

# AUDIENCE DEVELOPMENT IN DENMARK

By

Søren Mikael Rasmussen & Susanne Justesen

Nordic Orchestra Conference

# MOST IMPORTANT TAKE-AWAYS

From this presentation

- Create more sources of income – from foundations, sponsorships, ticketing and memberships
- Diversify: To attract a bigger audience you must diversify your communication, your value offers and your repertoire – and know your customer segments and their behavior
- Collect more data – to sustain your strategic planning, to know your audience better, to customize the user experience

# WHY & HOW

## Background and approach

Project initiated by DEOO and funded by Augustinus Foundation:  
First phase has just been finalised in October 2019

**Project background:** Overall public funding is reduced, and public funders demand focus on new audiences, children and youth, and a bigger reach among audiences in general.

**Project purpose:** To map out the current status on audience development amongst Danish orchestras and ensembles, in order to identify most important potentials and challenges

**Approach:** Visiting with 11 orchestras and ensembles and doing two interviews with their orchestra leader and the person in charge of

# 10 MOST IMPORTANT FINDINGS & CONCLUSIONS



# OUR 10 MOST IMPORTANT FINDINGS

## Conclusions 1 - 5

**CURRENT AUDIENCE IS SHRINKING:** The core audience is very dedicated, but also old and dying (60+) - because only very few orchestras and ensembles have been successful at attracting and retaining a younger audience

**AUDIENCE DATA IS VERY LIMITED:** The orchestras tend to know only very little about their current audience; and generally seem hesitant towards collecting data, and insecure as to how data can be used for audience development

**AUDIENCE COMMUNICATION IS NOT DIFFERENTIATED:** Most of the orchestras have a strong presence on social media, but they tend to communicate in the same way with everyone

**PLENTRY OF FORMATS TARGETING CHILDREN AND YOUNGER AUDIENCES:** So creativity is high and variation is broad; but seems to lack creativity in how they are communicated and presented to schools and families

**MOST PROMISING NEW FORMATS:** Also here the creativity is high but unfortunately this creativity seems a bit random and seemingly more focused on the musicians and less on the user and particular audience groups

# OUR 10 MOST IMPORTANT FINDINGS

## Conclusions 6 - 10

**CONCERT EXPERIENCE AND REPERTOIRE:** There is a general need for many of the orchestras to focus less on “formation” and more on user experience, e.g. designing different user experiences by focusing more on different user journeys (before, during and after the concert)

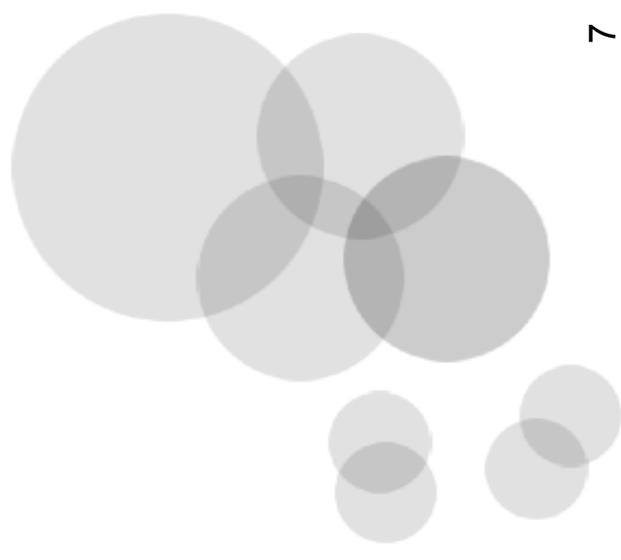
**OVERALL BUDGETS ARE DECREASING:** Most of their budgets (91% on average) are publicly funded, and due to a general cuts in public spendings on culture over recent years, there is an urgent need for orchestras in general to become better at generating new income sources

**RELATIVELY UNAMBITIOUS SALES AND MARKETING ACTIVITIES:** Most of marketing efforts seem to focus on general sales and discounts, and is still very centered around the printed programme; and the classical sale of concert tickets, rather than cultural experiences

**PARTNERSHIPS AND SPONSORING SEEMS MORE RANDOM THAN STRATEGIC:** Most orchestras have developed different partnerships in their local area, but the way these are formed and maintained - especially with corporate sponsors - seems more reactive than proactive

**URGENT NEED FOR A MORE STRATEGIC APPROACH TO AUDIENCE DEVELOPMENT:** There is a general awareness of the importance of audience development, but also a high degree of insecurity as to what it really is, what it takes, and which resources are necessary

# FOUR OVERALL RECOMMENDATIONS



# RECOMMENDATION #1

O&E need more data - and insight into how data can be used strategically

- Increase data collection: Only a few O&E use data in a strategic manner, e.g. use data strategically to reach a new target audience. GDPR has become a dangerous barrier for collection and use of data. The number of sources of data need to improve.
- Intensify use of data: Danish O&E need more data about their current audiences and especially about their potential audiences. But they also need to know more about how to use data, analyse it and use it for development.
- Get started with easy-to-use surveys after concerts – get a hold on first-timers and know, why they are there.

# RECOMMENDATION #2

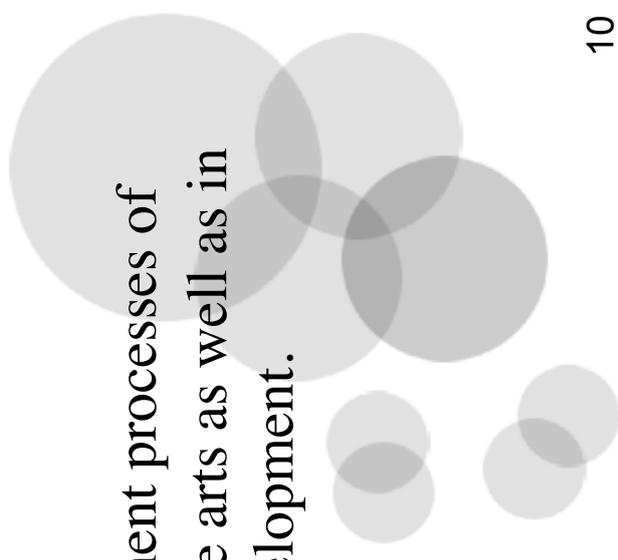
O&E need an overall analysis of their current audience

- Get to know your potentiel audience: O&E seem to know thier core audience well from looking at them in the concert hall. But looking is not enough. O&E needs quantitative investigation into potentiel audiences, so they know the different motivations and values that drive potentiel audiences.
- Get to know the user experience: O&E know their core audiences and how to attract them. But what does the average not-so-often-guest expect of a concert experience? Qualitative mapping of user experiences can help design the experience journey more thoroughly.
- Segmentate: Audiences are diverse, so O&E needs to segmentate their audiences in order to plan e.g. repertoire, experiences and added value to different kinds of audiences.

# RECOMMENDATION #3

O&E need a complete upgrade of their approach to audience development

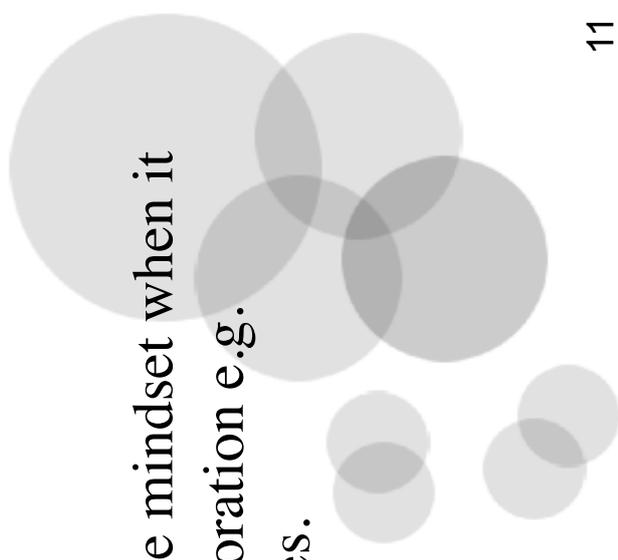
- Diversify: O&E needs to form an understanding, that AD is about having a dialogue with many diverse kinds of audiences, and that affects repertoire, communication and how you convey content.
- Change of perspective: O&E need to change current perspective and work with AD outside – in. That means to put audience in the center and see them as equals, not as a crowd that needs classical education
- Strategic anchoring: AD must be within the core management processes of O&E. It must be a prerequisite for strategic planning in the arts as well as in the designing of the user experience and the business development.



# RECOMMENDATION #4

O&E need help to ensure a more sustainable economy

- More sources of income: The economy within O&E is experienced as outside of control and influence. That's down to the fact that almost 90 percent comes from public funding. It is a must to increase the number of funders – foundations and sponsorships – and to increase earned income on audience activities.
- The most obvious place to look is ticket sales and price differentiation. There are far too many unsold seats and too low variations in prices in general. This could be developed within the framework of membership
- A pro-active mindset: There is a need for a more pro-active mindset when it comes to funding and sponsorships, to create a true collaboration e.g. artistically or strategically with foundations and businesses.



# GENERAL FINDINGS & CONCLUSIONS

Across the different themes

- **First-timers:** There is far to little awareness to first-time guests. They are in international AD perspective the most promising group to create growth in audience numbers.
- **A systematic approach:** There is very little sign of a systematic approach to AD, concept development, business development, membership schemes e.g. A more comprehensive work to build processes and evaluation is needed.
- **Formation:** It is a challenge, that many of the O&E seem to think that formation of their audience is a central part of their existence. It can look like they are talking down to audiences instead of creating a great experience. AD is not formation of the audience, it is O&E getting to know their audiences and create a vibrant collaboration.
- **New competencies:** There is a strong focus on the arts. But there a lack of resources and competencies within AD.

# NEXT STEPS...

Fase 2 of the project - hopefully ;-)

- A qualitative nation-wide user survey and analysis with focus on brand awareness, potentiel audience, segmentation of both existing and potentiel audience, barriers and promotion for participation in classical music experiences
- A mapping and analysis of the user journey in the 3 most promising audience groups: Youngsters, families and empty nesters.
- An ambitious national Audience Development project across danish O&E, with focus on top management strategies, concept development, prototyping and evaluation.

# MOST IMPORTANT TAKE-AWAYS

From this presentation

- Create more sources of income – from foundations, sponsorships, ticketing and memberships
- Diversify: To attract a bigger audience you must diversify your communication, your value offers and your repertoire – and know your customer segments and their behavior
- You need data – to sustain your strategic planning, to know your audience better, to customize the user experience

# THANK YOU FOR YOUR ATTENTION!

