Arts Management &
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Creating Online Audiences For Orchestras

By

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INTRODUCTION

In 2009, the findings of a national study raised serious concerns for symphony orchestras and the classic music sector. The study, *Audience Demographic Research Review,* conducted by the League of American Orchestras, confirmed the NEA's findings that overall classic music participation among the U.S. population declined by 29% between 1982 and 2008, showing its steepest drop between 2002 and 2008 (League of American Orchestras 2009, 6). Moreover, the findings indicated that the classical musical audience aged faster than the general public. Whereas the median age for classical music attendance rose from 40 to 49 between 1982 and 2008, the median age for the U.S. adult population increased only from 39 to 45 during the same time period. Shrinking and aging audiences appear to be threatening the viability of orchestras, suggesting that new initiatives are needed to increase participation.

According to the National Endowment for the Arts study *Beyond Attendance: A Multi-Modal Understanding of Arts Participation (2008),* arts participation can be defined as occurring through multiple modes: attendance of artistic events, personal creation and/or performance or art, and interaction with the arts through electronic media. With the development of the Internet and ongoing digitization, the latter category—interaction with the arts through electronic media—bears particular import. According to *Beyond Attendance,* of the 70% of U.S. adults who were online at least once a day, 20% downloaded, watched, or listened to music, theater or dance performances (NEA 2008, 51).

Furthermore, the highest electronic media participation rate observed among the artistic disciplines queried was for classical music. About 18% of the U.S. population listens to classical music via live or recorded broadcasts, suggesting a sizeable audience for classical music content exists in places other than the concert hall (NEA 2008, 52).

A survey conducted by the Pew Research Center in 2012 leaves no doubt that the digital revolution has already changed the performing arts sector significantly. Among 1,244 U.S. arts organizations, 99% have their own website, 97% have a social media presence, 94% post photos, 86% accept donations, and 72% sell tickets online (Pew Research Center 2013, 3). These findings indicate that the use of online technology is already pervasive among arts organizations for promoting their activities. Several orchestras worldwide are now going a step further by expanding their online activities to provide entire artistic productions online, thereby creating online audiences.

RESEARCH GOAL

In light of recent findings regarding online and electronic media participation for classical music, the goal of this paper is to analyze the importance of online audiences for orchestras. This issue will be addressed by answering the following research questions:

1. What defines an online audience?
2. How do orchestras create audiences online?
3. What potential opportunities are associated with the creation of online audiences?

SYNOPSIS

The paper is divided into three parts. Part one describes the characteristics of online audiences and how they differ from audiences that experience live performances in a concert hall. Part two provides an overview of online tools and strategies used by three world renowned orchestras: the Berlin Philharmonic, the Philharmonia Orchestra (UK), and the Detroit Symphony Orchestra. Part three discusses possible implications for symphony orchestras seeking to create online audience, based on the findings of parts one and two. The paper concludes with a summary of the research findings and statements regarding the overarching research questions.

DEFINING PARTICIPATION

In general, the term 'audience' describes a group of people attending a performance, be it a concert, play, opera, dance, or movie. The term 'arts attendance' historically was used quite narrowly but has been expanded in recent years to reflect broader concepts of arts participation, as in the NEA study *Beyond Attendance: A Multi-Modal Understanding of Arts Participation.* The study defines arts participation as occurring in several modes, namely through attendance of arts events, personal artistic creation and/or performance, and arts participation through electronic media. The NEA's most recent survey of public participation in the arts, published in October 2013, indicates that arts participation through electronic media is currently the most frequent mode of arts participation among U.S. adults (NEA 2013, 8).

Percentage of U.S. Adults Who Participated in the Arts at Least Once During a 12-Month Period, by General Category of Participation (2012)
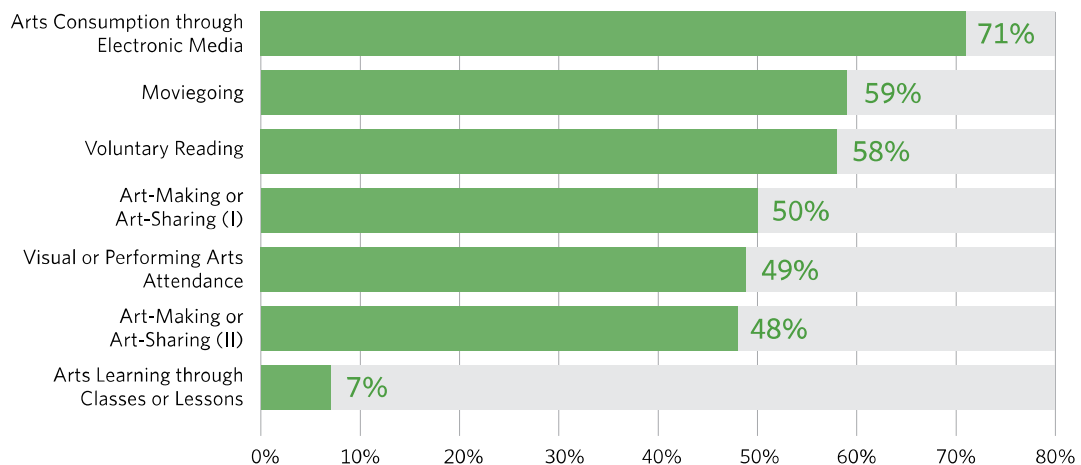
Source: National Endowment for the Arts, How a Nation Engages with Art

The use of the Internet as a means to participate in the arts was first mentioned by the NEA in its 2002 study. By 2008, 70% of the U.S. population was using the Internet, among which 20% were downloading, watching, or listening to live or recorded performing arts—specifically music, theater, or dance (NEA 2008, 52). The highest rate reported for accessing artistic content online was for classical music.

Moreover, the 2009 NEA study *Audience 2.0.: How Technology Influences Arts Participation* suggested that arts participation online does not negatively impact the attendance of live events. The study reported that audiences who engage with the arts through electronic media attend live performances at two to three times the rate of non-media participants (NEA 2009, 14f.).

The NEA's research also provides information about the specific demographic groups that are participating in the arts online or through electronic media. While men and women generally use electronic media and the Internet to participate in the arts at similar rates, findings suggest that younger respondents use the Internet to access theater, dance, or music at much higher rates than older respondents. For instance, roughly 43% of 18- to 24-year olds reported watching, listening, or downloading live or recorded performances (music, theater, or dance), compared with 1.3% of respondents aged 75 and older (NEA 2008, 53). However, almost 84% of U.S. adults who access classical music via recordings or broadcasts are older than 45, with the highest rates occurring among adults between 55 and 64 years old.

Use of the Internet to access the arts further increases with higher educational attainments, specifically at the college level and above. Families with lower incomes appear to use the Internet at lower rates. And overall, the disparity for using electronic media is smaller across income levels than across education levels.

TYPES OF ONLINE ARTS EXPERIENCES

According to the qualitative research study *Digital Audiences: Engagement with Arts and Culture Online,* conducted on behalf of the Arts Council England in 2010, online audience interaction with arts and cultural content can be classified into five main categories: access, learn, experience, share, create (Synovate 2009, 27).

Classification framework for online arts engagement. Source: Arts Council England 2010.

Access describes a range of online activities that direct people to attend arts events offline, for example discovering an organization's current programs, filtering opportunities, or purchasing tickets.

Learn covers a range of activities that have an educational purpose, for example, learning about specific works of arts and artists.

Experience refers to activities that allow users to experience artistic works in the digital space. It does not include viewing clips or videos as part of the 'access process,' but rather describes entire artistic experiences had online.

Share means the use of digital media to share content, experiences, and opinions online.

Create involves the use of online tools and the Internet as means for creating art and taking part in digital arts experiences. These interactions describe a framework of benefits that audiences enjoy from online engagement.

CASE STUDIES

After gaining a better understanding of the characteristics of online audiences, the next question is how symphony orchestras are currently cultivating them. The following three case studies illustrate the efforts of internationally renowned orchestras: the Berlin Philharmonic, the Philharmonia Orchestra, and the Detroit Symphony Orchestra.

BERLIN PHILHARMONIC

BERLINER PHILHARMONIKER

Founded in 1882, the Berlin Philharmonic is a world-class symphony orchestra famous for its musical excellence and polished performance by virtue of famed conductors such as Wilhelm

Furtwängler, Herbert von Karajan, Claudio Abbado, and since 2002, Sir Simon Rattle.

Through a partnership with Deutsche Bank, the Berlin Philharmonic launched its online platform "Digital Concert Hall" in December 2008. A virtual concert venue offering a wide array of services, the platform enables viewers to experience more than 40 live webcasts per season featuring the Berlin Philharmonic, as well as famous guest conductors and soloists. For this purpose, seven remote-controlled HD cameras have been installed in the concert hall of the Philharmonic along with new audio technology. Acclaimed directors are responsible for the productions in a video studio inside the hall created exclusively for this purpose.

A few days after the end of each concert, the recordings are moved to the Concert Archive, which stores over 200 performances that can be watched online on-demand. The section "Video Specials" features backstage interviews with orchestra members and artistic director Sir Simon Rattle, as well as recordings of the orchestra's education program and a selection of films about the Berlin Philharmonic.

To access the Digital Concert Hall, users purchase either a weekly (€9.90), monthly (€24.90), or yearly (€149) subscription. Students up to the age of 35, as well as music teachers, receive discounts on all subscriptions. Before a user subscribes to the online service, the Digital Concert Hall offers substantial online help for technical questions and allows the user to test whether or not its computer and Internet connection meet the required specifications, thereby minimizing technical barriers and facilitating online access.

The Digital Concert Hall is also available as an app for multiples devices. Free of charge, users can download the app onto iPhone, iPad, and iPod Touch devices in the Apple App Store. It can also be used on most Smart TVs and Blu-ray disc players.

PHILHARMONIA ORCHESTRA

Founded in 1945 by Walter Legge, the Philharmonia Orchestra is a British symphony orchestra based at the Royal Festival Hall in London. Since 2008, Esa-Pekka Salonen has been the orchestra's principal conductor and artistic advisor. Besides its quality of playing, residencies, and music education program, the Philharmonia is acknowledged as a musical pioneer for its innovative use of the latest technologies to reach new audiences.

In 2006, the orchestra created an interactive installation outside of the Southbank Centre's

Royal Festival Hall called "PLAY.orchestra." According to Mark James, Senior Developer at the Philharmonia, the success of this installation led the orchestra to investigate further digital projects. The organization formed its digital department in 2007, initially as a cross-over sub-department of both education and marketing. By 2009, the digital department become a department in its own right with a 6-person team dedicated to digital projects.

Through its online series *Featured Films,* the Philharmonia Orchestra offers a wide range of high-quality video content that is available on-demand, including videos that discuss the orchestra's repertoire and current projects, listening and instrument guides, as well as interviews with players and principal conductor Esa-Pekka Salonen. Content is distributed through the Philharmonia's webpage as well as on Vimeo and YouTube. Select feature films are also available for free in a monthly podcast series available on iTunes.

In 2012, the Philharmonia Orchestra, in collaboration with Touch Press, launched the iPad app "The Orchestra," which allows users to

interactively explore orchestral music and instruments and gain insights into the inner workings of the Philharmonia Orchestra. In contrast to the app discussed above, however, "The Orchestra" app is not free but costs $9.99 to download.

Through its digital projects, the Philharmonia receives around 30,000 visitors each month, including approximately 50% from the U.K., 15% from the U.S., and the remainder spread across the globe. This international online audiences consists of all age ranges, with the largest age group being individuals between 25 and 34 years old.

DETROIT SYMPHONY ORCHESTRA

The Detroit Symphony Orchestra (DSO) is one of the United States' longest-lived orchestras, having celebrated its 125th anniversary in December 2012. Since 2008, Leonard Slatkin has served as the orchestra's Music Director. The DSO's repertoire includes classical, pop, and jazz, while also collaborating with chart-topping musicians. In addition, the DSO reaches out to audiences beyond its own concert hall by performing in neighborhood venues in the greater Detroit region.

The Detroit Symphony Orchestra was the first American orchestra to implement a free, live-streaming webcast series that enables Internet users to watch classical concert in real-time for free. Launched on May 5, 2011, the DSO's

"Live from Orchestra Hall" has to date reached more than 120,000 viewers in 75 countries. Its live concerts are available through the DSO "Live from Orchestra Hall" website, as well as from on-demand classical music platforms such as Paraclassics and Classical TV.

The Detroit Symphony Orchestra also has its own app, "DSO to Go," a free mobile app for iOS and Android devices. This app allows users to watch live performances, buy concert tickets, pre-view and purchase digital albums, learn more about the organization's staff, and receive updates on the latest orchestra news.

DISCUSSION

As demonstrated by the case studies presented here, the cultivation of online audiences is gaining momentum among symphony orchestras, while incorporating a wide range of activities and online tools. These findings also illustrate potential opportunities arising from the creation of online audiences, including in the areas of audience engagement, accessibility, finance, branding, and music education.

AUDIENCE ENGAGEMENT

Orchestras can reach out for a new, potentially younger and more diverse audience through the creation of online offerings. The DSO, for

	Berliner Philharmoniker	philharmonia orchestra	DSO Detroit Symphony Orchestra
Live streaming	X		X
On demand streaming	X	X	X
Own website	X	X	X
Youtube Channel	X	X	X
Vimeo	X	X	X
Paraclassics, Classical TV			X
Mobile App	X	X	X
Concert performances	X	X	X
Interviews	X	X	
Program information	X		X
Ticket sales			X
Purchase albums			X
Education	X	X	
Movies	X		
Podcast		X	

Comparison of services offered by the three orchestras discussed in the case studies above

instance, has been able to reach audiences in over 80 countries with its free live-streaming series "DSO Live from Concert Hall." Thus, the orchestra was able to engage with an international audience and gain recognition abroad without touring. As stated in Part 1, 42.5% of the U.S. adults that access theater, dance, and music performances online are between 18 and 24 years old. If orchestras can attract the attention of this target group online— for instance through effective use of social media and innovative online marketing—the creation of online audiences may have a great potential to attract younger audience segments.

Besides reaching out for new audiences, the products and services for online audiences contribute to multi-dimensional, enriched concert experiences. Watching a concert live or on demand at the Berlin Philharmonic's "Digital Concert Hall" or through "DSO Live from Concert Hall" enhances several aspects of the concert experience, including by means of different camera perspectives and close-ups of musicians that provide a more intimate view of the performance. Interviews with musicians at the Berlin Philharmonic's "Digital Concert Hall," as well as via the Philharmonia's app "The Orchestra," shed light on the inner workings of the orchestra and facilitate interaction between orchestra members and online audience members, helping each organization to build stronger relationships with its customers.

ACCESSIBILITY

Creating online audience also makes an orchestra more accessible to people that

otherwise are not able to attend performances due to time, location, physical, or financial obstacles. On-demand streaming services make it possible to experience concerts at any time of the day, so that online audiences are not restricted by predetermined times that might not fit into their schedule. Because online audiences do not have to be at the concert hall in person, they can access the concert from anywhere as long as they possess the necessary technical device and Internet access. Moreover, online audiences are not excluded from experiencing a concert due to physical disabilities as they can access the concerts easily from their homes. Last but not least, audiences who cannot afford concert tickets can experience concerts by world-renowned orchestra thanks to free online services. Thus, products and services for online audiences make it easier to access symphony orchestras and allows the concert hall to reach a wider and potentially more diverse audience.

FINANCE

Creating online audiences has the potential to introduce new income streams to arts organizations. On one side, submission fees charged for accessing online content, apps, and podcasts generate additional earned revenue. Live and on-demand streaming also provide opportunities to increase contributed revenue from sponsorships, for example, embedding streaming announcements that feature sponsors and spots with sponsors. On the other side, revenue from ticket sales might be increased by transforming online audiences into future paying offline audiences. While more research is needed on this topic, the NEA's

findings that people who engage with art through media technologies attend live performances or arts exhibits at two to three times the rate of non-media arts participants suggests the possibility might exist (NEA 2010, 7). Mobile apps with ticket sale functionality, such as "DSO to GO," facilitate purchasing tickets and transforming online audiences into paying offline audiences.

ONLINE BRANDING

All three orchestras in the case studies presented here used their online activities to create a new brand. The Berlin Philharmonic products and services are provided at the "Digital Concert Hall," the Detroit Symphony Orchestra created the "DSO Live from Concert Hall," and all the Philharmonia's online activities are grouped under "Digital Projects." With the creation of these brands, these orchestras have positioned their online products in the marketplace and differentiated themselves from one another. Building up those online brands has the potential to aid symphony orchestras in rejuvenating their image and thereby increase visibility among new audiences.

MUSIC EDUCATION

Online tools can also help to expand and complement an orchestra's on-site music education programs. Mobile apps allow online audiences to broaden their knowledge about classical music in an easy and playful way while learning by whom and how each piece of music was produced.

The NEA study Arts Education in America: What the Decline Means for Arts Participation" (2008) analyzed the impact of arts education on arts participation. The findings suggest that arts education for both children and adults positively impacts arts participation. In this regard, music education activities online, in theory, can also help to increase participation. A desirable effect might be that after exploring the Philharmonia app "The Orchestra," users feel engaged and animated to download music on iTunes that they just discovered through the app, or even to attend a performance at the concert hall.

FUTURE RESEARCH

Audience engagement, accessibility, finance, online branding, and music education are each areas for which the creation of online audiences potentially provides opportunities and benefits for orchestras. However, empirical evidence is necessary to evaluate the actual impact of online audience in the practice. Further research should analyze the following aspects:

- How does the creation of online audiences influence visitor figures in terms of numbers, age groups, origin, and diversity?
- To what extent does online participation increase offline participation?
- How does the creation of online audiences influence ticket sales and total income?
- Does the creation of online audiences improve the perception of the orchestra and influence its recognition?
- To which extent do online music education programs increase interest and participation?

Research that provides reliable data to answer these questions can help orchestra managers when deciding whether or not to create online audiences. Moreover, it gives insight as to what extent the quality of current tools and strategies can be improved.

In addition, more research is necessary to explore potential challenges and threats associated with the creation of online audiences, such as funding issues, staff capacity, technical barriers, and quality concerns, as well as union and legal issues. The analysis of these aspects was not part of this paper. Nonetheless, they strongly influence the creation of online audiences and should be considered carefully.

CONCLUSION

The aim of this paper was to explore the importance of online audiences for symphony orchestras by defining the term 'online audience,' identifying tools and strategies currently used to create online audiences, and illustrating potential opportunities arising from them. In Part 1, the definition of the term 'online audience' showed that in the U.S. there is a sizeable audience for online classical music participation. It further explained five different types of online experiences: Access, Learn, Experience, Share, and Create.

In Part 2, the case studies of three orchestras— the Berlin Philharmonic, the Philharmonia Orchestra, and the Detroit Symphony Orchestra—revealed that a range of tools and strategies are already being used to create

online audiences. The offerings are manifold, ranging from live and on-demand streaming to mobile apps and podcasts.

In Part 3, five areas of potential opportunity for symphony orchestras were identified: attracting new target groups, increasing online and offline participation, generating new sources of income, enhancing awareness and recognition, and expanding educational efforts. However, further research is necessary to investigate the reality of these opportunities. To do so, concrete recommendations for further studies were given.

Overall, this research gave an insight into the current practices of the creation of online audiences. The findings show that the Internet along with new technologies are changing the traditional orchestra business, orchestra audiences, and concert experiences. The future will show to what extent orchestra managers will be able to incorporate online tools and strategies in their business models. However, strong evidence exists that the creation of online audiences can make an important contribution to overcome some of the pressing challenges facing the symphony orchestra industry.

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