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Orchestral audiences 'more loyal' than other artforms

Audiences for orchestral music are more loyal to the artform, are likely to attend more frequently and to book earlier than audiences for other performing arts, according to a research project carried out by Audiences London⁽¹⁾ for a consortium of twelve orchestras and orchestral venues⁽²⁾ in London.

The research, which drew on box office data from all twelve participating organisations for a period of six years, endeavoured to understand booking behaviour of orchestral audiences across London as a whole, rather than with one organisation or within a single year. In total, the 2,088 events included in the research were attended by people from nearly 350,000 households. The research is the latest of many collaborative projects facilitated by Audiences London, which allow arts organisations to work in cost-effective partnerships to address questions of common relevance. The project was funded by Arts Council England, London, with contributions from the orchestral organisations.

Results show that over the six years 36% of the households represented in the research went to an orchestral performance more than once. This compares to just over 21% of households attending all ticketed artforms in an average year, as represented in the 'Snapshot London Benchmark'⁽³⁾ of 35 arts venues in the capital. Income from these events totalled £35 million, of which some 70% was generated by people who attended more than once – demonstrating the significant value of repeat attenders to the orchestral marketplace. The orchestras therefore identified that to improve their long-term position, the opportunity is to convert more first- and second-time audience members into frequent attenders.

As well as looking at repeat booking and ticket yields, Audiences London created a Mosaic⁽⁴⁾ geo-demographic profile for the orchestral audiences as a whole, which showed audiences having broadly similar characteristics to overall arts audiences in Snapshot London. In behaviour, however, people tend to travel further for orchestral concerts (54.2% came from within 10 miles of the venue compared to 59.1% for Snapshot London Benchmark; while 17.5% came from over 50 miles away compared to 13.8% for Snapshot Benchmark). Orchestral audiences are also more likely to book in advance. In each of the time spans of 2-7, 8-14, 15-28 and 29-60 days ahead, orchestral audiences showed a greater tendency to book earlier than the Snapshot London Benchmark. Conversely, just 8% of households booked on the day for orchestral concerts compared to 15.7% of households for all artforms in the Benchmark.

Comparisons were also drawn between audiences for different types of orchestral concert, from 'branded' concerts and 'popular repertoire' through 'core', 'baroque', 'contemporary classical', 'orchestral film', 'modern' and 'orchestral jazz'. Time of day, the inclusion of vocal elements in the concert, star name performers and conductors etc were also considered for their influence on attendance.

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The orchestras and venues involved are Barbican Centre, BBC Proms, BBC Symphony Orchestra, Cadogan Hall, London Philharmonic Orchestra, London Sinfonietta, London Symphony Orchestra, Orchestra of the Age of Enlightenment, Philharmonia Orchestra, Royal Albert Hall, Royal Philharmonic Orchestra and Southbank Centre. This collaborative project allows them to go beyond research to look at ways of increasing audiences and income generation for the group, based on three key findings:

- while a small number of repeat attenders are loyal to a single orchestra or venue, the majority will choose concerts from a 'personal menu' of preferred venues and/or orchestras;
- year on year, a high proportion of audience members tend to re-attend soon after their previous visits, but then a significant number fall out of the habit of attending. This leaves a small number of core attenders that re-attend year after year.
- although the core of loyal attenders is more significant for orchestral music than other forms, the majority of audience members have yet to establish a regular pattern of attendance beyond 1-3 times. This large group of 'infrequent' attenders offers a substantial opportunity for increasing ticket income to these organisations.

The twelve partners are now looking to pilot a collaborative marketing campaign aimed at re-engaging these 'infrequent' audiences and helping them develop a concert-going habit by navigating the wide range of concerts available to them in London. The campaign will run during 2011.

"We've never had anything as strategic or as open as this consortium for London orchestral promoters before. We got together initially to work out the size of our marketplace, benchmark our own performance and better understand audiences for symphony concerts in London, and it's been a really exciting journey. We are now moving on to our first collaborative marketing campaign working together in 2011. We presented our approach at the ABO (Association of British Orchestras) conference, and the orchestras from North America and Europe fed back that what we were doing was really groundbreaking - it just goes to show that London marketers are really leading the way!" Karen Cardy, Marketing & LSO St Luke's Centre Director, London Symphony Orchestra

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For more information or images, in the first instance please contact Rachel Escott, Head of Audience Development Services, Audiences London, Direct Line 020 7367 0815, Main Line 020 7407 4625, rachel@audienceslondon.org



Notes for Editors

(1) Audiences London (AL) is an independent, not-for-profit agency which exists to help arts, culture and heritage organisations build the stronger, larger and more diverse audiences that are the heart of a dynamic and sustainable arts economy. Audiences London receives grant funding from Arts Council England and London Councils.

(2) The London Orchestral Consortium commissioned AL in January 2009 to facilitate a data-sharing and benchmarking project on their behalf. The project is funded by Arts Council England, London with contributions from the participant organisations.

Participants included eight orchestras and four venues:

Orchestras

BBC Proms
BBC Symphony Orchestra
London Philharmonic Orchestra
London Sinfonietta
London Symphony Orchestra
Orchestra of the Age of Enlightenment
Philharmonia Orchestra
Royal Philharmonic Orchestra

Venues

Barbican Centre,
Cadogan Hall
Royal Albert Hall
Southbank Centre

Overall project objectives

The project consisted of five strands of activity which together would enable the consortium to build an understanding of audiences for orchestral music in London. The first four strands involved market research, with the fifth focusing on the application of the research findings.

Across the five strands of the project the overall objectives were to:

- Understand the profile of audiences for orchestral work in London
- Understand the nature and extent of crossover between the orchestras' work
- Investigate how crossover might be related to venue, orchestra and type of work
- Explore the relationship between the location of a venue and an audience for orchestral work
- Explore the extent to which organisations compete for the same audiences for orchestral work
- Provide audience data and digital marketing benchmarks
- Establish a shared approach to gathering additional audience data
- Develop a segmentation of audiences for orchestral work
- Generate ideas and options for developing audiences for orchestral music

Project methodology

The twelve organisations shared their box office data for a 6 year period from 2003-09. The events were coded on a number of different variables to help add a further layer of understanding to the process. In total there were 2088 events and these were attended by 349,340 households.

A combined dataset was developed that set a number of benchmarks for the orchestral audiences. The orchestral audiences were then compared to wider arts audiences using Snapshot London (an audience data-sharing, profiling and benchmarking project, the largest of its kind in the UK, run by Audiences London and powered by Purple Seven).

For more detailed information on the methodology used, please contact Audiences London.

(3) Snapshot London

Snapshot London is an audience data-sharing, profiling and benchmarking project. It is the largest of its kind in the UK and is run by Audiences London. The unique, not-for-profit initiative lets the cultural sector gain maximum benefit from its audience data, by analysing actual booking behaviour drawn from the box office statistics from a variety of arts organisations. It therefore gives a picture of what people really do, and not what some people say they do.

(4) Mosaic groups and types

Mosaic, developed by Experian, is a powerful geo-demographic profiling tool that classifies people into different types depending on where they live (and a number of other variables). It can be used to understand more about the lifestyles and motivations of a group of attenders and help with targeted marketing campaigns to develop potential audiences. It breaks down the UK population into one of 15 main groups or 67 specific types. See <http://www.experian.co.uk/business-strategies/mosaic-uk-2009.html> for full descriptions of Mosaic and the Mosaic Group letter codes and characteristics.