

# Stalking the Culturally Aware Non-Attender

Musically inclined, but absent from the concert hall, how can this prospective audience member be lured to orchestra performances?

by Rebecca Winzenried

A heretofore-unclassified species has surfaced in recent studies on the concert-going habits of orchestra audiences. Along with subscribers, single-ticket buyers, and resolutely disinterested parties, references to members of a symphonically inclined, but commitment-phobic tribe emerged from the American Symphony Orchestra League's Audience Motivation Research Project and a similar Knight Foundation study. The Audience Motivation Research Project, in particular, dubbed this potential classical consumer the Culturally Aware Non-Attender.

Culturally Aware Non-Attenders (CANAs): Defined as adults who have not attended a classical concert in two years, but who have gone to other performing arts events, museums, or art galleries. While they have not attended a classical music concert, a significant number believe they would enjoy the experience.

Which makes them a supremely frustrating prospect. The tantalizing thought that a pool of potential audience members languishes just beyond reach is enough to make a grown orchestra manager cry. Who exactly are these people, and how can the orchestras reach them? In the interest of furthering our understanding of the species, SYMPHONY has put together



this field guide to the elusive Culturally Aware Non-Attender.

## Who Are These People, Anyway?

On the surface, it's hard for orchestra insiders to understand Culturally Aware Non-Attenders. The species is fairly easy to identify, yet its members display seemingly contradictory behavior.

Statistically, the average CANA is 43 years of age (compared to 57 for the average orchestra audience member), although 35 percent of all CANAs fall into the 18-34 bracket so coveted by marketers and advertisers everywhere. Their ranks lean toward the female populace (56 percent) and they are likely to have at least some college experience, although significantly fewer CANAs than regular concert attenders have post-graduate degrees (19 percent vs. 49 percent). More than half of CANAs subscribe to at least one daily

newspaper, but they are less likely than concert attenders to read arts and culture publications, favoring home, food, or fashion mags.

CANAs who are inclined to attend an orchestra concert represent about 10 percent of participants in a nationwide survey conducted as part of the 2001 Audience Motivation Research Project. These young to middle-aged adults have an interest in

things cultural: They can tell you about the hot movie or theater ticket in town; they flock together at the latest blockbuster museum shows; they've downed a few glasses of wine at art gallery openings. A good many (40 percent) even believe they'd probably enjoy an orchestra concert. And there's the rub. While CANAs often *mean* to go to concerts, they just don't get around to it. The Knight Foundation's 2002 Classical Music Consumer Segmentation Study, which surveyed individuals in fifteen orchestra markets, identified one in four adults as a prospective ticket buyer, but only half of those who expressed the highest levels of preference actually attended.

CANAs aren't hard to spot, if you know what you're looking for. I see them everywhere—sipping espresso at coffeehouses around Manhattan while poring over upcoming events in *TimeOut New York* magazine, standing on line at MoMA, mak-

ing plans to meet the husband or wife at the theater, e-mailing friends about the next sure-to-sell-out club date. And they're not just in New York, either. I've witnessed similar behavior in lots of other cities. But then, I'm more attuned to Culturally Aware habitats and behaviors than many people in this business. Most everyone I know outside the orchestra world is a CANA.

So I find myself spending a lot of time proselytizing for the art form at places where CANAs gather. And I've got some new ammunition. Since hearing results of the Audience Motivation Research, I've made a habit of informing Culturally Awarers I meet about their newly minted status. It's always interesting to be part of a demographic trend—like the NASCAR dads who have replaced soccer moms in the affections of the media. And CANAs are a bit amused to learn that they fit into a neat orchestra-related slot. "Wow, I'm flattered," they'll say. "I didn't even know they were thinking about me."

For if orchestras are courting their business, it's not obvious to Culturally Awarers. As far as these CANAs are concerned, they've been hiding in plain sight; they haven't been bombarded with the kind of marketing blitz they've come to expect when someone is attempting to get their attention. There's no rush of stories, ads, and billboards like the kind that anticipates the release of a pop music CD, Hollywood film, or the newest novel by that best-selling author. They don't hear the kind of buzz about orchestra concerts that they do about must-see museum exhibits.

Yet, from purely personal observation I know a lot of CANAs do include classical music in their listening habits. Granted, the fairly standard classical repertoire in their CD collections may not melt the hearts of critics, and they may put the music on while making dinner or giving the kids a bath (48 percent of CANAs have at least one child at home). But they *are* selecting some classical recordings. Audience Insight analyzed data in the Knight Foundation Study. Alan Brown, Audience Insight's president, said during a session at the League's National Conference last year, "Like it or not, people use classical music

as a soundtrack to their lives. They listen while vacuuming, cooking, riding a bike." That's just what the Culturally Awarers I know do. Classical music "helps them relax," it's "soothing."

CANAs tend to prefer listening to music on CD or tape vs. attending a live performance. They don't share the opinion of regular concert attenders that recorded music is a poor substitute for spontaneous performance and the energy of a concert hall. But give the CANAs some credit. They realize that there is a difference between live and recorded music, and don't consider radio or CDs a substitute for concerts.

## Let Go of Inhibitors

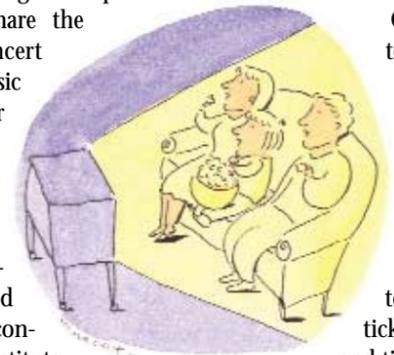
So what's the deal? Why will a person who expresses an interest in cultural activities go to a museum but not a classical concert? The Audience Motivation Research identified three across-the-board reasons why individuals, regardless of whether they are orchestra subscribers, single-tick-

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et buyers, or Culturally Awarers, don't go to concerts more often:

- It's difficult to find the time;
- It's difficult to make a commitment;
- Tickets cost too much.



Culturally Awarers tend to cite the last point more than ticket buyers do. They are four times more likely than regular attenders to say that ticket prices are too high. That's no mystery to me. The cost of tickets is held up time and time again by friends as

the reason they don't go to concerts (or plays, or dance performances, or operas) more often. Age, family responsibilities, and household incomes play a big part. CANAs tend to have lower household incomes than regular concert attenders (\$67,000 vs. \$91,000). Their younger demographic means they are climbing the salary ladder, and the costs of raising a family can sabotage a parent's best intentions to spend time, money, or energy on themselves. Think of the moms and dads who can't remember the last time they bought themselves a new pair of shoes.

But the excuse only goes so far. Most CANAs I know have easily coughed up the equivalent of an orchestra concert ticket seeing a couple of mediocre-to-awful movies and springing for the popcorn. A movie, they reason, can be a spur-of-the-moment decision, thrown into a weekend if and when it fits everyone's schedule. CANAs are also more likely than classical attenders to go

to rock concerts and sporting events. Tickets to rock concerts are at the highest end of the entertainment spectrum, and taking the family to a sports event (adding in parking, concessions, and souvenirs) can nearly require taking out a second mortgage. But CANAs view those expenditures as special-event outings.

For argument's sake, I've asked Culturally Awarers how much they'd be willing to pay for an orchestra ticket. A price point of

\$20 to \$25—roughly the equivalent of a quick dinner and a movie—seems to be acceptable. Tickets such as the \$25 across-the-board seats offered for opening weekend programs at the new Zankel Hall at Carnegie Hall tend to elicit a “Sure, it’s worth a try” attitude.

Ah, yes, orchestras will point out. But there are always reasonably priced tickets available, with discounts for students, family specials, and last-minute deals. True. Except these typically Culturally Aware people may be clueless about them. Orchestras tend to spend money on direct mailings—which go to those who have purchased tickets at some recent point in time. Newspaper ads and posters for classical concerts, with their tasteful lists of programs and guest artists, are confusing to casual observers. “I was looking at the posters in front of Carnegie Hall,” a friend points out, “and they were all these lists and names of performers and music. I know some composers, but I don’t always know the names of the music well enough to say, ‘yeah, I definitely want to go to that.’” More appealing, he says, are ads such as the ones that theatre companies often run, using bold graphics to create an impression, a *feeling* about a pending performance.

Research also indicates that CANAs are AWOL when it comes to online marketing efforts. Even Culturally Awares who

are regular Internet users (as 70 percent of them are) often don’t know that orchestras have web sites. “I guess it makes sense, since everybody has one now,” a cocktail-party acquaintance told me. “So...I guess they have some music clips there?” He was surprised to hear that music actually takes a backseat to online ticketing, educational initiatives, and program notes on web sites for orchestras large and small. “I had no idea,” he said.

“I mean, they’re playing 18th-century music. I guess I never thought they’d need a web site. I’ll have to check that out.”

#### Act Appropriately

Perhaps that particular CANA will eventually become an online ticket buyer, like the regular attenders and single-ticket buyers who love the convenience of Internet purchases. But then again, CANAs aren’t quite sure that they are even the right target audience for orchestral music. Ask them to



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describe the classical music concertgoer and they will say it is someone older, someone more wealthy than they are. The first things I tend to hear from Culturally Awares are comments about the graying orchestra audience, or how formal concerts are. All those opening-night gala broadcasts—not to mention the orchestra’s typical concert dress—have created a definite impression that classical concerts are a black-tie affair for persons of a certain age, which doesn’t match CANAs’ opinion of themselves or their casual, jeans-and-T-shirt lifestyles.

Besides, once there, they figure they probably won’t understand the rules anyway. CANAs are a little intimidated by what they regard as the rigid etiquette of the concert hall; they express concern that not knowing how to act might affect their enjoyment of an evening at the symphony. It’s not just the question of when to clap. CANAs who have been to concerts in the past recall feeling dis-



## Find a Concert, and a Lot More

“But I don’t even know where to find information about a concert...It’s too much effort to get tickets...I’m not sure I know what to do at a concert.”

Some of the major concerns expressed by Culturally Aware

Non-Attenders are addressed at a new web site, [www.findaconcert.com](http://www.findaconcert.com). Developed by the American Symphony Orchestra League, the site is a companion to the public service announcement that’s been available this season for orchestras to air in their local markets. The television PSA, “Exercise Your Emotions,” focuses on the power of orchestral concerts to move listeners; extreme close-ups of facial expressions suggest the emotions (serenity, joy, and exhilaration) listeners are experiencing. The spot ends with the suggestion to “Attend a live orchestra concert. Go to FindAConcert.com.”

Once there, visitors can search for local concerts and specific orchestras. If the title of a program like the Eugene Symphony’s “New and Intoxicating” appeals, they can learn more from brief, engaging

introductions about the music to be performed, such as how Witold Lutoslawski and Jennifer Higdon both wrote a Concerto for Orchestra, to spotlight as many instruments as possible. If it sounds good, they can click on a link to the orchestra for ticket purchase.

FindAConcert.com also addresses the issue of “What to Expect” with some tips and insights for classical newbies, from the infamous “When do I clap?” to why it might be interesting to listen to some of those seemingly random warmups that musicians are doing onstage before the concert.

The one-stop, online shopping aspect is good news for CANAs, since nearly three-fourths of them are regular Internet users. But of course, CANAs still need to be aware of the site to be motivated to check it out. To that end, orchestras have been coming up with some interesting ways to put the PSA and FindAConcert.com in front of Culturally Awares, from running the info as part of a pre-movie warmup at the local theaters to showing it during breaks at the local sports arena. Get motivated yourself by viewing the PSA at [www.findaconcert.com](http://www.findaconcert.com).

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tracted during long works, when other people seem to be intently watching the performers, or losing their concentration when other people seemed to be caught up in the music. Culturally Awares tend to blame it on their short attention spans. "I'm a product of *Sesame Street*," they'll say, or of fast-cut music videos, movies, and video games.

The issue is really that they aren't actively involved in concerts because they aren't terribly familiar with the music or what's happening in front of them. Interestingly, it's something that CANAs don't think is a problem—until they do attend a concert and realize that maybe it does help to have some understanding of symphonic form, orchestra instruments, or composers to fully appreciate the experience. That

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sounds like a circular argument, but the Audience Motivation Research found that it's more of a spiral—a frequency spiral: The more familiar with the music individuals are, the more they enjoy the music, and the more they enjoy the music, the more they will attend concerts. A kernel of interest, planted by exposure to classical traditions, explodes outward into an ever-expanding spiral of musical knowledge, enjoyment, and desire to learn even more.

Unfortunately, as Michael Tilson Thomas points out elsewhere in this issue (see "Out on a Limb," page 46), musical touchstones that were once ingrained in our society—folk songs and dances, hymns and anthems—have become today's uncommon knowledge. CANAs I've encountered have haphazard musical experience. Some have studied music privately, some played in the school band, and some have had virtually no exposure to classical music. Their reference

points from contemporary culture have little to do with the ability to appreciate a clarinet soloist's nuanced technique or to recognize the use of traditional songs and literary themes in a symphony. "It's like going into a new corporate culture and they are using a lingo you don't know...it's like an invisible wall," one participant in the Audience Motivation Research Project noted.

The bottom line: CANAs often don't have a lot of discretionary income and so are judicious in their entertainment selections. They feel pretty confident judging whether a play or movie might be worth seeing, based on past experience or word-of-mouth, but they don't have the same sense about classical concerts. And someone who isn't quite sure what he or she is supposed to get out of a program, who doesn't feel comfortable in the concert hall, isn't going to value the experience enough to make the effort. All in all, it's easier to stay at home and put in a DVD.

### A Meaningful Offer

Cultural Awares *are* in search of activities that offer more enlightenment than the average Hollywood spectacle. Eighty-six percent agree that "it is important from time to time to do something for myself" and 48 percent believe it is important to invest a lot of time in oneself.

They express an interest in activities that have some added value, that are rich in interpretive content. Take an audio tour of a museum exhibition and you'll leave with a fuller appreciation of how the featured artist was inspired by the social climate of his time, or at least some sense of why this blockbuster show was worth visiting in the first place. Not coincidentally, a similar idea for orchestra concerts is in development. The Concert Companion uses PDA (personal digital assistant) technology to deliver real-time notes and information about the music to audience members during an orchestra performance. So far, it's proven the most popular in tests with novice concertgoers, those who can identify with the idea of self-guided audio tours.

Of course, lots of orchestras do schedule pre-concert lectures. But CANAs who are turned off by the academic tone of program notes aren't enticed by the idea of a "lecture" either. "I'd rather spend more time at dinner before the program," one CANA told me. Culturally Awares do find value in informal

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discussions about the music and program themes, or social events that allow them to interact with musicians and conductors. This season, the Kimmel Center for the Performing Arts in Philadelphia has invited Fresh Ink series ticketholders to visit the "K. Lounge" upstairs after concerts. There, in a kind of after-hours club atmosphere, they can mingle with performers like violinist Jennifer Koh or pianist Christopher O'Riley and talk about the 21st-century music they've just heard. "No tuxedos allowed!" the ads declare.

Still, the idea of getting dressed up for a night out does appeal to Culturally Awares, 80 percent of whom view classical concerts as a romantic opportunity, a nice way to spend time with their spouse. Audience research points out that classical concert tickets are seldom an impulse purchase. Almost invariably, the interests and schedule of a second person (read: spouse) need to be consulted. If CANAs are going to the trouble of penciling something into the day planner, they like to make a special evening of it.

And for those more casual acquaintances? Sometimes Culturally Awares are just waiting for an invitation from their local initiator, that person in their social circle who takes charge of scouting out activities, forwards the e-mail invites, and follows up to make sure everyone has the details. Every family, every office, every neighborhood has an initiator who motivates the rest of us (the 52 percent who describe ourselves as responders, according to the Knight Foundation study) to get up off the couch and try something new. Alan Brown of Audience Insight suggests that it might be useful for orchestras "to think of initiators as their facilitators." Initiators, he notes, tend to be younger, highly active cultural consumers who are constantly scouring the horizon for opportunities. "Think of how one initiator is worth maybe 30 tickets a year, if we can help them do their thing," he told delegates at the League's National Conference.

With a little recognition from orchestras, it's possible their "thing" could involve arranging a few additional evenings at the concert hall each season. Culturally Aware Non-Attendees, by their very definition, are inclined to at least consider the idea. ∞

Rebecca Winzenried is managing editor of SYMPHONY.

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