



# Marketing Classical Music Concerts

Attracting the New Cultural Consumer

Master Thesis

Erasmus University Rotterdam

Erasmus School of History, Culture and Communication

Arts, Culture & Society

14. 06. 2019

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510093

Word Count: 25.989



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Abstract and Keywords

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# Marketing Classical Music Concerts

## *Attracting the New Cultural Consumer*

### **Abstract**

*Today, classical music concerts [CMC] seem to experience a stark decrease in participation. The audience is relatively old, and the concerts are not frequently visited. At the same time, it is more difficult to have younger potential audiences to participate. Recently, innovative trends emerged, and marketing becomes a more relevant tool to brand symphony orchestras and to appeal to a larger group. The classical music industry tries to liberate itself from the narrow content of elitist expectations and conventions, to survive the decline in, and greying of audiences. This thesis concentrates on the current issues in CMCs, and in particular how marketing is used to attract new cultural consumers, by pondering about: How Dutch CMCs perceive and navigate the change in the audience landscape. Using semi-structured interviews conducted in the Netherlands with marketers and directors of classical music concerts, discourses around the audience landscape are explored with a focus on marketing and innovation. Through thematic analysis, the operators' experiences and positions in the industry are explored and bring further insights on how they profile CMCs in today's society, including four analytical themes: Core Audience, Fringe Group, Audience Dilemma, Strategies. The interviews reveal that within the discourse on innovating classical music concerts, relevant strategies to attract the fringe/audiences are both artistic and marketing applications. The relationship between the core and new audience proves to be another challenge, resulting in an audience dilemma. The research has also shown that the new cultural consumer is still a fringe zone for the marketers and operators, and therefore target high- to middlebrow consumers. While the industry invites the next generation of audiences to the concerts, it still excludes a large group of potential audiences. The marketers' goal lies in innovating the marketing and concert formats and overlooks the ownership the core audience has with regards to purchasing systems. This implies that the Dutch classical music industry remains a top-down approach, with concerts and stakeholders being superior to the participating audience. Apart from sharing insights into how marketers include/exclude new cultural consumers to classical music, this study highlights the need to further research the relationship of older and younger generations participating at the concerts and how the strategies perform.*

**Keywords:** *Classical Music Concerts, Audience Dilemma, Fringe Group, Marketers and Directors, Inclusivity*

## **Acknowledgments**

*I would first like to thank my thesis supervisor dr. Janna Michael of the Erasmus University. Her door was always open whenever I had questions or worries about my research. Together we pondered about the findings, which challenged me to dive deeper and look for further insights.*

*I would also like to thank the 14 experts who volunteered and were involved in the interviews for this thesis. I am grateful for their passionate participation, sharing their insights and showing me around their workplace.*

*I would also like to acknowledge Micha Hamel and GAMPSISS for sharing the contact details of their partners. I am very grateful for Micha's valuable comments on the research design and providing me with information about the Dutch classical music industry.*

*Finally, I want to express my sincere gratitude to my parents and Gordian for providing me with eternal and emotional support throughout my years of study, without them it would not have been possible. Thank you.*

## 1. Introduction

Today, classical music concerts seem to experience a stark decrease in participation. In the Netherlands, the audience is relatively old, and the concerts are not frequently visited (Van den Broek, 2013). At the same time, it is more difficult to have younger potential audiences. The technological advancement since the 1980s has driven the attention away from classical music concerts towards non-live performances on radio, TV, and internet (Johnson, 2002). Furthermore, classical music is still characterized by old, traditional and high cultural associations (Bull, 2014; Kolb, 2001). For example, in the Netherlands, contemporary classical music tries to innovate the concert conventions, e.g. composing new cross-over styles, experimenting with their audiences, or leaving the concert halls altogether and conquering new locations. Besides the need for musical innovations, symphony orchestras must address the changes in audience behavior. The audience landscape becomes more diverse, as high and low culture merge to one amalgamation of diverse taste formations and show more tolerance towards others.

Brand really matters. A large part of our audience is not familiar with the music that we play - Schoenberg or Beethoven, Cage or Purcell, it really doesn't figure in their decision to come to one of our shows. Instead, it is their relationship to our brand that informs their decision to attend... They may not know the exact repertoire, but they believe that we will play them music that they will respond to (Szabo, 2019, section Brand, para. 1).

The case of the Manchester Collective indicates how relevant it is to approach a larger audience, by making their concerts genuinely accessible through branding. It appears that the appreciation of classical music is more influenced by the package of it, than by the composers or musicians performing it. During Szabo's<sup>1</sup> keynote lecture he was asked what symphonic orchestras must do to reach out to the young. He responded that the relationship between artists and audiences must be enhanced. Also, Halliday and Astafyeva (2014) suggest that millennials' consumer behavior and the current role of arts marketing indicate that younger generations care more for brands than for quality or educative means. Also, Tina Ramnarine from the Royal Holloway London shed light on new initiatives addressing orchestras under threat, e.g. developing social media presence, interactive websites, or new concert formats (MCICM, 2019). Based on the discussions at the MCICM, it can be

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<sup>1</sup> Adam Szabo was a keynote speaker at the MCICM symposium 2019 in Maastricht. The MCICM is a research project to study classical music practices and find out how to innovate the industry. The symposium took place in March 2019 hosting classical music stakeholders, including composers, conductors, managers, marketers, musicologists, and students. Over the two days, as I also participated, the current stake of classical music was discussed.

said that the classical music industry tries to liberate itself from the narrow content of elitist expectations and conventions, to survive the decline in, and greying of audiences.

This thesis assesses how Dutch marketers and organizers are promoting classical music concerts (from here on referred to as CMC) and how they respond to and face the new cultural consumer. As pointed out by Van den Broek (2013), the Dutch concert industry shows a stable performance of the last few years. However, the audience becomes older and the interest to listen to classical music weakens. Therefore, it is of interest to concentrate on the Dutch CMC landscape. Thus, the current discourse of classical music renewing itself is further discussed with regards to its relevance today. Furthermore, the thesis puts emphasis on the implications of how classical music institutions address the new cultural consumer.

*Research Question: How do Dutch CMCs perceive and navigate the change in the audience landscape?*

This thesis explores the current state of CMC promotions today and analyzes how marketers profile CMCs in society at large. Furthermore, it will be assessed in what way a new audience is in- and excluded by institutions. Data for this thesis were collected using 14 individual semi-structured interviews with marketers and organizers of Dutch CMCs. By focusing on evaluating the marketing processes of contemporary CMCs, the thesis looks for a connection between audiences and innovation in classical music. A thorough analysis of these questions is going to lead to relevant insights into societal and marketing developments in the cultural sector. So far, there is a lack of academic articles about the contemporary classical music scene, while journalism dedicates significant attention to this discourse. Hence, systematic research is missing up to this point, consequently, this thesis offers research-based perspectives suggestions on these matters.

It is necessary to clarify exactly what is meant by classical music. When talking about classical music, musicologists mainly refer to the small niche of great composers in the 18<sup>th</sup> century. Even though the 18<sup>th</sup> century is a highly appreciated and hence researched epoch for classical music, classical music is still widely studied, composed and performed today. While art sociologists argue that classical music is merely an art form, Bull (2014) adds that classical music is a bodily experience. A personal experience of consuming something so privately in a shared collective yet sharing it with others in a huge concert hall. Classical music is connotated with many conventions built up over the years and hails the composers of the 18<sup>th</sup> century. Moreover, the power of classical music is expressed and pondered by the mere listening to it, such that listening alone evokes an expressive thought-provoking experience (Kramer, 2007). For this thesis, however, I propose to use classical music as a sociological phenomenon, in order to emphasize on the way, the current audience engages with the CMC and vice versa. Especially, when looking at contemporary classical music, there is an emerging trend of innovative concert series. This trend might be linked to fewer subsidies available to support

cultural organizations and to the greying of the audience. It becomes apparent that CMCs must adjust to the change in society's taste, consumption, and behavior.

The contribution of this thesis is threefold: First, it seeks to find out about the current state of Dutch CMCs to present their relevance to today's society, by including insights into the challenges and accomplishments of the marketers and organizers. Here, the notion of tradition versus innovation and to what extent marketers try to innovate the format in terms of the marketing and program will be focused on. Secondly, I will outline the marketer's perspective on the consuming culture, including desired new audiences that will broaden the scope for CMCs. Additionally, the changing audience lifestyle, as well as the differentiation in behavior that is experienced by the CMCs, will be considered. Thirdly, the thesis will discuss marketing strategies that can be used to overcome the decline in specific audience groups.

It is my experience of working with contemporary classical music composers that has driven this research. As a music supervisor intern, I witnessed that it is of importance to endorse the musicians via marketing strategies and to incorporate the audience. Today, classical music must prove its relevance to still be listened to at concerts and not solely be packed on to Spotify concentration playlists. The supervised musicians, including Federico Albanese and Matthew Herbert, often have to do cross-over productions, to maintain their career as contemporary classical music composers. Accordingly, classical music is listened to in films, on Spotify or even in games, specifying that there is an audience consuming classical music, though not enough in the traditional concert format. This trend is causing severe issues for musicians, institutions and concert halls and urges them to mirror and re-invent. Therefore, I am interested in investigating how CMC organizers implement change and develop strategies to generate the engagement for CMC attendance of both old and new audiences.

The overall structure of the study takes the form of five chapters, including the introduction, theoretical framework, method, analysis, and discussion and conclusion. This thesis begins by discussing the theoretical framework, including the development of classical music, the increasing role of the new potential consumers of CMCs and their characteristics, as well as the growing relevance of art marketing in the legitimized art industry. This theoretical framework will lead to the research question of this thesis. The third chapter is concerned with the methodology used for this study. It will then go on to thematically analyze the findings and mapping the concept of how CMCs cope with the changing audience landscape. Approaches by Charmaz (2006) and Braun and Clarke (2006) have been adopted. The analysis presents the findings of the research, focusing on the four key themes: core audience, the fringe group, the audience dilemma, and strategies. The fourth chapter discusses the findings in relation to the theoretical outcomes to suggest theoretical and practical implications and to further respond to the research questions.

## 2. Theoretical Framework

This chapter will review existing literature on the discussion of how classical music has changed and in what way society impacts the musical canon and taste in contemporary classical music. The review will expand on these topics and contest the flux in classical music with a closer elaboration on audience types and their way of distinguishing themselves from others in relation to conventions and their musical habitus. To round off the theoretical discussion, the response of arts marketing to the flux in classical music appreciation and its efforts to promote the concerts to different audiences through market analysis and innovative methods, will be examined.

Today, the discourse on classical music appreciation and attendance shows that CMC organizers, as well as other classical music enthusiasts, fear the decline of the genre. The greying audiences in CMCs bring fear across the classical music industry, although statistics rather show an increase in audience participation (Neal, 2017). However, the participation can mainly be attributed to older generations, who visit the concert halls and buy tickets in advance. Thus, the concert formats coopt to their expectations, while not conforming to current societal interest, which will be further discussed in the following section. To overcome this fear of being outdated and old, symphony orchestras are motivated to address younger generations, e.g. children and stir them to be the next core audience (Neal, 2017). Nevertheless, some scholars argue that CMCs drive the young audience away due to their continuous focus on *Bildung*, canon, and traditional values (Tonart, 2018; Willemsen, 2018). For instance, the traditional audience's behavior differs other performing arts conventions, e.g. applauding, cheering, or talking to one's neighbors is not accepted, nor is taking drinks into the auditorium. For younger audiences this behavioral code may be intimidating, for they may be unfamiliar with the expected conduct and hence feel excluded (Willemsen, 2018). However, statistics show evidence that concert halls are not necessarily empty, as CMCs even show some growing audience numbers while having a gradually older audience coming to the concerts (Van den Broek, 2013).

### 2.1. Classical Music: The Development

This section reflects on the role of classical music, how it developed and its flux in attendance. Furthermore, I will reflect on the authors pointing towards the current state of contemporary classical music.

#### **Ancient: conventional, artistic, and exclusion.**

Bull (2014) who conducted autoethnographic studies at classical music concerts, argues that contemporary classical music is still a very conventional practice, yet the performance connects both musicians and listeners, who experience the concert as a shared and strongly emotional experience. Bull's approach towards classical music concentrates on bodily transcendence. She concentrates on the

performing site of CMCs, and how the genre is used nowadays to unite middle-class youth by means of participation. Still, classical music appears distinctive from the rest of the high arts, e.g. museums, ballets, etc., especially by how the audience behaves during the performance (Kramer, 2007). The bodily experience of performers can be described as an urge for silence and perfection, leading to a combination of enjoyment and understanding of the music. The musicians are subject to immense stress to keep up with the expectations of the audience. Bull (2014) concentrates her experiential research on the middle-class youth, and how the distinction is experienced. According to Bull, it can be said that classical music still connotes an elitist and almost sacred status in CMCs enhancing the described bodily experience on to its performers and therefore also its audience. Even though journalists pointed out that CMCs fear a greying audience, the industry is seemingly struggling to embark new strategies to attract larger audiences (Neal, 2017; Tonart, 2018; Willemsen, 2018).

In comparison to Bull, Johnson (2002) reviews classical music with a more literature-based approach. Johnson also looks at classical music being blatantly artistically influenced and believes that classical music is a connective link between the people consuming it. Therefore, he focuses on classical music in the concert context. Yet, he raises the paradox that CMCs are still quite distinctive from everyday life and do not play a relevant role for most people in their daily life. It seems that classical music faces the challenging task of keeping its relevance in the art context, while at the same time attracting an audience used to popular cultures. Johnson discovers a slight change in the conception of classical music in contemporary culture, and that the traditional field tries to break out of this conventionalized routine to engage with the popular. Based on the audience participation and their engagement with the CMC, Johnson argues that it is of importance to reflect on what classical music means for today's culture and in what way it could be part of the entertainment culture. However, he ignores the fact that classical music is dominating entertaining media as an additional supplement, e.g. game music, film soundtracks, or ambiance music (DeNora, 2000). The current society, especially millennials born in the 1980s and 1990s, look for technological advancements that progress pop music to always be new and catchy. Regarding Johnson, musical modernism is barely liked nor understood, because the industry is so much connotated with white male supremacy. Therefore, critical reflection in the classical music industry should be a central concern. The traditional canon may be ethnically diversified to include cultural minorities, and new characters. In terms of today, Johnson states that composers will be the actors of that change to introduce new elements to the canon and invite younger audiences reflecting and caring about current issues in society. "Intellectual and cultural goods should, such logic runs, be as accessible as anything else in the market" (Johnson, 2002, p.103). This concern is an important factor for the marketing methods of the CMC, as not only can innovation be found on the production side, but also in the promotion and self-identification of the CMCs.

Kolb (2001) conducted an explanatory study on the shift of attendance at CMC in the UK and US and grounded theory on the generational value change. Whilst Kramer and Johnson argue that classical music needs to change to survive, Kolb argues that people will keep listening to it. Kolb's approach on classical music attendance shows evidence separating audiences into fragments, due to conventions in classes, the introduction to radio and later television. Yet, the younger generations bring several challenges to CMCs: (1) they increasingly value leisure time and have more cost issues, while also demanding explanation on events, (2) there is a diverse knowledge base about classical music, (3) experiences are more valued than traditions, and (4) socio-demographic changes connected to the work life and ethnic backgrounds of the younger generation. While the first two factors are strongly experienced by orchestras in the US, the last two factors are understudied according to Kolb. In her article, she reviews the development of CMCs and in what way the attendance altered in relation to cultural developments. In the 18<sup>th</sup> century, classical music concerts used to be open to a large part of audiences, until the upper-class sequentially split the audiences into two. The segregation of the upper class from the rest of society slowly distanced the CMC from their initial social purpose. The community associated itself with highbrow culture, consuming traditional and institutionalized art. As Bourdieu's distinction theory between the upper class and lower class, the highbrow society has high cultural capital and wanders in the high class (Bourdieu, 1984). On the opposite, the lowbrow culture is associated with the lower class and tends to consume popular art forms that are considered rather an entertainment for the masses. The Italian opera, for example, was considered mere entertainment, while composers such as Handel were increasingly considered the cultural elite (Kolb, 2001). According to Kolb, this split of consuming cultures still expresses how many people think of classical music today, i.e. a product/ consumption style of wealthy westerners.

#### **Novelties: technology, subsidies, and inclusion.**

However, with the introduction to radio programs, this classification adjusted to developed listening technologies, which fostered music as for example jazz and Tin-Pan Alley in the 20s and 30s (Kolb, 2001). In the 1950s with the invention of the television, popular music styles dominated musical consumption. Even today classical music is a patronized genre of the educated white elite. Kolb concluded that the growing multicultural and cosmopolitan cities, will gain more ethnic minorities with higher educational degrees. Since most of those groups already listen to classical music, the concert format must therefore change to unite the segregated classes and invite those, who do not feel welcomed going to the concerts.

Also, Dowd, Liddle, Lupo, and Borden (2002) give an exploratory analysis of the symphony orchestra development of more than 100 years in the U.S. Despite the fact, that this research focuses mainly on the productive and artistic side of the classical music development, it includes performance development, new resources, and expansion on the programming on an educative level. According to

Dowd et al., U.S. symphony orchestras are still affected by the economic welfare of a few highbrow cultured people. Other scholars, such as Abbing (2019) argue that this might be because the notion of ‘serious art’ refers to the established art scene, as legitimized by the highbrow culture in institutions. Also, Dowd et al. talk about ‘high culture’ defining the classical canon in the music industry. Through their economic power, the high culture may sacralize certain art (e.g. classical music) in terms of aesthetic classification. Yet, before the 1900s, concerts run for commerciality, consisted of both serious and commercial art (Kolb, 2001; Dowd et al., 2002). Dowd et al. claim that through the establishment of exclusive organizations of e.g. voluntary organizations and the nonprofit organizations, the serious art began to distance itself from the commercial more entertaining arts. That would mean that even today, the classical canon is driven by the rich, who exclude and segregate others with their aesthetic classification.

Kramer (2007) in return tries to convince the music world to focus on the emotional, expressive, and cognitive values behind listening to classical music.

When I speak of classical music [...] I am not using the catchall commercial category that takes in some six centuries of very diverse practice, including opera, a theatrical genre with its own quite different set of problems and values. [...] The term classical music refers to a specific body of nontheatrical music produced since the eighteenth century with one aim in view: to be listened to (Kramer, 2007, p.11).

Kramer shows a distinct position as compared to Bull and Kolb. He dedicated a book on why classical music should still matter today and states that it can transfix the listener and transform them into experiencing the music. Although his approach is quite romantic, because he does not accept the societal impact on the musical canon, he brings a relevant argument by pointing out that classical music could learn something relevant and important from museums. Just as museums, classical music longs back to the passed away geniuses and exhibitions them in a monumental state. Though, museums developed and adjusted their state of exhibitionism, by making use of ‘clever marketing’ and changing the space into a space of “sociability, informality, and enjoyment of art” (Kramer, 2007, p.12).

The segregation in classical music represents a major challenge to today’s classical music organizations, to open and reach out to a bigger audience, no matter the class or the economic status. Educational institutions, e.g. conservatories or new talent foundations take first actions to resolve the elitist canon, by, for example, providing access to digital resources, influencing new musicians and music. Eventually, through critical self-reflection, the industry can change. “Ironically, the non-profit form that allowed such growth—and that enabled the institutionalization of high culture—would also contribute to the shift away from the classics” (Dowd et al., 2002, p.58). Having discussed the

evolution of classical music formats, its audience and their behavior and needs, I will now move on to consider the alteration in audiences.

## **2.2. Omnivores: What's New in the Audience Landscape**

As the classical music industry has undergone some major shifts, the society and their tastes towards music appreciation have also changed. The socio-economic developments in society, especially digitalization and globalization, influence the classical music participation (Adorno, 1978; De Nora, 2003; Peterson & Kern, 1996; Van Eijck & Knulst, 2005). It can be said that the accessibility to music significantly increased. “Nowadays you don’t even need to collect records anymore, just harvest MP3 and cruise through YouTube” (Reynolds, 2011, p. 20). The playlist goes back in time, as far as the listener desires, possibly beyond its age. “There has never before been a society that is able to access the immediate past so easily and so copiously” (Reynolds, 2011, p. 21). The consumer can use Spotify and put history into shuffle mode. Therefore, classical music may compete with current popular music on online platforms, as never before.

### **Towards a Greying Audience.**

Van den Broek (2013), conducted empirical research on the cultural institutions in the Netherlands and in what way interest in classical music greys, as well as attendance to classical music concerts decreases. Half of the Dutch population does not listen to classical music, and more than 90% say that they do not know in what way to listen and why to prefer classical music, over other musical styles (Van den Broek, 2013). According to van den Broek, the concert attendees become gradually older, which would indicate that the older generations did not pass their consumption lifestyle onto the younger ones. However, it is of interest to contextualize these findings with Van Eijck and Knulst (2005), as they found that although the audience is becoming greyer, this might be partly caused by people finding their interest and time for classical music, only later in life. This age threshold might be described by certain life situations, as for example retirement and having financially independent children.

Roose (2008) studies the motives of classical music audiences and their aesthetic disposition set. He shifts the focus from the cultural omnivore to the difference in audience participation in classical music, comparing older with younger generations. According to Roose, the primary drive for attending classical music concerts is the interest in the program or specifically in the artists. This can be linked to the introductory statement of Szabo (2019) who opposes that the marketer’s action creates a bonding brand with the consumers, whereas Roose argues that the artists or program create a brand already. For his analysis, Roose categorizes the audience in three groups of attendance, that of passers-by, interested participants, and the inner circle. The passers-by, who are averagely younger (mostly students) than the inner circle (greying audience), may be connected to the cultural omnivore. The

passers-by barely participate in classical music concerts, due to scarce leisure time and specific interest in the artists performing. However, the core audience/inner circle appreciates musical innovations, as well as the established conventions. Observing the audience types in participation frequencies is a tool to optimize arts marketing in relation to age, education, and motives for attendance (Roose, 2008). Roose claims that the inner circle is open to experiments and innovations, while other theories associate the core audience of CMCs solely with traditional conventions (e.g. Rimmer, 2012).

### **Today's Youth.**

Also, Dobsen (2010) concentrates on the audience's motives to attend CMCs, even though focusing on non-attenders. She conducts a small scope of qualitative research with a mixed method approach, including focus groups and individual interviews with younger participants (age 24 -36). Her experiential approach tries to uncover the experiences made by young and culturally aware non-attenders of CMCs. According to Dobsen, the young non-attenders feel intimidated by not being accustomed to the behavior and conventions of CMCs.

Whether an automated, ritualized behavior, or an accumulation of response from throughout the work, the non-attenders consistently expressed surprise, and often discomfort, with the degree of enthusiasm audiences displayed (Dobsen, 2010, p.118).

Not only marketers but also programmers may adapt their strategies to attract younger audiences, who are culturally skilled, to CMCs. Eventually, projects that focus on and promote an amalgamation of "educative, entertaining, and traditional performance formats", will increase the interest of those non-attenders (Dobsen, 2010, p. 123).

Vercammen (2017), on the other hand, studied the CMC's effectiveness of reaching out to young audiences to overcome the decline in audience participation. The mixed-method approach of both conducting surveys on non-attenders and attendees between 18-45 years old, as well as in-depth interviews with Dutch symphonic orchestras, she found out that although young audiences are interested in listening to classical music, they barely go to the concerts. Vercammen similar to Michael (2017), found that the younger audiences tend to go to CMCs when advised by friends or relatives. This consumer behavior may be linked to the lifestyle of the millennials, i.e. a stronger focus on the experience and the brand identity, opposed to only the musical experience (such as Kubacki & Croft, 2004; Astayefa, 2014; Kotler and Scheff, 1997). While the core-audience participates in and is more accustomed to CMCs, Vercammen found that reasons such as interest in program, venue, artists, motivate their attendance. This study has its limits, as she surveyed both, attendees and non-attendees, that (91% of total) visited a CMC in the last year. This similarity in behavior, makes the groups difficult to distinguish, however, the attendees do listen more frequently to classical music, while non-attendees barely listen to it.

Recent evidence suggests that the assigned highbrow culture is transforming its taste towards an overarching appreciation of both high and lowbrow culture (Michael, 2017). The cultural omnivore, defined as upper-class young professionals, are more eclectic in taste and musical appreciation, and hence may be of interest when discussing contemporary CMC's. Further, the music industry could turn into an eclectic pattern of tastes, and society becomes a multitude of mixed cultures and nationalities. This shift may group the audience into specific focus groups, with similar tastes, behavior, lifestyle, and possibly personas. It is of interest to look at audiences and their appreciation of classical music. Today, the cultural world experiences a change in taste and genre behavior, as an increasing eclectic taste and appreciation towards the arts exist. Especially, millennials tend to enjoy spending leisure time and associate quality with brands (Halliday & Astafyeva, 2014). However, millennials, seen as the hope for inter alia the performing arts, are very selective and flexible in their behavior. They can go to a Bach concert on one day, and to the cinema on another, which can lead to significant challenges for cultural institutions that rely on stable audience numbers (Kubacki & Croft, 2004). This discourse will be elaborated in section 2.2 on arts marketing.

### **A New World.**

In contrast to Roose (2008) and Dobsen (2010), Peterson and Kern (1996) approach the discussion of the omnivore as the shift away from snobbism in society. The study highlights that the shift can be linked to the trend of globalism and the younger generation. Unlike Roose and Michael (2017), they approach the field from a more quantitative perspective, as they make use of a national survey to measure the variable of who chooses for what kind of musical genre. In comparison to Michael's article on the young professionals, Peterson and Kern (1996) study the high-, middle-, and lowbrow cultures and their preferences in musical taste. The main finding is that highbrow consumers are likely to be more omnivore than low- or middlebrows, and therefore transform from snobs to eclectic preferences in musical taste. Similar to Michael (2017), who built on their study and studied the taste in actual participation and explores the opinion and experience of the individuals, Peterson and Kern question the distinction between high-and lowbrow culture. They study the factors of this electing trend i.e. status-group politics. "We speculate that this shift from snob to omnivore relates to status-group politics influenced by changes in social structure, values, art-world dynamics, and generational conflict" (Peterson & Kern, 1996, p.900). In relation to their hypothesis, they conclude that both generational transformations, such as broader education and better living standards and period effects, such as digitalization in the arts are influencers of the shift of highbrows consuming lowbrow culture.

To conclude, Peterson and Kern's approach introduces the democratization of culture through an increasingly global world and impacting the individuals' tastes and participation in arts. Yet, their study has a restricted scope to the U.S. perspective of taste, which is an inconsistency of the theory, since there barely is a middlebrow culture in the USA. In the USA is a large gap between the poor and

rich, which used to impact the music scene tremendously with Jazz and Blues being the music of the impoverished African Americans in times of slavery (Clarke, Hall, Jefferson, & Roberts, 2002). Today it seems that the highbrow culture uses lowbrow genres to decorate themselves with it and use it as their cultural accessories (King and Foster, 2013).

Conversely, Rimmer (2012) observes the musical habitus of individuals and in what way it deploys the relationship between musical participation and one's embodiment of cultural capital. Rimmer offers an explorative theory on the heuristic concept, emphasizing the importance to use qualitative methods when observing music and cultural capital. Unlike Peterson and Kern (1996), and Van Eijck and Knulst (2005), who consider the choices of genres, Rimmer argues that not only social status and education, but also geo-cultural factors offer information about one's musical participation rate. Considering all evidence, it seems that the appreciation of for instance classical music depends on the demographic profile of the possible audience. The musical habitus deploys the relationship between musical participation and one's embodiment of cultural capital (Rimmer, 2012). Similar to the other scholars, the research in the UK found out that there is also a trend of highbrow cohorts consuming not only classical music but also developed an omnivore taste towards the middle- and lowbrow music. In response, lowbrow cohorts show a rather univore taste. The digitization of music, inter alia internet use, as well as the musical technologies of i.e. storage capacities leading to shuffle mode, anticipated a further development of the cultural omnivore. Those factors are likely to also lead to hybrid/ cross-over genres (Rimmer, 2012). Through the ethnographic research on the actual consumption of the individuals, Rimmer was able to find out that people from rural areas tend to consume their music more privately, while the ones from urban areas strongly presented their taste with their outfits and lifestyle. Therefore, not only social status and education but also geo-cultural factors offer information about one's musical participation rate.

Rimmer's study shows that ethnographic research is required to understand the internal and embodied appreciations of music. The observation of the musical habitus may help to retrieve significant information on contemporary musical taste. In comparison to Bourdieu's notion of field study, Rimmer notes that sub-fields must be accessed than just the overarching music field. Research on sub-fields may open diverse social contexts for individuals, such as debates on gender, sex, rural versus urban, or young versus old. Though, Rimmer seems to ignore comparable findings from quantitative researchers (Peterson & Kern, 1996; Van Eijck & Knulst, 2005) to prove his point derived through case studies on focus groups.

The studies presented thus far provide evidence that the appreciation of music is not necessarily a matter of class anymore, but the social connotation may be connected with the geo-cultural approach. The more eclectic taste in music challenges the music industry to reflect, innovate, and create concepts that fit more adequately to the new audiences. There remain several aspects of the relation between the core and the new audience of CMCs, about which is relatively little known. These

include, among other things, the interaction between them, whether the core audience is trying to explain or points out on how the new audience needs to behave, or the involvement of the various audience groups with them in the planning of promotion and programming. Those aspects will further be explored in the empirical part of this thesis.

### **2.3. Arts Marketing: Branding of Classical Music Concerts**

So far, scholars presented that classical music faces drastic change and an increased interest to new audiences. Yet, there have been young trends of focusing steadily more on marketing in the arts and how to promote classical music concerts for a wider audience, to democratize the genre through more transparency.

#### **A Challenge.**

Kolb (2005) exemplifies that cultural organizations are becoming increasingly dependent on marketing strategies. Kolb does not talk about omnivores, but the new cultural consumer. The cultural consumer can be defined as a popular culture participant with a lower cultural background, that joins concerts for a once in a lifetime experience. While Roose (2008) adds that participation at CMCs, is also promoted by the communication of the venue program, or the artists itself.

In her work, Kolb (2005) describes six challenges of cultural organizations, that they face when adjusting their marketing strategies to the new cultural taste appreciation in society, and in their own development. Those challenges are inter alia coping with the change in leisure time, increasing the need for entertainment, globalized and personalized products, an amalgamation of high and low culture distinctions, fewer subsidies, as well as the end of the life cycle of the organizations. With the last challenge, Kolb comments that cultural organizations in an age of technological development and diverse audiences eventually reach the end of their life cycle. Through good use of marketing and innovative musical creations, the CMCs could reach out to the public, by the mere listening experience. Additionally, Kolb states five realities of the external environment, that the cultural organizations must cope with. Firstly, art may stop promoting itself as a distinctive and sacred product, the unpredictability of consumer's interest in cultural experience (compared to Jarness, 2015 who even distinguishes between various modes of consumption), a merge with art and technology, offering culture in selected packages, as well as responding to the new cultural consumer needs (Kolb, 2005). Furthermore, Jarness (2015) uses in-depth interviews to prove that even when audiences are culturally diverse attending CMCs, they might not have the same taste and lifestyles. Eventually, the distinct tastes and lifestyles appreciating different ends at a concert might even make the groups more segregated from each other (Jarness, 2015).

Butler (2000) raises the notion that arts marketing has still little academic attention, from the perspective of managers and business scholars. Butler focuses especially on the structural features that

characterize the arts marketing process in relation to performing arts, including theater, dance, and music. Those features are i.e. the product/ service, the organization, and the market. When focusing on the product or service, the cultural organization may have to take the cultural domain into account, as in what way the product is consumed by what cultural trend (high or low), but also the product is based in one location. For CMCs, their symphony orchestra is often named after the city they are placed in and perform at.

Through the detailed elaboration on what marketing challenges are faced by the cultural organizations, the paradox becomes clear that arts organizations rather focus on the art produced and take the commercial promotion secondarily, i.e. culture versus commerce, becomes apparent. However, arts organizations, such as symphony orchestras are partly funded by the state, because they depend on receiving the subsidies. They try to adjust and portray their image, that would fit with the state requirements for potential funds, instead of adjusting to the current market trends and needs. Therefore, it can be said that marketing with a customer-oriented focus, is not focused on the participating audience at all. Eventually, this leads to CMCs being promoted for artistic purposes, though not endorsing new audiences. Besides the notion of the culture-commerce discourse, Butler also highlights the diversity in audiences consuming art products. The audience is more extreme in choosing either popular culture or high culture, although the aim of an arts organization is to attract larger audiences. This is a risk, that organizations need to consider when positioning their product in the market. One needs to look at the connection between the product image of the cultural organization and its dependence on locality, due to municipality and fund support.

For an arts organization with a mission to bring art to the public at large, audience diversity presents an important issue. It may be worthwhile for organizations exploring the market to be less concerned with what makes great art, but with ‘what makes a great audience?’ Such market diversity implies the need for insights into behavioral segments, and consequent positioning strategies (Butler, 2000, p.353).

Butler raises the question that the increasingly diverse audience must be considered for the marketing strategies and objectives of the organization. Besides trying to open up and produce a good for a large audience, the promotion and marketing so far rather seems to aim to impress the fundraisers to receive subsidies. The marketing strategies decide whether the cultural organization is accessible to the audience or not.

According to Heilbrun and Gray (2001), particularly the performing arts, e.g. symphony orchestras, experience financial challenges. In the 1920s to 1940s CMCs have been at their peak of cultural mass consumption. However, live performances became less interesting with technological development, due to the option to now listen to music from home. Even if more recent literature (such as Warde et al., 2008; Dobson, 2010; Van den Broek, 2013) illustrates that this is not merely an issue

of technological advancements, as today's attendance is not decreasing, but CMCs being an elitist meeting point. Though, Heilbrun and Gray summarize that the symphony orchestras have suffered the most of this change towards non-live performances since the 1980s. Further, they critique the innovative compositions in what they call serious music (classical music). The participation of audiences did not increase, which can be linked towards the not necessarily attractiveness and promotion of the product. "In the eighteenth and nineteenth century, audiences listened to the music of their own time and were, for the most part, charmed by the innovations of contemporary composers. But in the twentieth century, at least in the realm of concert music, contemporary work has largely failed to capture the public's allegiance" (Heilbrun & Gray, 2001, p.387).

### **Commercialize.**

Kubacki and Croft (2004) argue that classical music starts playing a more important and popular role in mass marketing, as popular music has stagnated. "But while sales of popular music have stagnated, one of the great saviors of the industry has been the comparatively recent phenomenon of the mass marketing of classical music" (Kubacki & Croft, 2004, p. 578). One of the driving factors is the radio stations streaming increasingly more classical music than pop music (Gosling, 2018; Long, 2019; Moss, 2018). "Digital services are enabling us all to reach a much bigger global audience" (Long, 2019, para.3). It is a current trend that also classical music makes use of marketing to promote the artist and its music, yet discussions about aesthetics, conventions, and authenticity come up. For instance, Andrea Bocelli and Ludovico Einaudi are one of the few classical superstars winning the charts, by streamed and known the most (Long, 2019). The clash between artistic creation and commerce, as introduced by Butler (2000), is a known risk by younger classically skilled musicians. Examples are Nils Frahm's concert styles, or Joep Beving's photography and outfit. Also, music videos become part of the newly adjusted promotion plans for their music and for the artist(s) as a brand. Further, Kubacki and Croft (2004) discuss successful marketing objectives for classical music, such as soundtracks in films, radio stations, or other collaborations between art forms.

Halliday and Astafyeva (2014) studied the consumer behavior of millennials (18-35 years old) and their relation and impact towards cultural organizations. The focus lies in arts marketing and states that "marketing is no longer an option; it is now a survival tool for cultural institutions" (Halliday & Astafyeva, 2014, p.120). It seems that the millennials pose a great challenge for cultural organizations to attract them to participate. Therefore, Halliday and Astafyeva raise the importance to look at their interests and behavior. Their consumption lifestyle can be categorized by their openness towards new relationships and loyalty, their awareness of current social and political issues and their drive for self-actualization. Additionally, they demonstrate to value leisure as much as professional achievements. Halliday and Astafyeva (2014) define this change in generational behavior as an "era of choice rather than overt coercion or fixed status quo gives space for marketers" (p.124). Cultural institutions may

take benefit from this change when adapting their marketing objectives. The technological influence and commercial omnipresence make the millennials brand-conscious and eager to find brands with value (ibid). The brand community for a millennial cultural consumer is „a non-geographically bounded online (internet spaced) or/and offline (face-to-face with personal contact) temporary or stable community with more or less structured relations between its members, brought together by a brand (or its consumption activity) and community members’ needs” (Halliday & Astafyeva, 2014, p.125). Eventually, cultural institutions, including classical music marketers may make use of a petty bourgeois branding and reflect merely on the core consumer’s needs and behavior, when creating a brand community. Meanwhile, the millennials seek out art experiences themselves, through digital activity.

To summarize the synthesis of what has been discussed in the literature, it can be stated that adjusted marketing strategies may bring new audiences to CMCs. If the audience change to be of more omnivore taste and open towards experimental music, the concerts may also show an opening of conventions in classical music. As pointed out by Van den Broek (2013), the Dutch concert industry shows a stable performance of the last few years. However, the audience becomes older and the interest to listen to classical music weakens. Therefore, it is of interest to concentrate on the Dutch CMC landscape. To come back to the research question: *How do Dutch CMCs perceive and navigate the change in the audience landscape*, the literature framework provides new insights to CMCs. As introduced by sociological and marketing literature, the classical music landscape faces the urge to change its relation to the audience and cooperate with the cultural omnivores and make use of marketing tools to succeed. This thesis seeks to explore the changing nature of the audience landscape, experienced by the Dutch CMCs and further investigates their marketing processes.

- *What is the current state in the marketing of CMCs in the Netherlands?*
- *How do CMC organizers and marketers cope with an audience that merges classical/ highbrow with popular/ lowbrow consuming cultures?*

The goal of this research is to discover underlying structures in the communication between CMC organizers and their audience. By focusing on the Dutch CMCs, it is of interest to concentrate on their current state of marketing challenges, its current audiences and their audience they reach out to and how their innovative concepts relate to this.

Building on the theoretical framework, I have argued that CMCs experience the need to reframe its format as it is stepping in circles between innovation and longing back to the tradition and heritage concept of the classical canon. The discourse on the history of classical music consumers shows evidence that the different lifestyles may affect the programmers to strive for the new and innovative. Possibly, experimentation, as well as taking risks and blatantly focusing on the new audience will be approached. Therefore, it could be ascribed that the development of more wide-ranging taste and appreciation in between cultural spheres, results in making cultural organizations

more inclusive and accessible. Possibly, the empirical findings expect that the highbrow culture becomes closer with lowbrow culture/ or commerciality when performing pro inclusivity and accessibility. The literature, concentrating on the audience's formation influencing cultural institutions, found out that potential audiences of CMCs may have different conceptions about participating in the concerts, as well as other expectations to consume it. Further, it could be guessed that the millennials may increase audience participation in CMC's. As millennials are searching for brand identity in current organizations, the new audience's lifestyle becomes increasingly important for the information gathering of the CMCs and to adapt their marketing process and objectives to speak to the new audiences. Accordingly, the audience may trigger innovation in the CMC sphere.

### 3. Method

As different methods have been proposed by scholars projected in the theoretical framework to classify the development of classical music quantitatively, sociological scholars used more qualitative methods to assess the experience and choice of audiences in relation to their music consumption and patterns in taste. So far, research on the marketing perspective was measured with more quantitative tools, e.g. evaluating the sales (Kubacki & Croft, 2004), number of technological developments, or looking at their performance throughout the last decades (Heilbrun & Gray, 2001). This thesis uses qualitative analysis to gain insights into the position and experience of marketers and managers of CMCs and their perception and navigation of the audience development. It follows an explorative approach, as focusing on the information given and gathered during semi-structured interviews. This compound was prepared by adapting the procedure by Bryman (2016) of examining the overall strategies used throughout the research, including the construction of a fitting sample, interview, question guide, and analysis process. Accordingly, Bryman not only investigates the efficacy of the strategies but also illustrates practical issues concerned with doing interview-based qualitative research.

In the following sections, I am first going to introduce the sample and selection criteria to further introduce the strategies used to interview the participants. The interview strategy relies on a questionnaire, including inter alia photographs. Thereafter, an outline of the methodological process is illustrated in detail, including the first contact with interviewees to final written analysis. To round of the method section, I concentrate on reflexivity and reliability throughout the research.

#### 3.1. Sample

Regarding the sample, fourteen marketers and managers were recruited for this thesis. The initial cohort of 14 interviewees includes 8 marketers, 4 artistic directors, and 2 general managers of Dutch classical music organizations. The participants of this study were recruited from 6 symphonic orchestras, 2 music foundations, 4 ensembles, 1 orchestra hall, 1 conservatoire, and 1 classical choir (see Figure C1-C2 in Appendix C). The main source of participants was the research project *Gameful Music Performances for Smart, Inclusive, and Sustainable Societies* [GAMPSISS] (“GAMPSISS”, n.d.). GAMPSISS strives for a democratization of classical music and to enhance its attractiveness for an open-minded and diverse audience. The collaboration with GAMPSISS can be seen as an indicator of organizations interested in innovation, but also as a connector to the Dutch industry. They are considered working motors of innovation in CMCs, experiencing drastic changes in audience diversity and behavior. Of specific interest to this thesis is the marketing of the organizations, and therefore, I interviewed marketers and art administrators as representatives of the organizations. Due to restrictions in time window and responses, I reached out to 11 GAMPSISS partners. To reach a satisfactory number of participants the snowball sampling was used in addition. I have further selected

three interviewees outside the GAMPSISS network, including e.g. the head of marketing of a conservatoire. Just as orchestra halls and ensembles, conservatories not only train new talents but also perform concerts regularly. It is of interest, to also look at their experience of promoting their students and the concerts to audiences, and how they navigate the change in audience behavior.

The sampling strategy can be linked to a mixed approach of snowball effect and criterion sampling. Since some orchestra do not have a marketing department, the 'snowballing' will be a sample frame. Based on criterion sampling, art administrators, marketing directors and managers have been considered for interviews, as being behind the promotional decision-making of projects and brand (elaborated in the theoretical framework). This criterion may differ per organization, depending on their size and resources. The participants were spread across the Netherlands and interviews were held in person in the respective cities, i.e. Amsterdam, Rotterdam, Den Haag, Maastricht, Utrecht, Groningen, and Hilversum. Primary inclusion criteria for the participants were that they are working in the classical music industry in the Netherlands for more than a year, ensuring relevant knowledge of their company and its objectives. Executive members of the companies, e.g. head of marketing, were preferred to gain information on as many domains as possible. To decide on reliable sample size, the following was considered: data/ theory saturation, requirements for adequacy, style of the research, heterogeneity of the population, as well as research question (as proposed by Bryman, 2016). As the thesis is restricted by time and scale, theoretical saturation has been attempted. When discussing the participant's experiences and opinions, it is of interest to focus on a set number of participants, to keep an overview of the relevance per individual. In terms of reaching out to a heterogenic population, since participants of this study come from a broad variance of orchestras and ensembles within the Dutch classical music industry, the sample can be considered heterogenic to get closer to saturation.

### **3.2. Interviews**

Qualitative interviewing approaches the information given by the respondents at a deliberately in-depth level, making the interpretation of a certain finding likely (Gaskell, 2000). The interviews were conducted individually, to create a comfortable atmosphere for the participant to talk about what they really believe in (Gubrium & Holstein, 2001, p.15). Another aspect to make the interviewee feel at ease is when the interviewer prepares well about the organization and the projects of the interviewee beforehand for creating a natural conversation. The individual face-to-face interview creates a space for the interviewee to dive deep into their opinion and statements and to explain their position to the interviewer. The interviewer guides the conversation with follow-ups and probes (see the section below), though the participant will decide on the topics discussed, as the focus rests on their experience and insights. The sensitive topics of the interview, namely personal experiences, decisions made in CMC management regarding marketing campaigns and financial matters, demanded an individual interview setting.

Regarding the concepts discussed in the literature chapter, the subject matter of the interviews includes themes ranging from the development of classical music, innovation and contemporary trends, to targeting audience by looking at successful and rather unsuccessful strategies, and a brief indication to the budgets. In relation to what has been introduced by Bull (2014), Johnson (2002), and Kramer (2007) on classical music's relevance for today's society, it was of interest to look at how each organization would represent itself, such as their values and repertoire and whether they would consider themselves innovative or bound towards tradition. Further, to dive more into the marketing strategic choices, the interview looked at promotional concepts and the construction of branding, as introduced by Halliday and Astafyeva (2014), Kolb (2005), and Kubacki and Croft (2004). This led to also thematize the targeting of audiences and how the audiences engage with the CMCs. Lastly, it is of interest, as introduced by Dowd et al. (2002), Abbing (2019), and Heilbrun and Gray (2001) to investigate the financial mix of subsidies, donations, and private revenues, and how the budget for marketing and innovation is spread in comparison to programming departments.

### **Questionnaire Design.**

As the main interest of this thesis is the participant's point of view, a semi-structured design was chosen (Bryman, 2016). The beginning of the interview was structured as follows, to provide all necessary information and provide the interview with a secure atmosphere. Firstly, a brief introduction about the interviewer and the research goal was given. It followed the explanation and signature of the informed consent form. To ensure flexibility, the participants were encouraged to answer elaborately, by follow-up and probing questions. The interview guide was constructed to guide the interviews and keep them comparable. The interview guide includes direct questions to enable comparison between the interviews. It was of specific interest to gather each interviewees' description of their own department with different conventions and missions/visions in rich and detailed answers. Therefore, the interview guide includes a series of open and follow-up questions.

Bryman's (2016) question guide has been used as a guideline when constructing the interview guide and throughout the interview itself. The first question that was asked during the interviews was to establish a comfortable and safe atmosphere between the interviewer and the interviewee. The interviewee was asked to talk about their work routine by including some major projects and concerts. The following questions dived deeper into the material. Introductory notes were given to introduce the next stage in the interview and move from one topic to another. The topics that were brought up by the interviewee were further addressed in the discussions. Two probing questions applied in the interview were, for example:

- “Do you see opportunities in the change of audiences consuming art and culture today?”
- “Do the declining audience numbers put the state of the company at stake?”

Direct questions have been used as follow-up questions to understand the point of view of the participant. For instance, “what exactly do you mean when talking about the new audience types?”. Whereas indirect questions have been applied, to handle more sensitive topics and opinions. For example, some questions were structured to first inform about a certain topic and then point towards the perspective of the participants, such as:

- “Today, classical composers as Bach, have been re-interpreted by not only classical music but also other music genres and performing arts. Especially, DJ’s seem to be inspired by Bach’s repetitive chords and enjoy the minimalistic note to it. I am curious about how you perceive those new and rather minimalistic pieces. Would you associate this as innovation in classical music, or as no classical music at all?”

At times, the participant gave short answers, and the interviewer made use of attentive silence to elicit a more elaborate response. Their silence gives the interviewee time to think about their answer and a chance to gather additional information. Further, paraphrasing in combination with follow-up questions, was used to clarify important parts of the interviewee’s answer, e.g. “As you mentioned before, that you are trying to reach out to not only your core audience but also younger audiences, who seem to have a different consumer behavior and lifestyle...how would you then define the extent you try to reach out to new audiences?”.

### **Photographs.**

Pictures were used as another type of stimulus to facilitate the interview. They were provided by the interviewer, however, some interviewees also contributed with documents and video. The pictures were shown to support discussions on current marketing strategies of some contemporary classical music artists (see Images C3 – C 8 in Appendix C). As a source for the photographs, promotional material for upcoming concerts in the Netherlands was used. This approach, also called photo-elicitation, ensures that the interviewee does not feel excluded by not being aware of a specific example. Additionally, it stimulates further elaboration on the topic and triggers interviewees to reflect upon their own activities (Bryman, 2016). The photo-elicitation had the desired effect of letting the participants compare their own promotional material with the material shown (Harper, 1986). Showing the photos without an attached question, had to purpose of displaying potential differences between the interviewer and interviewee’s perspective. Further, this process helped to make the interviewee feel at ease and relax for a moment, by introducing an additional form of interaction to the interview.

### **3.3. Process**

Having defined what is meant with the sample and interview strategy, I will now move on to list the progression of the research. The participants were contacted via mail or phone. Prior to data collection, the participants received and filled out an informed consent form (see Table C9 in

Appendix C). The data was collected using a semi-structured interview structure. An audio recording was made for every interview, which in turn was transcribed via O-Transcribe. O-Transcribe was deliberately used to slow down the pace of the recordings and to accurately transcribe the interviews in verbatim language. The language of interview was consistently held in English, in accordance with the interviewees. One interview was held in German, since both interviewer and interviewee derive from Germany. It was of interest to make the interview as natural as possible, by not having verbal barriers. Each interview lasted between 40 – 77 minutes, which resulted in a total of 129 pages of transcripts. The interviews were conducted between March and April 2019, and took place in the interviewee's workplace, to ensure their comfort and natural behavior.

For the thematic analysis, a procedure of themes and subthemes, as laid out by Braun and Clarke (2016), was utilized. Further, Charmaz's procedure on initial coding and selective coding was used (2006). The study uses qualitative analysis to gain insights into the opinion and perspective of the interviewees and to understand their experiences and decisions made in marketing and managing CMCs. Braun and Clarke's phases of a thematic analysis guided the coding process of the theory. The thematic analysis, unlike grounded theory, observes and categorizes with the sensitizing concept at hand. The sensitizing concept is related to the marketing strategies addressing a diverse audience. Bryman (2016) discussed Blumer's notion of the sensitizing concept in length as it is one of the key formats for acquiring qualitative research, as it studies various approaches of one concept, "they provide a general sense of reference and guidance in approaching empirical instances" (p.383). Codes were established by naming segments of data with a label that simultaneously categorizes, summarizes, and accounts for each piece of data (Charmaz, 2006). As Charmaz puts it, "coding is more than a beginning; it shapes an analytic frame from which you build the analysis" (2006, p. 45). This data was re-read, analyzed and grouped into 78 initial codes and 4 themes. The conceptualized labels are within an intertwined network of the gathered data. The networks of themes, called axial coding have been mapped in concepts. The networks can be visualized in graphs for exemplification. Eventually, looking at selected quotes of the interviewees helped to define the four themes and their connections.

In addition to the coding process, a selection of instruments helped to keep track of the data. Data were studied using the computer program ATLAS/ti, to collect the amount of data in a structured way and look at the connections and networks between both codes, groups, and quotes. The cross-references generated, between all transcripts and codes, by the software, supports the effort to manage the amount of data (Kelle, 2000). Moreover, cross-references speed up the process of gathering and looking through data, as it is possible to jump between text quotes and other details. As the thesis follows a qualitative approach with interpretive analysis, the software is merely used to store and manage the data. The cross-references are only used as an overview of response rates on various codes

and themes. However, the interviews dive into the experiences and opinions of the participants, hence the focus of the analysis will lay on interpreting the quotes.

The transcribed interviews were read successively, in order to create a distance to the conducted interviews and dive deeper into the analysis mode. This process of reading was intermitted by adding the transcripts to the ATLAS/ti software for re-readings and coding. While following this procedure, recurring patterns in the documents were noted and codes were evaluated and either combined to categories or replaced by more relevant ones. Finally, connections and networks between those categories or themes, called axial coding, were noted. Those networks can also be mapped in concepts and visualized in graphs for exemplification. Eventually, looking at selected quotes of the interviewees it helped to define certain themes and connections.

### **3.4. Reflexivity**

In retrospection, the interviewing gave great details into the role of the interviewer, but also as a participant to research a certain culture. To receive as much information about the culture as possible, I also asked the interviewees whether it was possible to be shown around in the organization. In the role of the interviewer, I experienced the actual interviews, as well as a month of visiting different venues and institutions in the field of CMCs. Having an insight into the daily routines of marketers and organizers, I had the chance to observe the work environment and catch a glimpse of current projects and materials. As the interviews took place in their offices, I joined a natural setting, benefiting a naturalistic approach (Hammersley, 2011 [1992]). The interview guide provided me with themes and structures to ponder about the experience and statements of the interviewee. However, as being a guest introduced to the interviewee's workplace and participating as an interviewer, I prepared to collect information about the participants and their CMCs to supplement my external knowledge (Hammersley, 2011 [1992]). Throughout the interviews, I often got appointed by various participants, who categorized me as belonging to one of their focus groups they try to reach out to. At times I felt being kept out of the role of the interviewer and personally addressed. Though, this helped me better to understand the concepts addressed by the respondents.

#### **Validity and Reliability.**

The following is a brief description of how the analysis addresses its validity and reliability of the research. The specific interpretations of codes and themes are based on the repetitiveness of patterns in the documents, the importance highlighted by the interviewees, a theme fitting into the frame of the research goal. The constructed networks via the Atlas/ti software visualized (no)-connections between groups and codes that were not possible to assess by mere interpretation of the codes. Furthermore, I make use of member checking to account for the accuracy and honesty in the findings. I shared a summary or the whole findings with my interviewees, depending on their willingness to participate.

#### **4. Analysis**

The findings present how the CMC marketers and organizers perceive and navigate the change in the audience landscape. To begin with, the story of the marketers and organizers will be told, by focusing on the discourse of evolution versus revolution, core versus fringe audience, lifestyle, and audience profiling. Further, the discourse will lead to an overall pattern concentrating on the current audience dilemma for Dutch CMCs. Followed by trends reporting how CMC organizers and marketers roll and make use of strategies to deal with the change in audiences. The findings will be compared to the expectations and analyzed whether these have been fulfilled or not. These analytical procedures and the results obtained from them are described in the next section.

##### **Codes and Themes.**

Several codes about the way the classical music industry deals with the changing audience landscape have been developed. In total, 78 codes have been mentioned in varying degrees, as some developed a pattern throughout the data, while others, especially in-vivo codes have just been mentioned by a few interviewees<sup>2</sup>. For example, codes focusing on brand identity are mentioned 50 times, as well as Selling Tickets (39) or the Audience (38). This is partly due to the thematic analysis within the research frame. Less scope rests on Eclecticism with only 4 mentions, or Merchandise Products (2) or Rebellious (3) (see table D7. in appendix D). Nevertheless, some of the smaller codes have been grouped with others leading to a bigger theme.

As far as the open coding stage looks at relevant motives mentioned by the interviewees, either as important or quite extensive and regular, the selective coding is concerned with the frame of the research goals. The combination of both kinds of coding allows for a close examination of the connection between what has been asked during the interviewees' responses to the questions. After the first round of selective coding, the initial codes have been categorized into 13 groups, such as Branding, the Experience, Experimentation, Visualization, Canon, Audience Dilemma, Audience Profiles, Purchasing Systems, Popular/ Commercial, Information Seeking, Location, Education Systems, and Openness (see Table D7 in Appendix D).

##### **4.1. The Story: Evolution versus Revolution**

Throughout the interviews, every participant out of the 14 interviews, reflected upon its standpoint of CMCs in between tradition or innovation. They were either asked or came up by themselves to define their values either being heritage bound or appreciating modern values in CMCs. The interviewees had to decide whether they would associate themselves with heritage values or in the

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<sup>2</sup> The topic list provides a basic overview of patterns and repetitions and needs a revision to unite and group codes to more focused themes. See appendix for table.

direction of modern values. While some participants responded more towards the heritage discourse (10 interviewees), most reflected upon the current society and experienced the need to renew the image of the company to also communicate modern values (12 interviews)<sup>3</sup>. Some interviewees (5) defined themselves as a mix between both those categories. Stating that they were following their traditional values in their repertoire yet thinking they would represent modern ideas in the execution of a few projects. In the following, I will elaborate on three analytical themes, evolution, emergence, and revolution taken by various organizations.

### **Evolution: Heritage carries Tradition.**

The evolutionary level describes CMCs as they evolved in the 18<sup>th</sup> century. Regarding Bull (2014) and Kramer (2007), classical music is perceived as outdated, due to the strong conventions associated with it. However, the traditional concepts of transmitting knowledge and creating qualitative performances are of the focus here. Those concepts persist change in society and new formats in the industry. The classical repertoire is heritage that has to be prevailed and communicated in tradition. Some orchestras aim to remain true to the origins of classical music and perform the canon only. When giving an overview of its concert agenda, Artistic Programmer K mentions: “So, of course, we are, what I always say, we are like a living museum, to bring the core classical music repertoire in a normal concert format”. In comparison, Office Manager C considers traditional values an inevitable focus, but also wants to incorporate modern elements: “I see the heritage as a very important part, where everybody should know where it comes from and then go to the modern things”. Regarding the follow-up question, when asked how the interviewee makes the modern things appreciated by the audience, she said:

Looking back, it was a very bad mistake to neglect the audience like that to look down on the audience. You always have to embrace the audience and appreciate it. Yeah, I also think that there is such a gap, often, that I would advise to look for other forms of settings also.

After all, the evolutionary level values the heritage and is an inevitable process because of its strong connotations to the highbrow culture, segregating audiences. As some CMCs are well visited, they do not need to innovate to fit into society and invite other audiences. A few participants claimed that classics still sell the best, Marketing and Sales Manager E mentioned that the music should stay around its tradition. Today, some composers, such as Bach are reinterpreted and used in many cross-overs. In relation to those novelties, the participant was asked to rate their degree of innovation in terms of their CMC style. She responded:

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<sup>3</sup> 10 interviews had a focus on the heritage discourse (1,2,3,5,6,8,10,11,14), while the topic on innovation and modern motives (3,4,5,6,7,8,9,10,11,12,13,14) were discussed in 12 interviews.

Well, we do find innovation quite important, and we do try to renew ourselves in a way, but within these measures of our tradition. I think that our innovation isn't in the music itself but in everything else around the concerts. The way we perform will always be the same. [...] So, I think that your, the core, the way of performing that is consistent that never changes, but the jacket or the package of what we would put it in that's where we can vary and innovate and find these new younger people.

One innovation that shaped their brand, focuses on social media platforms to increase the accessibility of the organization but also experiment, whether it is possible to reach out to a new audience, without changing their content based on tradition. The participant, on one of the services provided on social media:

With our website, the biggest part of the audience comes from the Netherlands. With YouTube, it is the United States and Japan. So, suddenly we get all this international attention [...] well that is the biggest thing about our project because it is for free. It is our gift to the world.

Although a few orchestras remain traditional in performance and format, they experience the need to stay relevant. This can be done by either worshipping the classical canon or to introduce themselves to new markets. Those markets, as illustrated with the international YouTube, still only reach out to a certain society interested and accustomed to classical music.

### **Emergence: Fusing Tradition with Innovation.**

The emergent level is a step further in the spectrum of innovation, as it tries to fuse both values into one intermediary. As most interviewees are in the middle of the spectrum, it is apparent that the industry is in a change to become innovative and new, or it cannot go further, due to its tradition holding them back.

During the interview with Marketing and Sales Manager A, she specified being in between those values, since the heritage is deeply embedded in the orchestra's identity and being. "The heritage is a liability"<sup>4</sup>. Though, when the interviewee was asked in what way she experiences innovation in her own work surrounding, she said:

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<sup>4</sup> "Das Erbe wiegt schwer hier"

Now, one does not look towards the past. Of course, everything that has value and what needs to be preserved for those values, cannot be simply abandoned. Though, it still has to be developed, developed, developed. It is extremely important. From day-to-day<sup>5</sup>.

The symphonic orchestra calls for development, though trying to value the past. This is extremely difficult, when thinking about the change in audience landscape, as the younger generations, being less accustomed to the heritage values of classical music, modern values are increasingly becoming relevant.

Also, Marketeer F looks at different ways to promote CMCs. According to him, a new tradition can be performed: “So, you still perform the old music, but you are up for a new version, a new look, a new way of performing”. Though being very heritage bound, the participant summarizes possible innovations for CMCs:

You can innovate in terms of the music that you perform, so the material. Commission new pieces, commission new compositions, do something new, very essential new material and perform that however you want. You can innovate in terms of the form of the concert, so in the communication and the production, so you can have beer in the concert hall. [...] You ensure that the border the people need to cross to enjoy the classical music is lower and try to remove the atmosphere, the elites concert halls, to remove the romantic idea from the performance. [...] Historical performances are not a bad word, it's a good thing. But then again, I don't think that that we should let go of it completely because it is part of the heritage.

According to him classical music needs to stay traditional. He adds that it somehow must be made more accessible to a newer audience: “We must preserve old music and we must make it accessible to a newer audience”. Consequently, it can be said that CMC representatives experience major challenges to really risk the step for the new. They are inherited in the classic and are afraid to change the context of classical music when innovating.

### **Revolution: Experimentation for Innovation.**

This level is at the end of the spectrum of innovation and shows how some CMCs revolutionize the industry, by not necessarily changing the music content, but the format.

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<sup>5</sup> “Man schaut gerade nicht in die Vergangenheit. Natürlich alles was Wert hat und was Wert noch erhalten bleiben muss, das muss man nicht einfach so aufgeben aber man muss trotzdem entwickeln, entwickeln, entwickeln. Das bleibt einem nicht erspart. Das ist total wichtig, ja. Tagtäglich.”

We are very much, very keen on the development, on the genre of classical music. So, we feel that classical music should renew itself every ten or every year - every moment it should be renewing. [...] So, our work is to make sure that within one hundred years that there will be enough work from our area. That is basically our work (General Director B).

General Director B makes a plea to the industry, to not be afraid of development, because through constant renewal the CMC concept may endure for many decades to come. The participant expanded this statement by mentioning that all modern music originates in heritage and therefore in the canon of classical music:

I'd like traditions to always renew. Because society is changing at a rapid pace and I do think that newly composed music, newly new art should represent this change and this permanent kind of development. Museums, theater groups or an orchestra - the ones that are not able to renew from the insides to the outside are in danger for the future. So, I feel that contemporary music should aim to make the next step on what already exists.

Further, when discussing the role of the direct and indirect competitors, the conversation focuses more on the collective need to work together in the CMC industry. Taking an example of museums and theaters, which also constantly renew themselves, orchestras might be inspired to try out new products for new audiences. This means that to renew oneself it is relevant to look for communication and collaboration with other disciplines. In return, the interview with Marketeer and Publicity D shows its interdependency towards classical music tradition and values the contemporary. When asked to give an overview of the concerts and their brand, she said:

We are an ensemble for new music, contemporary music, but with emphasis on new. We have on one side the music of the 20th century composers that is a little bit our heritage, how the ensemble started. That is also our quality, because, now we are one or maybe one of the only ensembles in the Netherlands that is so skilled to perform this group of composers.

On stating that the company is very distinctive to the other orchestras, she adds: "If it is new and it's not limited to more classic ideas than I think the musicians are capable to do it". Though being very innovative and new in terms of classical music organizations, the participant finds it very difficult to promote the newest and most current developments in classical music. "Yeah for us I think it is difficult because sometimes you have to explain a lot because we don't play Bach". This means that innovation and newness do not necessarily mean success for CMCs. Just as some interviewees claimed that classics sell better and therefore do not feel the need to renew its image, although the audience still changes. The participant gives an example of how to try to overcome this obstacle and reach out to the new audiences: "We also focus on things like climate, gender, that is also a strategy to

reach out to the audience”. Eventually, through making sense of current trends and issues in society, the audience might associate innovation and modern relations with the traditional classical music industry.

While attending the MCICIM symposium in Maastricht<sup>6</sup>, I have interviewed the Marketing and Communication Manager J, who described his ideas and activity of innovation in CMCs and branding:

In our branding, more and more, I feel that we get back a sort of vibe now, around our orchestra [...] we are trying to do new things, that's good for the brand, that's good for new customers if that vibe is around us. In practice, as a marketer, I see innovation more as new formats. New formats, for new audiences, but what I hear more and more and learned this morning. Well, the small changes in the current practice are more on the audience perspective and the participation role.

Apparently, the marketers and managers are open to develop and innovate the image of the organizations, though trying to remain traditional and bound to heritage in terms of content in music. The overall trend shows that both, heritage related topics and topics focusing on the new have equal weight in the discussions. However, concentrating on the individual responses, the ensembles for new music as well as two symphony orchestras chose to speak more about innovating themselves, than other orchestras that focused more on talking about their heritage (see Table D1 in Appendix D). Innovations, as we have been introduced to, can vary from social gatherings to visual appearance to new media platforms, etc. to increase other ends of accessibility of concerts and therefore reaching out to new audiences and being relevant to current trends and issues in society.

#### **4.2. Core Audience versus New Audience**

The data shows that the respondents mostly spoke about a new audience, compared to their core audience (see Table D2 in Appendix D). It is interesting to note that the long-established orchestras which mostly exist through private donors, are concentrating on their core audience, being the musical enthusiasts with deep knowledge in classical music. On the other hand, the majority needs to focus more on the lay audiences and have them more engaged in their CMCs.

Although journalists and scholars addressed a decline in older audiences visiting CMCs, the Dutch industry shows stable sales figures. As some orchestras do not even have to promote their concerts, because they are sold out immediately, others make it their goal of integrating a wider

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<sup>6</sup> The MCICIM symposium took place in the last week of March 2019 in Maastricht. It was an organized debate about innovation in classical music. Key speaker was inter alia Adam Szabo from Manchester.

audience. Marketing and Sales Manager A introduces a change in the audience landscape, as the general audience is becoming younger, though being less accustomed to classical music:

The audiences, who are familiar with classical music are becoming less and less, but they are not dying out. There will always be people, who are familiar with classical music and maybe they will become younger [...]. But one of our goals must be to achieve that<sup>7</sup>.

Especially the more traditional organizations seem to have high sales figures, as their classical concerts sell out immediately. For instance, in times of Easter and the yearly St. Matthews Passion, Marketer F says:

There are a lot of existing audiences and the St. Matthews, we are almost sold out for all the concerts. So, it's easier, because your audience is already there, and you already have them engaged.

Yet, all representatives mentioned that they require subsidies to remain in the industry. Also, Marketing Manager/ Director G when talking about their subsidy support:

We do like commercial concerts, to get our own income and stuff like that. So, we don't need to be completely dependent on the government and on the subsidies. There is absolutely no way, that art can function without subsidies...because the thing is, if you must think about money, then you cannot aim for the same quality that you want.

Eventually, it can be said that Dutch CMCs do show great sale numbers, though they try to address younger generations to come to visit the concerts. Commercial concerts and subsidies guide the CMCs to not only stick to the core audience, but also reach out to a wider and more diverse audience.

### **Core Audience.**

The core audience is described as the audience center in the CMC industry. Out of all interviews, the core audience seems to be conceptualized as deliberately old, in place of being retired and having enough time to consume CMCs. They have immense knowledge about classical music and are accustomed to the conventions in CMCs. Thus, being connotated with the concept of *Bildung*. *Bildung*, is a concept on highbrow cultures who value cultural capital and distinguish themselves from the rest of society by being cultivated and civilized (Bourdieu, 1984). The core audience is challenging

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<sup>7</sup> „Die Zuschauer, die bei uns diejenigen sind die sich wirklich auskennen mit der klassischen Musik, das werden immer weniger, aber sie sterben nicht aus. Es werden immer Leute da sein, die sich mit klassischer Musik auskennen und vielleicht werden sie auch stets jünger, das wissen wir nicht, wir sitzen nicht in der Zukunft. aber eines unsere Ziele muss genau das sein, um das zu erreichen“.

the CMCs to provide a continuous variety of high-quality concert series of the canon since those have proven to sell the best. Nevertheless, this audience group decreases.

While the symphonic orchestra is making use of a few innovative projects to also invite the younger audiences, such as the IClassic series<sup>8</sup>, the core audience consists of the older generations.

The elderly may explain and teach the younger ones. They have enjoyed and participated in classical music for a longer period. They have a different knowledge base, and it is also interesting to exchange knowledge within generations. That is a purpose. We must facilitate this as an organization. This exchange between older and younger generations: the exchange of knowledge, the exchange of experience and maybe to also prevent the loneliness of the older generations, as they are lonelier than the younger ones. It's a meeting place. The meeting place is open to everyone. [...] I know that the elderly value the younger audience, but they also like to keep their traditional routines and to keep their experience. It is of importance, to have this meeting place accessible to all those people with the same possibilities to feel comfortable<sup>9</sup> (Marketing and Sales Manager A).

Marketing and Sales Manager E, when asked about what platforms are used to communicate to the audience, makes distinctions between people who are accustomed to classical music and others who are not. Apparently, only the ones who are already accustomed to it are potential audiences:

I think we have to make a difference between our regular concerts and our YouTube Channel and Facebook because the video only consists online. If we look at our regular concerts, we have our own channels. [...] It's, it doesn't make sense I think to try to find people with no connection to classical music or interest in classical music what so ever. It's too niche.

While arguing a general interest in classical music is required, the core audience is thus defined as:

Old and rusty and dusty and 50% of our visitors of the St. Matthew Passion are over 50 years

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<sup>8</sup> A CMC concept including innovation and information. The series are adapted by various symphony orchestras in the Netherlands, whom are eager to experiment in their concerts style and create something new. It is open to a wide audience as trying to inform them about classical music and teach them how to understand it today.

<sup>9</sup> "Die älteren können den jüngeren etwas mitgeben. Sie haben schon viel länger klassische Musik genossen und mitgemacht. Sie haben einen ganz anderen Wissensstand und es ist ja auch interessant um sich auszutauschen und halt innerhalb der Generation. Das hat eine Funktion. Wir müssen das als Organisation auch stärker fasilitieren. diesen Austausch zwischen der älteren und der jüngeren Generation: den wissensaustausch, den Erfahrungsaustausch und vielleicht können wir damit auch in der älteren Generation vor allem ein klein wenig der Einsamkeit bei dem ein oder anderen entgegenwirken, weil da sind auch leider etwas einsamere Menschen mehr zu finden als in der jüngeren Generation. Naja es ist auch ein Ort der Begegnung. Das müssen wir auch, das sind eine der Dinge an der wir arbeiten. Ein Ort der Begegnung ist für alle da. Ich sehe es immer mehr und ich weiß es auch aus den Daten, dass wir immer mehr junges Publikum hier her bekommen ähm gleichzeitig weiß ich auch, dass die ältere, das das ältere Publikum es wertschätzt, das jüngere kommen, aber auch gerne an ihren Werten festhalten möchte und an ihrem Erlebnis und als Ort der Begegnung ist es wichtig um all diesen Menschen den selben Raum und den selben Möglichkeiten zu bieten um sich wohl zu finden in diesem Haus".

old. If you look at a certain point of the supporter's group, they are even older and 70 and we have a large group that is even older than 80 years old in percentages. So, we have... there is an assignment for us in a way, that we really have to find this younger and new audiences.

Marketing and Communication Manager I gives a description of their existing audience they are targeting, which is compatible with the other respondent's core audience for the CMCs. This group has all the needs to actively engage in supporting the orchestras, though it is declining.

70% of the visitors here is 55-years-old, having the time to go to regular concerts, to go visiting us in dozen times of the year, through the whole programs of different genres, investing even in small payments and budgeting, but this group is declining.

Eventually, the regulars of the CMCs are familiar with it, and their expectations are challenging the organizers. They have very insightful knowledge of classical music and go frequently to concerts. Nevertheless, this audience is declining for some of the orchestras interviewed. Surprisingly, whilst the bigger orchestras concentrated more on talking about the canon and its core audience, the smaller orchestras focused more on talking about opening the system and strategies to reach out to the new audiences (see Table D3+D4 in Appendix D)<sup>10</sup>. Some, therefore, try to concentrate on new audiences, younger eventually. This audience is seen as a brick filler and to endure CMCs appreciation and attention. Though, some interviewees addressed the elitist and traditional focus of both the core audience and the industry itself that limits the outreach to the fringing audience. Therefore, it is argued that the target audience might need to be trained by either concert series or other audiences to familiarize themselves with CMCs.

### **The Fringe: A Desired Audience?**

The target audience is an increasingly growing fringe group that dwells across broad arrays of interest in music and culture in general. This new audience group has been repeatedly mentioned by a few respondents, who label it as an open and rather undefined group of audiences that the CMCs try to reach out to<sup>11</sup>. They are distinguished to the core audience, by means of age ranging between 18-60 years old, eclectic taste, lay audience of classical music, as well as including students and others, who are already interested in listening to classical music. The desired audience may be younger than the core audience, should be interested in classical music, but does not need to know much about it and it asks for an atmospheric setting at CMCs.

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<sup>10</sup> Whilst the bigger orchestras mentioned little about openness, the new music ensembles suggested to discuss more about the openness in CMCs, instead of looking at the canon. Eventually, the discourse of being open to new audiences and audiences in general is a more relevant topic, than relating to the canon of classical music.

<sup>11</sup> Interviews 7,8,9,10,12,13

General Director B, after explaining the traditional format of CMCs elaborates on the new audience and that it might change the format:

I am absolutely convinced that the younger generation is also open to classical music, but the prominent way is putting them off. Because of the problem with the new audience is the old audience. [...] I think the problem for the new audience is the old audience. And also, the old audience is quite intolerant about what you could and might change in the traditional focus group.

In another interview, Marketing Manager/ Director G pointed towards a few projects they organize, such as choosing different locations and this affecting the audience landscape.

We never talked about young visitors, but new visitors. So, we aim at people who will like to listen to classical music, but really don't know where to start and most of them are young, obviously. Of course, the style and the way we communicate and the posters, it's not really for 60-year-olds. We have some and that is fine.

With the help of promotion, the new audience might come to the concerts. When asked whether the participant sees potential in the new audience, the interviewee responded:

What we really hope with people who went to our concert and they think that the step to go to a real classical music concert would be less. So, then I hope they won't be too disappointed when they come in and see all the grey, white...which is awesome you know. Everyone is like 'Ah we want young audience' and that's wrong to want young audiences, because you don't want young audiences because they buy tickets late, it's annoying, they are really not faithful. So, one day they go to ours and the other day they go to another concert. They are really, they are not as faithful as the older audience, but it's nice to have the mix.

The industry increasingly approaches a target group that is unpredictable in making choices and is genuinely responsive towards trends. Accordingly, the industry might not be prepared to target this audience, which is at the brink of CMCs and other cultural entertainments. The respondent first described that the more classics are played the less it sells, which is quite different from what the other interviewees have mentioned so far. Though, when making use of some popular keywords that trigger the audiences' interest, it may be sold out. Whilst saying that not only their project is new to the industry, the respondent mentions it's also new to the audience:

That was the scariest decision we ever did was the first one, it was exactly two years ago and the Monday before we sold 300 tickets, the concert was on a Saturday. And that was just you know, we had to sell 1000! What shall we do? We can send a newsletter to the big

orchestras. And then we said, no we are not going to do that, because if you guys send the newsletter, it will be sold out in a second, but with the same audience. And we didn't do that and that was a scary decision. But I am very happy that we didn't, because it was sold out and 80% was younger than 40. So, it worked you know, they just buy their tickets late.

While most interviewees see benefits for the ticket sales, when reaching out to a new audience, General Director H sees benefits for an educational marketing campaign. When referring to a project they organize:

We get youngsters along with classical music or symphonic music and use their own network to share their podcast submission, so, we also have a marketing tool with them. It's the first time, so we are building the infrastructure right now, this is going to be online this week and we have six weeks to collect all the participants. We have no idea if anyone is going to do it, but it's not too big of an investment and it will be there for next year as well. But there should be an educational, strong element in it. It's not just marketing. It starts with the educational idea and vision and then we find marketing ways for the benefit of the ensemble.

Some interviewees point out that festivals might be a good concept to approach younger generations and introduce them to classical music. Marketing and Communication Manager J, when talking about how to get young people to connect to contemporary or modern classical music:

A festival, where more young people are interested in new music and we are trying to find those niche people and help them bring their friends and share what it is. But at the same time, you see a lot of these events that are being visited by 55 and older and it's a grey mass, which is declining, which goes through all those projects, but all the youngsters are more picking. They are choosing their concert one day before or two days before, while the older target groups are already choosing on the whole season, for example. Buying tickets and choosing what they want to go to, so it's changing rapidly, and we are still trying to figure out how to connect with the youngsters.

Eventually, the younger audience is not only difficult to reach out to, but it is also perceived as unpredictable whether they appreciate CMCs or not. They are recognized to make more selections, though this can be an eclectic taste spanning from interests in pop music to classical music. The orchestra hall organizes, just as many other orchestras, film music concerts, or game music to attract the younger ones since this is of more interest to them. The Marketing, Communication and Sales Manager N gives an overview of their audience analysis:

For me is younger by the way 25 to 40. Under 25 it's a little bit of education. So, it's important what you program. It's also what you get like Haydn, Handl, the old music at this moment. Maybe in 10 or 20 years it's different, but at this moment fewer young people are

visiting it, and that's also for the contemporary music from the 70s and 80s. That's also for other older people and young people go in more, to the late 19, beginning of the 20th century and the minimal music and film and game music.

When asked to focus more on the current audience, compared to the core audience, which tends to be older:

And like people, like concerts like Joep Beving, we also can produce themselves, sometimes, or like Einaudi, that's also concerts for themselves. Or those people often just come, just one time, because they want to see their star. [...] Maybe we also get this group of people, but at this moment, they tend to come just one time, or one time here or something like that.

Eventually, the fringe audience is a quite large group of people ranging from ones interested in classical music, to media enthusiasts in e.g. film or games, to festival goers. This large group seems to show a more selective and unpredictable consumer style, compared to the core audience. This might be a larger possible group to reach, though it is increasingly difficult to communicate to a group with a different lifestyle and mindset.

The current study found notable differences between the new audiences and core audiences. The core-audience refers mostly to the canon of classical music and stands in a sole relationship with the concept of *Bildung*. Some CMC organizers believe that the core audience might educate the new audience but do not consider the current lifestyle of the audience. It is possible that the revolution leads to experimentation and new concepts in branding. However, the canon as such may not be changed or used in relation to those categories, due to its longing to educate people to be able to consume it. The core audiences, who are enthusiastic about and skilled in classical music, will be in contact with the new audiences, which I will further elaborate in Chapter 4.4.

### **4.3. Lifestyles and Audience Profiling**

The industry shows growing interest in a desired new target group, the fringe group. However, the fringe is a broad group that shares some overarching values and lifestyles apparent in their consumer behavior. The CMC representatives show how they perceive this lifestyle and how they navigate the diverse interest via audience profiling, further in the text.

#### **Lifestyle.**

The lifestyle of the new audience lies in leisure activity and authenticity. According to the interviewees, they enjoy drinking wine, going to museums, going to cinemas, or travel during their leisure time. Their values differ from the core audience, being apparent in the way they behave. The focus on lifestyle gives important information about the way the new audience thinks and behaves; therefore, the CMCs can try to adapt to this lifestyle when reaching out to them. Some interviewees

gave some details about the lifestyle and how they deal with it<sup>12</sup>.

With regards to the photo interaction, the majority discussed how photographs and visuals, in general, are used to attract younger generations. General Director H described the promotional material speaking to the young especially, as covering sustainable concepts and introducing a collective atmosphere. “Especially the millennium generation is looking for something that is trustworthy to stay, it is sustainable. So, this is a very smart way to brand it to a younger generation” (General Director B). Also, Marketing and Communication Manager J claims that photographs can influence emotions and atmospheres already when used in promotional material. During the photo interaction, he argues:

Our audience likes more pictures of the emotion they can expect. So, we brought in pictures of sometimes the emotion related to the music. For instance, in the new brochure you will see, we are playing the Dvořák’s No. 9, the New World with a famous conductor. No picture of the conductor, but only a picture of the Statue of Liberty in New York. Just the feeling, new world [...] So, that’s the direction we are going now and it’s, well, conductors. We had a famous conductor a few months ago, with us. And he came into the hall and saw the poster and no picture of him, no name of the conductor on the poster.

Therefore, it can be said that the focus on the lifestyle of the fringe audience slowly takes over the attention of the marketers, and stepping away from the hierarchic manners, such as valuing the composers. The Marketing Manager/ Director G was asked whether she adjusts the marketing to reach out to the new audiences:

They visit more museums than other performing arts. So, that was for us a reason to get some, to work together with local museums. So, we now have something in Breda and we have something in The Hague, to get you to know because, obviously, our audience likes that more...for the Facebook advertisement it’s brilliant to know if they like wine and to cycle and you know, just you can... put those criteria.

The respondent continues and gives an example of how to approach the audience for her project:

You know the marketing for that is also very different. It is very personal, we have to post selfies of all time and Insta-stories about how we drink our coffee and people like that. For an Ensemble that would just be nonsense to do that, but for the music foundation it works,

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<sup>12</sup> Interviews talking about it: 7, 9, 10, 11, 12

because you know, they like that. 'We don't like to see the logo. We like to see the coffee.'  
That is also a difference.

Apparently, it is successful, when the organization adopts the lifestyle of its audience to promote and communicate the brand and the concerts. When asked how the audience engages with the concerts:

If you look at the younger target group, they behave in a totally different way, they will not be buying tickets beforehand [...]. And this is something I didn't see three, four years ago. So, this is a change where people are figuring out as they go, what are we going to do tomorrow and the day after, where this older target group is planning three for months ahead and even longer.

For instance, Marketing and Communication Manager J gives an example of what kind of project deals with this lifestyle of the new audiences and how it is adapted:

In Maastricht, Karneval is very big business. So, we have 8 Karneval concerts, where we make a lot of fun on stage and people tell certain jokes and music is playing, of course, a big role and people see those concerts as the interesting start of the Karneval days. So, we made a tradition out of it and people, who have nothing with classical music, just want to be there.

Artistic Programmer L addresses a limitation when trying to reach out to a new audience, as the taste in goods is more eclectic, the consumer lifestyle is difficult to predict. He talks about the cultural omnivore:

It is very difficult to bring the cultural omnivore type of audiences to classical music concerts. They are too busy with other events and happenings, they only buy the tickets super late, etc. The core audience, in return, gets those subscriptions half a year up front and joins almost every concert series there is.

Apparently, analyzing the lifestyle of the new audience, which is very different from the behavior of the core audience, has its benefits and difficulties. On one hand, when adapting to the lifestyle in brand and image, the CMCs might be appreciated by younger generations. On the other hand, their lifestyle also makes it unpredictable for successful events, to sell out on time.

### **Audience Profiling.**

While the CMC organizers and marketers increase their audience outreach, becoming wider and more diverse, the audience may be categorized in profiles. Profiling of audiences makes it easier to program and promote the CMCs. Audience profiling is a marketing strategy to personalize the products and services offered, as in creating marketing personas or conducting surveys and study

demographics, interests and behavior to improve marketing. The participants, overall, demonstrated that the more the marketers categorize and distinct the audiences into focus groups, the more they also try to focus on the experience and participation of the audience at the concerts (see Table 4.).

Interpreting table 4, on average the more the interviewees lay weight on talking about the audience profiles, the attention on creating an experience for the audience increases simultaneously. Via focus groups, the marketers differ between various groups of audiences and create associated personas to personalize the promotion and execution of CMCs. As soon as they created a fictive persona visiting their concerts, including information on its age, hobbies, job, wage, and interest, the marketers adjust the promotion to create a personalized experience for the focus groups.

|                   | I  | II | III | IV | V  | VI | VII | VIII | IX | X  | XI | XII | XIII | XIV | Sum |
|-------------------|----|----|-----|----|----|----|-----|------|----|----|----|-----|------|-----|-----|
| Audience Profiles | 14 | 15 | 5   | 4  | 14 | 4  | 14  | 3    | 4  | 7  | 3  | 2   | 14   | 2   | 105 |
| The Experience    | 7  | 9  | 7   | 10 | 8  | 12 | 26  | 19   | 8  | 11 | 11 | 3   | 21   | 6   | 158 |
| Sum               | 21 | 24 | 12  | 14 | 22 | 16 | 40  | 22   | 12 | 18 | 14 | 5   | 35   | 8   | 263 |

**Table 4. Audience Profiles versus The Experience Ratio (all interviews)**

For instance, Marketing, Communication, and Sales Manager M shows how they make use of marketing personas and how this helps to address the various groups of audiences. When asked to elaborate more on their marketing personas, the participant explained the lifestyle segmentation:

We are now in a process of making new personas, based on their behavior of buying tickets but also based on their online activity or offline activities. So, we try to make some different persona, but also, and that's a little bit new, is culturally diverse, it's different also, in media usage. So, we are in the middle of that. And then try to say, okay, because ... like I can imagine that the Joep Beving program<sup>13</sup> really has one type of persona, but a lot of concerts, like Rachmaninov piano concerts, there are maybe four personas in one hall. And of course, more, but the biggest groups are perusing this lifestyle segmentation. [...] We tried to make it more personalized to more fit for our organization. But also, of course, you make some generalizations with personas.

#### 4.4. The Pattern: The Audience Dilemma

As the interviewees experience being in between longing back to tradition and trying to be new, the change in audience landscape challenges them to renew and to innovate their image. The core audience expects quality and variety in traditional pieces, while new audiences mainly feel attracted to newly developed strategies focusing on experiences and atmospheres triggered in different locations.

In all the cases, the informants reported the audience dilemma. The participants experience audience dilemma where they struggle to program and promote and perform the concerts in a way to

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<sup>13</sup> The interviewee points to the photographs used during the photo interaction, to make his argument about Joep Beving.

reach out to both, the ‘die-hards’ and the new audiences while their ideas and behavior at cultural events are very distinctive<sup>14</sup>. As the core and fringe audience is revealed to sincerely differ in consumption practices (Chapter 4.3.), the participants are in the dilemma on how to reach more audiences due to the decline of interest in CMCs, but also to keep their regulars.

General Director B, when asked whether their core group would also go to the *Pieces of Tomorrow*<sup>15</sup>:

Not very often. Yet, we do see some slightly older people in their 50 or 60 years, at the contemporary kind of format you see them as well. But in general, those are quite divided audiences. And we like it that way because we don't want them to mix. It's a change of culture, a change of lifestyle so this is important.

The interview with the Marketing and Sales Manager E, the role of the core audience as an active member supporting the existence of the company, it might have some values that will be adapted in the CMCs of the organization. When asked whether the core audience also have some decision-making power or how they are engaged with it, when donating money:

Our audience is really concerned [...]. They find it important what we do, but their knowledge level is high as well. So, it happens sometimes, when we post a video that these people actually have scores at home and they read, and they say, ‘Oh I heard a wrong note in bars, such and so’. If we would have these people involved it's a bit of a risk as well, because of their high knowledge level.

Besides being interest in the program, the regulars also tend to critique campaigns. The interviewee is ambivalent whether she should integrate them or ignore their comments, since her interests are on selling tickets. She continues by making the point that it is difficult to have them engaged and selling tickets:

We had this radio campaign twice, and two times I got an email from the same guy, who is over 80 and a large donor. He donates quite some money, and of course, he has some privileges because of that. Completely angry and shocked and ‘What are you doing, talking through music, this is not your level’ He thought it really doesn't fit the ensemble. If I must listen to this guy, what can we do? For me being on the radio is a way of selling tickets.

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<sup>14</sup> Who spoke about this: 2, 10, 11, 12, 13, 14

<sup>15</sup> “Full-fledged classical music in a pop jacket. The formula for success: we start a little later, beers are allowed inside, the conductor speaks out loud, DJ St. Paul is our host, visuals support the story and furthermore we let the music speak. Immerse yourself!” (“*Pieces of Tomorrow*”, n.d.)

Marketing and Communication Manager J explains conservatoires struggle to approach audiences. It's a fringe group for them, and their staff did not figure out how to deal with it, as representing a superior role of canonical music.

So, you have a lot of higher educated people, that will tell you that they don't know a lot about classical music, but they would like to know a bit about classical music. So, helping them to understand the most basic themes, helping them through Spotify and music lists [...] And it's difficult to connect to this group because here we are about top-level classical music. So, the staff finds it difficult to connect to this kind of the first step in classical music. This target group, they just know the big names and you cannot really dive deep with them. You need to find, with patience, we need to find a new target group and built on that. That's a struggle that we are going through.

While being challenged with the fringe group, the core audience is easy to engage with. The conservatoire is afraid to be too traditional to reach new audiences, though does not change because the core still comes to the concerts.

The core group is so important for us in terms of turnover, it's almost 80% of our financial basis of ticket-paying visitors. So, that's very important for us to keep those customers coming and the difficulty is, that you concentrate on that group too much and that you have a feeling of ... that we are almost afraid of losing them and that you are too conservative not to disturb that relationship. Because you know, that people are coming solely for the music and the deep feeling with the music of that group of visitors. While the other group is more open-minded, has less knowledge about classical music, less knowledge about the soloists and the conductors, that's playing a less important role. And the difficulty is that you are too conservative to maintain that primary group of customers.

Also, the respondent experiences the difficulty of how to approach both groups at the same concert. He gives one example of how to navigate the newcomers:

We now have an app. It explains the music to you, while you are listening to it. So, if you hear it for the first time the 7<sup>th</sup> symphony of Mahler, you can put on the app. Then in real time, you are explained what you are hearing. So, the background, why it was composed, but also the special moments in the music that are addressed in the app. It's very helpful for the new audience. [...] So, people won't see that other visitors are using it, but they are negative and are responding to us as the organizer of the concert, negatively. In a way: 'Why are you innovating, we don't want smartphones in the concert hall, please stop this new initiative'. That's the dilemma. We continue, I explain it to them, why we are doing it and probably they don't notice, but almost 20% of the visitors are using it and they can't see it.

Even if the core audience complains about this innovation, they continue to support the newcomers. Further, when asked about how they respond to the die-hard's reaction, he said:

We have to move on and then well, probably we will lose that customer, but the next generation matters more. We have to improve, we have to innovate, we have to go further. You can't have them all. We try more and more to show the visitor, the students, business people, young people, who attend for the first time our concerts, to show more and more the emotion of listening and participating in our concerts.

Further, Artistic Programmer K mentions that the diverse audience makes it more difficult to adopt to the individual mindset of those. He was asked to describe the current audience of the IClassic series:

We expected to have a much younger audience to be there. The result is that it has not so much to do with age, but much more with the open mind. What we see that it's a very mixed public, with all kinds of ages, and not so much only the younger group. First, it was our goal to be there for them and to give them an experience by presenting other concert formats, which would be very interesting for them. Unfortunately, we failed.

Similarly, Artistic Programmer L does not know how to navigate the fringe group. He adds that it is hard to transfer the fringe group to serious concerts:

It is very difficult to bring the younger audiences to the regular classical music concerts. In fact, the film concerts that they would go to is most often music composed by Beethoven or Strauss or Verdi. Though, they are not as interested in it as I would think they would have been. [...] It is very difficult to bring the cultural omnivore type of audiences to the classical music concerts. They are too busy with other events and happenings, they only buy the tickets super late and so on. The core audience, in return, gets those subscriptions half a year up front and joins almost every concert series there is.

This discourse between old and new generation's values illustrate the image of certain CMCs being challenged to renew, though still expected to stay the same due to heritage value. Most interviewees increasingly pay attention to adjust the media platforms to the audience lifestyles. Marketing, Communication and Sales Manager M, when asked about the difference in innovation between classical music and innovation in branding, he reflects on their media activity:

A lot of things change, and it changes a little bit slower in the classical music culture, because there is less money, but also it has this more traditional public you could reach with brochure or with flyer or things like that, or an email, of course. But nowadays, because of the new audiences and the new concepts, you also, don't reach a new audience with a brochure

anymore. But we have to go very wide in our marketing activities because our brochures are still very important.

Marketing and Sales Manager N analyses their current participation rate, in relation to where the CMCs should stand in future terms:

You have subscribers and the single ticket buyers. We have these 20.000 unique visitors per season and 4.000 are subscribers. And these subscribers have a totally different profile than the single ticket buyers. These single ticket buyers can be divided into different groups. Out of these 16.000 single ticket buyers, there are 13.000, who just come once a season, and from that group there are 11.000 new. So, there are a lot of tourists that you can focus on, but I know the whole cultural sector has that problem. Of your new customers, just 10% will come back the next season. So, you can do a lot of efforts in this group, but yeah, we should think about ways to attract them and to come back. Of course, but that's a hard group to attract. So, maybe focus on, of course, the subscribers, but we have a lot, we do there, but also on this single-buyer group.

According to the respondent, besides attracting a new audience it is also a major challenge to turn them into subscribers. As the orchestra is placed in Amsterdam, they also have a lot of single attendees, e.g. tourists. She continues to describe her current audience, but how the core audience differs from the single ticket buyers and the middle group:

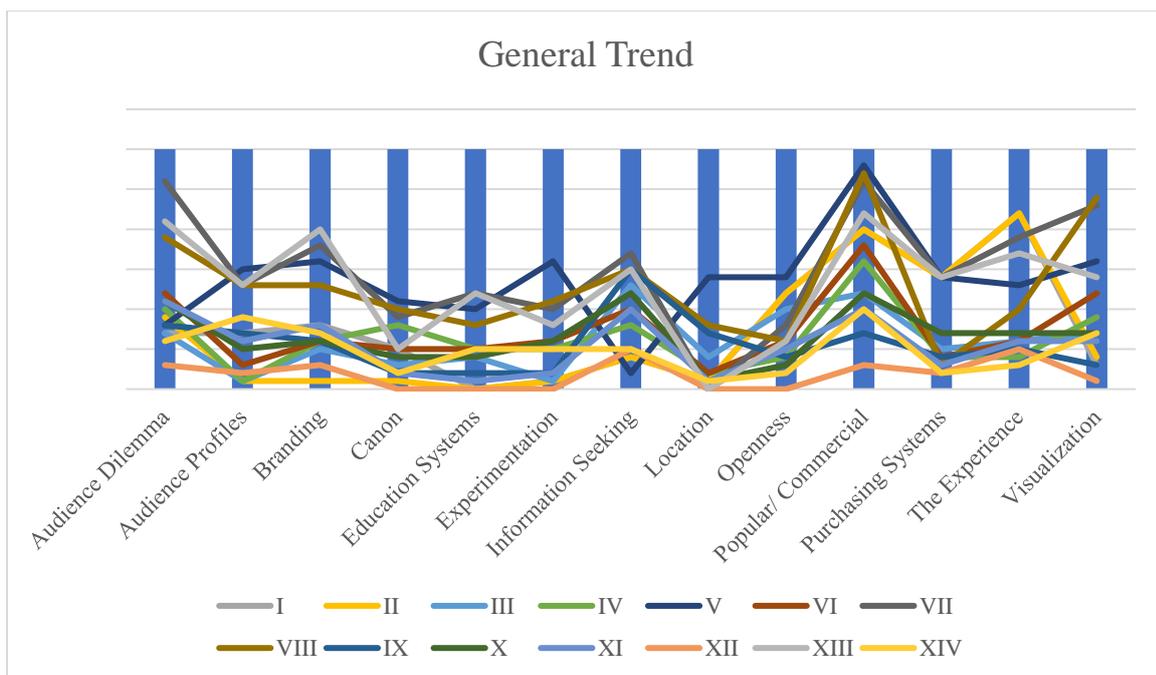
These single ticket buyers, they are much, much younger than the subscribers. It's like roughly 25 % till 30, and then 25% it's 35 till 50 years old. 50, 65 and then 75 is the oldest one. Well, these subscribers are above 65. So, that's a totally different group and they come, tourists will be, the group of tourists is growing in the single ticket buyers. And Amsterdam and area, the Randstad, so big Amsterdam is the most important group for single ticket buyers.

The audience dilemma is a theme occurring in all the interviewees' marketing, programming and managing processes. To reach out to a wider audience to prevent a decline in core audiences brings some major challenges with it. Decisions are made on whether to unite the core audience with a new audience, creating segregated events for the new audience, experimenting in music, experimenting with the atmosphere, or focusing on current trends in society. Some major influences for this re-branding of the image of CMCs are driven by the lifestyle of the new audience, the change in purchasing systems, as well as eclectic and selective taste. Overall, the discourse of moving in between heritage and innovation, tradition and modernity, and old and new, pushes the CMC marketers and organizers to reframe their format and to look more closely at what the audience appreciates and desires.

#### 4.5. The Trend: The Way CMCs roll

The general concept of how CMCs take note of a changing audience landscape can be exemplified as a guide that illustrates the uniqueness of the CMC profiles. The guide displays the strategies and position of the various informants on an average level, as well as on a personal level. As I found out in the literature review, as well as in our findings, today's classical music concerts are challenged by their own frame. They have to innovate and refurbish their context and create brand objectives in relation to what is trending in the current society. Therefore, CMCs happen to be in between tradition versus innovation, heritage versus modern, and classical versus contemporary. The choice of their position relates to values they believe in, as well as the products and services they offer and perform.

This performance can be demonstrated as a graphic stabilizer on a stereo. An equalizer with more than 78 dials (codes) on them. All the dials have different units that have different effects. All those means are produced by the unique CMC profile, resulting in different strings. Below, the equalizer is defined by the 13 themes most mentioned in the interviews.



**Figure 4. General Trend of Theme Ratio** (Overview of the weight of the themes in relation to one another).

This figure entails another step in the analysis of the researched data. All 14 interviews (I-XIV) are compared to each other, to illustrate their performance and reaction on certain themes. What stands out on the equalizer is that the dials on the popular and commercial matter are respectively high, whereas themes discussing the canon, or the education systems are relatively rarely mentioned by all interviewees. The general pattern of CMC profiles illustrates that it is of more relevance to discuss the commercial side of CMC performances and promotions, in terms of their success. Little

has been mentioned on the location, but as we heard from a few interviewees, the location sometimes increases the popularity of a CMC.

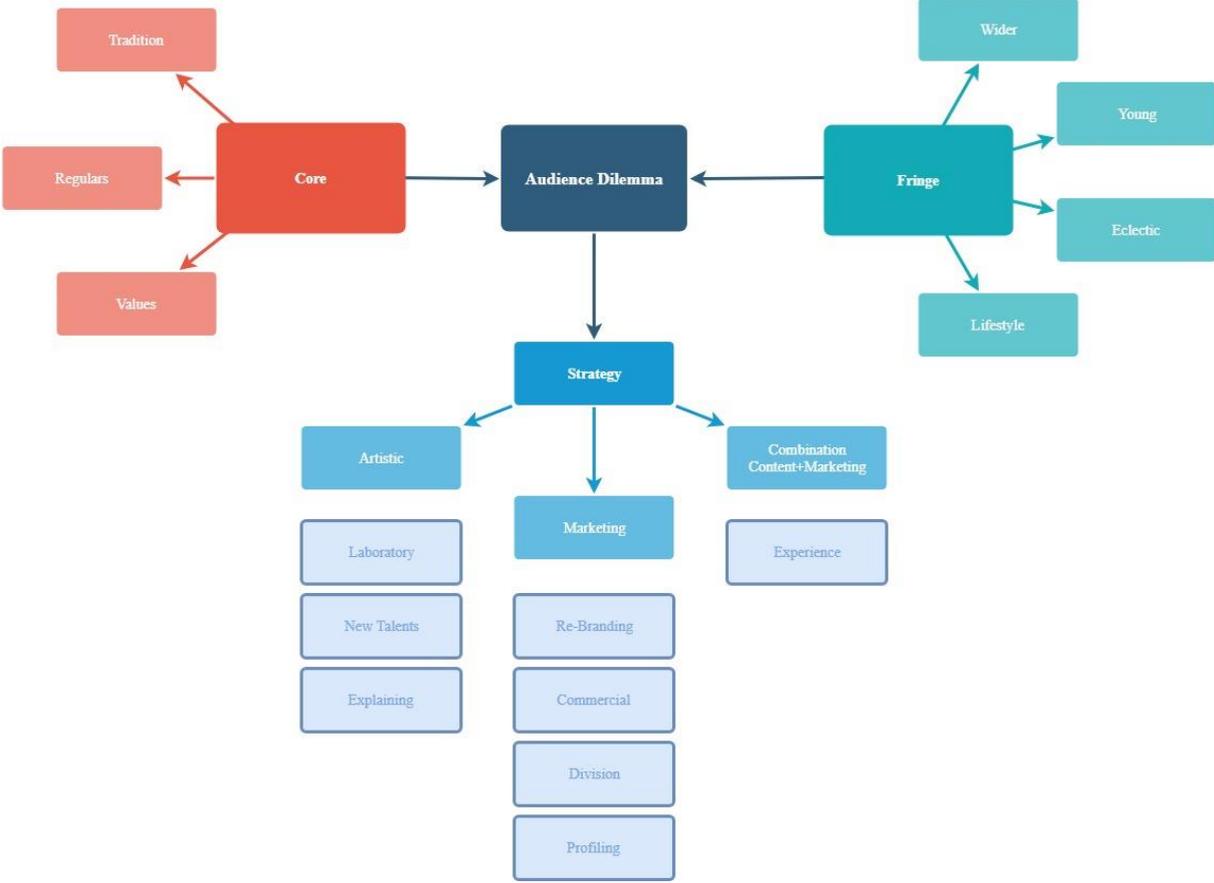
In relation to the topics discussed most and the examples of successful and less successful promotions of CMCs shared, the example of the stereo stabilizer shows that each representative drives its unique strategies to deal with its reframing of the CMC format (see Table D8 in Appendix D). Since the Classical Music Ensemble and Society (V) concentrates on experimenting in both concerts and branding, the themes of popularity and commerciality and openness are very high. Therefore, it could be said that those projects might be more successful by experimenting in their frame, because audience dilemma is not affecting them as much. In contrast, the National Ensemble and Music Foundation (VII) mentioned relatively much about the audience dilemma, compared to other interviewees, and therefore takes information seeking and visualization as a tool to mediate their popularity in the industry/ bring in more popular artists to the concerts. Also, one of the symphony orchestras (XII), which was a very open, almost narrative interview, talked about the challenge to deal with the dilemma in audiences, and therefore using the power of cross-over with popular artists, as well as seeking more information about its audiences (created focus groups) to increase the personal customer-oriented experience during the new formats of CMCs.

The ratio shows the general tendency of what has been discussed in the interviews. The 13 themes entail information about how the marketers and organizers navigate their overall performance. While education systems link to possible projects to train new talents and use classical music to educate the lay audience, the visualization theme refers to a sort of desensitizing effect via audio-visuals and posters to make the target accustomed to the organization. Further descriptions can be accessed in the codebook (see Table D7+8 in Appendix D). Though, to keep in line with the research format, only themes concentrating on the changing audience landscape have been considered. The key aspects of how Dutch CMCs perceive and navigate the changing audience landscape can be grouped in four overarching themes, including the core audience, the fringe audience, audience dilemma, as well as the various strategies used by CMC marketers and organizers to deal with the dilemma (see Figure 4.2).

#### **4.6. The Map: The Strategies to cope with the Changing Audience Landscape**

As shown in the analysis above, Dutch CMCs are challenged by the audience dilemma, as the core audience declines. CMCs need to reframe their traditional format to appeal to new audiences. Though, when reaching out to new audiences, the challenge is to adapt to the different lifestyles of the various audience groups. The groups may vary from classical music experts and enthusiasts to younger audiences with less expertise on classical music, and more international diverse audiences, e.g. tourists. Especially the younger generations tend to have a different lifestyle compared to the core audience, which follows traditional values and prefers the canon over experimentation.

All interviewees aim to overcome the decline in the core-audiences, while also making use of various strategies that appeal to new audiences (see Figure 4.2). The strategies include two major approaches: artistic influence and marketing perspective. The artistic perspective rests on the musical approach and treats CMCs as rich and qualitative heritage that needs to be passed on to the next generations. Regarding the marketing perspective, the focus lies on recent developments on how to reach out to a new audience, by being innovative and provocative. A third strategy is a combination of both strategies. In the following sections, I will elaborate on all three strategies.



**Figure 4.2. Mapping Strategies Navigating the Audience Dilemma**

**Artistic Strategies.**

The artistic strategy deals with the audience dilemma by making use of more experimental projects and using the new audiences as a laboratory, recruiting new talents via social media channels, or educating the new audience first and then have them participate in the CMCs.

***Experimentation.***

The results of the representatives’ audience research on focus groups show that inter alia, the fringe tend to be more open towards experimentation as well as rather looking for a social experience than the pure confrontation of performances. Besides, the core audience seems to challenge the CMC representatives with their expertise in classical music, as referring to mistakes in videos or audio clips.

Even if they try to experiment, they risk a critique or complaint by the core. Therefore, most of the interviewees first try out the experiments on the newer audience and then try to bring those events to the core. Besides trying out the events, the new audience should get used to CMCs and might return to other concerts, less experimental and more related to the canon.

The experimentation is a recurrent theme in the interviews, as it interferes with most groups. To experiment is to afford to take risks in either networking, for instance, art collaborations, purchasing systems, changing locations, new concert styles, or working with marketing personas to develop the branding and therefore campaigns to attract new audiences.

### ***Laboratory of Experimentation.***

The experimental and innovative CMCs, e.g. Pieces of Tomorrow, or IClassics, use the new audience as a laboratory for experimentation. Experimenting on setting and program may invite new audiences to CMCs. Those laboratories are more about the experience than about knowledge communicated in the canon. It is about breaking boundaries. When successful, those program series are transformed into more regular events and might even be introduced to the core audience.

General Director B gives an example of his programming strategy and goals of promotion:

You might think that Pieces of Tomorrow is a kind of laboratory to try out things that we try to implement at the traditional concert on Friday night. So, in general, looking upon the future I like the concert on Saturday afternoon be in a slightly more formal and traditional setting, but a lot of contemporary music going on there. So, a lot of new music. And I like Friday night to be innovative in a way we present classical music. [...] So, within two or three years it might be that we have for every Friday night concert a different kind of night plan.

Further, the concert series called IClassics, which has been picked up by various interviewees, is a platform that invites experimentation in classical music for both innovation and information aspects. Artistic Programmer K gave an example of an innovative CMC project they do:

So, what we try is to go outside the concert hall and present classical music in a completely different way than normal classical concerts. That gives us a reality to try ... as much as possible to make a concept different and more interesting for a new audience. It's like a kind of laboratory, what we can try and when it works we will add it to our normal concerts. So, a good example what we did, we did somethings [...] We also added some actors, explaining the music [...] and they added some parts before the performance of the music and everyone in the audience they understand the music much more because we did this. And we tried this for the first time in a very innovative series, the IClassics. So, we could understand and add it to our core-classical series.

Marketing and Sales Manager E refers to its purchasing systems, including donors and foundations that support the development of the CMCs. Through financial support, the organization can experiment and attempt new strategies. Besides, they launched a big YouTube campaign by uploading high-quality videos of their performances. Regarding the changing branding and image of the Classical Music Ensemble and Society, the participant was asked what kind of identity they are aiming for the next few years:

At some point, [...] it is a bit difficult to find funding because it is all privately funded. We do not get any government subsidies for the YouTube channel. Even for the Society, it's only I think 20% of our income. So, that makes it a bit of a challenge, but if people find this important as well, we can keep continuing and they fund us, we can actually do this.

### **Marketing Strategies.**

The marketing strategy deals with topics, such as re-branding the organization, commercializing the products, defining audiences into focus groups, as well as creating related concerts to those focus groups.

### ***Re-Branding.***

As the CMCs try to reframe their format, in terms of audience outreach and program, the identity and image inevitably alters as well. The brand identity adjusts to the consumers, who have an influence on the identity construction of the CMCs. According to the interviewees, the audience becomes part of a community of the CMCs once they become familiar with the routine, which again affects the image. The brand matters more in communication with the new audience than the music itself. When they like the last concert they have been to as they didn't know so much about the music, the next time they would return for another concert, but just because of the image of the organization. For instance, one ensemble wants to be seen as a brand when they communicate to the audience, a brand that stands for quality and expertise in every single product they offer. Marketing and Sales Manager E on what image they try to communicate:

Well, sometimes the concerts that we perform are very niche. It is sometimes quite difficult music, not everyone likes Bach. So, to me, branding is most important, in a way that... what I would like is that people see that there is a concert coming up of us, they know beforehand it's going to be good. It's going to be a good concert because it is us no matter what's on the program. It doesn't always work of course, but that is what we are working on: good quality, having a nice evening.

Some interviewees may also make use of their own audience/ musicians to communicate their brand, without interaction. For example, the conservatoire puts emphasis on this and how it teaches its students on how to brand itself when asked directly:

We can help to provide education on how to use Instagram, how do you use Facebook, how do you use marketing tools, how do you want to come across, what kind of name do you want to make for yourselves... And they are sharing their own material through our channels and so we can invest in them, instead of doing that apart. They are doing their thing and we are trying to tell the story of the school, the story of the students. [...] The students are putting everything out there. So, we need to find a good fit to be connected and just show the progress they are making.

### ***Development.***

Clearly, the discourse of reframing the format of CMCs via marketing is under construction for all interviewees. The context of classical music is changing, pushed by the current trends and issues in society. The classical music audience, as already mentioned by Adam Szabo during MCICM, is not compatible with interests followed in the current society. As the CMCs adhere to the tradition, the content may be untouched, though the package is under construction, regarding Marketing and Sales Manager E:

It is so much easier to innovate in branding and if we look at the society positions itself, I think that people think that we are a little bit dusty and a knowledge institute. Today, we are just an ensemble, musicians, instrumentalists, and vocalists. So, if we look at the way we brand ourselves and do our marketing, there is a lot of innovation possible and we need to get rid of the idea that we are an old dusty, old-fashioned organization. I think it's a nice challenge, I think, to be more modern hopefully in a couple of years in our branding.

Marketing Manager/ Director G, when asked about whether they feel the need to change their visuals and image:

We do change the visuals of the ensemble all the time. So, we have a new design for 5 years I think. [...] It changes all the time and you have to. You have to change to you know, fonts get old. So, you always have to change it.

Whether the audience also affects those choices of change and adaptation, the respondent states: "We did the survey, we found out that our audience, [...] like 80% said, 'We don't care what you play'. So, that was interesting to me. So, on the poster, the big news should be our Ensemble, not Mahler". Through constant development, the ensemble discovered that it is of relevance to make use of the brand when promoting CMCs. Just as Kubacki and Croft (2004) and Halliday and Astafyeva (2014) have mentioned about the increasing role of brands in society.

### **Third Strategy.**

The third strategy, being an amalgamation of both artistic and marketing strategy, concentrates on the audience's experience and tries to package the CMCs into a diverse bundle of atmosphere,

sociability, and entertainment. Here the focus is less on educating and explaining to the audience how to listen to CMCs, but on giving suggestions on how to enjoy CMCs when not accustomed to classical music.

*Experience.*

Although it seems difficult to reframe the format of CMCs due to the bond to their heritage values in its products and image, CMCs try to experiment to create a new experience for the audience. A common view amongst interviewees was that the experience is becoming an increasing role at CMCs, due to new audiences with a different lifestyle. As some organizations argued that the image they try to promote and communicate is related to the quality and the music, General Director H states that the community and society is of more relevance:

The funding is moving away from another artistic high-quality project, because we have enough orchestras already, but we are following the more social, inclusive path of what music should bring. So, that's what we are trying out now. We do it with the magazine, sometimes with a documentary, with short-clips on YouTube.

For example, their audience participation projects related to games:

And we just incorporated the whole audience participation into the bigger theme. So, every tour, we try to find something within the theme that really connects the audience to the whole performance. What people always give back, or tell us, is they really feel part of the group. There is no audience and orchestra, there is just a bunch of people together and doing music and trying to do experiments. It's just very flexible and high energies of, even if you don't like classical music or certain repertoire pieces, people still have a really good time, because it feels fun and energetic.

In most cases, the informants reported that it is time to move away from promoting the content of the music and to put more emphasis on the experience of the programs and its atmosphere. Increasing the variety of concert programs initiates more experimentation at the end of the CMCs. Although the majority claims to make the concerts more about the experience of the audience, just a few commented to make itself more open to new audiences.

## 5. Discussion and Conclusion

In this thesis I have focused on the question, how Dutch CMCs perceive and navigate the change in the audience landscape. To address this question, I have focused on a group of marketers and organizers in Dutch CMCs for whom dealing with the audience dilemma, i.e. the challenges arising from appealing to the core and new audiences at the same time, is a key challenge in their daily work. In focusing on the orchestras and ensembles, I have explored the different strategies developed and used by these individuals. Through the analysis of semi-structured interviews, I identified four key aspects, namely core audience, fringe group, audience dilemma, and strategies, that my participants endorsed in the current discourse on the audience landscape in classical music. For many of the respondents, the audience dilemma either affected them to stay close to their tradition and heritage-bound values, or to re-position themselves by innovation in program and marketing. While balancing between tradition and the longing to innovate, the CMCs reach out to a wider audience, consisting of both the core- and new attendees. In the following section, I will discuss a key topic that derived from the analysis on the interview responses, namely the evolutionary (gradual & slow) or revolutionary (existential & fast) approach to change in CMCs.

### **Evolution versus Revolution.**

In the discourse of evolution versus revolution in promoting CMCs, the thesis indicates that the content in classical music must remain the same, while the format and branding can be renewable. Even if changing the concert format, the industry continues with conventional practices, such as explaining the music to new comers in the field, or only inviting new attendees coming from a wealthy and educated background. Classical music is still connotated as a legitimized art discipline by both audience groups. Therefore, the CMC representatives try to move the listening experience from a bodily experience (Bull, 2014) towards emotional and cognitive ideals (Kramer, 2007). For instance, using light installations and DJ sets just as in Pieces of Tomorrow or IClassics, which attracts younger generations familiar with digital and technical devices (Johnson, 2002).

The major reason why the industry tries to change, is the decrease of the core audience attendance (Van Eijck & Knulst, 2005). However, a few ensembles do not experience a decrease, the majority is challenged to make up the ground. The core audience is described as old and conventional and at times also engages with the CMCs via private funds (Dowd et al., 2002). By means of having deep knowledge about classical music, they expect quality and variety in the repertoire. Just as Bull (2014) referred to CMCs still following a conventional practice, the respondents referred to the core audience as the ones holding back to the canon and the concept of *Bildung*. Accordingly, the core audience is not as open towards change and innovation as suggested by Roose (2008). In contrast, the group of respondents not only take the young into account when reaching out to the new audience, as demonstrated by Dobsen (2010) and Vercammen (2017) but put emphasis on large

and diverse segments of audiences. The focus on a larger fringe group, can be linked to Kolb's (2005) call to segment audience groups to better adjust to their interests. However, this is a difficult process that the marketers and organizers have not successfully implemented yet. They take immense risk, since the new audience's consumption behavior is rather unpredictable, compared to the core audience. This indicates that CMCs increasingly adopt the audience's lifestyle in branding, for example, by reframing the format to communicate current trends in society. In contrast, Heilbrun and Gray (2001) stated that contemporary classical music failed to make its concerts more popular, which can only be changed due to personalized branding campaigns. A few ensembles adopt their lifestyle according to technological changes, e.g. by posting photos of their coffee while working on the next program, others prefer discussing current politics and societal issues. Now that the CMC representatives begin to split their audiences to navigate the audience dilemma, they might divide the groups according to their lifestyles. In sum, the CMC market is becoming increasingly personalized, due to the focus of marketer and representatives and their ability to split their audiences into different target groups (Roose, 2008; Kolb, 2005).

Taken together, these results suggest that the audience triggers innovation in the CMC sphere. A greying audience and the fringe audience lack of interest in CMCs is affecting the organizations to change. The interviewees seem to agree that classical music should adapt to the current trends and issues in society, though most of them argue that the music as such should stay the same. In contrast, only a few organizations open to adjust their musical content. New media platforms, new settings or other atmospheres may be alternative ways to reach out to new audiences. It can be concluded, that the focus turns away from the elitist conventions and the expected preferences of new target groups are considered. However, the increasing focus towards the audience also shows that the audience is a mix of many profiles with different interests, behaviors, and tastes.

### **Audience Dilemma: Strategies to deal with it.**

The challenges arising from appealing the core and new audiences at the same time can be summarized under the term 'audience dilemma'. In this section, I will focus on three strategies that have proven to be useful in trying to include both old attendees and the fringe group to eventually overcome the issue of greying audiences. So far, the omnivores and fringe groups in general do not increase the audience participation in CMCs. The CMC marketers and organizers pointed out that the younger audiences, being part of the new audience joining the concerts, are very unpredictable. This group might go to a CMC once, but thereafter return to commercial events, due to their eclectic taste and interest. Most of the respondents rather introduce a new concert platform, including film or game concerts, or concerts taking place in another location, which does bring the fringe group in touch with the classical format of CMCs.

The first format promotes artistic strategies, including experimental concerts testing new formats on the new audience, explaining and educating them about the content, or recruiting new talents (Johnson, 2002; Dobsen, 2010). Here, marketing fulfills a rather supporting role, by communicating and endorsing the artistic benefits, when going to a concert. The second strategy considers programs merely influenced by the marketing department as genuinely changing the promotion through constant re-branding, commercializing the concerts and artists, as well as targeting the concerts to audience profiles (Halliday & Astafyeva, 2014; Kubacki & Croft, 2004; Kolb, 2005). The third strategy is a mixed approach of both artistic and marketing influences to create a real experience for the audience, beginning with the promotion. Although presented separately, the strategies are interlinked and rather go together to be successful. Through unification of both marketing and artistic strategies, the marketers and organizers indicate that it is of relevance to emphasize the consumer's experience. Regarding the results, especially the younger audience, is tolerant and open-minded towards entertainment in classical music. While Michael (2017) referred to the young professionals being open to cultural entertainment, it can be said that younger audiences, in general, prefer entertainment in any kind of discipline. Therefore, social aspects, such as community building are of interest. This notion gains support, considering that the fringe group would rather value going with their friends, instead of knowing about the music or connecting at pre- and post-concert moments (Michael, 2017; Vercammen, 2017).

After all it can be said that the CMC marketers and organizer implement a traditional strategy to reach out to the audience, inter alia convincing them by telling a story about the concept, putting it in a package, to generally sell it as an experience. Although, most representatives mentioned that they personalize their marketing and consider concrete personas in their promotion and programming, they do not engage in a dialogue with the audience. Eventually, the audience dilemma points toward the necessity to listen to the audience and work together to create a harmonious relationship between core and fringe.

### **Research Questions.**

With respect to the key research question: *How do Dutch CMCs perceive and navigate the change in the audience landscape*, it can be concluded that CMC marketers and organizers took note of a change in audience landscape as their core-audience declines. The key findings entail inter alia, evolutionary stagnation, new audiences affecting the industry, the new are a fringe group for marketers, and new in- and exclusion for next generation of core audiences. Furthermore, their regular purchasing system does not maintain the change from regular to new attendees. The subscription to

concert series<sup>16</sup> offered in a package ticket deal, are only bought by the wealthy core audience, while the new audience rather buys the tickets a day before. This purchasing behavior alarms the marketers, because maintaining the concert series make it very unpredictable whether the concerts will be sold out or not. As discussed in the analysis, all orchestras and ensembles experience difficulties to approach new audiences and need to adapt to this change in purchasing behavior to sustain themselves. Specifically, an increased attention towards digital tools and online platforms may enrich the promotion and communication with the new audiences. The marketers put great emphasis on the visualization of their materials, in forms of videos and photos. In a time of social media, businesses may endorse their products via Instagram or Facebook. Since, it is increasingly difficult to catch the consumer's attention, also the CMCs are showing more media activity to stay relevant.

Those active measures are addressed to the large fringe group. Marketers perceive them as the new possible consumer group of CMCs. This fringe group entails various demographics, including the age group of 18-60, an interest in listening to classical music, being informed about politics and society, cultivated, highly educated, and sufficiently wealthy to afford those concerts. The marketer's current target is a new attendee. However, despite being younger and more concerned about societal issues, its characteristics do not differ significantly from the core attendee. Eventually, CMCs aim to include the next generation to their core audience, even though they are more difficult to approach. Marketers and organizers navigate this change by producing events and concerts customized to each focus group, making the market more exclusive than inclusive. Though some orchestras think about replacing the old audience with the new, e.g. by establishing new concert formats, others decide to bring the various audiences together. It can be summarized that marketers and organizers still struggle to approach new audiences, which rather seems as a large fringe group.

The second question of this thesis was: *What is the current state in marketing of CMCs in the Netherlands*. Through constant self-reflection, CMCs swing between concepts of tradition and innovation. This study found that the bigger the orchestra and the older its own past, the more the institution tries to hold back on to their tradition. The most interesting finding from that analysis is that the regular attendees of those orchestras, are embedded in the orchestra, either through constant participation or private donations. Although some orchestras assume that the younger generations fear the old attendees in the concert hall and are therefore hard to approach, the older audience is reserved when it comes to innovation and new audiences. Eventually, this discourse between conforming to the core audience and endorsing the new audience, the marketers consider three strategic formats (marketing, artistic, and mixed method) as have been mentioned above. While the strategies are built to engage the fringe with CMCs, the core audience is also affected by them. On the one hand, the

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<sup>16</sup> Concert series are a purchasing technique to sell tickets, but also to predict the popularity of the program offered.

artistic strategy implies to sooner or later unite the audiences and to bring the fringe on the same level as the core. On the other hand, the marketing strategy creates a commercial market focusing on the fringe and thereby excluding the core. Lastly, experience engagement implies a new format of CMCs, in design and conceptualization. While the first two approaches try to convince the audience to join the concerts, the third innovates the industry by providing and serving the desired audience with an experience. It can be concluded that the Dutch classical music industry is currently innovating its collaboration and communication of marketing and artistic departments, leading to successful strategies that deal with the change in audience landscape.

With respect to the third question: *How do CMC organizers and marketers cope with an audience that merges to a mix of classical and highbrow with popular and lowbrow consuming culture*, it was found that the strategies to cope with the change in audience landscape either focus on dividing the different kind of audiences, or to unite them. Some of the bigger orchestras mentioned the fear of losing their core audience, when inviting the new to the same concert series. Eventually, as mentioned above, the mixing of audiences causes an audience dilemma. The marketers' attention shifting towards the fringe group suggests that the conventional highbrow culture of classical music gets closer to the commercial and lowbrow culture, in terms of inclusivity. CMCs adapt their branding to present lifestyles and to be appreciated by the new audience. The focus on lifestyle makes the CMC marketers and organizers reframe their format and move from a pure traditional canon towards current trends. However, according to the interviewees of this study, branding has its limitations, as the target audience is desired to be highly educated to be able to understand the concepts. The interviewees further explained the change in lifestyles and the interest of their target groups and excluded people who cannot afford cultural consumption, transfer in different social groups and cultures, or who have interest in less acknowledged music genres. Especially, the Netherlands, which is a country with a diverse set of cultures, still seems to distinguish between sub- and countercultures. Thus, it can be said that the core audience and fringe group grow closer together, yet a big part of the Dutch society is still excluded.

To summarize, this thesis contributed to the understanding of how Dutch CMCs perceive and navigate the change in the audience landscape on three levels. First, it informs about the current state of Dutch CMCs that move between evolution, emergence and revolution on the spectrum of innovation. Though the sales figures are stable, the greying audience grows and leads the marketers and organizers to re-brand their relevance in society. While the classical canon is sold immediately without any marketing campaigns, innovative concepts take more risks. Second, it gives insights into the challenge of how to stay relevant in today's consumption culture, with a broadened audience. So far, marketers and organizers only know little about the new cultural consumer, who therefore remain a fringe group. Eventually, the strategies create new in- and exclusion of smaller audience groups. The thesis provides insights for the classical music industry and academia about how marketers aim to

position CMCs in society at large. The third contribution refers to the choice and nature of strategies that are currently used to overcome the mentioned challenges. While the artistic and marketing strategies individually only enable limited innovation, combined they create a new approach to communicate with and learn from the new cultural consumer, especially in terms of experience and community creation.

### **Theoretical Implications.**

Some of the issues emerging from this finding relate specifically to Dobsen's (2010) notion of *edutainment*. The young attendees are intimidated by the core audience and their behavior during the CMCs. Edutainment is a combination of creating an experience and educating the audience on the behavioral conduct during the concerts (Dobsen, 2010). This implies that a mixed strategic approach, including artistic and marketing strategies, would be applied to appeal to the desired consumer. In addition, some orchestras chose to outsource their projects, to keep their core attendees, and simultaneously advance the experience of the new audiences.

Furthermore, the impact of experimenting with the CMC format, is a possibility that classical music is still very distinctive and that it must find ways to become more accessible (Johnson, 2002), which the three analytical strategies imply. Moreover, the marketing strategy provides support to the conceptual premise of Kubacki and Croft (2004), who argue that CMCs do not lack audience numbers due to mass-marketing. However, they need to modernize to be sustainable in the industry. Therefore, innovation in marketing may maintain the outreach. Although, Roose (2008) characterizes the core audience of classical music attendees to be open to innovation and change in the musical content, the findings suggest that the core audiences are already less open towards format changes and complain about developments made to attract new audiences. Just as Dowd et al. (2002) declared, highbrow cultures used to sacralize the performing arts, there are still audiences who engage with CMCs through their private donation. The core audiences' engagement is holding the CMCs back from reframing their formats. Some CMCs are segmenting their audiences and organize various events for the different interests and lifestyles. Even if Kolb (2005) argues that segmentation in the market is a great way to deal with the various lifestyles, in practice it is very unpredictable. Eventually, some concert series would be too risky to introduce, when merely addressing to the young, who purchase tickets too late. Various series also commit new in- and exclusion as becoming very specific in program.

### **Practical Implications.**

Putting the theoretical implications into practice, the findings suggest that marketing is an inevitable link in recruiting new audiences for CMCs. Through marketing objectives, also in collaboration with programmers, the traditionally and conventionally connotated industry, may be democratized through commercialism. Popularity in artists, and venues may not only be

communicated through artistic quality, but also through promoting and branding the orchestra. Even if Dutch CMCs are subsidized by the state, according to the interviewees, most of the expenses are spent on the production and programming of the concerts. Conceivably, subsidies should also address experiments and innovation, and not classical music in general. Through funding, the current strategies of CMCs will be less risky and enable marketers and organizers to include a broader audience, without on private donors. It appears that the core audience has power and influence on the program, because of their financial involvement. The private donation programs should ensure the independence of the organization and not share power and influence with donors. At the same time CMCs should adjust to the state-subsidies request for diversity and innovation. However, the marketers' goal lies in innovating their marketing and concert formats and overlooks the ownership the core audience has with regards to purchasing systems. This implies that the Dutch classical music industry remains a top-down approach, with concerts and stakeholders being superior to the participating audience.

### **Limitations.**

The current theoretical debate on classical music development can benefit from a more elaborate discussion on current issues related to contemporary classical music concerts, especially on evaluating the performance and the audience participation. A possible limitation to this thesis is that it does not directly engage with Dutch literature on innovations in classical music, though generally following a Western approach. As this study is based on the experience and opinions of marketers and organizers of Dutch CMCs, the study could have been benefited from additional interviews with organizers of venues hosting CMCs. Tough this would turn the focus away from the marketing and more to a management perspective. Another limitation of qualitative studies, such as the one present, is the face-to-face method of interviews, relying on contextual factors as for example the language barriers between both researcher and interviewee. However, the interviewees were asked to use Dutch expressions for specific terms unfeasible in English. The interview included specific questions, which marketers and other CMC representatives were not aware of. This could have been prevented by introducing the topics of interview discussion beforehand (e.g. mail), though this would have biased the interviews open nature and potentially put the interviewee in an artificial situation, resulting in prepared response. For further research, this can be prevented with a survey sent out to the interviewees to be able to get a detailed overview of their financial mix and overviews. However, this would require a quantitative approach.

### **Future Research.**

This study has raised important questions about the nature of the audience participation in CMCs. Further work is necessary to understand the implications of dealing with the audience dilemma. Research using attentive focus groups with audiences might bring new revelations about the participation and relation of older and younger generations. Hereafter, it is necessary to reveal the

functionality of the analytic strategies by considering specific cases where audiences have been brought together or kept separate. Eventually, this will further the understanding about the audiences' experience and whether the younger generations fear the old or vice versa. Another focus of future research should be the topics of cultural policy plans and donation systems. Studying recent calls for cultural democracy may provide new insights for adjusting marketing and artistic strategies, as well as enhancing democratization in high arts (e.g. Wilson, Gross, & Bull, 2017). For instance, the 2018 UK cultural policy plan, by Wilson et al. (2017) introduces that the canonized arts, including classical music may have to become more inclusive, by including a culturally diverse audience. They stance other strategies to overcome this burden in cultural consumption, by concentrating on the community using a bottom-up approach. It is of interest to further study the efficacy of those strategies and to finally meet the goal of becoming inclusive to the public. Throughout the interview phase, I have received considerable amount of promotion materials from CMCs that would justify a separate study, including a content analysis. Through triangular data source collection, e.g. interviews, document analysis, and observation, it would be possible to discuss the topic on both ends, creation and reception of the materials (Dibbits, 2015). This triangularization could forward the communication and dialogue between classical music organizations and their audience.

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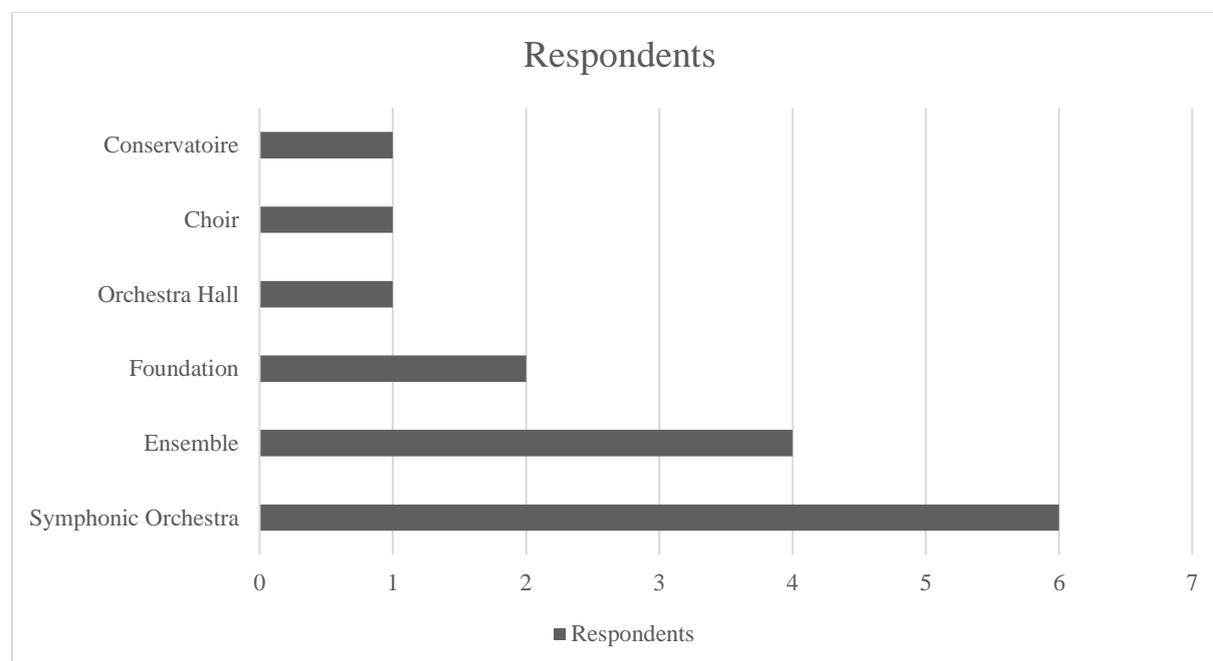
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## Appendices

### Appendix A: Introduction

### Appendix B: Theoretical Framework

### Appendix C: Method



**Figure C1. Overview of Respondents**

|      | <b>Respondent</b>                            | <b>Type of Organization</b>                 |
|------|--|---|
| I    | Marketing and Sales Manager A                | Symphonic Orchestra                         |
| II   | General Director B                           | Music Foundation and Orchestra              |
| III  | Office Manager C                             | Symphonic Orchestra                         |
| IV   | Marketeer and Publicity D                    | Ensemble of New Music                       |
| V    | Marketing and Sales Manager E                | Classical Music Ensemble                    |
| VI   | Marketeer F                                  | Classical Choir                             |
| VII  | Marketing Manager/ Director G                | Classical Music Ensemble + Music Foundation |
| VIII | General Director H                           | Ensemble for New Music                      |
| IX   | Marketing and Communication Manager I        | Conservatoire                               |
| X    | Marketing and Communication Manager J        | Symphonic Orchestra                         |
| XI   | Artistic Programmer K                        | Symphonic Orchestra                         |
| XII  | Artistic Programmer L                        | Symphonic Orchestra                         |
| XIII | Marketing, Communication and Sales Manager M | Orchestra Hall – Concert hall               |
| XIV  | Marketing and Sales Manager N                | Symphonic Orchestra                         |

**Figure C2. Anonymized Respondent Information**

## Interview Guide

Introduction : *I would like to remind you that the interview will be recorded for quality purposes and all information will be kept anonymous and confidential. There are no wrong answers, as I am only interested in your experience, opinion, and positions. You can stop whenever you want. If there is a question you would rather not answer, which we do not hope for, this is of course okay. (Consent Form explanation)*

*This interview is going to take approximately 60 minutes. As your time spent on the interview will be counted as in-kind contribution to the GAMPSISS research, I would like you to note down the time too. The interview is about various areas – we start with your work routine, then turn toward the mission and the vision, the marketing objectives, and the audience. In the end, we are also interested in the financials.*

Job Title:

Organization:

1. Regular work day
  - a. Could you tell me about your work routine, by including tasks and events?
  - b. *Sometimes marketing requires field research, by both looking at the audience types as well as one's own orchestra and concerts offered.* How would you describe your position in marketing?
  - c. Could you tell me about your concerts? Examples
  - d. In what way does the marketing link to the concerts?
2. Mission and Vision
  - a. Could you please describe the aim of the company?
  - b. Do you associate either with heritage-oriented or modern values? Could you explain your values?
  - c. How would you define contemporary classical music in your own words?
  - d. How would you describe your concerts: traditional or innovative? Why?
  - e. What do you associate with innovation in classical music?
  - f. Do you experience a difference between innovation in music and innovation in branding? Examples.
  - g. How do you contribute to classical music innovations? Do you have examples?
3. Marketing objectives and strategies
  - a. How would you describe the organization's identity and image?
  - b. Could you tell me about your choice of aesthetics (visuals) for the company, promoting the events and musicians?
    - i. *Show a series of photos of classical music promotion*
  - c. Through which platforms do you communicate and advertise the events? Does it differ depending on the pieces or music played?
  - d. Do you think that classical music is a difficult product to promote? Explain.
  - e. How would you define your uniqueness in the classical music market?
  - f. What role do your direct and indirect competitors play?
4. Target
  - a. How would you describe your current audience? (active-reactive)

- b. What kind of audience are you aiming for? Could you give me an idea of the profile of the new audience?
    - i. Do you see opportunities in the change of audiences consuming art and culture today?
    - ii. Do the declining audience numbers put the state of the company at stake?
  - c. To what extent do you approach new audiences? Which inclusivity do you aim for? Who do you exclude/ include?
  - d. How do you communicate with the audience?
  - e. Do you feel the need to study the audience? What strategies do you use to reach new audience?
  - f. How does the audience engage with your events?
  - g. In what way does the audience affect your marketing objectives?
  - h. Could you please tell me about strategies on projects/ concert series that have been successful and others that did not go well? Do you have examples?
5. Subsidies, funds and crowdsourcing etc.
- a. Could you tell me about your financial mix?
  - b. How much budget do you have for marketing, compared to the arts department?
  - c. Many art organizations that are funded by the state tend to spend most of their budget on the arts, instead as on the promotion. In contrast, the entertaining industry spends more than the half on promotion.
    - i. Do you experience an influence of the state to receive the funds?
  - d. Are you trying to adjust the needs (programming) to receive funds?
6. Further challenges
- a. Are there any further challenges you experience in the marketing process?

Time for follow-up questions, if required.

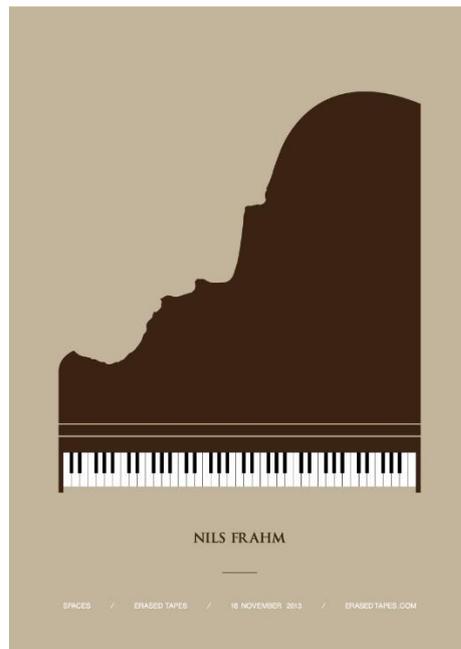
*This was the last question of the interview. Thank you very much for your participation and sharing your insight. If you are curious about the results, I would be more than happy to share them with you in July. Also, the results will be presented at the next GAMPSISS partner day in September.*



**Image C3 + C4. Joep Beving**



**Image C5 + C6. Pieces of Tomorrow**



**Image C7 + C8. Nils Frahm**

|  |   |
|--|---|
| <b>Project Title and version</b>                       | GAMPSISS: GAMEful Music Performances for Smart, Inclusive, and Sustainable Societies  |
| <b>Principal Investigator</b>                          | Micha Hamel   |
| <b>Name of Organisation</b>                            | Erasmus University Rotterdam, Codarts, Hogeschool voor de Kunsten and TU Delft  |
| <b>Name of Sponsor</b>                                 | De Nederlandse Organisatie voor Wetenschappelijk Onderzoek (NWO)  |
| <b>Purpose of the Study</b>                            | This research is being conducted to explore contemporary listening cultures and the integration of games and gamification in classical music concerts, so that its audiences may engage themselves in meaningful modes of listening.  |
| <b>Procedures</b>                                      | You will participate in an interview lasting approximately 30 to 90 minutes. You will be asked questions about your position on marketing strategies and your view on classical music audiences and the sector at large. You must be at least 18 years old.   |
| <b>Potential and anticipated Risks and Discomforts</b> | There are no obvious physical, legal or economic risks associated with participating in this study. You do not have to answer any questions you do not wish to answer. Your participation is voluntary, and you are free to discontinue your participation at any time.   |
| <b>Potential Benefits</b>                              | Participation in this study does not guarantee any beneficial results to you. As a result of participating you may better understand your own views on listening and your relation with classical music audience. The broader goal of this research is to intensify the listening experience of western classical and contemporary composed music through games and gamification, so as to evoke a qualitative experience that could be carried out in the everyday life of a citizen. It are the members of the audience who are meant to benefit from the results of GAMPSISS.  |
| <b>Sharing the results</b>                             | The results of this research will be shared with the public through publications, symposia and news outlets. We are also sending updates through a newsletter.  |
| <b>Confidentiality</b>                                 | <p>Your privacy will be protected to the maximum extent allowable by law. No personally identifiable information will be reported in any research product. The GAMPSISS research team does also not share or publish sensitive and company specific information though which an organization can be identified. Also, sensitive information will not be published but only reported on aggregated level. Should mentioning your organization benefit the clarity of any research report, we will contact you in advance and confirm the details or give you a chance to object. Moreover, only trained research staff will have access to your responses. Within these restrictions, results of this study will be made available to you upon request.</p> <p>As indicated above, this research project involves making audio recordings of interviews with you. Transcribed segments from the audio recordings may be used in published forms (e.g., journal articles and book chapters). In the case of publication, pseudonyms will be used.</p> |

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|   | The audio recordings, forms, and other documents created or collected as part of this study will be stored on the researcher's password-protected computers and will be destroyed within ten years of the initiation of the study.   |                         |
| <b>Compensation</b>                       | There is no financial compensation for the participation.  |                         |
| <b>Right to Withdraw and Questions</b>    | <p>Your participation in this research is completely voluntary. You may choose not to take part at all. If you decide to participate in this research, you may stop participating at any time. If you decide not to participate in this study or if you stop participating at any time, you will not be penalised or lose any benefits to which you otherwise qualify.</p> <p>If you decide to stop taking part in the study, if you have questions, concerns, or complaints, or if you need to report an injury related to the research, please contact the postdoctoral researcher and thesis supervisor:</p> <p style="text-align: center;">Janna Michael: Michael@eshcc.eur.nl</p> |                         |
| <b>Statement of Consent</b>               | <p>Your signature indicates that you are at least 18 years of age; you have read this consent form or have had it read to you; your questions have been answered to your satisfaction and you voluntarily agree that you will participate in this research study. You will receive a copy of this signed consent form.</p> <p>If you agree to participate, please sign your name below.</p>  |                         |
| <b>Audio recording</b><br>(if applicable) | <p>I consent to have my interview audio recorded</p> <p><input type="checkbox"/> yes</p> <p><input type="checkbox"/> no</p>  |                         |
| <b>Secondary use</b><br>(if applicable)   | <p>I consent to have the anonymised data be used for secondary analysis</p> <p><input type="checkbox"/> yes</p> <p><input type="checkbox"/> no</p>   |                         |
| <b>Who to contact</b>                     | <p>If you have questions or comments, please contact Janna Michael, at <a href="mailto:Michael@eshcc.eur.nl">Michael@eshcc.eur.nl</a>. You can also always contact the secretary of the ESHCC Ethics Review Board, Mrs. Linda Jansen, at ethicsreview@eshcc.eur.nl.</p>  |                         |
| <b>Signature and Date</b>                 | <b>NAME PARTICIPANT</b>  | <b>NAME INTERVIEWER</b> |
|   | <b>SIGNATURE</b>   | <b>SIGNATURE</b>        |
|   | <b>DATE</b>  | <b>DATE</b>             |

**Figure C9. Informed Consent Form**

## Appendix D: Analysis

|                 | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | XII | XIII | XIV | Sum |
|-----------------|---|----|-----|----|---|----|-----|------|----|---|----|-----|------|-----|-----|
| Heritage        | 4 | 4  | 4   | 0  | 3 | 3  | 0   | 2    | 0  | 1 | 1  | 1   | 0    | 1   | 24  |
| Innovation/ New | 0 | 0  | 1   | 7  | 5 | 2  | 2   | 1    | 1  | 1 | 2  | 3   | 1    | 1   | 27  |
| Sum             | 4 | 4  | 5   | 7  | 8 | 5  | 2   | 3    | 1  | 2 | 3  | 4   | 1    | 2   | 47  |

**Table D1. Heritage versus Innovation/ New Ratio (all interviews)**

|                  | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | XII | XIII | XIV | Sum |
|------------------|---|----|-----|----|---|----|-----|------|----|---|----|-----|------|-----|-----|
| Lay Audience     | 5 | 4  | 2   | 1  | 0 | 2  | 6   | 1    | 1  | 1 | 0  | 1   | 2    | 0   | 26  |
| Music Enthusiast | 2 | 2  | 2   | 0  | 4 | 2  | 3   | 0    | 1  | 0 | 2  | 0   | 1    | 0   | 19  |
| Sum              | 7 | 6  | 4   | 1  | 4 | 4  | 9   | 1    | 2  | 1 | 2  | 1   | 3    | 0   | 45  |

**Table D2. Lay Audience versus Music Enthusiast Ratio (all interviews)**

|          | I  | II | III | V  | VI | X | XI | XIII | XIV | Sum |
|----------|----|----|-----|----|----|---|----|------|-----|-----|
| Canon    | 12 | 10 | 10  | 14 | 6  | 3 | 5  | 6    | 2   | 68  |
| Openness | 5  | 1  | 3   | 11 | 5  | 4 | 2  | 5    | 2   | 38  |
| Sum      | 17 | 11 | 13  | 25 | 11 | 7 | 7  | 11   | 4   | 106 |

**Table D3. Canon versus Openness Ratio (bigger Orchestras)**

|          | IV | VII | VIII | Sum |
|----------|----|-----|------|-----|
| Canon    | 4  | 8   | 6    | 18  |
| Openness | 8  | 9   | 10   | 27  |
| Sum      | 12 | 17  | 16   | 45  |

**Table D4. Canon versus Openness Ratio (smaller Ensembles)**

|                   | I  | II | III | IV | V  | VI | VII | VIII | IX | X  | XI | XII | XIII | XIV | Sum |
|-------------------|----|----|-----|----|----|----|-----|------|----|----|----|-----|------|-----|-----|
| Audience Profiles | 14 | 15 | 5   | 4  | 14 | 4  | 14  | 3    | 4  | 7  | 3  | 2   | 14   | 2   | 105 |
| The Experience    | 7  | 9  | 7   | 10 | 8  | 12 | 26  | 19   | 8  | 11 | 11 | 3   | 21   | 6   | 158 |
| Sum               | 21 | 24 | 12  | 14 | 22 | 16 | 40  | 22   | 12 | 18 | 14 | 5   | 35   | 8   | 263 |

**Table D5. Audience Profiles versus The Experience Ratio (all interviews)**

|                  | I | II | III | IV | V | VI | VII | VIII | IX | X | XI | XII | XIII | XIV | Sum |
|------------------|---|----|-----|----|---|----|-----|------|----|---|----|-----|------|-----|-----|
| Audience Dilemma | 2 | 1  | 6   | 4  | 1 | 6  | 19  | 10   | 5  | 7 | 6  | 5   | 17   | 3   | 135 |
| Experimentation  | 2 | 2  |     |    | 3 |    |     |      |    |   |    |     |      |     |     |
| Experimentation  | 4 | 8  | 1   | 8  | 2 | 10 | 17  | 15   | 15 | 1 | 10 | 5   | 15   | 5   | 139 |
| Sum              | 2 | 2  | 1   | 12 | 1 | 16 | 36  | 25   | 20 | 1 | 16 | 10  | 32   | 8   | 274 |
|                  | 6 | 0  | 9   |    | 5 |    |     |      |    | 9 |    |     |      |     |     |

**Table D6. Audience Dilemma versus Experimentation Ratio (all interviews)**

| Groups              | Codes  |
|---------------------|--|
| Audience Profiles   | Audience<br>Audience Profiling<br>Families<br>International<br>Lay Audience<br>Music Enthusiasts<br>New Audience<br>Orientation towards Focus groups<br>Tourists   |
| Information Seeking | Audience Profiling<br>Data-Driven<br>Donating System<br>Internet<br>Laboratory for Experimentation<br>Research<br>Ticketing  |
| Visualization       | Artistic Influence<br>Brand Identity<br>Creativity<br>Design<br>Informal Communication<br>Internet<br>Lifestyle<br>Media Platforms<br>Merchandise Products<br>Playful<br>Setting<br>Shoe Box Hall<br>Visuals |
| Purchasing Systems  | Audience Participation<br>Donating System<br>Enacting connections<br>Financials<br>Merchandise Products<br>Pressure<br>Selling Tickets<br>Ticketing  |
| Location            | City Image<br>Festivals<br>International<br>Media Platforms<br>National Visibility   |

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Experimentation

Art Collaborations  
Atmosphere  
Audience Participation  
Bucket list  
Eclecticism  
Experience/ Emotion  
Festivals  
Film Music  
Laboratory for Experimentation  
Lifestyle  
Marketing Persona  
*Mosaique*  
Music Experience  
Musical meets Opera  
Network  
New Audience  
Playful  
Rebellious

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The Experience

Atmosphere  
Audience Participation  
Bucket list  
Experience/ Emotion  
Families  
Festivals  
Film Music  
Informal Communication  
Innovation/ New  
International  
Laboratory for Experimentation  
Lay Audience  
Lifestyle  
Music Experience  
New Audience  
Playful  
Rebellious  
Setting  
Visuals

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|                     |   |
|---------------------|---|
| Canon               | <ul style="list-style-type: none"> <li>Artistic Influence</li> <li><i>Bildung</i></li> <li>Chamber music</li> <li>Classical Repertoire</li> <li>Existence of Orchestra</li> <li>Heritage</li> <li>Music Enthusiasts</li> <li>Noblesse oblige</li> <li>Repertoire</li> <li>Sacred</li> <li>Shoe Box Hall</li> </ul>  |
| Branding            | <ul style="list-style-type: none"> <li>Brand Identity</li> <li>Bucket list</li> <li>City Image</li> <li>Creativity</li> <li>Data-Driven</li> <li>Design</li> <li>Development</li> <li>Informal Communication</li> <li>Innovation/ New</li> <li>Internet</li> <li>Marketing Persona</li> <li>Media Platforms</li> <li>Merchandise Products</li> <li>National Visibility</li> <li>Orientation towards Focus groups</li> <li>Repetition</li> <li>Research</li> <li>Selling Tickets</li> <li>Story-Telling</li> <li>Strategic</li> <li>Visuals</li> </ul> |
| Popular/ Commercial | <ul style="list-style-type: none"> <li>Atmosphere</li> <li>City Image</li> <li>Lifestyle</li> <li>Marketing in Opposition to Program</li> <li>Media Platforms</li> <li>Merchandise Products</li> <li>Selling Tickets</li> <li>Soloists</li> </ul>   |

|                   |   |
|-------------------|---|
| Audience Dilemma  | Audience Dilemma<br>Cultural Engaged<br>Current Society<br>Eclecticism<br>Flexibility<br>Lay Audience<br>Lifestyle<br>Music Enthusiasts<br>New Audience<br>Selling Tickets<br>Variety in Concerts |
| Education Systems | <i>Bildung</i><br>Educative Approach<br>New Dutch Music Ambassador<br>New Talents<br>Noblesse oblige  |
| Openness          | Accessibility of Concerts/ Programs<br>Distance<br>Interrelationship with the other departments<br>Outreach   |

**Table D7. Code Book (78 Codes associated with the 13 Themes)**

|      | Focus   | Strategy  |
|------|---|---|
| I    | Audience dilemma, Branding, Popular (less: Experiments, Education)                              | Attract the young to film concerts, IClassics, through developing a brand. Artistic focus on musicians and tradition. Dividing audiences.   |
| II   | Audience Profiles, Experimentation, Experience (less: Popular, Purchasing, Location)            | Using the new audience as a laboratory to improve regular concerts. The consumer experience matters more than educating them about the music.   |
| III  | Experimentation, Branding, Canon (less: audience dilemma, education, information)               | Experimenting with the style of the orchestra, though being bound to tradition, due to cooperation with other institution. Since successful collaboration, no need to address the dilemma, as also no insight in the information system.  |
| IV   | Branding, Experimentation, Experience (less: purchasing, audience profiles)                     | Currently rebranding the ensemble to fit more to today's society. Performing very experimental, therefore trying to address the audience's experience in promotion.   |
| V    | Audience Profiling, Branding, Canon, Education, Information (less: experimentation, experience) | Though being sold out at many concerts, since good relationship with core audience. Currently re-branding its image to open international access on online platforms and address and inform the young, more diverse audiences.  |
| VI   | Branding, Experimentation, Experience (less: Canon, Education, Purchasing)                      | Story-telling and making the concert appealing to a very diverse audience. The concept must be experimental and persuasive, as not approaching music enthusiasts, but lay audience. Therefore, less attention on educating the audience, but experiencing it as a community.      |
| VII  | Audience Dilemma, Branding, Experimentation, Popular, Experience (less: education, canon)       | Very aware and challenged by the audience dilemma and therefore constantly re-branding its ensemble, but also making use of experimental projects, booking famous acts, and concentrating on experience, instead of traditional formats.  |
| VIII | Experimentation, Experience, Visualization (less: Profiles, Canon)                              | Visual support of films, and photos to portray the ensemble as a brand. The experiments on the street, various rare locations, and with games, address everyone and therefore does not target single profiles.  |
| IX   | Experimentation, Popular, Experience (less: branding, information)                              | The musicians do the branding themselves as they may post and address the conservatoire at times. Therefore, systematically trying to experiment with the musician's creativity. Making use of cross-cultural collaborations with other successful orchestras and conservatories. |
| X    | Audience Dilemma, Branding, Experimentation, Experience (less: canon, education, information)   | Using an app to unite both young and older audiences to the same CMCs. Constant experiments in both branding and program help to discover how the audience experiences it.  |
| XI   | Experimentation, Popular, Experience (less: Profiles, education, information)                   | IClassics to experiment on new possible projects. Trying to attract a diverse audience by making the concerts popular through branding campaigns. E.g. Bucket-list.   |

|      |  |  |
|------|--|--|
| XII  | Audience Dilemma, Profiles, Experimentation, Popular (less: canon, education, visualization) | Cross-overs and collaborations with pop genres, including world-famous DJs and film composers. Aware that the younger audiences only come for the soloists and not for the orchestra. Though by having many collaborations, they try to become more popular for the young and have them come back. |
| XIII | Audience Dilemma, Profiles, Branding, Popular (less: Canon, education, information)          | Although being a very traditional company, they are challenged by the audience dilemma and have segmented projects to reach out to young, old, tourists etc. The branding processes focus on film and photos to create a community.  |
| XIV  | Branding, Information, Purchasing (less: profiles, education, dilemma)                       | Though portraying a very heritage-based orchestra, they have to sell more tickets. Therefore, current re-branding by looking at ticketing and audience surveys.  |

**Table D8. Codebook: Overview of Strategies used in relation to Code Ratio (all interviewees)**