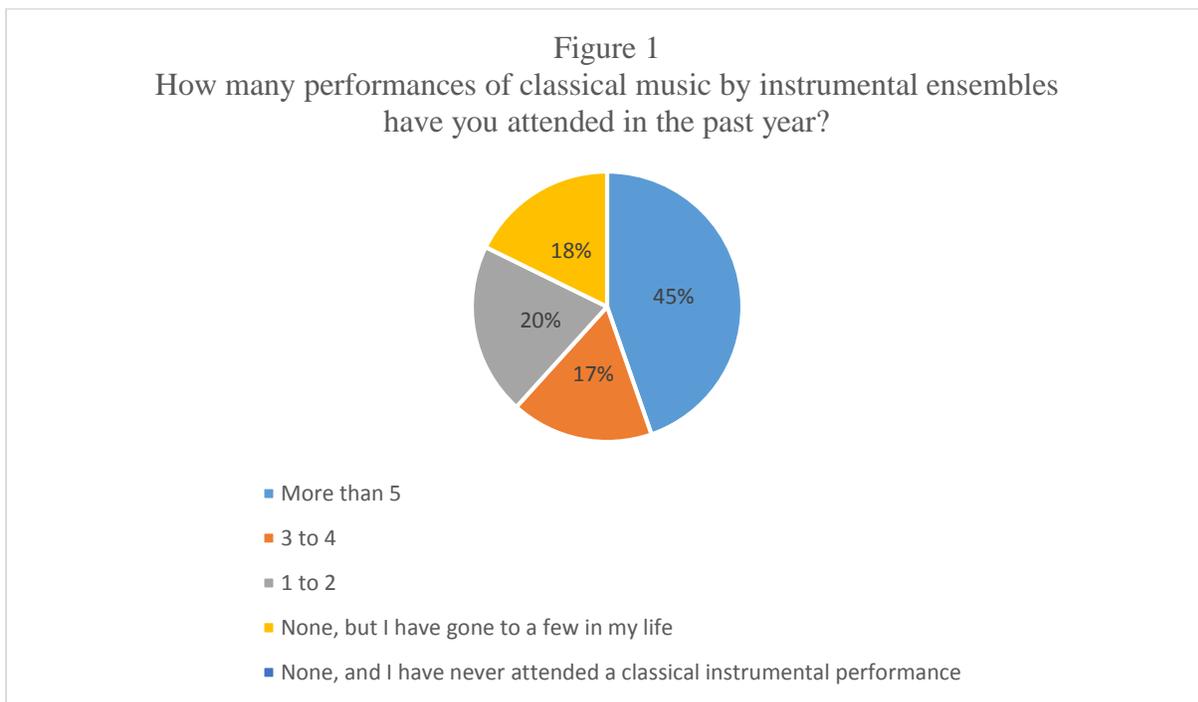
The method implemented for this research was the distribution and analysis of a survey discussing orchestral attendance decisions to University of Northern Iowa students. This survey involved nine to eleven questions, (see Appendix A) depending on the individual, discussing the musical background of participants, their performance attendance choices, and what factors led to these choices.

The survey was administered to a variety of students on campus who were split into three groups for research purposes: music majors, non-music majors who have been involved in music, and non-musicians. These groups were determined based on participant responses to questions regarding their musical involvement. E-mails were sent to directors, professors, and administrators of various groups on campus, who were urged to send the survey link on to the

students with whom they work. Specifically, the survey was sent to all members of instrumental ensembles on campus, including the Panther Marching Band, Symphonic Band, Wind Symphony, and Symphony Orchestra. In addition, it was distributed to all Soundscapes Music Appreciation students and sent out as part of the University of Northern Iowa Honors Program updates. The researcher also offered to visit any ensembles or courses in order to explain the survey to potential participants, and carried out a presentation for the Symphony Orchestra. Students had approximately two weeks from the time the survey was posted in which to complete it. The survey was administered electronically through the Google forms online platform. Data were collected from a total of 145 students. Prior to administering this survey, IRB certification protocol were followed in order to secure approval.

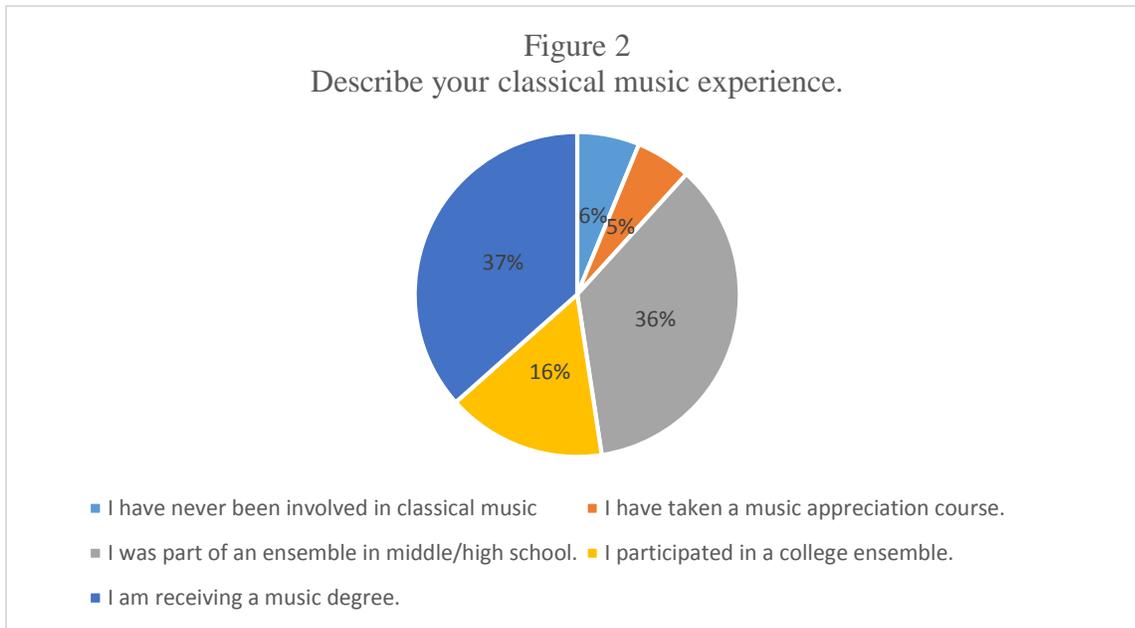
Results

Numerous results were obtained from this survey. Of the 145 individuals responding, 63 people (43.4%) indicated that they had attended more than five instrumental classical music performances in the past year. Twenty-four had attended three to four, 29 had attended one to two, 25 had attended none in the past year but had at an earlier point in their life, and four had never attended such a performance (Figure 1). Therefore, it appears that the majority of the participants in this survey had attended at least one performance in their lifetime, and so were informed enough to satisfactorily complete the survey.

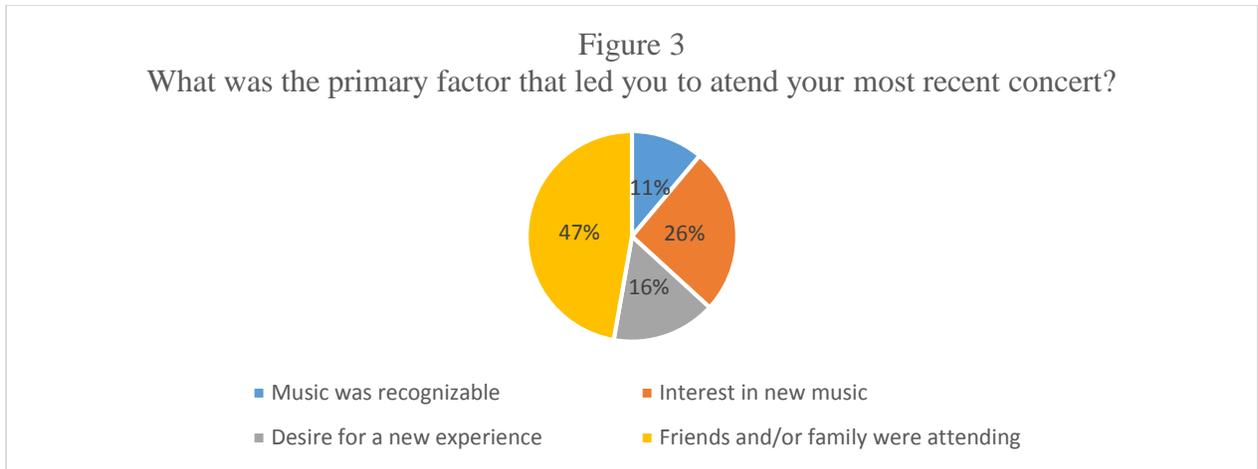


A similar pattern emerged with regards to classical music experience. The group identified by highest number of participants was those receiving a music degree. Of those surveyed, 36.6 percent indicated that they were receiving such a degree, while 35.9 percent reported that they were part of an ensemble in middle or high school, and 15.9 percent indicated that they have participated in a college ensemble. Therefore, approximately 88 percent of the

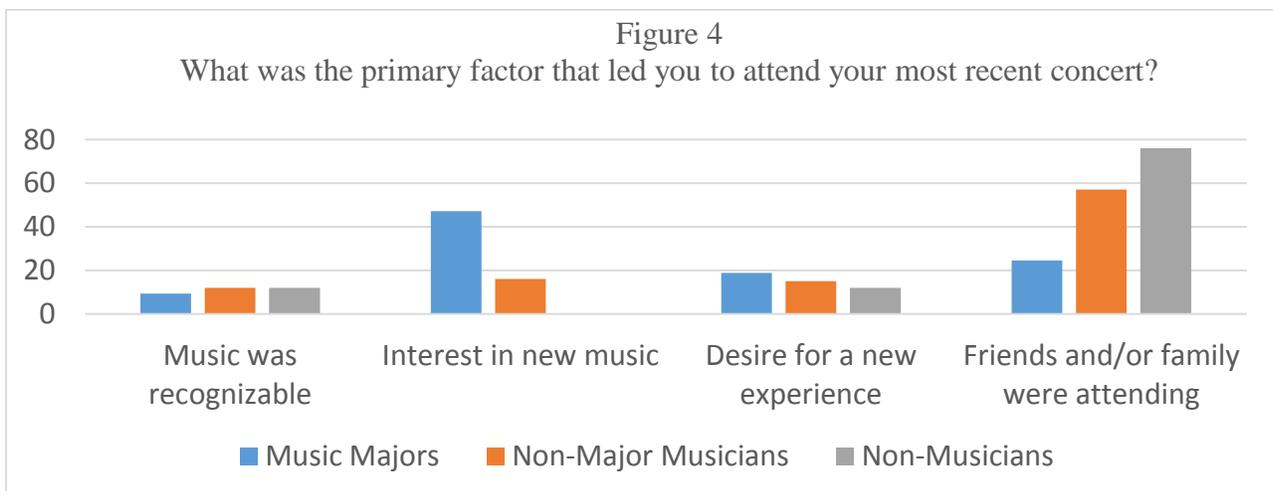
respondents in this survey had some experience as a member of a musical ensemble at some point in their life. Comparatively, only about 12 percent had no musical experience (Figure 2). These classifications were utilized when evaluating responses to other questions, as they allow for differentiation between populations.



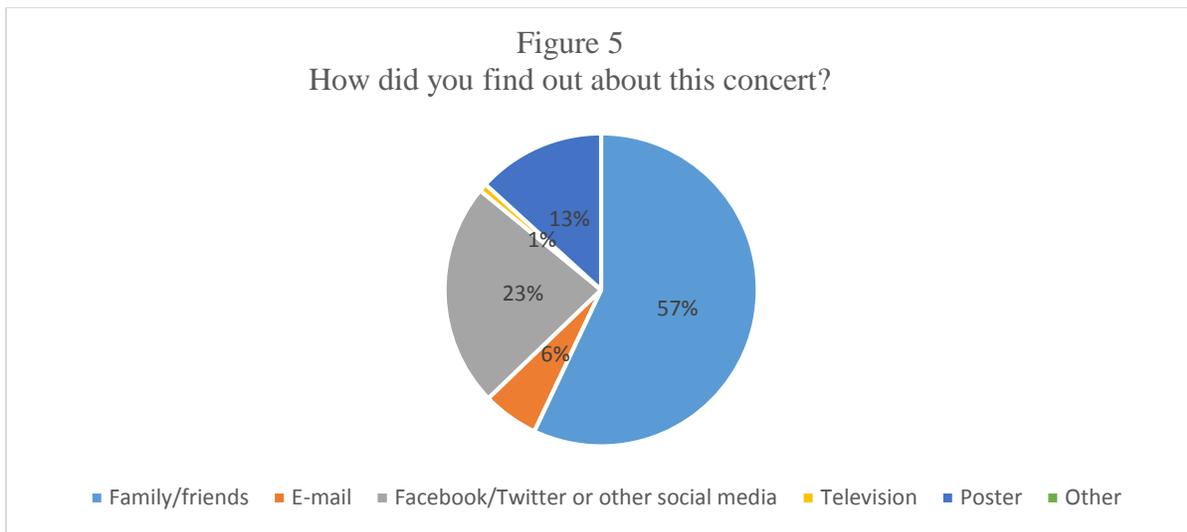
Overall, the factor that was most commonly cited as the main reason for concert attendance was the attendance of family and friends. This was the primary factor that led 46.9 percent of total respondents to attend the performance. The second factor was an interest in new music, which received 25.5 percent of responses, third was a desire for a new experience at 15.9 percent, and fourth was the recognizable nature of the music, which received 11 percent of responses (Figure 3).



When broken down into three groups: music majors, non-major musicians, and non-musicians, there was variation in regards to the primary factor affecting concert attendance. The majority of non-musicians cited family and friends as the largest factor affecting their decision, with 76 percent of respondents selecting this option. For non-major musicians, this was still the most common factor, but the margin was much less definitive than it was for non-musicians. Fifty-seven percent of non-major musicians cited family and friends as the cause of their attendance. However, this trend was not consistent among the music major group. This population cited interest in new music as their primary motivation for attending an orchestral performance, with 47.2 percent of participants indicating this preference (Figure 4).



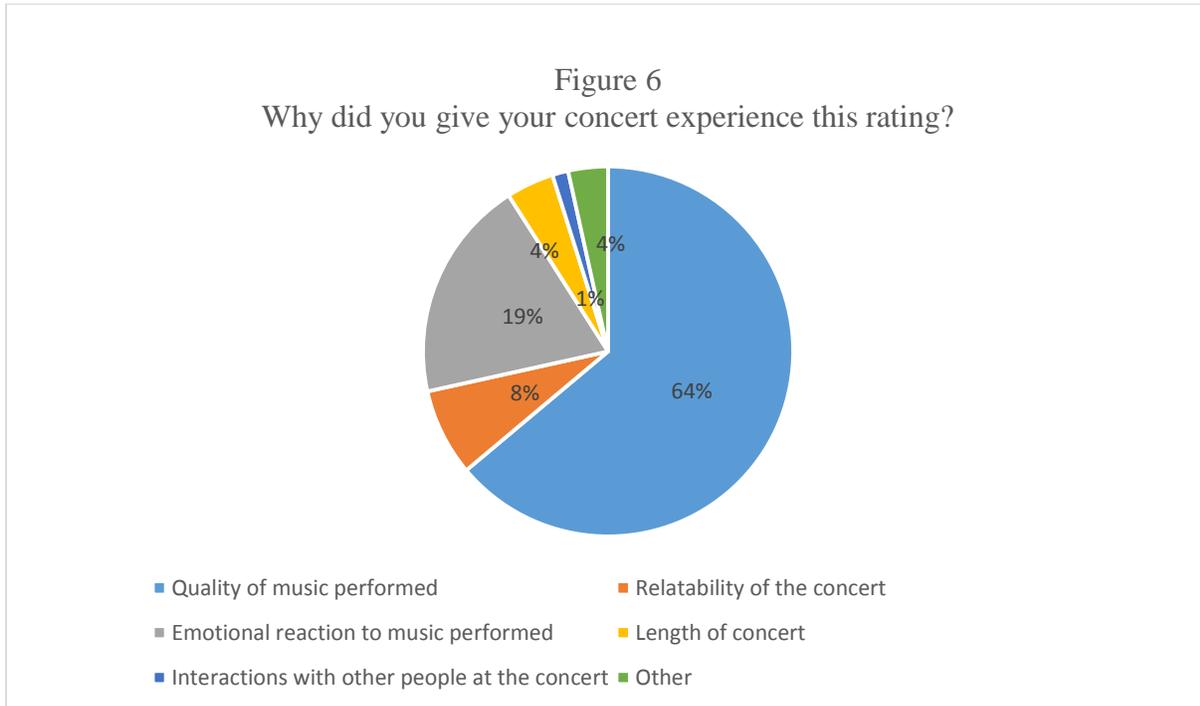
When asked how they found out about their most recent concert, the largest number of participants indicated that they were notified by family and friends, and this answer comprised 47.6 percent of total responses. The next most commonly cited source of information was social media such as Facebook or Twitter, which constituted 19.3 percent of total responses (Figure 5). Other forms of communication, such as e-mail, television, posters, and class announcements were significantly less commonly reported.



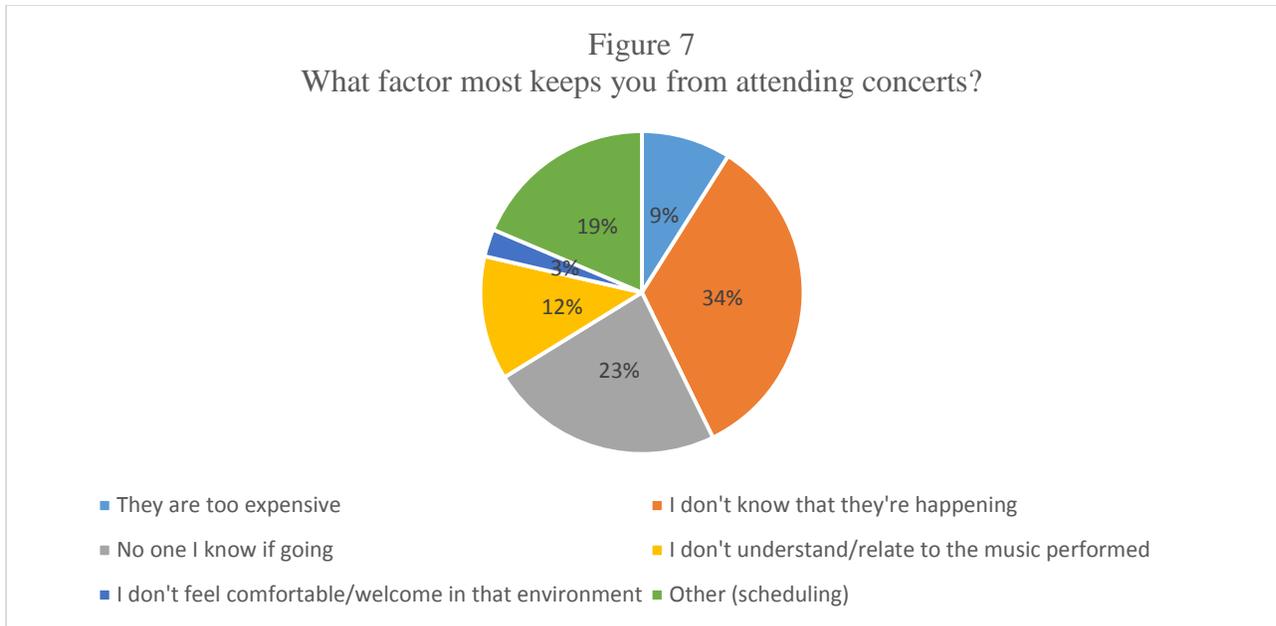
When asked to rate their concert experience 44.1 percent of respondents classified it as very positive, and 46.2 percent indicated that it was positive. Therefore, approximately 90 percent of people surveyed indicated that they had a positive experience when attending a classical music performance. The remaining individuals classified their experience as neutral, and no participants indicated that their experience was negative. Similarly, 87.6 percent of respondents said that they do plan to attend future classical performances.

Respondents were then asked why they classified their concert experience as they did. The most common response was quality of music performed, which received 63.4 percent of total responses. The second most commonly selected reason was emotional reaction to the music

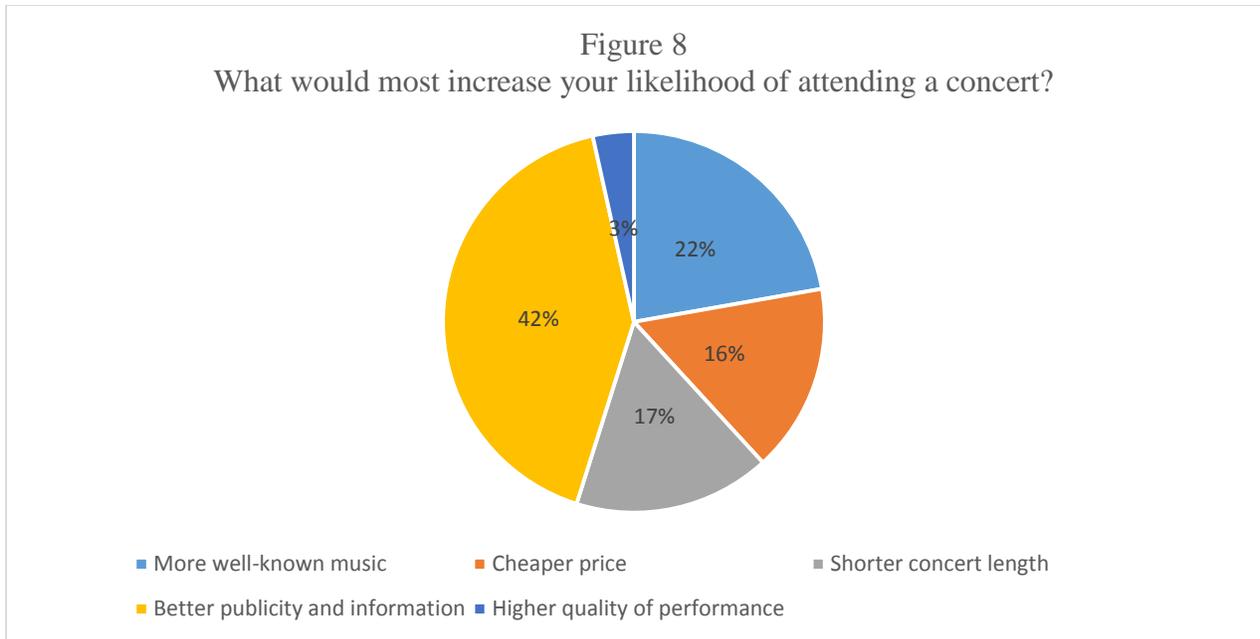
performed, which received 19.3 percent of responses (Figure 6). Significantly lower factors included relatability of the concert, length, and interactions with other people while at the concert.



There were numerous factors cited as the most common reason that individuals do not attend concerts. However, the most commonly selected answer was that they do not know they are happening, which received 33.8 percent of responses. The second most commonly cited reason was that no one they know is going, collected 23.4 percent of responses. A large number of individuals also cited busy schedules or inability to find time as a factor that contributed to their attendance decisions (Figure 7). Other factors cited included price, inability to understand the music performed, and discomfort in the concert environment.



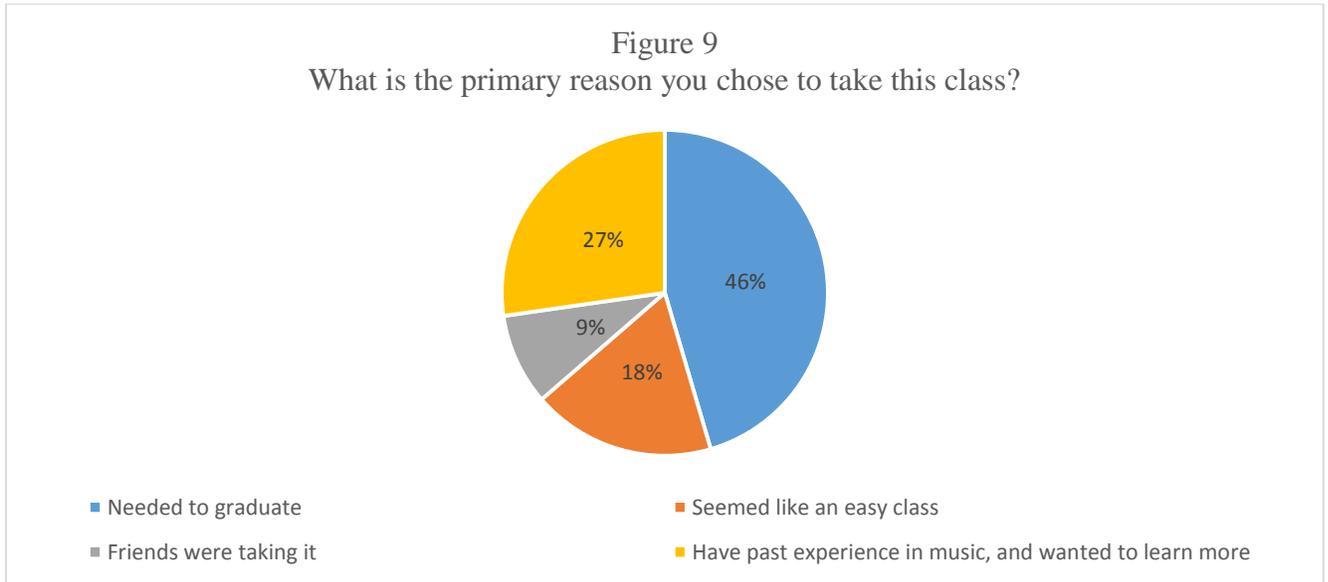
The next question posed was what would most increase these individuals' likelihood of attending a concert. Throughout all three subgroups, the general consensus was that better publicity and information would raise the chances that a concert would be attended. Of those surveyed, 41.4 percent indicated that this would most increase their likelihood of attendance. Secondly, performance of more well-known music was cited by 22.1 percent of people as a factor that would increase their attendance. Shorter concert length was cited by 16.6 percent of respondents as a factor that would improve their likelihood of attendance, while 15.9 percent said a cheaper price would help with this. Only 3.4 percent said that higher performance quality would positively impact their future attendance decisions (Figure 8).



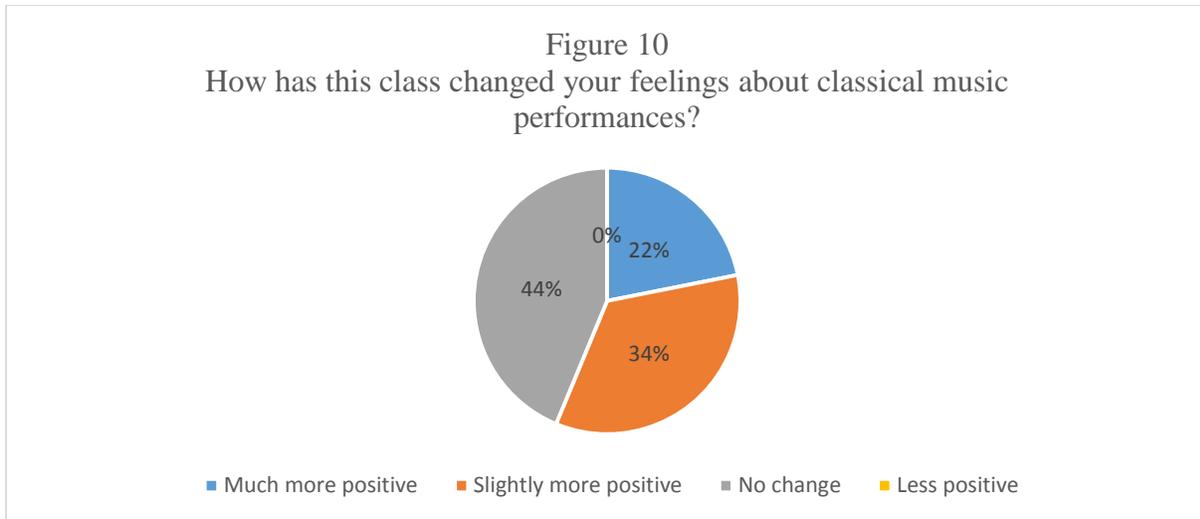
The responses to this question were also broken down into three groups: music majors, non-major musicians, and non-musicians. Unlike the question regarding the primary factor affecting attendance decisions, the responses to this question were quite similar across the three groups. However, more well-known music did increase in its frequency of selection moving from music majors to non-musicians. Fifteen percent of music majors selected this, 27 percent of non-major musicians chose this answer, and 35 percent of non-musicians felt this would most improve the likelihood of attending a performance. In addition, 41 percent of music majors and 44 percent of non-major musicians indicated they would be more likely to attend a performance if there was better publicity and information available. However, only 24 percent of non-musicians selected this choice.

Specific questions were also posed for the students who were enrolled in a music appreciation course at the time of the survey. The first question asked was why the individuals chose to take this course, to which 45.5 percent of respondents indicated that they enrolled in order to graduate. Past experience in music and a desire to learn more was the reason cited by

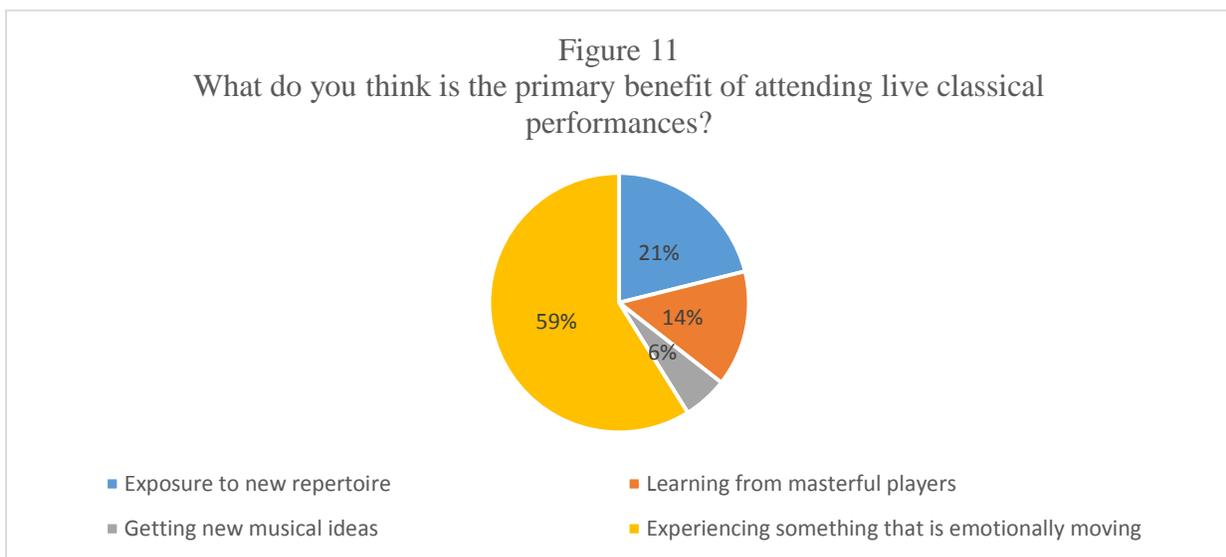
27.3 percent of respondents. Perceived ease of the course was the primary factor that led 18.2 percent of students to enroll, and 9.1 percent of student respondents said they chose this course because their friends were taking it (Figure 9).



The students were then asked how the music appreciation course has changed their feelings about classical music performances. The course had no change on the perception of classical music performances for 43.8 percent of respondents. Yet, 56.2 percent of students indicated that this class had made their perceptions either slightly or considerably more positive (Figure 10). No students responded that the course had a negative effect on their feelings about classical music performances.



A final question was asked of music majors and ensemble members regarding the primary benefit of attending live classical performances. The most commonly cited answer was to experience something that is emotionally moving, which 58.9 percent of respondents selected. Second was exposure to new repertoire, which 21.1 percent of respondents said was the primary benefit of attendance at concerts. Learning from masterful players was the benefit listed by 14.4 percent of respondents, and getting new musical ideas was selected by 5.5 percent of respondents.



Discussion

From these results, there are a number of conclusions that can be drawn. There are differences in motivations for concert attendance between music majors, non-major musicians, and non-musicians. This was evident especially in the question regarding primary factors that motivate an individual to attend a concert. In addition, the factors that would increase attendance were different for these three groups, as musicians cited more information as necessary for attendance, while non-musicians expressed interest in more recognizable music. Therefore, it is crucial that orchestras decide which audience to target. If motivations and influencing factors differ so significantly for these two groups, orchestras must tailor their messaging specifically to the group they are trying to reach.

Many students cite a lack of information as a reason for not attending. This illustrates that there is a problem in the information flow at some point. While orchestras may believe that they are publicizing concerts and events, this information is not getting to students. This is indisputably shown here, as all three groups indicated that more information and publicity would increase their likelihood of attending a performance. It is probable that there is disconnection between the orchestras and the individuals they are trying to reach. It would be valuable for orchestras to investigate where people are looking for their information, and then seek to utilize these sources. Better understanding the information seeking behaviors of the target audience can allow them to be more effectively reached. Therefore, publicity is an area that could be improved upon in order to increase concert attendance.

Recommendations for Orchestras

From these findings, recommendations can be made to help orchestras be more successful as they move into the future. First, the differences between the responses of music

majors and non-majors indicates that specific audiences should be targeted. Professional orchestras cannot use an identical approach for all populations and assume that it will be effective. Instead, specific audiences should be selected and targeted for marketing and publicity campaigns. In addition, it is crucial to understand the motivations of these groups, as well as where they look for their information.

Secondly, the prevalence of family and friends on attendance decisions emerged throughout the data. Millennials cite notification from family and friends as the primary manner in which they get information. In addition, non-music majors strongly indicated that the attendance decision of family and friends is a crucial factor in determining whether or not individuals attend concerts. Therefore, orchestras must work to ensure that family and friends are talking about performances. This involves generating a conversation so that information is passed along, both through word of mouth and digitally, by their target audience's peers. The 2015 Edelman Trust Study showed that people are much more likely to trust someone they know and believe to be like them, than someone from the organization that is doing the advertising. Specifically, the most highly trusted group from which to receive information is family and friends, which 72% of people trust (Edelman, 2014).

There are multiple ways in which this conversation can be generated. One is to utilize social media in a way that is interactive instead of simply informational. By inviting viewers to share or comment on content, they are engaging in a dialogue. Not only does this make them feel more connected to the orchestra, but also uses these interactions to reach the networks of those interacting. In other words, if someone shares an orchestra's post on Facebook, that content will reach that individual's friends instead of only the people who follow the orchestra's Facebook page. Another manner in which to generate conversation is to hold events and publicity stunts. If

something unexpected is going on, people are much more likely to talk about it. Therefore, orchestras must be innovative and creative. This could manifest itself in programming choices, partnerships with other artists, and events held outside of the concert itself. These could include anything from dinners to contests, festivals to endorsements. Overall, it is critical for orchestras to think outside of the box in order to generate conversation that will truly reach individuals of the millennial generation. This generation is bombarded with a plethora of information from all directions, yet orchestras must find a way to cut through and have their voices heard.

Suggestions for Future Research

While this research exposed some underlying issues and patterns, it also brought up many more questions that could be investigated in order to better understand this complex issue. Since the millennial generation students tend to cite lack of information as a reason for not attending performances, it would be telling to look into where they get their information. Looking at where they find out about other events they attend could help marketers at orchestras understand where best to reach them.

In addition, the difference between music majors and non-majors on some questions raises a question about the impact of music education. Why do these groups have such different responses to some questions, yet much the same reaction in other areas? Does increased exposure to music or a more thorough understand of what is going on influence a person's likelihood to attend a concert? If this is the case, there are many directions researchers could go. Does music need to be taught at a certain formative age in order for students to gain this understanding of its purposes? As music programs are being cut from public schools, this may have an effect on future generations' ability to understand and enjoy performances of classical music. Also, should music education be mandatory for all students? At what point do we, as a

society, draw the line between what can be required and what must be left to personal preference and independence?

Another interesting topic for further investigation involves the orchestra's obligations as an institution. Many orchestras in modern society are pairing with popular artists, playing movie music, or putting on outdoor concerts, among other things, to attract a new audience. While this may bring in young people or those who may have been previously unfamiliar with orchestral performances, it also may upset for traditional long-time ticket holders. Is this solving the problem, or simply shifting to favor a different demographic? On a more existential level, is the orchestra's primary obligation to its community or to the integrity of its artistic expression? A marriage of classical and popular music may have benefits in terms of increased ticket sales and getting new people in the door. Yet, are the more traditional members of society willing to sacrifice the sanctity of a Beethoven symphony, for example, for more widespread exposure? As we move forward into a new time in culture and society, it is imperative to continue to ask questions and seek to understand the world in which we live so that we can most effectively interact with it.

Conclusion

The contents of this analysis have focused on addressing the question of what is currently being done by orchestras in order to reach millennials, as well as what millennials would like to see happen in the future. In order to answer the original question posed when beginning this research, it is imperative to consider all of the aspects this research considered. It is difficult to dispute that there is currently a significant problem facing American orchestras. This is demonstrated by decreasing attendance at orchestral performances, financial troubles faced by ensembles, and difficulties involving strikes and lock outs. While the problem may have

worsened in recent years, it is not a new difficulty, as discussions of this topic can be found from 1969 onward, and potentially before. In light of the recognition of a problem, it is critical that orchestras consider what action to take in order to ameliorate the current condition of the orchestra in society.

In surveying college-age individuals of the millennial generation, researchers found several commonalities. First, these students get most of their information from family and friends. Therefore, in order to effectively reach them in the midst of a highly stimulated world, orchestras must encourage the generation of a conversation. A culture in which orchestral music is valued, and groups of friends and family members discuss it as much as they do other aspects of society today, seems as if it would bode well for the success of orchestras. Second, many college students cited a lack of information as reason for their lack of attendance. While most orchestras think that they are publicizing their performances, this demonstrates that the messages are not being successfully received. Further research should be done to investigate how better to bridge this communication division.

Currently, there are a variety of actions being taken in hopes of expanding the orchestra's place in society and allowing young people to feel welcome. Programming of new and non-traditional works, partnerships with other artists, and multi-media presentations are all altering the manner in which society views the orchestra. Simultaneously, orchestras are implementing education and community outreach program with the goal of educating young people about orchestral music. While these steps are helpful in some cases, the answer to the orchestras' problems is still unclear. Through careful consideration of audience, as well as considerable creativity, the American symphony orchestra may move into the next generation with hope of developing a population of millennial ticketholders.

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Appendix A:

Survey Questions:

- How many performances of classical music by instrumental ensembles have you attended in the past year? These include orchestras, wind bands, and chamber ensembles such as quartets or quintets.
 - More than 5
 - 3-4
 - 1-2
 - None, but I have gone to a few in my life
 - None, and I have never attended a classical music performance

- Describe your classical music experience.
 - I have taken a music appreciation course.
 - I played in an ensemble in middle/high school.
 - I participated in a college ensemble.
 - I am receiving a music degree.
 - I have never been involved in classical music.

- What was the primary factor that led you to attend your most recent concert?
 - Music was recognizable
 - Interest in new music
 - Desire for a new experience
 - Friends and/or family were attending

- How did you find out about this concert?
 - Heard from friends/family
 - E-mail
 - Facebook/Twitter or other social media
 - Television
 - Radio
 - Poster
 - Other (please explain)

- How would you rate your concert experience?

- Very positive
 - Positive
 - Neutral
 - Negative
 - Very negative
- Why was this?
 - Quality of music performed
 - Relatability of the concert
 - Emotional reaction to music performed
 - Length of concert
 - Interactions with other people at the concert
 - Other (please explain)
- What factor most keeps you from attending concerts?
 - Too expensive
 - Don't know that they're happening
 - No one I know is going
 - I don't understand/relate to the music performed
 - I don't feel comfortable/welcome in that environment
 - Other (please explain)
- Do you plan to attend future classical concerts?
 - Yes
 - No
- What would most increase your likelihood to attend a concert?
 - More well-known music
 - Cheaper price
 - Shorter concert length
 - Better publicity and information
 - Higher quality of performance
- What is the primary reason you chose to take this class? (music appreciation students only)
 - Required for liberal arts
 - Seemed like an easy class
 - Friends were taking it
 - Have past experience in music, and wanted to learn more
 - Have no experience in music, but wanted to find out
- How has this class changed your feelings about classical music performances? (music appreciation students only)

- Much more positive
 - Slightly more positive
 - Neutral
 - Slightly less positive
 - Much less positive
 -
- What do you think is the primary benefit of attending live classical performances?
(Ensemble members only)
 - Exposure to new repertoire
 - Learning from masterful players
 - Getting new musical ideas
 - Experiencing something that is emotionally moving