Audience-development strategies of three university symphony orchestras in South Africa

MM Swanevelder

iD orcid.org/ 0000-0003-4887-0921

Dissertation submitted in fulfilment of the requirements for the degree *Master of Music* in Musicology at the North-West University

Supervisor: Dr Y Brand

Co-supervisor: Prof HM Potgieter

Graduation May 2018
Student number: 22597832

NWU®

NORTH-WEST UNIVERSITY
NOORDWES-UNIVERSITEIT
UNIBESITI YA BOKONE-BOPHIRIMA

1 November 2017

TO WHOM IT MAY CONCERN

This is to confirm that I assisted Ms MART-MARI SWANEVELDER with the language editing and proofreading of her thesis (School of Music, North-West University), while she was preparing the manuscript for submission. The title of the thesis is **Audience-development strategies of three university symphony orchestras in South Africa**.

I went through the paper making corrections and suggestions with respect to language usage, and followed up further enquiries on the paper. Given the nature of the process, I did not see the final version and I restricted my editing to language issues, but I remained available for consultation as long as necessary.

I may be contacted at the number/address below for further information or confidential confirmation.

Dr Edwin Hees
(Associate Professor Emeritus)
University of Stellenbosch
Private Bag X1
Matieland 7602
Cell: 076 977 7742
eph@sun.ac.za

ACKNOWLEDGEMENTS

I would like to acknowledge the following people for their support throughout this study:

- ➤ My parents, Deon and Emerentia Swanevelder, for their faith, love and encouragement, without whom I would never have enjoyed so many opportunities.
- ➤ My supervisors, Dr Yvonne-Marie Brand and Prof Hetta Potgieter, without either of which this work would not have been possible. They generously gave their time to offer me valuable guidance towards improving my work.
- ➤ Prof. Edwin Hees for the language editing.
- ➤ Mandie van der Merwe, for her constant encouragement and valuable friendship.
- ➤ Gerdus, Yolanda and Chris, for making university life (of little sleep and endless cups of coffee) worth it.
- ➤ Dr Liesl van der Merwe, her constant guidance and support have kept me going ahead.

ABSTRACT

This dissertation explored the audience-development strategies of university symphony orchestras in South Africa, which were intended to ensure that audience numbers might stabilise or grow. This is a huge challenge for orchestras when building and maintaining their audience base.

The main question that guided the dissertation was: What are the audience-development strategies of three university symphony orchestras in South Africa? To answer this question the dissertation had to be divided into two parts. Part one consisted of a conceptual framework article aimed at answering the first sub-question: What are the existing audience-development strategies for symphony orchestras, as described in the scholarly literature? Part two consisted of a comparative case study article exploring three universities' audience-development strategies. The comparative case study aimed to answer the second sub-question: What themes emerged from the analysis of the data on the audience-development strategies of three university symphony orchestras in South Africa? For this article I drew on the conceptual framework as well as on the open-ended interviews with the conductors and marketing officers of the three participating orchestras for the case study.

The two most pressing themes across the case studies concerned were: 1) the lack of funding, and 2) the lack of administrative infrastructure. I found that the participating orchestras' strategies seemed to be the responsibility of their respective marketing officers and depended on the limited capabilities of these marketing officers, and that their audience-development strategies were vague and focused on the short-term.

From the study it is evident that to improve sustainability for these orchestras, the marketing officers should acquire sufficient marketing knowledge and should be employed fulltime. The three orchestras should also re-evaluate some of their existing audience-development strategies to facilitate continual growth; this includes creating a sound brand and utilising internet social media. Besides suggesting the relevant benefits of audience-development strategies for symphony orchestras, I also

recommend specific activities which the management teams of university orchestras might implement to ensure the growth and retention of their audience base.

Keywords

OPSOMMING

Hierdie verhandeling het konsertgehoorontwikkelingstrategieë van drie universiteitsimfonie-orkeste verken om te verseker dat gehore nie verder krimp nie, maar eerder groei. Die behou van gehore en uitbou daarvan is problematies vir baie simfonie-orkeste.

Die hoofnavorsingsvraag wat die studie gelei het, was: Van watter konsertgehoorontwikkelingstrategieë maak drie Suid-Afrikaanse universiteitsimfonie-orkeste gebruik? Hierdie navorsingsvraag het die studie in twee gedeeltes verdeel. Die eerste deel bestaan uit 'n konseptuele raamwerkartikel wat poog om die eerste subvraag te beantwoord: Wat is die bestaande konsertgehoorontwikkelingstrategieë van simfonie-orkeste soos tans beskryf in die literatuur? Deel twee bestaan uit 'n vergelykende gevallestudie wat poog om die tweede subvraag te beantwoord: Watter temas het na vore gekom deur die data-ontledingsproses van die konsertgehoor-ontwikkelingstrategieë van die drie Suid-Afrikaanse universiteitsimfonie-orkeste? Vir laasgenoemde artikel was daar 'n kombinasie van inligting wat die eerste artikel opgelewer het sowel as die inligting spruitend uit ongestrukureerde onderhoude met dirigente en bemarkers van die drie deelnemende orkeste.

Die twee opvallendste temas in die twee gevallestudies was die volgende: 1) die tekort aan befondsing, en 2) die tekort aan administratiewe infrastruktuur. Verder het ek bevind dat die strategieë van die deelnemende orkeste die verantwoordelikheid van die betrokke bemarkers is, maar dat dit ook afhanklik is van die dikwels beperkte vermoëns van dié bemarkers. Die konsertgehoorontwikkelingstrategieë was nie net onduidelik nie, maar die fokus was ook op die kort termyn.

Ter verbetering van die volhoubaarheid van hierdie orkeste, is dit nie net noodsaaklik dat die bemarkers van die orkeste hul kennis verbreed nie, maar ook dat hul voltyds aangestel word. Bestaande konsertgehoorontwikkelingstrategieë moet ook weer geëvalueer word ten einde deurlopende groei te bewerkstellig; dit sluit die ontwikkeling van `n handelsmerk in en ook die benutting van sosiale media. Behalwe vir die voorstelle rakende die nut van konsertgehoorontwikkelingstrategieë, maak ek ook

spesifieke voorstelle wat deur universiteitsorkesbestuur en -bemarkers geïmplementeer kan word ten einde die behoud en uitbreiding van hul gehore te bevorder.

Kernwoorde

Bemarkingstrategie, marksegmentasie, klassieke simfonie-orkeste, kunste besigheidsbestuur, konsertganger-ontwikkeling.

Table of Contents

List of Figures

List of Tables

CHAPTER 1

INTRODUCTION

1.1 Background

Designing appropriate audience-development[1] strategies for symphony orchestra audiences is a broad and multifaceted endeavour that is discussed and studied by nearly every arts administrator (Gilmer, 2008:15). As audiences grow smaller and become harder to attract each year, organisations attempt to establish new and innovative strategies to build and retain audiences. Many professional orchestras have already implemented marketing tactics that have effectively improved audience attendance. These marketing tactics include traditional marketing tactics and mailing lists, communal engagement, festival programming, market segmentation, branding and subscription strategies (Bedell, 2012:17). However, although there is an abundance of investigations into marketing strategies for audience-building purposes in the performing arts and for professional orchestras, little has been written about the strategies applicable to non-professional or semi-professional orchestras, which include university orchestras.

The problem that faces university symphony orchestras is that shrinking audience numbers not only reduce income earned, but it also influences the prospect of effective fundraising and building the audience base. Symphony orchestras have been moderately successful at developing and adopting marketing strategies which assists in reaching goals allied with maintaining audience members (Rizkallah, 2009:111). However, loyal audiences are diminishing, and orchestras are more and more concerned with attracting a new and bigger audience base, so one might ask the question: *Who will fill the seats in the concert hall today*? (Lin, 2008:25).

---

[1]In this study the term "audience development" refers to expanding and retaining audiences.

Recent research on symphony orchestras shows that if orchestras fail to identify their audiences, communicate ineffectively and do not use suitable methods of communication with their target audiences, they waste time and money and they also lose what audiences they have (Lin, 2008:19-20). If a symphony orchestra fails to entice audiences, it risks losing possible individual donors and fail to attract institutional donors (Kaiser, 2012:5). All symphony orchestras encounter problems when attempting to build their audience base such as dwindling participation in live symphonic music concerts (Knotts, 2015:1), smaller subscriber bases, the aging of existing audiences, altering values related to symphonic music in different generations, and the increasing curtailment of music education in public schools (Bedell, 2012:17). These problems are especially menacing to medium-sized and small symphony orchestras lacking significant endowments, which is the typical situation for university symphony orchestras. Larger symphony orchestras with sizable donations and of fixed repute may not be struggling with sustainability at present. Yet, if decline of audiences continues, they will also face the same uncertain future as small-size orchestras (Lin, 2008:24).

Although extensive research has been done on possible reasons for declining participation in live symphonic music concerts, little is known about what actions the management teams are taking in response to these changing trends in audience attendance (Bedell, 2012:1). There is also little literature available on the views and practices of the management teams of orchestras, thus making them an under-studied group. There is also no literature on marketing strategies or audience-building strategies for orchestras in South Africa. So far in my research I have found no literature on strategies which are manageable for one person, seeing that small orchestras usually appoint one person (or occasionally two people) for this purpose.

The literature on the problem revealed a few recurring topics (as indicated in Figure 1). A brief account of these recurring topics and issues follows, and will be discussed in more detail in Chapter 2 (Article One – Conceptual Framework).

Audience engagement through programming
Music education
Customer segments
Demographics
Technology and channels of communciation
Branding
Tickets and subscription strategies
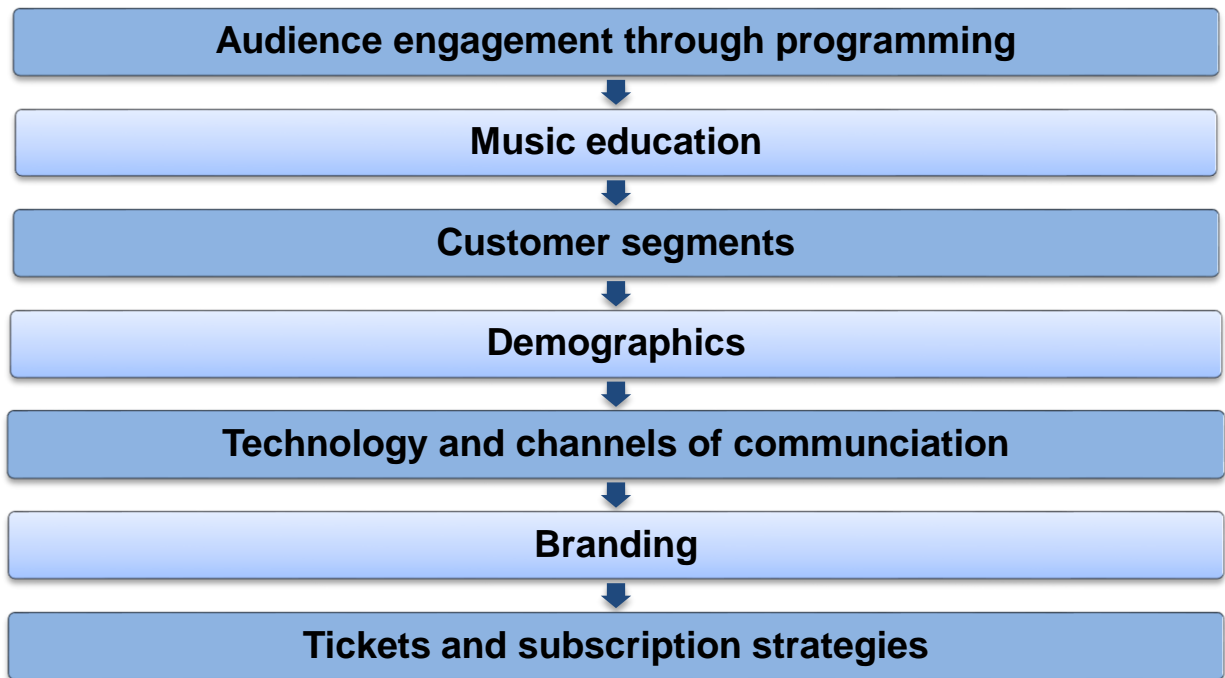
Figure 1: Recurring research topics on audience developing strategies

1.2   Audience engagement through programming

It is an unfortunate truth that the pursuit of box office success "has led to conservative, even reactionary, programming" (Martorella, 1985:313). Ensembles often face the uncomfortable conflict between programming works they feel they should perform and that audiences should hear versus what they are confident will sell tickets (Martorella, 1985:314). This would explain the hesitation among orchestral leaders about performing newer music. According to Merkle (2014:19), new music does not have the tried and tested evidence of appeal to attract new audiences that orchestras seek when planning a season.

The conductor Leonard Bernstein, who took over the New York Philharmonic in 1958, made progress in involving and educating the audience. His educational television series, Leonard Bernstein's *Young People's Concerts*, influenced music education and

symphony orchestras greatly by providing the audience with a new mode of experiencing concerts (Lin, 2008:5).

1.3   Music education

International studies point out that enrolment in music subjects in especially the secondary school is declining (Lewis, 2015:iv). Although there is evidence supporting the view that music education should be a significant component to the curriculum in public schools (Jacobs, 2010:26), schools experiencing a lack of funding, time and staff, and driven by standardised test goals, are forced to prioritise, and frequently choose other subjects over music and other art forms (Lin, 2008:22). This is also relevant in the South African education curriculum. It is acknowledged that children who are exposed to music education and music experiences at an early stage are more likely to appreciate symphonic music and become ticket buyers (Jacobs, 2010:27). Many international orchestras developed successful and thriving outreach programmes in an attempt to educate potential audiences (Kotler & Scheff, 1997:21); examples of this are the Vermont and Annapolis symphony orchestras, which have dedicated programmes to music education to educate children and younger audiences. However, not all orchestras possess the necessary funds and time to fill the gap in the public school curriculum (Kotler & Scheff, 1997:21). South African symphony orchestras are mainly non-government funded organisations and thus struggle to develop extensive outreach programmes. Merkle (2014:24) explains that regardless of what strategy an organisation adopts, diversifying services have proven to be an effective approach. Appealing to audiences through product diversification also aids in reaching more segments of the local community (Merkle, 2014:24).

1.4   Customer segments

It is important to understand who comprise existing audiences and what their relationships are to the organisation (Merkle, 2014:12). Osterwalder and Pigneur (2010:20) define customer segments as "the different groups of people or organisations

an enterprise aims to reach and serve." There is certainly an opportunity for expanding audiences in the light of the rapidly changing demographics of South Africa. As demographics and other factors change, organisations must take into account the value that audiences place on the orchestra(s) in their communities (Merkle, 2014:15-16).

1.5   Demographics

Demographical information such as education, race and gender are good predictors of orchestra attendance (Rizkallah, 2009:121). Research also addresses the issue of age. The League of American Orchestras has indicated that half of attendees at traditional symphony concerts have an average age of 55 years (Lin, 2008:20). Long-term audience development will be affected by aging audiences and will prove to be a challenge for orchestras in the future, but this can be countered through effective communication strategies to inform and educate a younger audience base.

1.6   Technology and channels of communication

Social media are becoming part of everyday life; thus it is understandable that marketing strategies ought to incorporate social media to communicate with potential audiences (Park, 2010:22). The popularity of social media requires that modern marketing approaches should adapt to the use of Facebook, Twitter, YouTube etc. (Park, 2010:22). Gillin (2009:128) states that "while the internet offers certain challenges to arts organisations, it also gives new power to these organisations, if they are able to accommodate themselves to its use".

Osterwalder and Pigneur (2010:26) define "channels" as "how a company communicates with and reaches its customer segments to deliver a value proposition". Traditional delivery methods of publicity for concert hall performances is still alive and well (Merkle, 2014:26), but this study will also examine alternative concert marketing methods. According to Withey (2009:3), there is little doubt that the total potential audience for symphonic music has grown enormously as a result of electronic access to

a diverse range of high-quality symphonic music. However, this promising fact does not necessarily mean that all who are exposed to symphonic music will attend performances. Thanks to online streaming options, sharing on social media and other advancements, there is a larger potential audience for symphonic music than ever before (Merkle, 2014:27). All that is left for the orchestra is to convince the 'potential' audience to attend concerts – something that can be done by positioning their orchestra effectively through branding.

1.7   Branding

Park (2010:46) defines branding as *"a principal strategy of strategic marketing as a way to establish the image of arts organisations and products and as a way to improve the value of arts products as well"*. Michael Mauskapf (2012:275) states that "understanding how people measure and perceive value is a crucial step in determining what conditions breed success*"*. Mauskapf (2012:275) contends that investigation of the perceived value of the orchestra product would surely enable organisations to position themselves more effectively. Rizkallah (2009:121) argues that positioning the product positively in the mind of the audience is important, given the role that perception plays in decision-making. Branding orchestras differently can help alter the image of snobbishness so commonly associated with symphonic music and overcome any misperceptions regarding the expenses related to concert attendance (Rizkallah, 2009:121).

1.8   Tickets and subscription strategies

There is a misperception that ticket prices for symphony orchestras in South Africa are extremely expensive. Rizkallah (2009:122-123) states that organisations performing symphonic music should eradicate this perception by communicating ticket prices clearly to their market segmentations. Another major strategy of audience development for symphony orchestras is subscription campaigns (Kotler & Scheff, 1997:261-262). Sales of subscriptions have provided arts organisations with a method to build their

patron bases, guarantee income and create a consistent relationship with their audiences (Lin, 2008:16).

Though there are many other themes of audience-development strategies, the above themes appear to be the most consistently addressed in the literature. These topics will serve as a guide for this investigation of audience-development strategies; however, the investigation will not be limited to these topics.

This particular study differs from previous investigations reported in the literature in several ways. My research on audience-development strategies so far has revealed that the focus is placed on professional symphony orchestras and rarely involves the audience-development strategies of university symphony orchestras, largely composed of amateur performers. A researcher, Burdukova (2010), provides an analysis of orchestras within the South African context, but her study also concentrates only on professional orchestras and does not include university orchestras. My study focuses primarily on the audience-development strategies of university symphony orchestras within a South African context, which also incorporates an in-depth investigation of the processes adopted by the management teams.

This study could guide emerging performing arts leaders and arts administrators, enabling them to gain understanding of audience-development initiatives for university symphony orchestras in South Africa. This study may appeal particularly to performing arts leaders across South Africa, as this research and research results may influence their own audience-development strategies. This study greatly influenced my way of thinking about audience-development for the North-West Youth Orchestra. A vast number of today's orchestras are experiencing a decline in audience attendance. It is for this reason that I wish to identify strategies to assist organisations in overcoming this predicament, in the hope also of increasing future sustainability.

The purpose of this comparative case study was to explore the audience-development strategies of three university symphony orchestras in South Africa in order to understand how they build and retain audience members.

1.9 Research questions

The main research question that guided this inquiry was:

- What are the audience-development strategies of three university symphony orchestras in South Africa?

The research sub-questions stemming from the main question were:

- What are the existing audience-development strategies for symphony orchestras, as described in the scholarly literature? (Chapter 2 - Conceptual Framework - Article 1)

- What themes emerged from the analysis of the data on the audience-development strategies of three university symphony orchestras in South Africa? (Chapter 4 – Comparative Case Study – Article 2)

- In what ways can these themes be interpreted within the context of the scholarly literature on audience-development strategies? (Chapter 5)

1.10 Research design

This study followed a qualitative design to explore audience-development initiatives that focused on organisations based in my location and related to this area of interest. Qualitative research is "emergent and flexible", and adapts to the changing circumstances of the study in progress; the researcher is in close contact with the participants and spends time in the natural setting of the study (Merriam & Tisdell,

2016:18). The researcher adopted different lenses, filters and perspectives to illuminate "social life to discover new perceptions about the facet of the world" that is being researched (Saldaña, 2014:8).

The researcher adopted a constructivist worldview and concentrated on the meanings that each participant ascribed to their experience and views on audience development. The constructivist researcher frequently addresses practices of communication among individuals and believes that people seek to understand the world they live in by developing subjective meanings to explain their experiences. Researchers with this worldview focus on the participants' views of the situation being studied (Creswell, 2014:8).

This study followed the article option[2] for the dissertation. The article option entails constructing one or more chapters within the dissertation as articles to be submitted for publication to pre-determined accredited journals. These articles may be presented for examination in lieu of a dissertation or chapters of the dissertation. This study was thus divided into three phases:

- Phase one (Chapter 2 - Conceptual Framework – Article 1)

The first section (Article 1) consists of a conceptual framework, which is defined by Merriam (2009:66) as the underlying structure, the scaffolding or frame of one's study. Documents are a convenient source of data and I investigated a number of documents such as journal articles and academic books to conduct this study. Merriam and Tisdell (2016:167) also refer to media such as television, film, radio, newspapers, literary works, photography, and more recently the internet as sources of "public data". The public data that I used in this study include a range of websites, Facebook and YouTube.

---

[2] The article option requires each article to discuss the methodology used, thus some reiteration will occur.

The focus was on non-professional or semi-professional orchestras, in this case specifically university orchestras. A search was conducted to identify 'audience-building strategies for university symphony orchestras', which also extended to an examination of audience-building strategies for symphony orchestras in general. The data collection and analysis was a continuous process until data saturation was reached and no further categories emerged. These categories were developed into themes. The research methods, data collection and data analysis are discussed in detail in Chapter 3.

- Phase two (Chapter 4 - Comparative Case Study – Article 2)

The second phase entailed a comparative case study (Article 2) of three university symphony orchestras in South Africa regarding their strategies for audience development. The term "comparative case study" is defined by Kaarbo and Beasley (1999:372) as "the systematic comparison of two or more data points ('cases') obtained through use of the case study method". This phase entailed conducting a cross-case analysis to determine what marketing strategies the three participating orchestras implemented and if these strategies were interrelated.

Data was also collected through individual interviews. The interviews were open-ended and particular attention was paid to the similarities and differences between responses. Stake (1995:65) states that the purpose of such interviews is not to acquire yes or no answers, but to encourage the participants to explain their experiences.

- Phase three (Chapter 5)

In the third phase, data was interpreted within the context of the literature on audience-development strategies to determine common ground, if any, between the two articles.

1.11 Data analysis

The Noticing, Collecting, Thinking (NCT) model (Figure 2) for analysing the data was applied. The three basic components of the model are noticing things (finding interesting things when reading documents), collecting things (categorising similar things that have been noticed before) and thinking about things (considering how categories fit together) (Friese, 2014:12). Analysis moves back and forth between noticing, collecting and thinking.
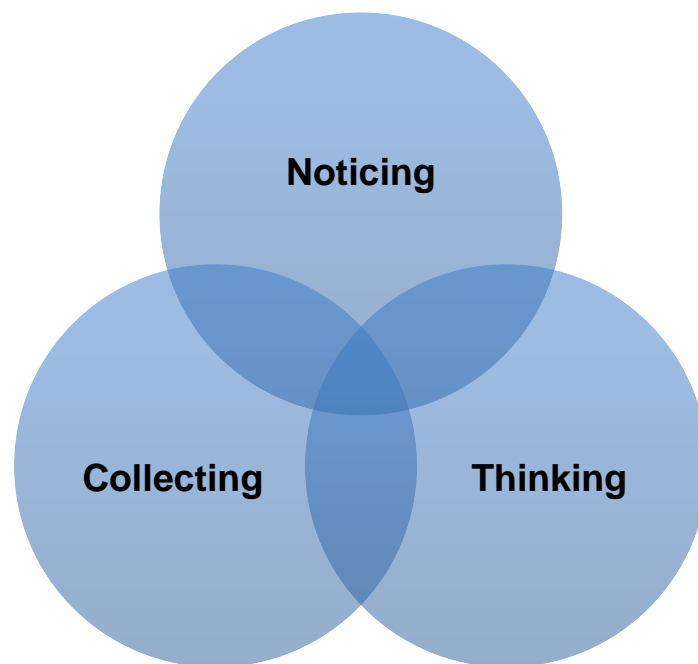
Figure 2: NCT model

The individual interviews were transcribed and analysed using a thematic approach where data were coded, using the software programme Atlas.Ti 7 to identify emerging themes (Braun & Clarke, 2006:6; Vaismoradi *et al.*, 2013:400). The thematic analysis aimed to examine the datasets by dividing them into relatively small units and treating them descriptively (Vaismoradi *et al.*, 2013:401). Using thematic analysis made the process of establishing interrelatedness between the Conceptual Framework (Article 1) and the Comparative Case Study (Article 2), more manageable.

1.12   Participants

The participants were the respective marketing officers and conductors of three university symphony orchestras in South Africa which made a total of three groups with two participants in each group. I protected the identities of the three university orchestras by giving them pseudonyms (Orchestra A, B or C). The sites of study were chosen because they were homogeneous samples and described particular subgroups (management teams) in depth. According to Patton (2015:173), different kinds of participants who are involved in one programme need to be investigated thoroughly; in this case, the small homogeneous samples were the management teams.

1.13   Validation strategies and ethics

I achieved validity through triangulation and crystallisation of multiple sources of data (Creswell, 2014:240). Merriam and Tisdell (2016:245) define this process as comparing all the data collected through observations, interviews and follow-up interviews with the same people and reflecting on data collected to obtain understanding. According to Oliver-Hoyo and Allen (2005:42), "triangulation involves the careful reviewing of data collected through different methods in order to achieve a more accurate and valid estimate of qualitative results for a particular construct". Denzin and Lincoln (2011:5) states that "in the crystallisation process, the researcher tells the same tale from different points of view while mixing genres and writing formats, offering partial, situated, open-ended conclusions. Crystallisation provides the researcher with a deepened, complex, thoroughly partial understanding of the topic (Denzin & Lincoln (2011:122). I also used member checking, which incorporated feedback on the emerging findings from the participants (Carlson, 2010:1105). In this way the preliminary analysis was taken back to some of the participants so that they could confirm whether my interpretations "ring true" (Carlson, 2010:1105).

Table 1: Strategies used for validation

Strategy	Description
Triangulation & crystallisation	Numerous sources of data and collection techniques to verify results were used and reflection on the analysis experience to identify and articulate patterns or themes were utilised
Member checking	Data and preliminary analysis were presented to participants for confirmation of interpretations
Peer review / examination	Examiners evaluated the study

I followed Creswell's (2014:208) advice about rights, needs and values before beginning with the interviews or observations. The purpose of this study was explained to the participants and consent forms (Addendum A) were discussed and signed. All interviews were voluntary and participants could withdraw from the project at any time. The ethical procedures stipulated by the North-West University were strictly followed.

1.14   Role of the researcher

This investigation was of particular importance for me because of my involvement with the North-West Youth Orchestra's marketing team for the past five years and my passion for orchestral performances. Concert attendance by audiences motivates musicians and management to produce a high standard of performance. This in turn encourages more concerts, which then attracts new audience members, thus building the audience base. This results in audience sustainability, which promotes financial sustainability of the orchestra on the basis of ticket sales.

1.15   Significance of the study

According to Merkle (2014:4), many aspects of contemporary life such as leisure time, flexible income, work-life balance, popular culture and communication methods have changed dramatically over time, yet most orchestral functions have remained practically unchanged. This study identified problem areas in the audience-development strategies of South African university symphony orchestras; that could help to develop new solutions for new problems.

1.16   Structure of chapters

Figure 3: Layout of chapters

Chapter 1 was to introduce the study and provide an overall account of the planning as well as a brief description of the research design. Chapter 2 consists of a conceptual framework (Article 1), which took the form of an article to be submitted to the journal *Arts Marketing: An International Journal*[3]. Chapter 3 explained the research design, approaches and methods that were used in this study. Chapter 4 was written in the format of a comparative case study (Article 2) of three university symphony orchestras to determine their different audience-development strategies. This chapter has been submitted for publication to the journal *Musicus*. Chapter 5 discusses the conceptual framework and the comparative case study in order to determine common ground between them. The figure above (Figure 3) provides a layout of the chapters discussed.

---

[3]Currently published as *'Arts and the Market'*

CHAPTER 2

ARTICLE: Conceptual framework[4]

2.1   Title

Audience-development strategies of symphonic orchestras: a conceptual framework

2.2   Abstract

Purpose – The purpose of this study is to formulate a conceptual framework of current audience-development strategies of symphonic orchestras and aspects that influence these strategies.

Design/methodology/approach – The authors propose a conceptual paper aimed at providing a framework for audience-development strategies within a qualitative paradigm with a constructivist worldview.

Findings – The article provides a conceptual paper on audience development for symphonic orchestras.

Originality/value – The authors' perspectives on knowledge about audience development for sustainability will be of great interest to managers, practitioners and policy-makers.

Keywords – audience development, sustainability, arts management, symphony orchestras

Paper type – Conceptual framework

---

[4] See Addendum B for the information and house style of the Arts and the Market Journal

2.3 Introduction

The purpose of this article is to provide the reader with an eclectic overview for understanding (Cronin *et al.*, 2008:38) the existing audience-development strategies for symphony orchestras, as described in the scholarly literature. The research for this was conducted within a qualitative research paradigm which assisted in generating new perceptions and cognitions (Saldaña, 2014:8) about audience-development strategies. It offers a conceptual framework depicting current audience-development strategies that are available to symphonic orchestras worldwide, but this conceptual framework will focus only on the most popular strategies to date. The data for this article consisted of 120 academic sources which were examined in terms of their relevance to the article. These academic sources were then examined and coded until data saturation was reached. The data collection and analysis process was iterative. By the time saturation point was reached only 60 primary documents remained. The keywords for the literature search were 'audience-development strategies for university symphony orchestras', which was later expanded to include 'symphony orchestras' in general. A search was also done with the keywords 'identify audience-building strategies for university symphony orchestras', which was also later expanded to 'audience-building strategies for symphony orchestras' in general.

The Notice, Consider and Think (NCT) model for analytical purposes was used (Friese, 2014:12). This model consists of noticing things (finding of interesting or notable information when examining the documents); collecting things (themes were generated from the data collected); and thinking about things (considered how the themes fit together) (Friese, 2014:12). Analysis continues to move in a circular motion moving between noticing, collecting and thinking until saturation has been reached.

2.4 Overture

Classical music concerts have a range of diverse challenges to manage (Lin, 2008:7). Over time the expectations of concert-goers[5] have changed. Reasons for this may be the economic environment, social interaction, the variety of music programmes, and entertainment-related factors such as the venue, presentation of the programme and the repertoire. As a result, many audience-development strategies are no longer as effective as they were in the past (Bernstein, 2007:vii; Mandel, 2012:1). Marketers must be sensitive to consumers' needs (Lindelof, 2015:201) and the types of messages that are used to attract the consumers, as such messages are important in building up and retaining audiences (Battisti *et al.*, 2016:1). However, if this is approached incorrectly, the marketers may create barriers between themselves and audience members (Bernstein, 2007:vii). A strong and loyal audience base has many advantages and should not be taken for granted (Boyle, 2006:128). Sigurjonsson (2010:1) states that audience development is a complex subject and should not be theorised by focusing solely on dominant marketing strategies. As Bernstein (2007:viii) says, "It is not the art of finding clever ways to fill your seats. It is the art of creating genuine customer value". Audience development is the process during which an organisation builds lasting relationships with individuals (Maitland, 2000:6).

Marketers must re-examine the current market conditions, including the competition, as well as the attitude of consumers, to sustain sound management in their organisation (Goldsmith *et al.,* 2010:326), and modify existing strategies to adapt to the new environment and create fresh marketing initiatives to ensure continual audience development. Kolb (2000:159) lists eight general types of audience research implemented by organisations (Figure 4). Research into attendance provides the main empirical foundation for elaborating audience-development strategies (Mandel, 2012:2).

---

[5]In this article concert-goers, audience and consumers will be treated as synonymous.

Audience research	• Nature, composition and preferences of current and potential audiences
Motivation research	• Reasons for attendance
Customer satisfaction	• Extent to which event meets audiences' expectations
Pricing research	• Formulation of pricing policies
Product research	• Improvement of product and facilities
Competitor research	• Audience perception of product in comparison to other products and venues
Policy research	• National attitudes towards the arts
Promotional research	• Effectiveness of different media, messages and promotions in communicating

Figure 4: Most common types of audience research[6]

What is audience development?

Arts administrators need to understand how and why barriers are created between their organisations and consumers and how they can overcome these barriers to encourage audience participation. The topic of audience development has been investigated for the past several decades (Kemp & Poole, 2016:1). The term 'audience development' was coined in the mid-1990s to describe the strategies used by institutions to find and retain potential audiences (Maitland, 2000). McCarthy and Jinnet (2001:24-25) describe audience development as a process during which organisations attract and attempt to satisfy the needs of existing and potential consumers through implementing innovative strategies.

---

[6]As derived from Kolb's *Marketing for Cultural Organisations: New strategies for attracting audiences to classical music, dance, museums, theatre and opera* (2000).

Reussner (2003:103) argues that:

> Audience development implies maintaining the core audience, building a broader audience base, attracting diverse audiences and building relationships with the community.

Audience development is comprised of a variety of concepts and activities. Kawashima (2006:57) identifies four categories of audience development (Figure 5) in the arts, including 'Extended Marketing (targeting potential audiences), Taste Cultivation, Audience Education (understanding what audiences might be interested in and providing additional benefits and broadening their cultural scope), and Outreach (making performances accessible) (Kawashima, 2006:57). Audience-development strategies strive to encourage existing consumers to attend frequently and/or to diversify the audience base by targeting new market segments (Tajtáková & Arias-Aranda, 2008:179). Thus, audience development is "as much about increasing the range of audiences as it is about the size of audiences" (Hill *et al.*, 1997:27).
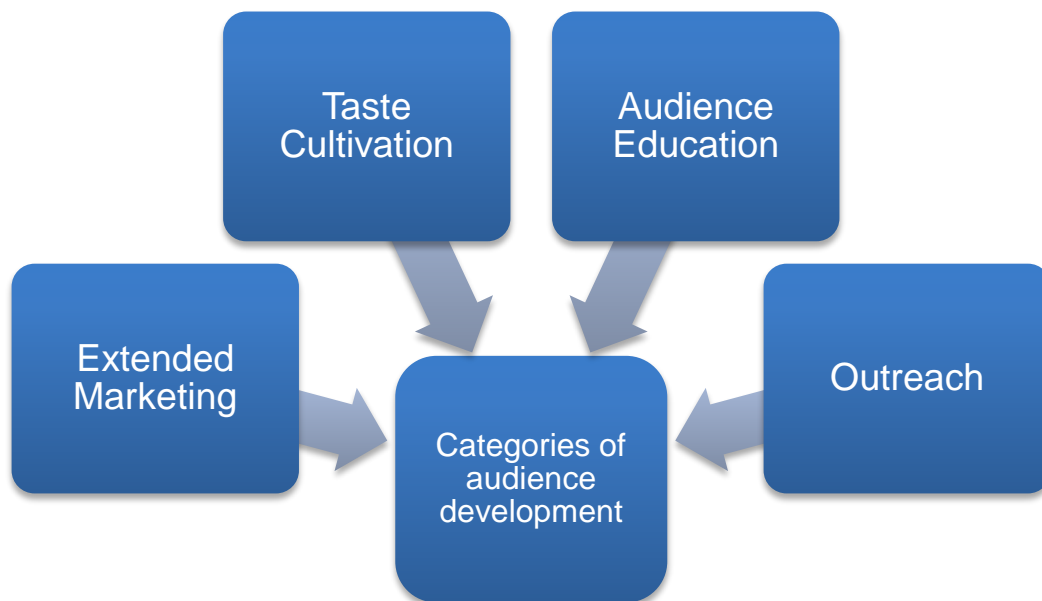
Figure 5: Categories of audience development

2.5 Context: a perspective on audiences, orchestras and managers

'Ethnographic, psychological and sociological' studies on classical music audiences and performers have grown in recent decades as declining audiences jeopardise the future of symphony orchestras (Kemp & Poole, 2016:53). In order to survive, symphony orchestras should evolve in terms of programming and advertising strategies to retain current audiences and to lure prospective audiences (Lin, 2008:1-2). The orchestra and audience form one entity, and appreciation becomes a necessity. Artists and audiences become interdependent, and the building of an audience is an all-important function of the organisation in all fields (Frey, 1938:263).

Not only should the music itself appear relevant to the audience, but the orchestra members and management teams should engage with audience members. The sacralisation of classical music and the elite stratification created a gap between musicians and audiences in classical concerts, whereas the very opposite is evident in a rock concert as the audience's and musicians' energy is co-dependent (Gilmer, 2008:17). One-way communication in concerts should be replaced with reciprocal communication (Gilmer, 2008:17).

Members of the orchestra each play a role in the way the audience experience the performance, so if one-way communication is dominant, audience members will feel their interests are being sacrificed for the sake of art (Adler, 1991:63). The orchestra can prevent the loss of these audience members by interacting with them. By interacting in small group settings, musicians close the gap between the two sides of a performance. This is where the management team should constantly examine the reactions of the audience to determine which strategies are successful and which are not (Gilmer, 2008:20). Orchestra members should take into account prevailing audience mind-sets and needs, and commercial factors (Lin, 2008:13), when deciding on the overall image of the orchestra. Attitudes toward participation in the arts are important to determine a person's intention to participate in an event. If potential audience members experience orchestral performances as intended only for senior citizens with a tertiary

education, high income or previous knowledge of orchestral performances, then they would most likely avoid buying a ticket (Gilmer, 2008:17). This is a common perception associated with orchestral performances but, contrary to popular belief, the symphony orchestra was not always the exclusive realm of the elite.

2.6 Historical overview

The existing literature on symphony orchestras within South African context, focus mostly on professional symphony orchestras and little mention is made towards their audience-development strategies. Since acquiring research focusing on audience-development strategies of university symphony orchestras within a South African context proved to be challenging, the decision was made to focus on an international perspective of symphony orchestras in general. This international perspective will provide insight to the implementation of audience-development strategies within symphony orchestras which will serve as a guide to explore the audience-development strategies of university symphony orchestras in South Africa.

In the early 19th century, classical music performances in the United States were accessible to the whole public and included a mixture of general music lovers and groups of the elite (Levine, 1988a:86). The ambience of a concert during this time was different than previous times, as the musical programme integrated lighter, more popular tunes of the day with more serious Western art music to create wide-ranging programmes for a variety of audience members (Gilmer, 2008:2). The music served as a "cultural lexicon that broke through the walls of class and income and was welcomed and admired by people of all segments of society and 'owned' by none" (Levine, 1988b:108). However, Europe did not allow the mixing of one class with another (Levine, 1988b:97). This class distinction was imported from Europe and it began to be absorbed into American culture in the second part of the 19th century and also began to spread throughout the rest of the world (Gilmer, 2008:3). The elite regarded European tendencies as an ideal and adopted the inclination of 'far superior' European appreciation of 'cultural products' as the proper approach to appreciate higher forms of

music (Gilmer, 2008:3). Thus, boundaries arose as this 'correct way' of appreciating higher forms of music was favoured and the lower class began to associate classical performances with the privileged classes (Frith, 1996:27).

The format of a symphony orchestra performance became increasingly standardised from then on. Orchestra concerts are generally associated with prestigious concert halls, highly formal attire and socially exclusive upper-class attitudes. Though that might have been true for a long time, today orchestral concerts and their patrons are changing by recreating the more informal atmosphere of the concert performances of the early 19th century (Levine, 1988a:87). But even though orchestras are changing, overcoming these stereotypes is still a challenge as the most recent "stereotypical standardization" of orchestral concerts is still fresh in the minds of consumers (Gilmer, 2008:17). Many organisations are beginning to modify the structure of symphonic music events to help overcome these stereotypes by presenting lighter programmes mixed with more traditional programmes[7] and educating audiences about the art of orchestral performances (Bedell, 2012:25).

2.7 A new perspective on models for audience development

Communication and technology

Advances in communications technology such as the internet and email have given orchestras a platform to provide their audiences with information at almost no inconvenience (Bernstein, 2007:xi). A successful marketing strategy should contain effective ways to communicate with the target market (Kotler & Scheff, 1997:299-319). To draw audiences to the "product, price, promotion, or performance, organisations need to inform, persuade and educate" (Lin, 2008:19). The most popular and consistent suggestion is to make use of the new technology in creative ways to draw people's attention (Shore, 2013:2-3). It is extremely important to send effective messages which encourage interest and promote sales. Increasingly, symphony orchestras are creating

---

[7] Traditional programmes refer to a programme containing more serious music.

elegant websites to correspond with and attract the attention of current and potential audience members[8] (Lin, 2008:19). These websites provide detailed information without the burden of printing costs or the expense of mailing weighty items, and they are also colourful and can be easily updated, which is perfect for spreading current news quickly (Bernstein, 2007:168). If symphony orchestras neglect to identify their audience and methods of communication, they waste time and money, and also risk losing their audiences.

```
Communication — Channels of communication — Product (symphony orchestra concerts) — Inform (build audiences' knowledge)
                                            — Price (value of product)
                                            — Promotion (subscription packages, ticket sale strategies) — Persuade (provide validation of value)
                                            — Performance (performance practice) — Educate (counter stereotrypical characteristics)
```
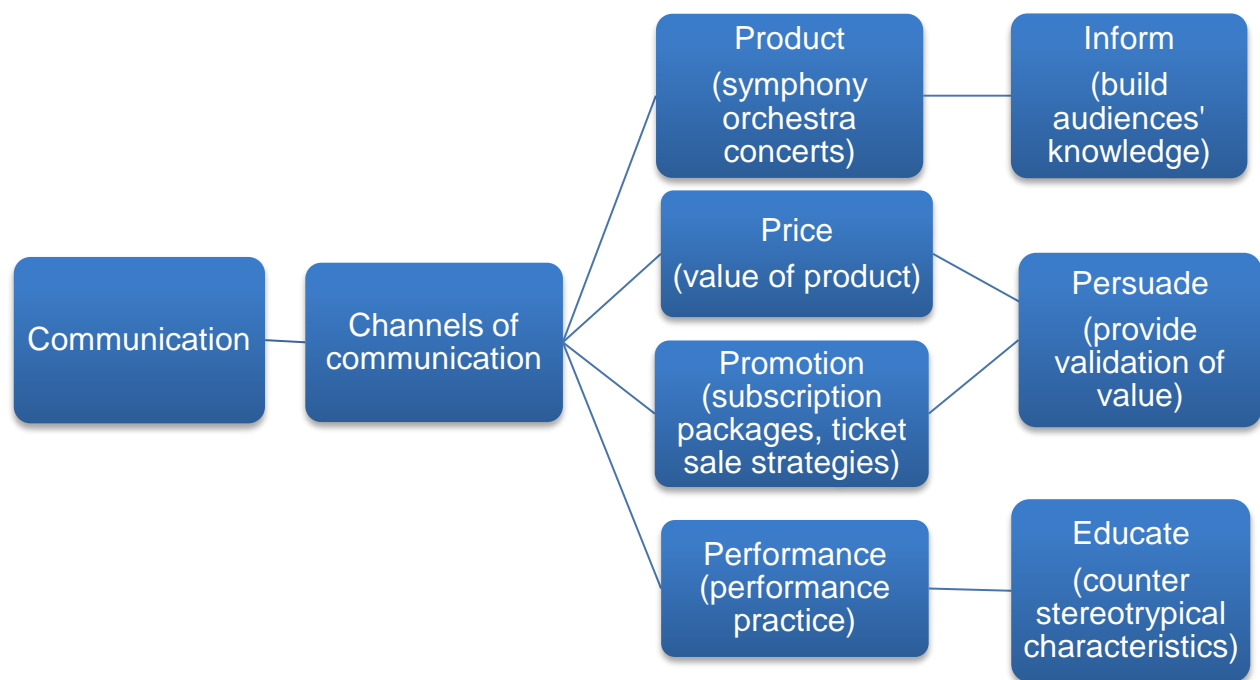
Figure 6: Communication mix

By adopting social media such as Facebook or Twitter, or disseminating a blog, photos, videos or recordings that are available online, orchestras have been more successful in building their audience base (Bedell, 2012:45). Kotler and Scheff (1997:299-319) point out that effective communication channels and promotion plans lead to successful marketing. Arts organisations should not be afraid to make use of multimedia and online

---

[8] Examples are Yale Symphony Orchestra, http://yso.yalecollege.yale.edu/; Chicago Symphony Orchestra, https://cso.org/; Johannesburg Symphony Orchestra, http://www.jso.co.za/.

resources to develop new marketing and audience-development tactics (Shore, 2013:11).

Programming and audience-engagement

Even though the main objective of an orchestra is to perform music before an audience, they should remember that there are other aspects to keep in mind as well, such as striving to present the most compelling performances and to target different kinds of offerings to different audience segments (Gilmer, 2008:16). Orchestras cannot possibly assume that one performance/programme would appeal to all consumers. Symphony orchestras should attempt to develop prospective audiences by implementing programmes and opportunities (Figure 7), which would lure segments of the market that would otherwise not be likely to attend music performances (Park, 2010:13). These strategies might include programming which is designed to inform the audience on the background of the music, and its importance and relevance today (Gilmer, 2008:18). These programmes enable audience engagement, while educating current and possible future audiences.
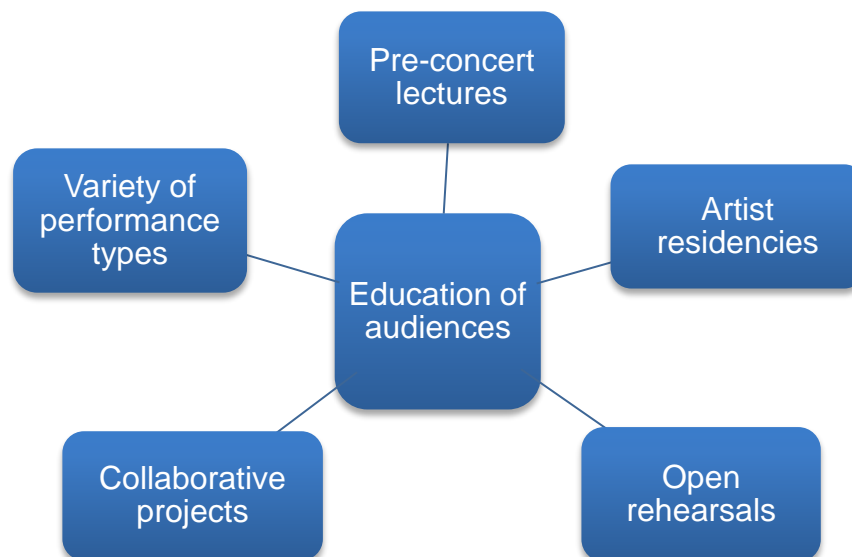
Figure 7: Programmes and opportunities

Diverse programming can attract diverse audience segments. The orchestra may perform classical works, chamber music or even a more contemporary programme to attract different audiences. Younger audiences and prospective audiences in general are more likely to attend contemporary music performances (Rizkallah, 2009:121). A popular trend among orchestras is to collaborate with pop artists as special guests[9] (Bedell, 2012:42). The ultimate goal is that traditional programming and contemporary programming should interlock at some point (Gilmer, 2008:19).

Market segmentation

Market segmentation in the performing arts has been an important topic of debate amongst artists, arts administrators and analysts (Roy *et al.*, 2014:2). Not all audiences are the same in their habits and preferences, which means that a single marketing strategy will not be the best way to reach different consumers (Bernstein, 2007:81). To understand the habits of potential audiences, marketing teams must make use of extensive market research to determine a target market. With market research, organisations can determine where to focus their marketing strategies (Bedell, 2012:18). Determining whether to advertise to a recurrent, infrequent or an absent audience seems to be a major topic of debate amongst orchestra managements. Bedell (2012:22) recommends marketing to already active audience members. These consumers are already aware of the organisation's events and performances, and thus they are easier to attract to its functions. Organisations also find it less expensive and less time consuming to market to already active audiences, because these organisations already have the information required to communicate with these consumers. While this method is effective, orchestras must not neglect to reach potential audiences if they wish to increase their audience base (Bedell, 2012:23).

---

[9] In 2013 Shem von Schroeck (singer) performed with the Calgary Philharmonic Orchestra; In 2015 Dallas symphony orchestra held a collaborative performance with St. Vincent (Indie pop artist). There are also South African examples: Nataniël narrating *Carnival of the Animals* at the Stellenbosch Chamber Music Festival. Nataniël le Roux, referred to simply as Nataniël, is a South African singer, songwriter, author, entertainer and entrepreneur.

Young professionals are a promising audience base and symphony orchestras should develop strategies that will attract them, but also keep in mind that they have a more mature audience to cater for as well. Educating the prospective audience is seen as a primary strategy for audience development. Education allows the future audience to learn how to appreciate and understand the arts; it is actually central to long-term audience development (Kam Fai, 2008:11). Some of the non-attendees of arts events might fear that they have no deep understanding and knowledge of certain arts forms, so they might not feel comfortable about attending performances, but if they are equipped with the relevant arts appreciation abilities, they would be more likely to go to arts events (Kam Fai, 2008:11).

Kotler and Scheff (1997:110) explain that there are various patterns of market selection that may be considered by an organisation: they are single-segment concentration (specific group), product specialisation (specific product that appeals to certain market segment) and selective specialisation (multi-segment coverage). The actual choice of target markets depends on understanding specific consumer habits. To understand the habits of the intended market, managers must perform extensive market research. With this information, organisations can focus their marketing tactics more effectively on different sections of the market (Bedell, 2012:18).

One way of focusing their marketing tactics is called relationship marketing. Relationship marketing emphasises customer satisfaction and increased retention (Shore, 2013:10). Although maximised profit is still the main goal, it should be seen as a long-term objective in relationship marketing. Increased participation increases loyalty and thereby increases audiences (Rentschler *et al.,* 2002:124-125). Relationship marketing is a remarkably useful strategy for audience development. It may lead to developed audience-development strategies and assist in defeating the competition in the fight for the audience's time and money (de Rooij, 2009:1). When an organisation creates a constructive and secure relationship with consumers, they enable trust and loyalty, which leads to long-term retention and growth of their audience base. Relationship marketing is also low in cost as investment of consumers occur only when

the relationship begins, thus the overall cost lowers the longer the relationship continues. (Bedell, 2012:19). The challenge, however, is to attract the audience member to ultimately attend that first concert in order to build the relationship.

Orchestras should allocate different offerings to different segments of the target market to reach a variety of consumers (Gilmer, 2008:16). Kotler and Armstrong (2005:54) define market segmentation as "dividing a market into distinct groups of buyers who have distinct needs, characteristics, or behaviour and who might require separate products or marketing mixes". Zuzana *et al.* (2012:92) state that a fundamental technique of targeted marketing is the segmentation of performing arts audiences and that these segmentations include (but are not limited to) age, geographical factors and social class, which include components such as income, education or occupation.

There are many segmentation possibilities and organisations must decide which approaches to segmentation would be the best to use. Table 2 shows the most commonly used segmentation in the arts.

Table 2: Types of market segmentation (Thomas, 2017[10])

Type	Description
Geographic segmentation	Regional differences in consumer preferences
Media segmentation	Different types of media tend to reach different audiences
Price segmentation	Appeal to variation in household income
Time segmentation	Product sold only at certain times of the year (e.g. Christmas)
Psychographic or Lifestyle segmentation	Based upon multivariate analyses of consumer attitudes, values, behaviours, emotions, perceptions, beliefs and interests

---

[10]"*Decision Analyst: Market Segmentation*" by Jerry W. Thomas (2017).

Kotler and Scheff (1997:108) provide characteristics which any optimal segmentation scheme should possess; these are:

- **Mutual exclusiveness**: each segment should be theoretically detachable from the other segments;
- **Exhaustiveness**: potential targets should be placeable in some segment;
- **Measurability:** size, purchasing power and profile of segments should be measurable;
- **Substantiality:** each segment should be substantial in that it has a large enough potential membership to be worth pursuing.

According to Hassan and Craft (2012:344), it is not only important to select a market segment, but it is also important to create an effective brand identity.

Branding

Brand identity becomes an essential part of any arts group as various groups are competing for performers, audiences and funding etc. Hence, it is important to tell people what makes the group unique and stand out from others (Rizkallah, 2009:121). Branding is even more significant when it comes to the performing arts, as the performances offered to the audience are intangible experiences that cannot be previewed before the audience has paid for their tickets (Kam Fai, 2008:8).

Bernstein (2007:194) explains that a brand should not be considered as a logo or a label. He states that "it is a symbol of trust between the organisation and the customer" (Bernstein, 2007:194). It paints a picture of the quality and type of product which could be expected and the services that will be rendered. It is important to communicate why the organisation is unique and how it stands out from others. Brands are social (Bernstein, 2007:194), because they signify views that people share. A brand has a power which brings people together for a mutual purpose, as in the case of a symphony orchestra, to share an experience. A distinctive brand could also help in attracting

patrons and companies to develop possible collaborations, such as partnerships and sponsorships (Kam Fai, 2008:9). Defining and developing the organisation's brand will provide an extensive understanding of the organisation's present requirements and opportunities, and whether ideas, old and new, are suitable for the organisation's central strengths and resources (Bernstein, 2007:65).

As mentioned above, the products offered by performing arts organisations are typically intangible experiences; audiences would sometimes rely on the organisation's brand to determine whether their "products" are suitable for them, since the brand is already a vehicle that carries the organisation's mission and messages (Kam Fai, 2008:9). Orchestras can shake off their elitist image by implementing a fresh approach to branding which will attract younger people and prospective audiences (Rizkallah, 2009:121).

Tickets and subscriptions

Arts managers have discussed and researched the topic of whether changes in the patterns of ticket purchases has been influenced by the art presented on the stage, or by changing responses of the audience because of the way that the art is packaged and communicated (Bernstein, 2007:5). The roots of the problem and the answer lie in both the marketing culture of symphony orchestras and the lifestyle of audience members; furthermore, many subscribers are also retired, which allows them more time for concerts than younger people might have (Wang, 2003:17).

Season subscriptions are considered a valuable long-term audience-development strategy (Dragga, 2013:1). Loyal subscribers provide security for arts organisations because they guarantee ticket sales and fill concert halls (Lin, 2008:15). Subscriptions collect the revenue of ticket sales in advance and help the organisation "to even its income flow during the off-season and/or to earn interest through short-term investments" (Kotler & Scheff, 1997:263).

However, audience members today have less free time and, because of economic changes, restricted budgets as well (Bernstein, 2007:211). Consumers have a tendency not to plan ahead and are therefore less likely to make long-term commitments (van Vuuren *et al.*, 2012:95-97). Younger people tend to purchase single tickets as a result of their infrequent attendance (Wang, 2003:17). Subscription packages require tickets to be paid for before the season starts (Tereyağoğlu *et al.*, 2012:19) and this might make subscription packages unappealing for most modern customers who do not plan their schedules in advance, or because they are too expensive. Furthermore, consumers such as young professional adults are working and have a variety of family and social activities to attend to (Ordun, 2015:42), which makes planning in advance to attend a season of ten concerts impossible (Lin, 2008:17).

Subscription models worked well in the past to retain loyal patrons, but it has become less significant as new generations come to the fore (Ordun, 2015:40). This is particularly true for orchestras who are attempting to draw in potential or younger audiences (Dragga, 2013:2). In these cases, new generations might experience a lack of time and money for an individual to commit to an expensive subscription package. Wang (2003:17) states that emphasising a culture of subscriptions over the purchase of single tickets has the effect of discouraging prospective younger audiences to attend. However, by emphasising single ticket sales, marketing teams might lose their base audience and with this the bulk of their ticket income (Wang, 2003:17; Dragga, 2013:8-10). Marketing officers might need to think about the rewards and drawbacks of these two strategies and decide between a subscription or a single-ticket advertising model and which will lead to greater sustainability (Bedell, 2012:20). The only reasonable solution is for symphony orchestras to be more flexible with their ticket-selling strategies to make room for both segments.

Marketing mix: integrating the 4Ps with the 4Cs

The marketing mix is one of the fundamental strategies used by marketing teams – particularly the scheme of the four Ps (Figure 8) (Bovée *et al.*, 1997:7; Krueger *et al.*,

2003). In order to build lasting relationships and attract a variety of consumers, management teams must integrate strategies in the marketing mix to attract a variety of audiences in unique ways (Gilmer, 2008:15).
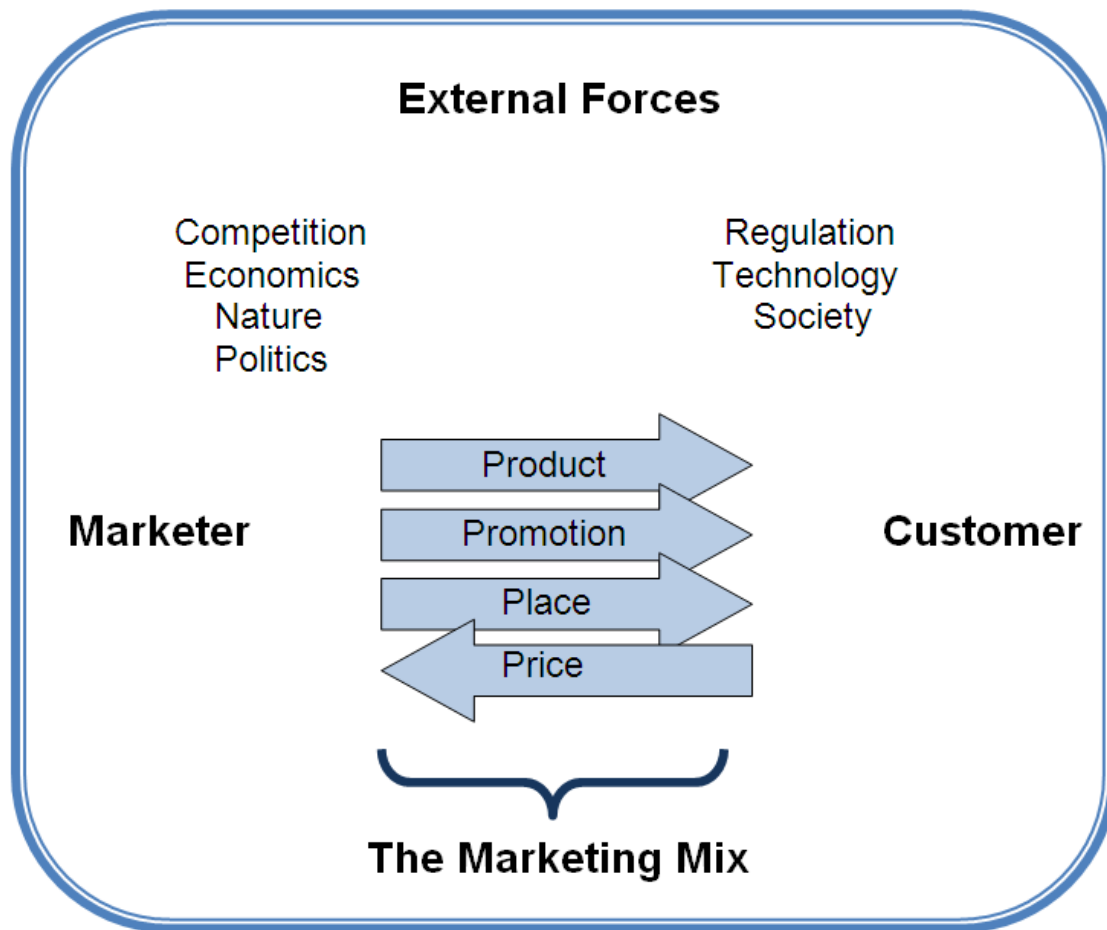
Figure 8: The four Ps (Bovée *et al.*, 1995:7)

- *Product*

This element includes all "goods and services" that is provided to the target market (Krueger *et al.*, 2003:5). Bernstein (2007:90) states that the product has two different levels: the first is the core and the second the augmented product. He describes the core product as: "that which is visibly and centrally being offered to the consumers – the

works performed by the orchestra are core products". The augmented product, Bernstein (2007:91) says,

> consists of features and benefits created by the arts managers to promote purchase and enhance consumption of the core product – this includes ticket offerings such as subscription packages, ticket exchange privileges, newsletters, pre- or post-performance lectures, etc.

The central challenge facing symphony orchestras today is the need to convince the consumer to attend their performances and to build a lasting relationship with those consumers to ensure loyalty (Wang, 2015:34). Management teams must overcome many challenges, such as upholding the consumer's expectation of musical quality, but still be able to present their product in such a way as to attract both new and present consumers (Gilmer, 2008:15-16).

- *Place / Venue*

The appeal of any venue is based on convenience and, typically, low ticket prices (Bernstein, 2007:97). Place refers to those organisational decisions which makes the product available to the consumers (Kotler *et al.*, 1999). There is a perception that orchestral performances are stuffy and old-fashioned. Orchestras must consider their venue carefully and ensure that the place of performance is audience-friendly (Graham, 2015:10).

- *Price*

Price plays a significant role in consumers' decision to attend a performance. Ticket purchases are determined with reference to the consumer's economic conditions and also by the products available on the current leisure market (Graham, 2015:20). Production costs, government regulation and ethical standards must be taken into account, as they all affect price setting for performances (Krueger *et al.*, 2003:5). Orchestras must ensure that the consumer feels that the ticket price validates the product being received. A low price can attract consumers, while at the same time

taking sales away from competitors, while a high price can create a sense of the exclusivity of a product (Bovée *et al.*, 1995:18). Consumers who are however not yet personally invested in the way that long-term loyal consumers are, will hesitate to build a long-term loyalty of money and time, so the objective of the orchestra is to convince those consumers to commit (Gilmer, 2008:23; Kamakura & Schimmel, 2012:2).

Ticket prices determine if consumers will purchase the subscription package or wait to buy single tickets (Kamakura & Schimmel, 2012:4). Expenses are a challenge as concerts are costly to present, since the orchestra has to rent or maintain a concert hall, remunerate conductors, musicians and stagehands, and make provision for other expenses (Dille, 2016:51-54). Ticket prices tend to rise as more concerts are presented each year, as the orchestra seeks methods to cover expenses. Although some studies (Lin, 2008:17) indicate that a ticket price does not discourage loyal subscribers with a higher income, it does have an effect on new subscribers and renewal subscribers. According to Dille (2016:84-85) single-ticket consumers are more concerned with ticket prices than subscribers are.

Promotional considerations

A promotional strategy incorporates a variety of techniques to communicate with a target market and to persuade them to buy tickets (Kotler *et al.*, 1999; Bovée *et al.*, 1995). Two-way communication among orchestra and audience is important and the orchestra should be able to help facilitate this communication (Bernstein, 2007:103). Seeing that consumers have a variety of options to spend their money on, selling season subscriptions and even single-ticket sales is proving to be more difficult (Dille, 2016:125). Thus it is essential that orchestras create promotional plans that are specifically developed for certain segments of consumers. Having one promotional plan for all segments will simply not do, as potential consumers will not respond the same way as long-term consumers will to certain marketing plans (Bernstein, 2014:37). Long-term consumers prefer tradition and appreciate the whole experience of dressing-up and listening to musical works by the Masters. Potential consumers need to feel that

they will receive value for their money. Thus they might be persuaded to attend using strategies of a more sociable nature (Gilmer, 2008:26).

Bernstein (2007:89) argues that marketers have relied on the four Ps (product, price, place and promotion) to develop marketing plans, but he suggests that they also consider the four Cs: customer value (not product), customer costs (not price alone), convenience (not place) and communication (not promotion) (see Figure 9). Krueger *et al.* (2003:6) also note that modern consumer-oriented marketing necessitates taking the four Cs into account. The four C marketing strategy is focused on customers' attributes and the vital factor is consumers (Lin *et al.*, 2013:online).

CLIENTS (Customer value) Find what the customer wants and needs. Then create the product, service, or solution.	COSTS (Customer cost) Consider all costs involved in satisfying your clients, including costs that clients themselves will have to incur to satisfy their needs
Target Market	
COMMUNICATIONS All interactions between your organization and clients	CONVENIENCE How and where does the customer want to purchase?

Figure 9: Marketing mix – the four Cs (Kar, 2011)

- *Customer value (Clients)*

The seller perceives value as the amount of money the buyer pays (Chen *et al.,* 2015:222). Porter (1985:38) defines value as follows: "In competitive terms value is the amount buyers are willing to pay for what a firm provides them." Customer value entails what the consumer wants to receive from the product or service offered to accomplish the consumer's desired goals (Woodruff & Flint, 2001:321-337).

- *Customer cost*

Customers no longer focus only on the price when making a purchase (Kotler & Armstrong, 2007), but also consider the time, energy and/or opportunity costs (Smutkupt *et al.,* 2010:133). Organisations must understand the financial situation of consumers in order to provide them with appropriate financial options to cater to their specific needs and wants (Lin *et al.*, 2013: online).

- *Convenience*

Convenience is a key advantage for customers with time pressures (Smutkupt *et al.,* 2010:134). Orchestras should consider how accessible and understandable their services that they are providing to their consumers are, so that they may respond better to the consumer's requirements to generate value and encourage motivation relating to attendance (Lin *et al.*, 2013:online).

- *Communication*

Orchestras should communicate continuously with their consumers. The marketing team should also provide communication channels which the consumer may use to communicate with the orchestra (Lin *et al.,* 2013:online). To understand the needs of the consumer, communication between the orchestra and consumer should remain constant (Lin *et al.*, 2013: online). All message sources – either from traditional

communication instruments or beyond the range of these instruments, such as product messages, service messages and unplanned messages (Duncan & Moriarty, 1997:78; Finne & Strandvik, 2012:128) – serve customers' needs for knowledge and understanding relating to a product, service or any phenomenon that renders value-in-use for their needs (e.g. in making purchasing decisions or consumption situations).

2.8 Coda

To sum up, the above conceptual study shows that the available strategies currently implemented are quite strong. They are consistent in terms of fulfilling their own missions, but the question remains: Are they still viable enough to remain exactly the same? Symphony orchestras' base audiences have consisted typically of a more mature audience. The challenge facing orchestras now is to attract younger audiences while still retaining their current mature audience base (Rizkallah, 2009:111). The possibilities of audience development should be further explored in order to obtain sustainability for symphony orchestras. Marketing teams should assess marketing strategies, particularly in terms of the market location and trends. The creation of a mixed audience assists in forming a continuous progression of support that assists in the sustainability and growth of the symphony orchestra as a community art form.

> "If you're trying to persuade people to do something, or buy something,
> it seems to me you should use their language, the language they use
> every day, the language in which they think".
> — David Ogilvy[11]

---

[11] Ogilvy, D. 2013. Ogilvy on advertising. p. 49

2.9 Bibliography

Adler, N. (1991). *International dimensions of organisational behaviour* (2nd ed.). Boston: PWS-KENT.

Battisti, N., Dolcetti, F. R., Nutricato, M., Betti, F., & Propersi, G. (2016). An audience development questionnaire based on emotional text analysis: A festival case study. *13ème Journées Internationals d'Analysestatistiques Des Données Textuelles,* 1-12.

Bedell, R. (2012). *Audience development: Texas symphony orchestras.* (Unpublished Master's program). University of Oregon, Oregon.

Bernstein, J. S. (2007). *Arts marketing insights: The dynamics of building and retaining performing arts audiences*. San Francisco: Jossey-Bass.

Bernstein, J. S. (2014). *Standing room only: Marketing insights for engaging performing arts audiences*. New York: Palgrave Macmillan.

Bovée, C. L., Houston, M. J., & Thill, J. V. (1995). *Marketing*. London: McGraw-Hill.

Boyle, S. (2006). Single serve or package deal? A study of regular attendees to symphony orchestra concerts. *International Journal of Nonprofit and Voluntary Sector Marketing, 12*(2), 127-134.

Chen, J. K., Batchuluun, A., & Batnasan, J. (2015). Services innovation impact to customer satisfaction and customer value enhancement in airport. *Technology in Society, 43*, 219-230.

Cronin, P., Ryan, F., & Coughlan, M. (2008). Undertaking a literature review: A step-by-step approach. *British Journal of Nursing, 17*(1), 38-43.

De Rooij, P. (2009). *Customer loyalty in the performing arts* (17th International colloquium in relationship marketing ed.). Netherlands: Maastricht University.

Dille, B. B. (2016). *Vibrant symphony orchestras: A policy analytic perspective.* Unpublished manuscript.

Dragga, N. (2013). *Choose-your-own subscriptions: A positive or negative ticketing strategy for American symphony orchestras?* (Unpublished Masters of Science in Arts Administration). Drexel University, Philadelphia.

Duncan, T., & Moriarty, S. (1997). *Driving brand value*. New York: McGraw-Hill.

Finne, A., & Strandvik, T. (2012). Invisible communication: A challenge to established marketing communication. *European Business Review, 24*(2), 120-133.

Frey, E. (1938). Artists and audiences. *The Journal of Higher Education, 9*(5), 263-270.

Friese, S. (2014). *Qualitative data analysis with ATLAS.ti* (2nd ed.). London: SAGE Publications.

Frith, S. (1996). *Performing rites: On the value of popular music*. Cambridge: Harvard University Press.

Gilmer, L. A. (2008). *Attracting arts audiences: An examination of historical perceptions and current marketing strategies of the symphony orchestra in the United States.* (Unpublished Honours program). University of Tennessee, Knoxville.

Goldsmith, R. E., Flynn, L. R., & Kim, D. (2010). Status consumption and price sensitivity. *Journal of Marketing Theory and Practice, 18*, 323-338.

Graham, H. (2015). *The American symphony orchestra: Factors affecting concert attendance and predictions for the millennial ticketholder.* (Unpublished Designation University Honours). University of Northern Iowa, Cedar Falls.

Hassan, S. S., & Craft, S. (2012). Examining world market segmentation and brand positioning strategies. *Journal of Consumer Marketing, 29*(5), 344-356.

Hill, E., O'Sullivan, C., & O'Sullivan, T. (1997). *Creative arts marketing.* Butterworth: Heinemann.

Kam Fai, K. (2008). Hong Kong Sinfonietta - an evaluation of its branding, marketing and audience development strategies. *Graduate Journal of Cultural and Creative Industries, Online*, 8-13.

Kamakura, W. A., & Schimmel, C. W. (2012). Uncovering audience preferences for concert features from single-ticket sales with a factor-analytic random-coefficients model. *International Journal of Research in Marketing, Online*, 1-14.

Kar, A. (2011). Cs of marketing- the marketing mix. Retrieved from http://www.business-fundas.com/2011/4-cs-of-marketing-the-marketing-mix.

Kawashima, N. (2006). Audience development and social inclusion in Britain: Tensions, contradictions and paradoxes in policy and their implications for cultural management. *International Journal of Cultural Policy, 12*(1), 55-72.

Kemp, E., & Poole, S. M. (2016). Arts audiences: Establishing a gateway to audience development and engagement. *The Journal of Arts Management, Law, and Society, 46*(2), 53-62.

Kolb, B. (2000). *Marketing cultural organisations: New strategies for attracting audiences to classical music, dance, museums, theatre and opera*. Dublin: Oak Tree Press.

Kotler, P., & Armstrong, G. (2005). *Marketing: An introduction*. Cornell University: Pearson/Prentice Hall.

Kotler, P., & Armstrong, G. (2007). *Principles of marketing*. Upper Saddle River, NJ: Prentice Hall.

Kotler, P., Armstrong, G., Saunders, J., & Wong, V. (1999). *Principles of marketing* (2nd Edition ed.). Europe: Prentice Hall.

Kotler, P., & Scheff, J. (1997). *Standing room only: Strategies for marketing the performing arts*. Boston: Harvard Business Press.

Krueger, C. C., Lu, N., & Swartman, P. (2003). Success factors for online music marketing - eTransformation: From the four P's to the four C's. *Proceedings of CollECTeR Latin American Conference on Electronic Commerce,* 1-16.

Levine, D. (1988a). *The opening of vision*. New York: Routledge.

Levine, L. W. (1988b). *Highbrow/Lowbrow: The emergence of cultural hierarchy in America*. Cambridge: Harvard University Press.

Lin, P. (2008). *Challenges of developing audiences for symphony orchestras in twenty-first century.* (Unpublished Masters of Arts). University of Akron, Ohio.

Lin, T. T., Lee, C. C., & Lin, H. C. (2013). Analysis of customer profit contribution for banks with the concept of marketing mix strategy between 4Cs and 5Ps. *Service Business, 7*(1), Online.

Lindelof, A. (2015). Audience development and its blind spot: A quest for pleasure and play in the discussion of performing arts institutions. *International Journal of Cultural Policy, 21*(2), 200-218.

Maitland, H. (2000). *A guide to audience development.* London: Arts Council of England.

Mandel, B. (2012). Audience development as a field of arts management research. *Jahrbuch Für Kulturmanagement Des Fachverbands Für Kulturmanagement, Bielefeld*

McCarthy, K. F., & Jinnett, K. J. (2001). A new framework for building participation in the arts. Retrieved from https://www.rand.org/pubs/monograph_reports/MR1323.html

Ogilvy, D. (2013). Ogilvy on Advertising. New York: Vintage books

Ordun, G. (2015). Millennial (gen Y) consumer behaviour, their shopping preferences and perceptual maps associated with brand loyalty. *Canadian Social Science, 11*(4), 40-55.

Park, H. (2010). *Communicating with audiences: The strategic marketing of music festivals.* (Unpublished Masters of arts in arts administration). University of Oregon, Eugene.

Porter, M. (1985). *Competitive advantages: Creating and sustaining superior performance.* New York: Free Press.

Rentschler, R., Radbourne, J., Carr, R., & Richard, J. (2002). Relationship marketing, audience retention and performing arts organisation viability. *International Journal of Nonprofit and Voluntary Sector Marketing, 7*(2), 118-130.

Reussner, E. M. (2003). Strategic management for visitor oriented museums. *International Journal of Cultural Policy, 9*(1), 95-108.

Rizkallah, E. G. (2009). A non-classical marketing approach for classical music performing organisations: An empirical perspective. *Journal of Business & Economics Research, 7*(4), 111-124.

Roy, X., Courchesne, A., & Colbert, F. (2014). *Audience development in the classical and contemporary music sectors in Quebec: A response to market fragmentation?* Unpublished manuscript.

Saldaña, J. (2014). *Thinking qualitatively: Methods of mind.* Singapore: SAGE.

Shore, K. (2013). *Using social media and internet technologies as new marketing strategies, and their effectiveness for the modern American orchestra.* (Unpublished Master of science in arts administration). Drexel University, Philadelphia.

Sigurjonsson, N. (2010). Orchestra audience development and the aesthetics of customer comfort. *The Journal of Arts Management, Law, and Society, 40*, 266-278.

Smutkupt, P., Krairit, D., & Esichaikul, V. (2010). Mobile marketing: Implications for marketing strategies. *International Journal of Mobile Marketing, 5*(2), 126-139.

Tajtáková, M., & Arias-Aranda, D. (2008). Targeting university students in audience development strategies for opera and ballet. *The Service Industries Journal, 28*(2), 179-191.

Tereyağoğlu, N., Fader, P., & Veeraraghavan, S. (2012). *Filling seats at a theatre: Estimating the impact of posted prices and dynamic discounts.* (Unpublished Working paper). The Wharton School, Philadelphia.

Thomas, J. W. (2017). Market segmentation. Retrieved from
https://www.decisionanalyst.com/media/downloads.MarketSegmentation.pdf

Van Vuuren, T., Roberts-Lombard, M., & van Tonder, E. (2012). The relationship between selected variables and customer loyalty within an optometric practice environment. *Acta Commerccii Independent Research Journal in the Management Sciences, 12(1),* p. 94-106.

Wang, A. (2003). *The American symphony orchestra: Renewable audiences or a dying institution?* (Unpublished Undergraduate thesis). Princeton University, New Jersey.

Wang, X. (2015). *On moral capital.* New York: Springer.

Woodruff, R. B., & Flint, D. (2001). The initiators of changes in customers' desired value - results from theory building study. *Industrial Marketing Management, 30*, 321-337.

Zuzana, C., Jitka, C., & Miroslav, K. (2012). Segmenting the performing arts markets: The case of czech national theatre attenders' motivations. *Journal of Competitiveness, 4*(3), 92-104.

CHAPTER 3:

RESEARCH DESIGN AND METHODOLOGY

3.1 Introduction

This chapter will outline the study's design and methods used to gain an understanding of the audience-development strategies of symphony orchestras and specifically university symphony orchestras. The following figure (Figure 10) gives an overview of the elements that directed this research.
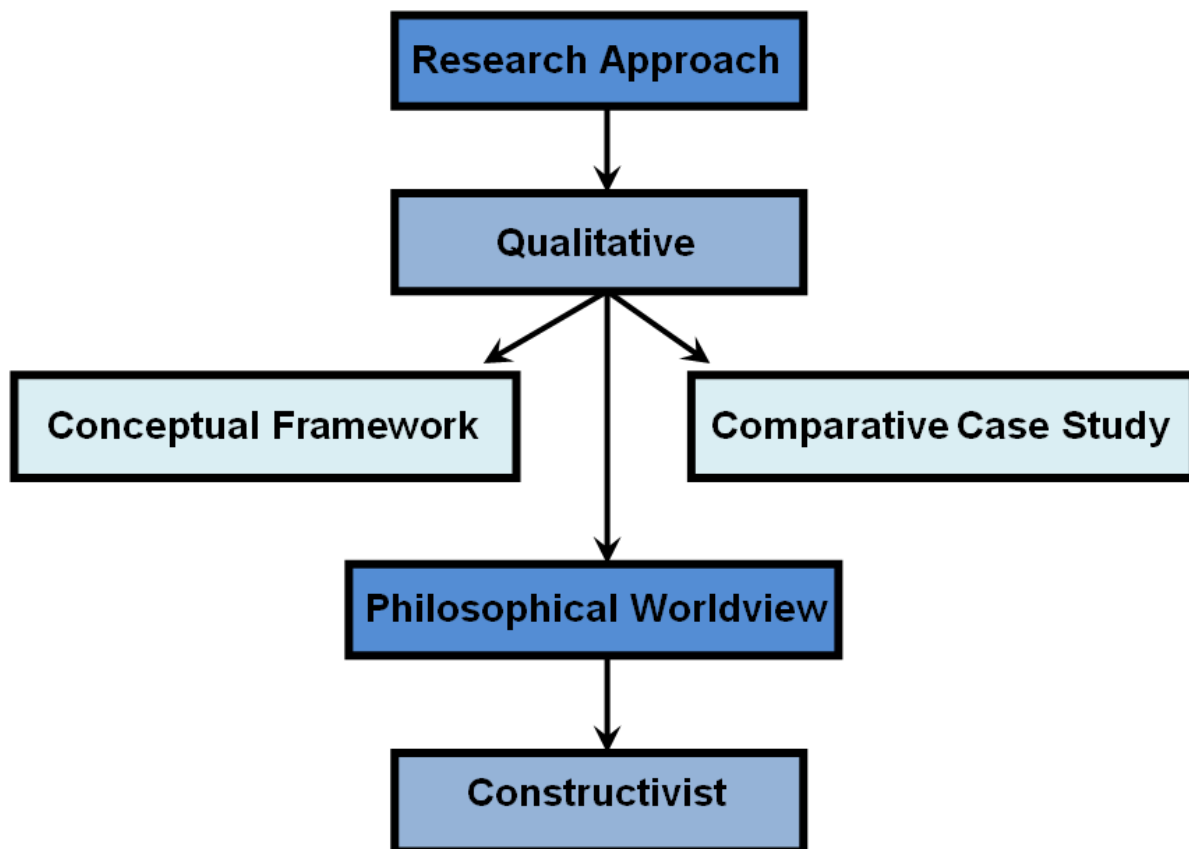
Figure 10: Overview of elements

3.2   Research approach

3.2.1   Philosophical worldview

Creswell (2007:6) uses the term "worldview" to describe the "general orientation about the world and the nature of the research that the researcher holds". The constructivist worldview served as the philosophical point of departure in this study. The objective of the researcher in terms of this worldview is "to rely as much as possible on the participants' view of the situation being studied" (Creswell, 2007:8). The focal point was to elicit "socially constructed meanings of reality as understood by an individual or group" (Guo & Sheffield, 2007:620). Creswell (2014:8) points out that a Constructivist worldview is often combined with an Interpretivist approach. Interpretivism refers to an understanding of the world as experienced in a subjective manner by individuals or groups (Reeves & Hedberg, 2003:32).

3.2.2   Research design

The chosen design for this study was qualitative, which is characterised by the search for meaning and understanding of the participants' experiences (Merriam, 2002:6). A qualitative research design was chosen as a strategy, because it added significant depth, understanding and richness to the research. Qualitative research methods are emphasised in interpretivism, "where words and pictures as opposed to numbers are used to describe situations" (Carcary, 2009:12). In this research study, a conceptual framework was formed and a comparative case study undertaken. The process of research entailed identifying problems and collecting data (typically reflecting the participants' points of view); the data was then analysed inductively to build general themes to interpret the meaning of the data collected (Creswell, 2009:4).

3.3 Research process

This study was conducted in three phases (Figure 11). Phase one of this study (Chapter Two) was a comprehensive analysis of the literature culminating into a conceptual framework article on the audience-development strategies of symphony orchestras in general. Phase two of this study (Chapter Four) was a comparative case study article to determine what audience-development strategies have been adopted by three South African university orchestras. Phase three (Chapter Five) entailed a comparison of the two articles to explore the similarities and differences (if any) between existing audience-development strategies and the way that the three South African orchestras made use of these strategies according to their own needs.
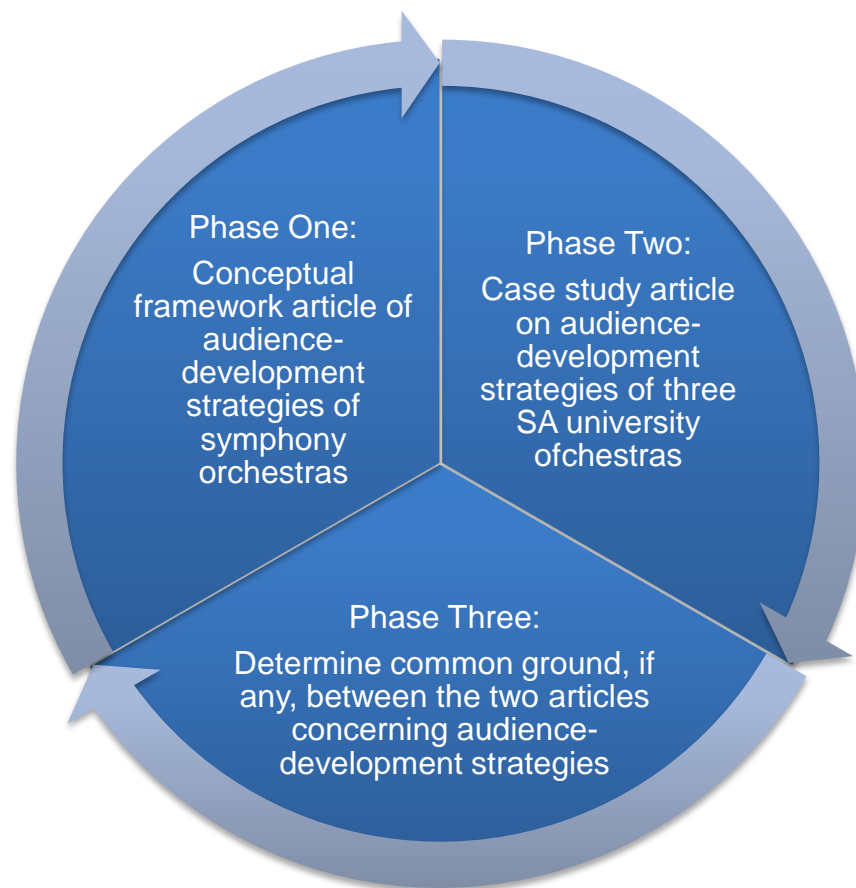
Figure 11: Phases of this study

3.4 Phases of this study

3.4.1 Phase one: conceptual framework

Miles and Huberman (1994:18) define a conceptual framework as:

> A visual or written product that explains, either graphically or in narrative form, the main things to be studied – the key factors concepts or variables – and the presumed relationships among them.

Conceptual frameworks provide guidelines for managers and therefore conceptual frameworks are a vital feature of management research (Meredith, 1993:8). While a conceptual model could be used to explain a phenomenon, a conceptual framework can be used to understand the fundamental dynamics of a phenomenon (Burnard & Bhamra, 2011:5585).

Phase one of this study entailed writing a conceptual framework article on the audience-development strategies of symphony orchestras within an international perspective. This article attempted to build a framework to explore the dynamics of audience-development strategies in general, which was then utilised in exploring the audience-development strategies of university symphony orchestras in South Africa. The conceptual framework drew attention to current audience-development strategies that are available to symphony orchestras and arts organisations, what problems they experienced when applying these strategies, and how they resolved these problems.

3.4.2 Phase two: comparative case study

A case study can be described as a method that is employed to produce an all-inclusive, comprehensive understanding of intricate subject matter in its actual framework (Crowe *et al.*, 2011:1). Case studies are bound by time and activity, and detailed data is gathered through a mixture of data-collection methods over a continuous period of time (Yin, 2014, 12); they can provide various insights into a particular phenomenon (Rule & John, 2011:1).

Phase two of this study consisted of producing a comparative case study article on the audience-development strategies of three university symphony orchestras in South Africa. Comparative case studies are carried out over time and emphasise similarities within and across contexts (Goodrick, 2014:1). Yin (2014:16) has described the case study methodology as a unique method of experiential enquiry particularly apt for exploring the "how and why" of current phenomena within a real-life context. The application of this research methodology in this instance enabled greater understanding of, and comparison between the three university orchestras' audience-development strategies (Gale, 2015:87). Comparative case studies basically entail six steps which should preferably be executed as shown in Figure 12.

Stage 1: Identify research questions

Stage 2: Identify variables

Stage 3: Select case

Stage 4: Construct case

Stage 5: Code data

Stage 6: Make comparisons

Figure 12: Steps in comparative case study (Kaarbo & Beasely, 1999:372)

The order of these steps allows for descriptive data to be gathered and tested iteratively (Goodrick, 2014:2).

3.4.3 Phase three: finding common ground in the conceptual framework article and the comparative case study article

While there is no guarantee that common ground[12] can be achieved in every case, this phase was guided by the idea that insights and theories were potentially complementary. Shared understanding implies an overlap of understanding among participants (Maher *et al.,* 1996:282). Smart *et al.* (2009:2) define shared understanding as "the ability of multiple agents to exploit common bodies of casual knowledge for the purpose of accomplishing common (shared) goals". Clark (1996:12) defines common ground between speakers as "knowledge, beliefs, and suppositions they believe they share". Common ground is an active construct that is jointly created by speakers during the communicative process (Kecskes & Zhang, 2009:333). This phase of the study attempted to identify the common ground between phase one and phase two. By reviewing existing audience-development strategies for symphony orchestras (phase one) and comparing them to the audience-development strategies of three university orchestras (phase two), this study presented a multitude of fertile ideas and wide agreement on many common strategies, in spite of differing starting points.

3.5   Population, sample and participants (used in phase two of this study)

Polit and Hungler (1999:43,232) describe a population as "the total of all subjects" which fits to a set of conditions, including the whole group of individuals that the researcher wishes to investigate and "to whom the research results can be generalised". A sample as described by LoBiondo-Wood and Haber (1998:250) is a segment or a division of the research population chosen to participate in the study and acts as representative of the research population.

This study used a small homogeneous research sample to describe the particular sub-group in depth (Patton, 1990:173). The research population was symphony orchestras. The research sample included the organisational teams of the orchestras and the

---

[12]In this study common ground is defined as a shared understanding or mutual way of experiencing, understanding or applying concepts.

homogenous research sample of interest for this study was the conductors and the marketing officers of three university orchestras in South Africa. Participants consisted of two members from each of the three orchestras – the conductor and the person responsible for marketing. The orchestra selection was based on two criteria. The first is that the orchestras must be a university orchestra, which means it is a non-professional orchestra, and the second reason for selection of these participants was a matter of access and willingness of the orchestra to participate.
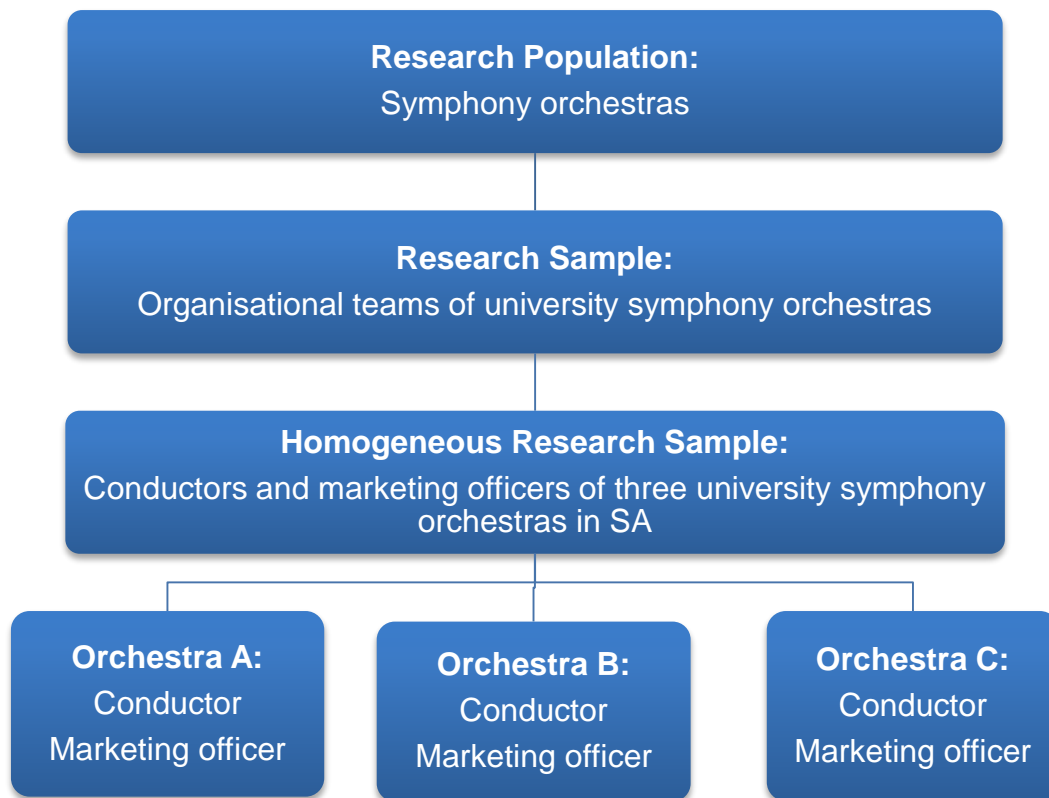
Figure 13: Participants

3.6 Data collection

The data collection for this study was divided into two phases.

3.6.1 Phase one: conceptual framework – data collection

In this phase the conceptual framework article was constructed through a review of the available multidisciplinary literature; the criterion for including them was only that they discussed audience-development strategies and symphony orchestras in some way. The keywords used for the literature search were 'audience-development strategies for university symphony orchestras', which was later expanded to include symphony orchestras in general. A second literature search was conducted with the keywords of 'audience-building strategies for university symphony orchestras' and this was also later expanded to 'audience-building strategies of symphony orchestras' in general.

3.6.2 Phase two: comparative case study – data collection

Both primary and secondary sources were used for the data-collection process. Primary data sources included key informants[13] for each case, who were individually interviewed to elicit their understanding and experience of the audience-development strategies that are used by their respective orchestras. The interviews were open-ended to give the participants ample opportunity to describe their experiences and special attention was devoted to any similarities or variations in the responses. Secondary data sources mainly included electronic marketing websites, Facebook, YouTube channels, etc. These sources were examined to determine how they addressed audience-development strategies.

3.7 Data analysis

The data analysis for this study was also divided into two phases.

---

[13] The informants were the conductors and the marketing officers of the respective orchestras used for this study.

3.7.1 Phase one: conceptual framework - data analysis

The data collected was examined to form a narrative to gain better understanding of the phenomenon. Strauss and Corbin (1990:20) describe description of data as follows:

> In description, data may be organized according to themes. These themes may be conceptualizations of data, but are more likely to be precise summaries of words taken from the data. There is little, if any, interpretation of data. Nor is there any attempt to relate the themes to form a conceptual scheme.

The description of the data was organised into suitable themes, which formed the structure of the article. Friese's (2014:12) Noticing, Collecting and Thinking (NCT) model was used to assist in this process. She presents this model as a general model for analysing qualitative data using Atlas.ti.7 tools (Friese, 2014:92). NCT, in fact, represents a very simple model for processing qualitative data. The data was analysed in both a linear and circular process, mostly entailing a circular movement back and forth between noticing, collecting and thinking.

3.7.2 Phase two: comparative case study – data analysis

The interviews of the participants were transcribed. These transcriptions were analysed thematically using Atlas.ti.7. Braun and Clarke (2006:79) define thematic analysis as "a method for identifying, analysing and reporting patterns within data". The analysis of the interviews was conducted in four stages (discussed below), using Braun and Clarke's explanation of thematic analysis (2006:16-23). Stage 5 consisted of writing up the data analysis, which formed the basis of the comparative case study article (Chapter Four).

Stage 1

The transcriptions of the interviews were read and studied to gain an understanding of the data. Tables were created (Table 3) which contained superordinate and subordinate themes. The sub-categories of the subordinate themes were listed in these tables (Table 3) and the subordinate themes and were numbered accordingly.

Stage 2

In this stage the researcher identified and labelled emerging themes and inserted them into the tables. These themes were conceptual and represented the essence of the transcripts.

Stage 3

Emerging themes were structured and collated to create manageable clusters. All the established themes were listed in order to determine which of them are consistent with one another, and also how they were related in terms of content and meaning.

Stage 4

A summarised table was compiled of the structured superordinate and subordinate themes. This table included raw data quotations from the respective participants pertaining to each theme, illustrating the theme and its respective subordinate themes. Table 3 is an example of the structure of the table for the four stages of analysis.

Table 3: Example of final table

SUPERORDINATE THEME 1 First major theme that emerged	
Subordinate themes	**Raw data themes**
Subordinate theme 1: 1st sub-theme pertaining to the superordinate theme	The responses of the interviewees
Subordinate theme 2: 2nd sub-theme pertaining to the superordinate theme **Subcategories** 2.1 Subcategory 1 2.2 Subcategory 2	The responses of the interviewees

Once the four stages of data analysis of the interviews were completed, analysis of electronic marketing approaches commenced. The three respective orchestras' websites, Facebook pages, YouTube channels and any other means of marketing were analysed to determine if the orchestras' audience-development strategies were similar (or not) and how they implemented these strategies. The findings were presented in the form of a comparative case study article, which forms Chapter Four of this study.

3.8 Validity

Validity in research necessitates precision and honesty in the presentation of methodical results (Le Comple & Goetz, 1982:32). Triangulation and crystallisation entails the collection of information from multiple sources of evidence and then reflecting on the analysis experience to identify and articulate patterns or themes. According to Richardson (2000, 934), triangulation and crystallisation supplies us with a comprehensive, intricate understanding of the phenomenon. Therefore, more than one source of data substantiated the results, ensuing in the convergence of data and validating the study. Member checking entails the participants verifying the validity of the study by examining the narrative accounts. Lincoln and Guba (1985:314) describe member checks as "the most crucial technique for establishing credibility" in a study.

The data and interpretations of this study were presented to the participants to allow them to corroborate the trustworthiness of the data and the accuracy of their descriptions.

3.9 Ethics

In all stages of a study a researcher encounters ethical challenges (Sanjari *et al.*, 2014:1). Some ethical imperatives are: anonymity, confidentiality and informed consent (Richards & Schwarts, 2002:136).

All the orchestras as well as the respective conductors and marketing officers were given pseudonyms to keep their identity hidden. All data and information obtained from participants regarding this study were treated confidentially and no harm (physical or psychological) came to the participants. The objective of obtaining informed consent is to emphasise the researcher's duty to fully inform contributors of different aspects of the study in understandable language (Orb *et al.*, 2001:95). Consent forms (Addendum A) were given to each participant who gave permission to use their responses as data for this study.

3.10   Conclusion

This chapter provided an overview of the research design, philosophical worldview, and research process and research methods. Figure 14 summarises this chapter.
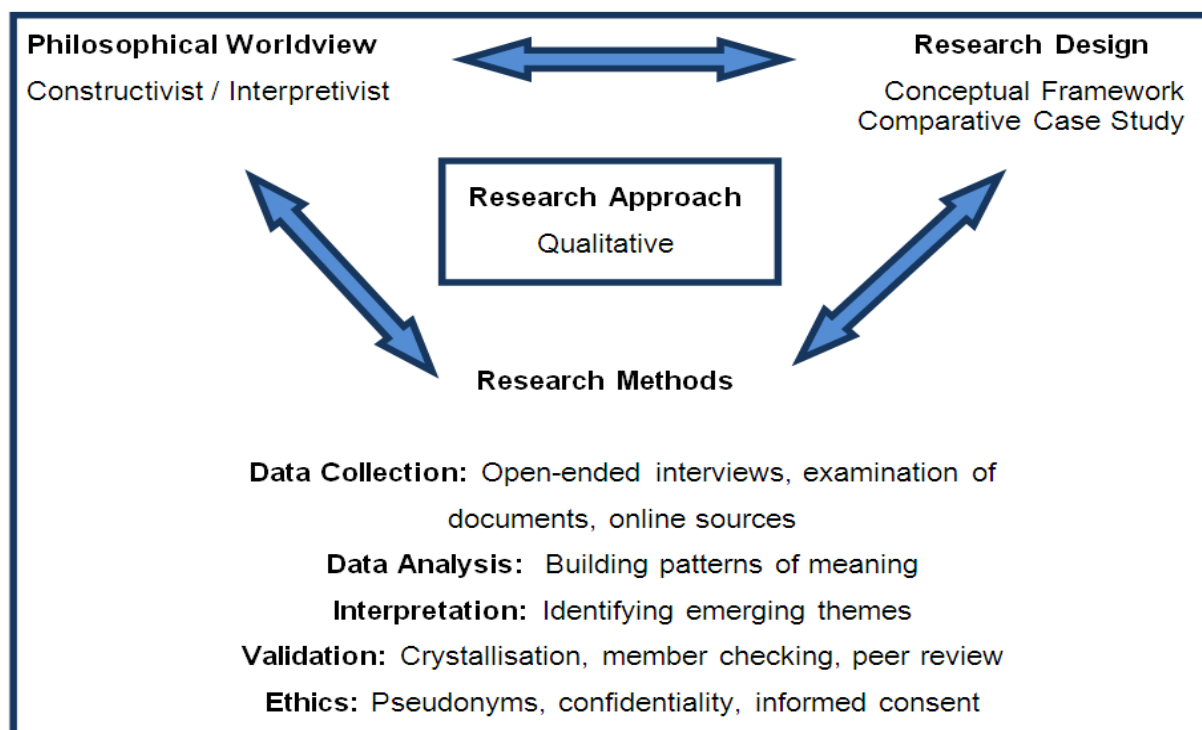
Figure 14: Summary of Chapter 3

In Chapter 4 I present the second article, which is the case study.

CHAPTER 4

ARTICLE: Comparative case study[14]

4.1　Title

Audience-development strategies of three university symphony orchestras in South Africa

4.2　Abstract

This comparative case study involved the exploration of audience-development strategies of three university symphony orchestras in South Africa. The participants consisted of the marketing officer and the conductor of each participating orchestra. In the first phase of this project the marketing officer and conductor of each of the participating orchestras were interviewed to obtain their views on the audience-development strategies of their orchestra. The second phase involved examining each orchestra's social media channels to compare the views of the marketing officer and the conductor with the actual execution of the respective strategies discussed. The final phase consisted of the write-up process, where comparisons were made between the participating orchestras. It was clear that all three of the participating orchestras encountered challenges regarding audience development for their respective orchestras. All participating orchestras placed their focus on the use of Facebook campaigns and posters for their audience development needs and only one of the three orchestras made use of market segmentation. The major challenges for these orchestras were a lack of funding and the lack of administrative infrastructure for the orchestra. Some conventional audience-development strategies seemed to work and produced some positive results, but it is clear that university symphony orchestras in South Africa need to develop a customised audience-development strategy that suits their specific needs in this diversified cultural environment.

---

[14] See Addendum C for the information and house style of the Musicus Journal.

Abstrak

Hierdie vergelykende gevallestudie het betrekking op die verkenning van konsertgehoorontwikkelingstrategieë van drie Suid-Afrikaanse universiteitsimfonie-orkeste. Die deelnemers vir die studie betrek onderskeie bemarkers en dirigente van die deelnemende orkeste. In die eerste gedeelte van hierdie navorsingsprojek, is daar ongestruktureerde onderhoude met dirigente en bemarkers van die drie deelnemende orkeste gevoer. Die tweede gedeelte het betrekking op die ondersoek van die deelnemende orkeste se onderskeie platforms op sosiale media en dit word vergelyk met die dirigent en bemarker se beskouing van die verwesenliking van die strategieë wat geïdentifiseer is. Die finale gedeelte het bestaan uit die dokumentering van die bevindinge en vergelykings wat getref is tussen die verskillende orkeste. Dit is duidelik dat al drie orkeste uitdagings ervaar in terme van konsertgehoorontwikkelingstrategieë. Hulle fokus was op die gebruik van sosiale media, veral Facebook asook plakkate om gehore te trek. Slegs een orkes het gebruik gemaak van marksegmentasie. Die hoofuitdagings vir die betrokke orkeste was 'n tekort aan befondsing asook aan 'n administratiewe infrastruktuur. Sommige van die gebruiklike konsertgehoor-ontwikkelingstrategieë het suksesvol geblyk, maar dit is duidelik dat Suid-Afrikaanse universiteitsimfonie-orkeste gerigte konsertgehoorontwikkelingstrategieë moet ontwikkel wat direk op hul behoeftes in 'n diverse kulturele omgewing van toepassing is.

4.3   Introduction

The overriding purpose of this comparative case study was to determine the audience-development strategies of three university symphony orchestras in South Africa. To accomplish that goal it became necessary to determine what the term 'audience-development' means and how it related to the strategies of the three participating orchestras. This article reports the conclusions derived from the data obtained.

4.3.1 Through the lens of the literature

According to Pätynen *et al.* (2014:4409), "symphony orchestra performance can be the most profound and moving experience of art and culture", yet most orchestras struggle to fill the concert halls as a result of contemporary life-style changes that influence behaviour and an audience's perception of classical music concerts (Lin, 2008:1). Orchestras are held responsible for not succeeding to attract younger audiences; musicians and music-lovers are concerned about the fact that the majority of concert attendees are above 40 years of age and worry that once this older generation dies out, it will not be replaced by a younger one (Wang, 2003:1). Yet, there seem to be no clear consensus regarding the state of attendance at performing arts events amongst experienced performers and researchers (Bernstein, 2007:6). Some researchers have predicted a decline of the performing arts, particularly that of classical music, for a long time. Music critic Samuel Lipman (1992:25) states that "classical music now stands, for the first time in the modern world; on the periphery of culture…classical music today is in deep trouble." Norman LeBrecht, music critic for the *London Daily Telegraph* and author of *Who Killed Classical Music?* (1997) writes: "Ticket sales have tumbled, record revenue has shrivelled, state and business funds have dried up…orchestras [are] threatened with extinction…The future of musical performance hangs in the balance at the close of the twentieth century" (p. 5, 12). Yet other researchers believe there is no reason to be concerned about attendance regarding the performing arts. "We live in something of a classical music golden age," insists music expert Douglas Dempster (2000:45). "Classical music is more widely heard and available, performed at a higher level of preparation and artistry, both in the U.S. and, I would wager, around the world, than it has ever been before – if classical music is in some kind of trouble, it is trouble that is simply not evident in tangible measures of its popularity and availability" (Dempster, 2000:45). Bernstein (2007:9) states that,

> [t]he arts themselves are not less desirable than they were in past decades or to past generations. Stagnating or declining attendance can be largely attributed to the fact that the ways the arts are described, packaged, priced, and offered to the public have not kept up with changes in people's lifestyles and preferences.

Conflicting comments about the audiences for symphony concerts make the true condition hard to unveil (Wang, 2003:15). Audience needs and preferences are changing constantly and as a result some aspects of the performing arts world are in constant flux, thus orchestra managements need to adapt to these changes to ensure a growing audience base.

4.3.2 Audience development as a strategy

An audience is vital to the survival of all art forms, so predictably the topic of audience development is a preoccupation for many orchestras (Bedell, 2012:17). If attendance at classical symphony concerts declines and methods of reaching existing and potential audiences become increasingly ineffective, organisations should seek new and innovative strategies to reach and build their audiences. Nobuko Kawashima identifies four diverse categories (Figure 15) of audience development (Kawashima, 2000:iv).

Extended Marketing	•Uses marketing tools to attract audiences who are interested but do not currently attend •Targets new audiences that are similar to existing audiences
Taste Cultivation	•Introduces new art forms, genres or cultural institutions to broaden their scope •Target existing audiences
Audience Education	•Enriches experience of existing audience by providing enhanced understanding through introductions, artists talks, etc. •Target existing audiences
Outreach	•Takes art outside normal institutional settings to groups that rarely attend •Seeks to reach socially excluded groups - is the only one of the four types that has social inclusion as a central objective

Figure 15: Four categories of audience development

In short, the term audience development covers a wide range of aspects including the "financial, artistic, social and educational aspects" of an organisation when concentrating on the audience in innovative ways, regardless of different means and methods (Lindelof, 2015:202).

4.4 Methodology

4.4.1 Design and method of inquiry

The design of this comparative case study article was qualitative in nature. Denzin and Lincoln (2000:3) assert that qualitative research calls for an interpretive and naturalistic approach: "This means that qualitative researchers study things in their natural settings, attempting to make sense of, or to interpret, phenomena in terms of the meanings people bring to them". This study greatly benefited from a qualitative design since it assisted in understanding the perceptions of each participating orchestra regarding their own marketing and audience-development strategies. Goodrick (2014:1) states that a comparative case study is a detailed investigation, often commencing over time and involves two or more cases to create 'generalizable' knowledge regarding causal questions to determine how and why particular programmes or strategies work or fail to work. Comparative case studies entail the exploration of the similarities, contrasts and patterns between two or more cases that share a common focus or goal (Goodrick, 2014:1). Each context and environment is different, thus the comparative case study method helped this investigation explore whether the existing audience-development strategies were effective for each participating orchestra in their different respective contexts and environments, and if the implementation differs in each case, then the reasons and results were recorded.

Comparative case studies fundamentally entail six steps, which ought to be done in the order shown in Figure 16.
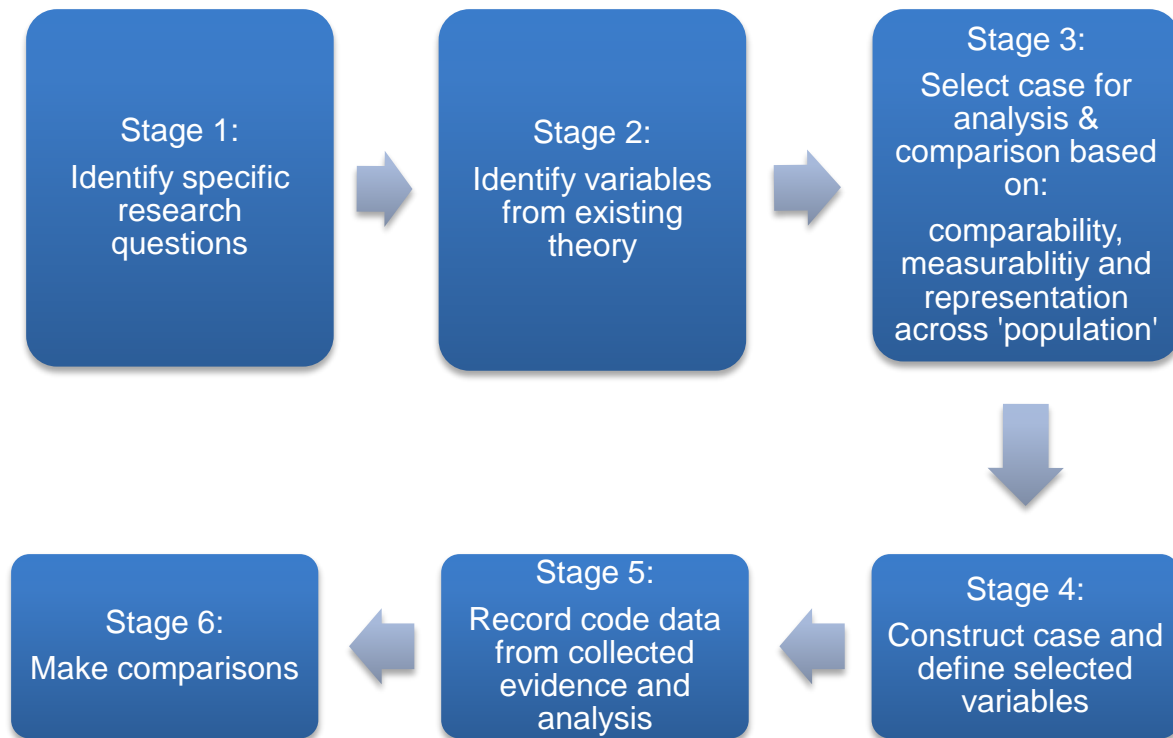
Figure 16: Steps in comparative case studies (Kaarbo& Beasley, 1999:372)

4.4.2 Research population, sample, homogeneous group and participants

'Population' refers to the "totality of all subjects that conform to a set of specifications, comprising the entire group of persons that is of interest to the researcher and to whom the research results can be generalized" (Polit & Hungler, 1999:43,232). The research population for this article was three university symphony orchestras in South Africa. A sample is the segment or a division of the research population chosen to partake in a study, "representing the research population" (LoBiondo-Wood & Haber, 1998:250). The research sample for this article was the organisational teams of the research population. Homogeneity diminishes inconsistency and thus provides a focused analysis of the phenomenon of interest (Stommel & Wills, 2004:333). The homogeneous sample for this article was the marketing teams and conductors of the research population.

```
┌─────────────────────────────────────────────────────────────┐
│                    Research population                       │
├─────────────────────────────────────────────────────────────┤
│          Three university symphony orchestras in SA          │
└─────────────────────────────────────────────────────────────┘
                              ▼
┌─────────────────────────────────────────────────────────────┐
│                     Research sample                          │
├─────────────────────────────────────────────────────────────┤
│        Organizational teams of the research population       │
└─────────────────────────────────────────────────────────────┘
                              ▼
┌─────────────────────────────────────────────────────────────┐
│                 Homogeneous research sample                  │
├─────────────────────────────────────────────────────────────┤
│       Conductors and marketing teams of research sample      │
└─────────────────────────────────────────────────────────────┘
```

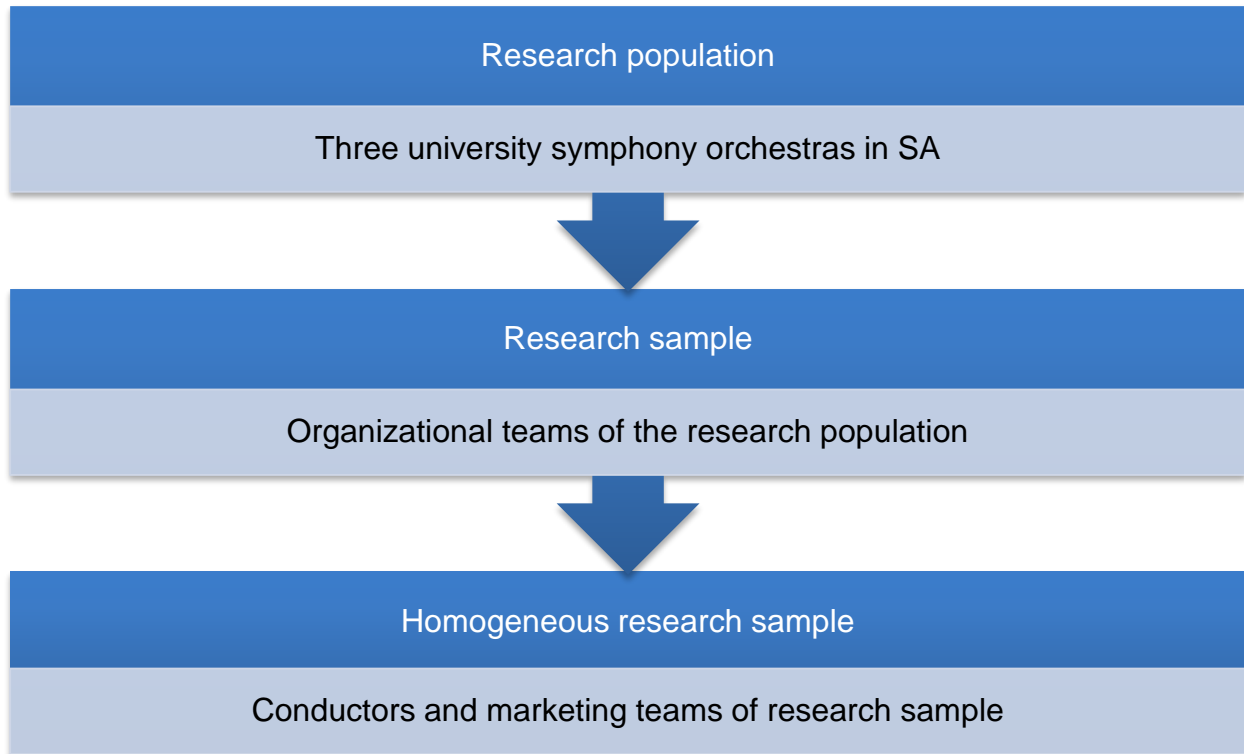Figure 17: Participants

4.4.3 Data collection and data analysis

Both primary and secondary sources were used for this comparative case study article. The primary sources consisted of open-ended interviews conducted with the homogeneous research sample. Each group consisted of two members (the conductor and the marketing officer) of the participating orchestra.
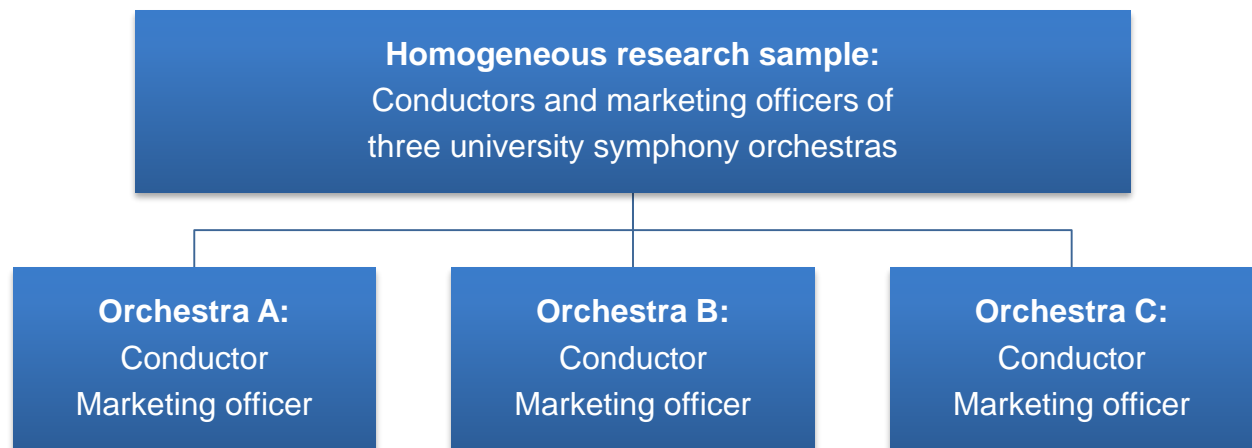
Figure 18: Primary sources – interviews with participants

All interviews were transcribed verbatim to ensure detailed understanding of the information collected. These transcriptions and data[15] were analysed thematically using Atlas.ti 7. Thematic analysis allows a researcher adopting a qualitative method and design to develop themes and codes to check consistency or to compare information, which enhances the clarity of findings and facilitates the process of data analysis (Boyatzis, 1998:160). Figure 19 summarizes the main characteristics of thematic analysis in the continuum of qualitative research.

---

[15]Data can be in any form including transcriptions of interviews, notes in the field, political documents, pictures and videos (Joffe & Yardley, 2004:56-68).
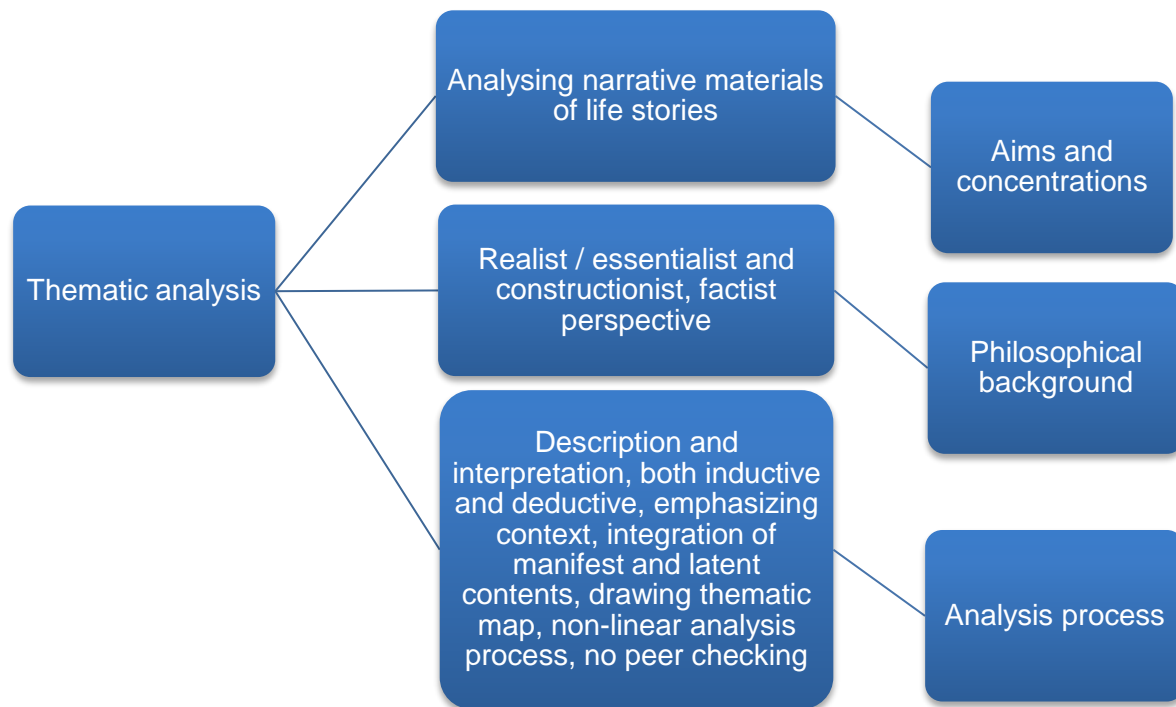
Figure 19: Main characteristics of thematic analysis in qualitative research (Vaismoradi *et al.,* 2013:399)

Information sources included electronic marketing and printed marketing materials. These included (but were not limited to) each orchestra's Facebook page, YouTube channel, Twitter pages, Instagram accounts, posters and newspaper articles. I consulted Braun and Clarke's explanation of thematic analysis (2006:16-23) and arranged the thematic analysis into five stages (Figure 20).

Figure 20: Stages of thematic analysis

4.5   Results

Figure 21 presents a graph indicating the themes that emerged from the case studies.

Figure 21: Themes emerged from data

It was clear that all three of the participating orchestras encountered challenges regarding audience development for their respective orchestras. The data indicate that the main challenges facing the participating orchestras are a lack of funding (Figure 22) and a lack of administrative infrast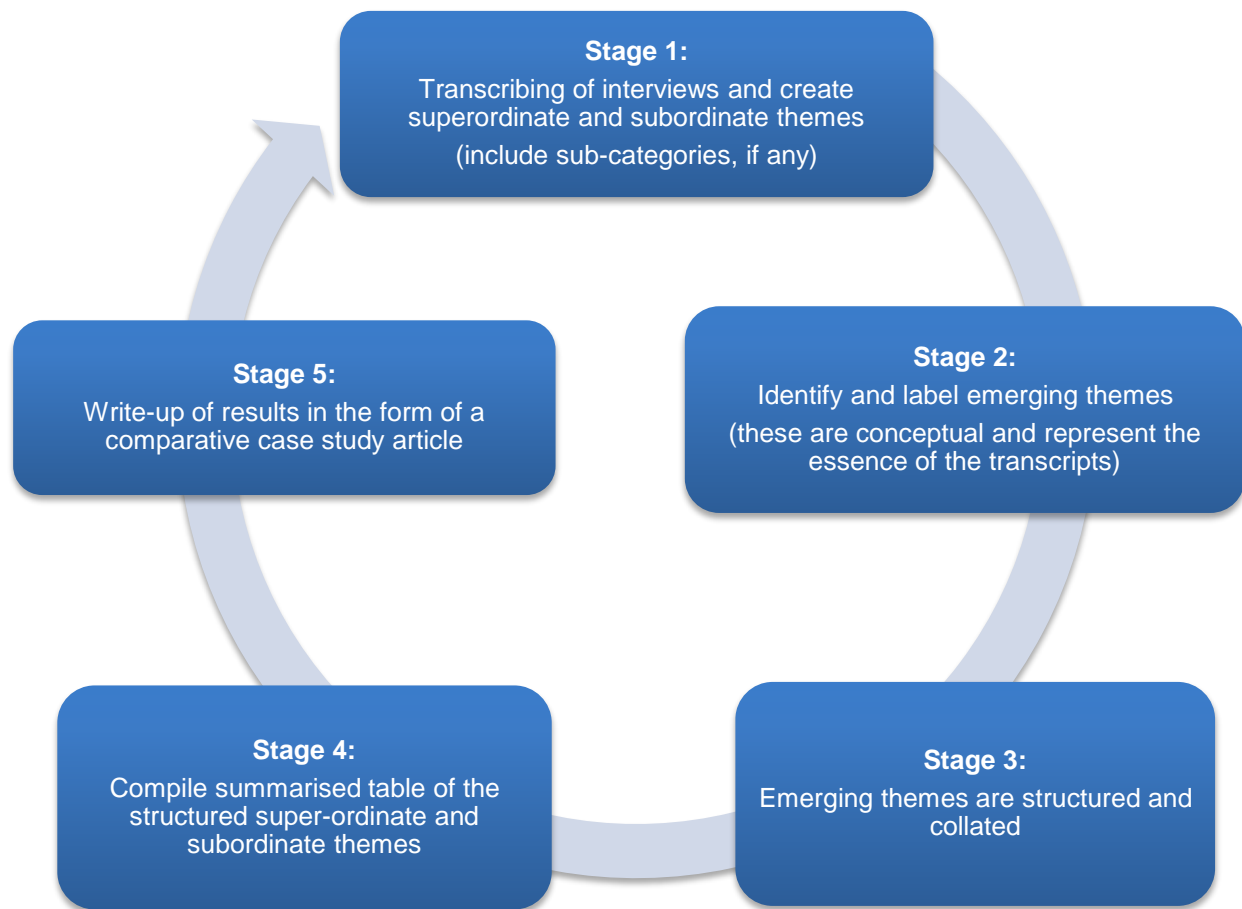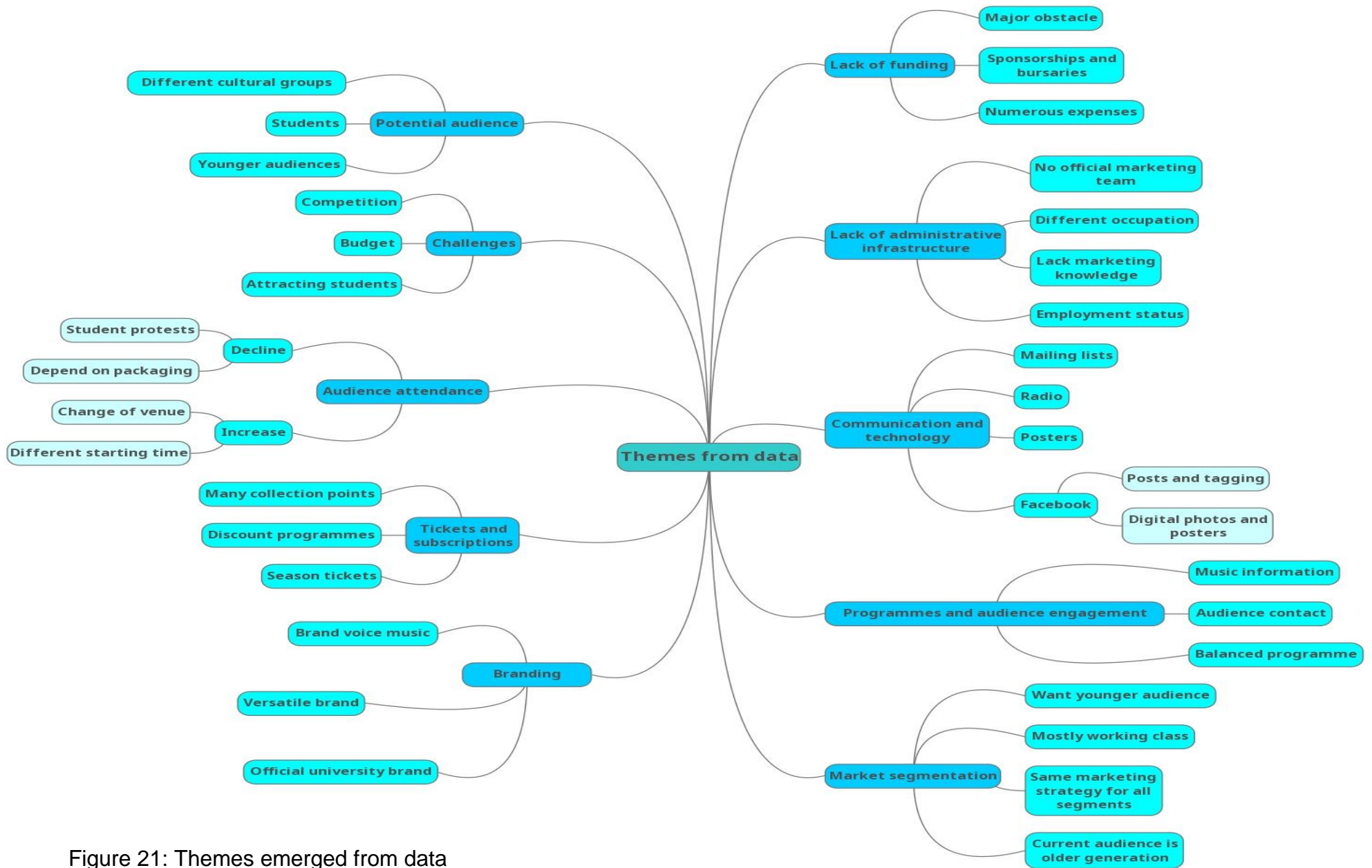ructure (Figure 23) for the orchestra itself. Below is a summary of these two main challenges derived from the data collected from the three university orchestras regarding their audience-development strategies.

Orchestra A:

"...We could always use more money for marketing purposes and for equipment and scores..."

Orchestra B:

"...The budget is never big enough..."

Orchestra C:

"...Biggest challenge is lack of funds...more funds would make a difference with advertising and reaching audiences..."
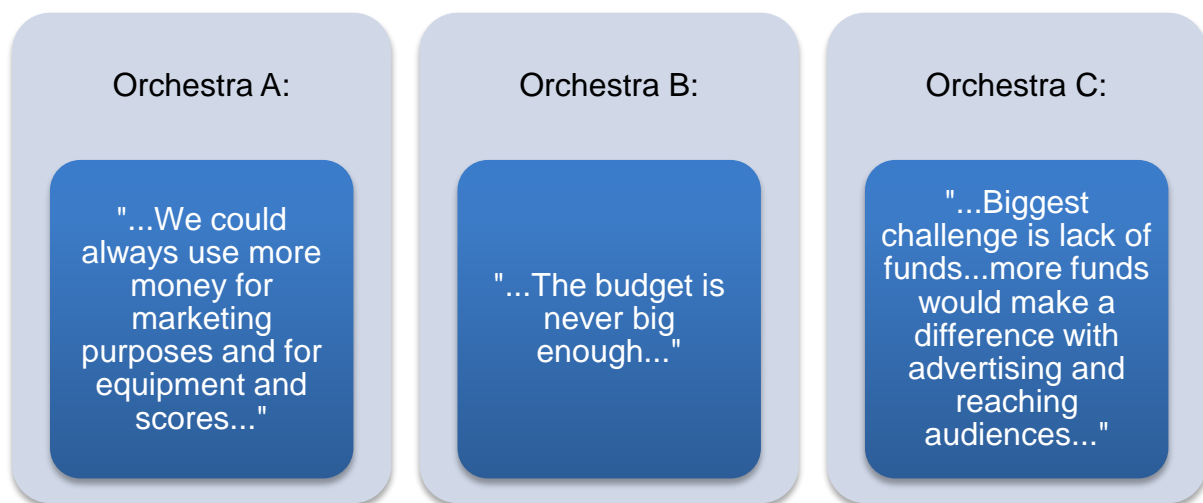
Figure 22: Lack of Funding

All participating orchestras identified the lack of funds as a major obstacle to their audience-development strategies. All three university orchestras were mostly dependent on sponsorships or bursaries. Each orchestra has a number of expenses when preparing for a performance. These include music scores, equipment, transport, printing of marketing materials and programmes, and in some instances paying for guest performers and technical support on stage, etc. This puts a strain on the orchestras' budgets and so they need to look for simpler and more cost-effective ways of promoting their orchestra and building their audience base.

Orchestra A:	Orchestra B:	Orchestra C:
"...We do not have a full-time marketing team..."	"...I am not a social media specialist and do not spend enough time on social media..."	"...We do not have enough staff members to administer large volumes of marketing..."

Figure 23: Lack of administrative infrastructure

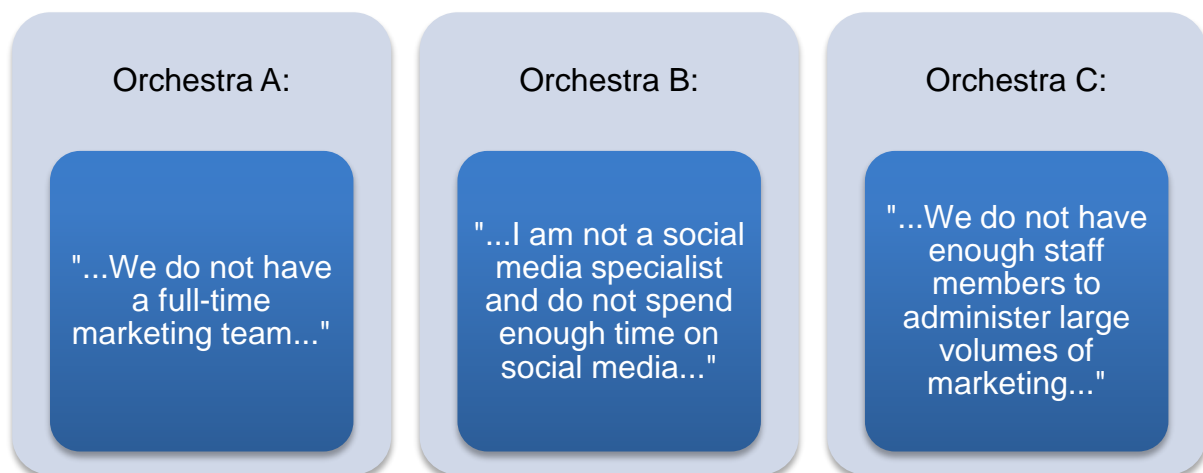All participating orchestras confirmed that they do not have full-time marketing teams and those who are currently responsible for the promotion of their orchestra do not have the necessary knowledge or experience. Each orchestra has one person responsible for the marketing and promotion of the orchestra and none of them has formal training or adequate experience in promotional strategies. Most of them were either students or they worked full-time in another capacity. This made the process of continuous strategizing and problem solving regarding the orchestra's audience-building and marketing strategies difficult. The conductor in Orchestra B pointed out that some terms of appointment for the orchestra also hindered progress in reaching their audiences effectively. The conductor stated that:

> I'm part-time staff, while the manager and her assistant are employed full-time, so in terms of hierarchy of who says what goes, permanent staff gets the institutional backing and the time to do the things – even if it is successful or not. The marketing strategy is ineffective, but I can't say anything because I'm part-time and my opinion could put my job in jeopardy.

Orchestra B was not the only university orchestra with this problem. Some conductors or marketing officers for university orchestras were appointed only part-time, while other members were appointed full-time. The part-time employees might feel that they are subordinate members and hence be less willing to point out issues or offer solutions, while full-time employees might feel that their opinion carries more weight in a situation because of their employment status. This hindered

communication within the orchestra and made the process of planning and strategizing difficult, since all aspects of the orchestra might not be known to the person who ultimately makes the final decisions.

4.6 Audience-development: strategies and problem solving

Communication and technology

Orchestra A:	Orchestra B:	Orchestra C:
• Mostly Facebook • Interesting posters • Tagging of people • Selling of DVDs • Posting photos and videos on social media	• Use main communcations department	• Make use of publicist • Posters, media trade exchanges • Annual brochures

Orchestra A's primary method of marketing and audience-development was through Facebook posts and tagging. They made use of their entire orchestra when promoting a concert, encouraging them to post and share posts on Facebook starting two months before every concert. After each orchestra camp, photos and videos of the orchestra were posted to Facebook to keep followers and potential audiences up to date with what the orchestra was doing. Orchestra A also made use of radio interviews and newspaper articles to promote concerts or events. Even though they used posters, their experience was that they did not reach as many people as the posts of Facebook did, as verified by the marketing officer:

> Posters are not as effective as Facebook because you share a post on Facebook and then someone else shares it and then someone else; before you know it, you have 6,000 views and that is how you spread the word, especially with young people. Posters are more for the older generation and if you place them strategically, it is not necessary to print thousands of posters to reach a group of people.

Orchestra C made use of a publicist who arranges publicity articles and interviews for the orchestra to promote its concerts. Posters, media trade exchanges and social media played a dominant role in their marketing and audience-development strategy. An extensive internet search showed clearly that orchestra C has widespread coverage of its concerts and events. Social media posts were constantly updated and there was no lack of information for current and potential audience members. This was corroborated by the marketing officer:

> We also have extensive mailing lists. We print an annual brochure with all our concerts in it, and back this up with an electronic version when there are additions or changes. The electronic version is then made available to the public as soon as possible to prevent confusion.

Orchestra B used an entirely different approach. Instead of trying to reach its audience base themselves with a personalized strategy to fit the needs of the orchestra, they make use of the official communications department (OCD), which manages all social media campaigns for the entire university. This might be ideal up to a point, as explained by the marketing officer:

> I am not a social media specialist and so do not spend enough time on our social media. My main work allows little time for this…thus a dedicated social media campaign with someone running it would work better.

However, it is risky to rely only on the OCD to promote the orchestra since there might be some differences in the strategies required to obtain wide optical awareness for orchestra B compared to the academic organisation as a whole, as these two entities might have different goals. Even though orchestra B's Facebook page was not frequently updated, the marketing officer stated that she sent regular email updates to their audience base. Another interesting comment by the marketing officer about their communication process was:

> …we are careful to change our communication process…our audience does not appreciate new ways of communication.

When asked about why the audience was unappreciative of new communication methods, the answer was unclear and the reason could still not be identified. After further investigation into orchestra B's audience-development strategies, it seemed that they focused more on their existing audience base rather than trying to expand their audience base. This was later confirmed by a statement made by the marketing officer:

> We changed radio stations we advertised on and are focusing more on building a loyal audience rather than hoping to entice people who are interested in a particular programme.

Programming and audience-engagement

Orchestra A:	Orchestra B:	Orchestra C:
• Conductor posts information about music • Incorporate music which connects with audience • Future strategies still to be implemented; customer feedback and visual elements • Personal contact with audience	• Mainly through social media • Balanced programme • Mailing lists • Personal contact with audience	• Discount programme • Information in programmes • Use of commemoration dates • Competitions • Personal contact with audience

Orchestra A incorporates music that the audience members can connect to or sing along with. This type of programmes usually includes some lighter music, such as film music or jazz, but also more traditional classical pieces. This results in the audiences listening to something they know and also being exposed to something new. In essence orchestra A tries to educate and engage with their audience members through programming. Two months before every concert the conductor posts information about the pieces that would be performed to entice and inform current and potential audiences, thus giving them a better understanding of the music. The conductor also considered incorporating visual elements in the future

during a concert to guide the listener through the listening experience. Another possible future strategy which could be considered and refined was mentioned by the marketing officer:

> I would like to get input from the audience to know what they would like to listen to…maybe a box with suggestions.

These possible future strategies are excellent methods to engage audiences in concerts and also to ensure repeat attendance. Orchestra members also conversed with audience members during intervals and after each performance to build a personal relationship and make them feel part of the orchestra family.

Orchestra B mainly incorporated social media to engage their audience members – this was done through the OCD of the university. Information was posted on the official website and on Facebook about the performance, the music and the conductor to tempt audiences to attend. The conductor also strove to put together a balanced programme to include pieces across a range of genres to appeal to a variety of markets. The marketing officer stated that she tried to build a relationship with the audience members by greeting them before each concert and during intervals.

Orchestra C engages with audiences on a personal level before a concert and during intervals and builds a friendly relationship with their audience members. During these engagements the management team attempts to entice audience members to participate in the discount programme, which invites members to join for a lump sum at a discounted price at the beginning of the year, thus giving the concert budget a boost. The management team also includes information in the programmes that requires the audience to respond. This information includes surveys to find out where they heard about the concert, how they would feel about earlier starting times, or if they would like to join the mailing list. When planning the annual concert calendar the management team looks for commemorative dates for composers, musicians and festivals, and builds the programme around this information. Orchestra C also engages audiences through competitions such as raffles, where audience members are required to phone a certain radio station or hum a tune over

the phone or relate a story or anecdote about the subject matter to win tickets to a concert.

Market segmentation

Orchestra A:	Orchestra B:	Orchestra C:
• Mosty older audiences who love classical music • Try to reach younger audience	• Middle to upper class • Above 40 • Mostly working and married	• Student based • Music schools and music groups • Target through programming

Orchestra A did not have a clear market segmentation. Though most of their audience members were older and showed an interest in traditional classical music, the orchestra tried to tempt younger audiences to attend, but there was no clear strategy to reach different audiences according to their age, race, income level, occupation, location, etc. The use of vibrant and interesting posters was incorporated into their marketing strategy, but the same posters were used for all segments. The management did not mention different approaches to reach different audiences according to their respective demographics.

According to Orchestra B's marketing manager, their market segment tended to be middle- to upper-class audiences, who were mostly above 40, working and married. It was interesting to note how she described their market segmentation, since they had not done any research into audiences attending their concerts. Thus, it is unclear how she could arrive at such a definite description.

Orchestra C's market segmentation was mostly student based. The orchestra also targeted music schools and music groups to ensure continual growth in the orchestra itself. The management teams used programme targeting where the concert programme was constructed in such a way to attract and entice certain demographic

groups to attend. This ensured they would be able to attract an audience base from students to working-class members to senior citizens of all genders.

Branding

Orchestra A:	Orchestra B:	Orchestra C:
Versatile brand	Part of official university brand	Brand voice is music

It was interesting to notice that orchestra A did not have an official brand at present. They tended to choose a different idea for each concert, but they made it clear that they were still finding their feet and trying to establish a successful brand. The marketing officer stated:

> We don't really have a brand. With each concert we choose a theme and work around that. I would love to eventually have a fixed brand but we do promote a feeling of being young and vibrant.

The conductor added:

> I try to make our brand colourful and incorporate passion and make it interesting, but it is still a working process with a lot of experimentation.

Orchestra B was bound to the official brand of their university, since they made use of the university's OCD. The orchestra was subject to instructions from the branding team of the university and therefore had to conform to what the OCD felt was more representative of the university. This did not leave room for the orchestra to create its own voice or message, since it needed to plan according to the OCD's representation of them.

When the management team of orchestra C was asked to describe their brand, they confidently declared:

> Our brand is music. The purpose of our brand is to entertain and educate the public and fill the need in the cultural void by providing repertoire learning opportunities for music students in the orchestra.

Of the three orchestras, orchestra C seemed to be the only one that was sure of its brand and strove to build and establish it within the community.

Tickets and subscriptions

Orchestra A:	Orchestra B:	Orchestra C:
• Tickets available at variety of points • No season tickets • Discounts	• Online based and at door • Considering season tickets	• Available online or at door • Discount programme

There were a variety of ticket-buying points for orchestra A. Tickets were available online, at certain shops in town, at the Mall, at certain music schools and at the door. When asked if they make use of subscription strategies, the marketing officer answered:

> We do not make use of subscription or season ticket strategies, but we have considered using block bookings where you book 10 or more seats and then receive a discount.

The conductor later clarified that subscriptions were difficult since the orchestra did not have many concerts each year, so he did not see much worth in such a strategy at the moment. While orchestra B was considering the use of season tickets in the future, it was in the process of exploring the use of an online method of selling tickets. Customers were also able to buy tickets at the door before each concert. The marketing officer stated that they provide a professional product with non-professional players, thus their concerts are not as expensive as those for

professional orchestras. Orchestra C provided discounts when audience members join the discount programme and tickets could also be purchased online.

Of the three orchestras, only orchestra C had subscription tickets available.

Visible increase or decline in audience

Orchestra A:	Orchestra B:	Orchestra C:
• Increase of attendance • Change of venue • Different time for concerts	• Decline since 2016 • Depends on packaging	• Decline • Student protests

Orchestra A's manager stated that they have definitely had an increase in audience attendance since they recently changed their venue from their usual concert hall to the university concert hall. The university concert hall is bigger than their previous concert hall and thus it has a reputation for big and elaborate concerts. The new venue placed them closer to the student hostels and this in turn enticed more students to attend, while maintaining their current audience base since the venue is still attractive. The conductor also added that they focused more on what they placed on social media and instead of Sunday concerts they chose to have Saturday concerts. This way they attracted people from other towns who now had enough time to get to the concert and return home for work.

Orchestra B's marketing officer indicated that there has been a decrease in attendance at their concerts since 2016. The conductor argued that was difficult to determine the reason for this:

> It depends on the packaging of the concert in particular. There may have been a decline when the orchestra has stand-alone concerts when they are the featuring event, but when we have a collaborative performance with other people such as professionals or foreigners, we tend to have more people attending.

It was understandable that a university orchestra would have more attendees when they have professional soloists or foreign soloists playing with them, but the question remains: Has the orchestra itself experienced a decline in attendees at its concerts? The marketing officer and the conductor confirmed that when they performed alone they indeed saw a decrease in attendance.

Orchestra C also experienced a decline in attendance at its concerts, but according to the marketing officer, this had nothing to do with the marketing strategies but rather the student protests:

> At the moment we are experiencing a decline in attendance due to student protest actions. As a result of these protests, we were also obliged to shut down rehearsals and concerts from time to time due to safety issues.

The management team of orchestra C stated that they informed the public by means of mailing lists, websites and other media when concerts were still presented, but people felt an element of insecurity during the student protests and this had an impact on audience attendance, but there was not much they could do about the issue.

Problems in reaching audiences

Orchestra A:	Orchestra B:	Orchestra C:
• Attracting students • Orchestra members to help promote concerts • Misperception about orchestra • Need percussion players • Some members of public still don't know about concerts • Programme	• Changed methods of purchasing tickets • Audience preferences • Competition • Conventual strategies ineffective • Lack of communication between management	• Hijacking of threads on facebook • Conflicting concerts • Advertising budget

Orchestra A stated that attracting students and young people was a real challenge. The management team found that most potential audience members perceived orchestral music as stuffy and meant for elderly people, and the orchestra was finding it difficult to shake off that stigma. The orchestra did not have a marketing budget. They relied on the orchestra itself to promote their concerts and, according to the marketing officer, it was a challenge to encourage the members of the orchestra to participate in the promotion of their concerts by posting information online or by selling tickets. The management team also indicated that some people or organisations had a misperception of how the orchestra works and expected them to arrange a flashmob or small concert within a small amount of time. Orchestra A was also in need of more percussion players as they currently have to pay guest players to fill some roles when they were planning a concert. After further discussion the conductor revealed that:

> The biggest challenge for me is constructing the concert programme. There is this pull between what will attract the audience with music I feel the orchestra needs to perform for developmental purposes. It is easier to play the commercial music to ensure audience attendance, but then the orchestra won't grow technically.

The management team pointed out that sometimes they thought every aspect was covered in terms of marketing, but still heard from people that they didn't know about the concerts and that they should market more. This was still a major issue that they were not sure how to deal with.

Orchestra B management stated that when they changed their method for selling tickets, the result was that fewer people were willing to buy tickets and thus they are more reliant on door sales. The marketing officer also referred to the audience's preferences regarding concerts:

> The audience has a very definite preference of who they would like to see. If the conductor is not popular, they do not attend; the same with guest performers.

The conductor also pointed out that competition with professional orchestras is a challenge:

> The university orchestra competes with the adult orchestras or professional orchestras for performance times and audience attendees. I would say if the concerts fall on the same weekend, audience members would rather choose the professional orchestra over a non-professional orchestra for quality reasons and if they have already spent on one concert, I doubt they will come to our concert too.

The management team of orchestra B argued that the conventional strategies that work in the West and in Asia are not applicable in Africa, since we have a wider racial profile. The conductor also pointed out that the marketing strategies for the orchestra are ineffective, since they do not have a personalised strategy that caters for the orchestra's qualities and needs:

> It is largely because there is no marketing manager. The only marketing is the OCD of the university itself and they do not have music or performance knowledge. There is also some kind of dislocation between artistic leadership and marketing, and there should be better cooperation within the management team. But employment status plays a huge role in the managing of this orchestra and so it is a constant struggle.

Orchestra C found the hijacking of threads on Facebook problematic. During student protests some student protesters would use the orchestra's Facebook page to state their demands and needs. The marketing officer argued that it was better to delete the posting as neutralising nearly always backfires. According to the marketing officer,

> institutions also schedule concerts that are in conflict with ours (especially other orchestral concerts) and sometimes there is a big international show in town which takes audience attendees and their spendable entertainment money away from our orchestra.

The management team confirmed that if they had an advertising budget, they would be able to reach a far wider audience with advertisements in written and electronic media.

Potential audience

Orchestra A:	Orchestra B:	Orchestra C:
• Audience from different cultural backgrounds • Students	• Primary schools especially • Younger audiences	• Different cultural backgrounds • Younger audiences

Orchestra A would like to have students attending more than they are attending at the moment. They also noticed that their audience base is mostly white and would like to expand their audience base to become more culturally diverse. Orchestra B expressed a wish to entice a younger audience to attend. "I am keen to attract primary schools and especially targeting communities in lower economic areas in society", said the conductor of orchestra B.

Orchestra C was adjusting its strategies to attract black and coloured paying audiences and young audiences of all races who are not students. The marketing team stated that they know they reach those audiences through social media and other methods, yet generally they do not attend unless they know someone who is performing and tickets are free.

4.7   Coda

The research findings made it evident that the major challenges for these three university orchestras in South Africa were a lack of funding to cover thorough and effective audience-development strategies, and a lack of official marketing teams. At the time that the research was concluded, each orchestra had one person responsible for the marketing and audience-development for the orchestra, and it appeared to be a much bigger challenge than one person could handle. The wish list for potential audiences included student (and non-student) audiences reflecting a racial diversity. Some conventional audience-development strategies seemed to

work and produced some positive results, but it was clear that university symphony orchestras in South Africa need to develop a customised audience-development strategy that is suited to meet the specific needs of this diversified cultural environment.

"Marketing is not the art of finding clever ways to dispose of what you make.
It is the art of creating genuine customer value".
– Philip Kotler[16]

---

[16]Kotler, Philip, 2001. Marketing insights from A to Z: 80 concepts every manager needs to know. p. xii

4.8   Bibliography

Bedell, R. 2012. "Audience Development: Texas Symphony Orchestras." Master's program, University of Oregon.

Bernstein, J. S. 2007. *Arts Marketing Insights: The Dynamics of Building and Retaining Performing Arts Audiences*. San Francisco: Jossey-Bass.

Boyatzis, R. E. 1998. *Transforming Qualitative Information: Thematic Analysis And Code Development*. London: SAGE.

Braun, V. and V. Clarke. 2006. "Using Thematic Analysis in Psychology." *Qualitative Research in Psychology* 3 (2): 77-101.

Dempster, D. 2000. "Wither the Audience for Classical Music?" *Harmony* (11): 45.

Denzin, N. and Y. Lincoln. 2000. *Handbook of Qualitative Research*. London: SAGE.

Goodrick, D. 2014*. Comparative Case Studies, Methodological Briefs*. Florence: UNICEF.

Joffe, H. and L. Yardley. 2004. "Content and Thematic Analysis." In *Research Methods for Clinical and Health Psychology*, edited by D. F. Marks and L. Yardley, 56-68. London: SAGE.

Kaarbo, J. and R. K. Beasley. 1999. "A Practical Guide to the Comparative Case Study Method in Political Psychology." *Political Psychology* 20 (2): 396-391.

Kawashima, N. 2000. Beyond the division of attenders vs Non-attenders: a study into audience development in policy and practice. *Centre for Cultural Policy Studies, research papers No 6,* University of Warwick.

Kotler, P. 2011. *Marketing Insights from A to Z: 80 Concepts Every Manager Needs to Know*. New Jersey: John Wiley.

LeBrecht, N. 1997. *Who Killed Classical Music? Maestros, Managers, and Classical Music.* Secaucus, N.J: Birch Lane Press.

LoBiondo-Wood, G. and J. Haber. 1998. *Nursing Research: Methods, Critical Appraisal, and Utilization.* 4th ed. St. Louis, MO: Mosby.

Lin, P. 2008. "Challenges of Developing Audiences for Symphony Orchestras in Twenty-First Century." Masters of Arts, University of Akron.

Lindelof, A. 2015. "Audience Development and its Blind Spot: A Quest for Pleasure and Play in the Discussion of Performing Arts Institutions." *International Journal of Cultural Policy* 21 (2): 200-218.

Lipman, S. 1992. *Music and More: Essays, 1975 - 1999.* Evanston: North-western University Press.

Pätynen, J., S. Tervo, P. W. Robinson, and T. Lokki. 2014. "Concert Halls with Strong Lateral Reflections Enhance Musical Dynamics." *PNAS* 111 (12): 4009-4414.

Polit, D. F. and B. P. Hungler. 1999. *Nursing Research: Principles and Methods.* 6th Edition ed. Philadelphia: J.B. Lippincott.

Stommel, M. and C. Willis. 2004. *Clinical Research: Concepts and Principles for Advanced Practice Nurses.* Philadelphia: Lippincott Williams & Wilkins.

Vaismoradi, M., H. Turunen, and T. Bondas. 2013. "Content Analysis and Thematic Analysis: Implications for Conducting a Qualitative Descriptive Study." *Nursing and Health Sciences*: 398-405.

Wang, A. 2003. "The American Symphony Orchestra: Renewable Audiences or a Dying Institution?" Undergraduate thesis, Princeton University.

CHAPTER 5

CONCLUSION: DISCUSSION AND COMPARISON

Vignette

January 2013. That was it, my dream job! I was appointed as the North-West Youth Orchestra's manager. Two years of trying to land a job like this and it finally paid off. I was thrilled at the fact that I was now part of a creative team and looked forward in starting in my new capacity. Ideas for marketing and audience building raced through my mind. Little did I know that having ideas and implementing them successfully was more complex than it appeared!

I had more than enough experience as an administrator, but this was my first time working in the performing arts environment. It took only a few weeks for me to realize that being a manager of a symphony orchestra was a whole new ball game. I implemented all the marketing strategies I was familiar with, and which had shown ample success in my previous employment, but I did not achieve the same result this time. I knew achieving this should not be this hard, but what was I doing wrong? From here I started looking into audience-development strategies that were specifically designed for symphony orchestras, but immediately noticed that there was a gap. Most strategies were designed for professional orchestras which already had a big audience, but how was I to create an audience for a non-professional university orchestra? Finding the answer to this question was the way forward.

5.1   Introduction

The main reason for this study was to explore the audience-development strategies of three university symphony orchestras in South Africa to determine whether the strategies they are using are effective or not, and what changes could be implemented for the strategies to achieve the greatest success. This final chapter provides answers to the research questions stated in the beginning of the study. A brief overview of this chapter is presented in Figure 24.
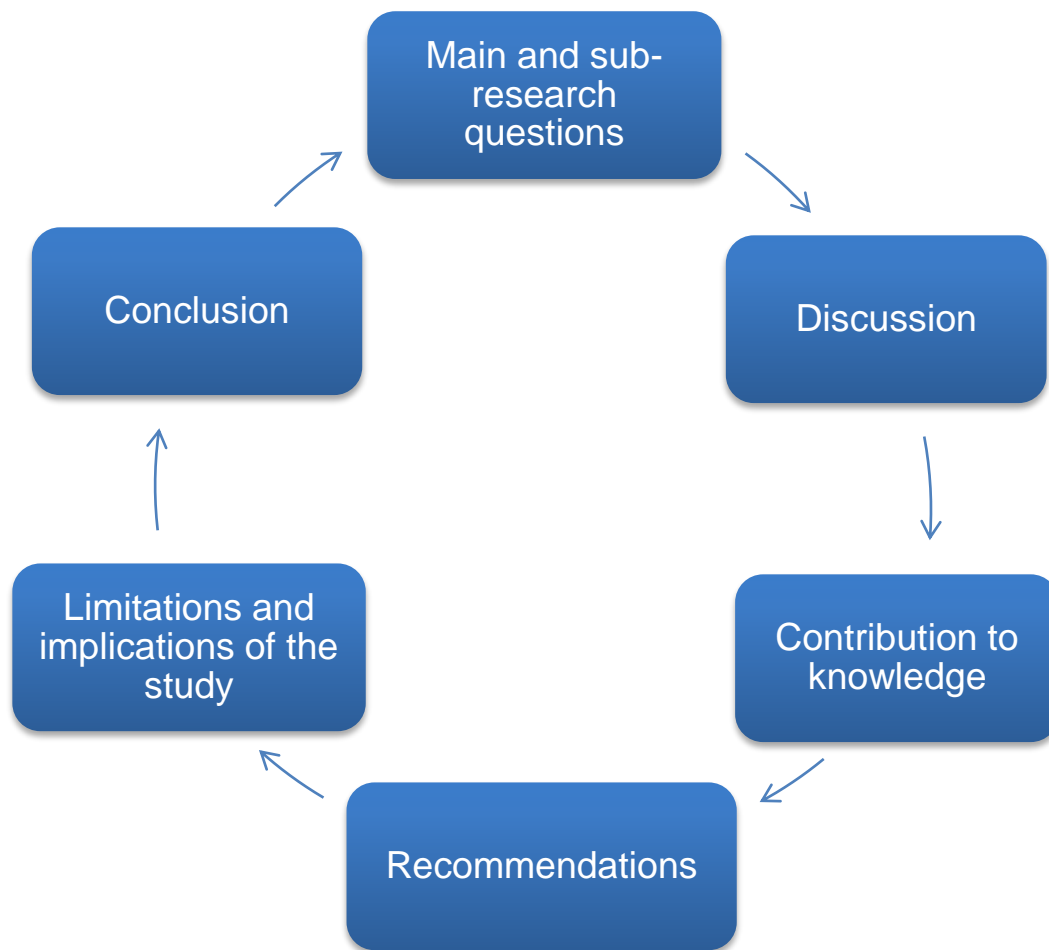
Figure 24: Brief overview of this chapter

5.2 Main research question

What are the audience-development strategies of three university symphony orchestras in South Africa?

The idea of audience-development strategies might at first seem quite straightforward, namely that the strategy is formulated and then implemented. However, transforming audience-development strategies into action was a far more complex and difficult task as each orchestra has diverse needs and challenges. Finding a suitable strategy takes time and this was confirmed in the review of audience-development strategies in the literature and across the three cases. In order to explore the audience-development strategies of the three participating university orchestras, the existing audience-development strategies that are

available to symphony orchestras in general first had to be examined to build a conceptual framework. After this, the audience-development strategies of the three participating orchestras could be explored by comparing them to the existing strategies to determine whether these orchestras could use their existing strategies without alteration, or if it was necessary for the orchestras to adapt these existing strategies to improve their effectiveness. Thus, to answer the main research question, the two research sub-questions that stemmed from the main research question first needed to be answered.

5.3   The research sub-questions

Sub-question 1

What are the existing audience-development strategies for symphony orchestras, as described in the scholarly literature? (Chapter 2 – Conceptual framework – Article 1)

After extensive research on audience-development strategies for symphony orchestras, the following recurring topics (Figure 25) were identified in the scholarly literature:

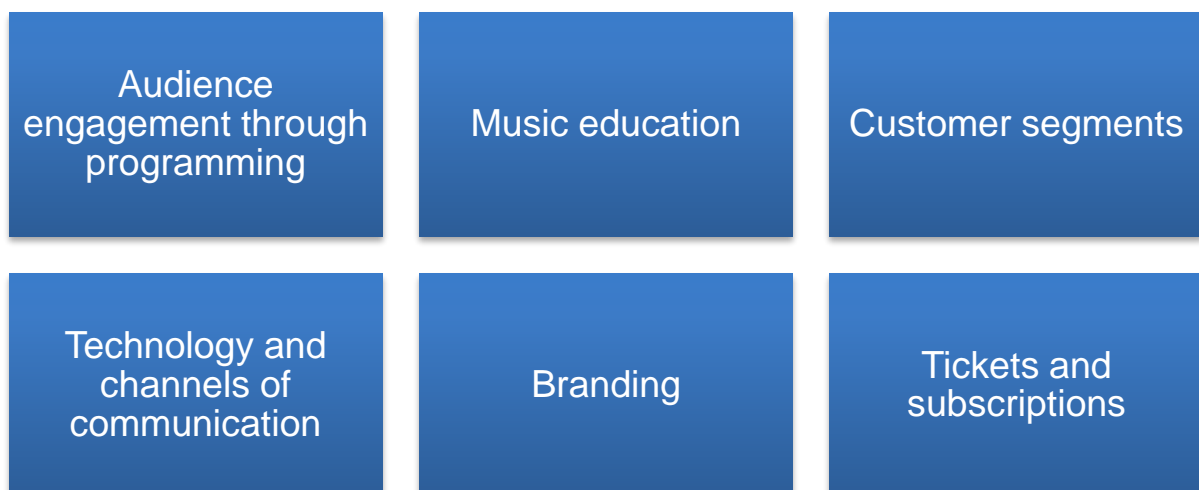|		
Audience engagement through programming	Music education	Customer segments
Technology and channels of communication	Branding	Tickets and subscriptions

Figure 25: Recurring topics within scholarly literature[17]

---

[17]More information on these recurring topics can be obtained in Chapter 1 and 2.

Audience engagement through programming

Programming is the most deliberated aspect of symphony orchestra management as it is the sole product of the orchestra. Programming and artistic decisions can play a critical role in advancing the mission of a symphony orchestra and hence to truly promote audience development, a symphony orchestra must reach out to all types of audiences, not just those who have a history with the symphony (Gore, 2008: 1-2). According to Bronstein (2004:25):

> One of the biggest challenges in the performing arts business is understanding how to balance creating a great artistic product with audience development and accessibility.

Brown and Ratzkin (2011:10) described audience engagement as a foundational principle of artistic programming and not a by-product. Yet in many arts organisations engagement programmes are designed and implemented by marketing staff without much thought as to how they fit into a larger strategic framework (Brown & Ratzkin, 2011:10).

Music education

The time invested in music education within the school curriculum is declining and this must be a vital concern for symphony orchestras (Lin, 2008:23). According to Kotler and Scheff (1997:513-529), "generally, people who are exposed to a rich arts education as children are more likely to have a life-long participation in the arts". Elliott (in Elliott & Fowler, 1994:41), a notable music educator and scholar, says:

> Music programs in schools provide an effective, enjoyable and authentic way of enabling students to achieve rich cultural understandings.

Pei-Yi Lin (2008:23) adds that "the earlier and more consistently children are exposed to music education and music experience, the more likely they will be to appreciate classical music and become audience members".

Customer segments

All customers are not the same and a single marketing strategy will do a poor job of serving a range of different customers. Thus, basic market planning entails segmenting the total available market, targeting key segments with specific offers, and positioning the offers to attract these target segments (Bernstein, 2014:vii). This could be done by implementing new distribution channels; making changes in pricing policies to attract different audience groups; or presenting a new and attractive package for the product being sold (Varbanova, 2013:133).

Technology and channels of communication

Communication aimed at developing audiences has become increasingly important for all performing arts organisations and for organisations operating in increasingly competitive markets and effective communication with audiences provides greater sustainable competitive advantages (Masterman & Wood, 2006:199). Used creatively, new technologies could offer real lines of communication between the audience and the organisation (Carver & Beardon, 2005:186). Some technological channels of communications that are available are provided in Figure 26.
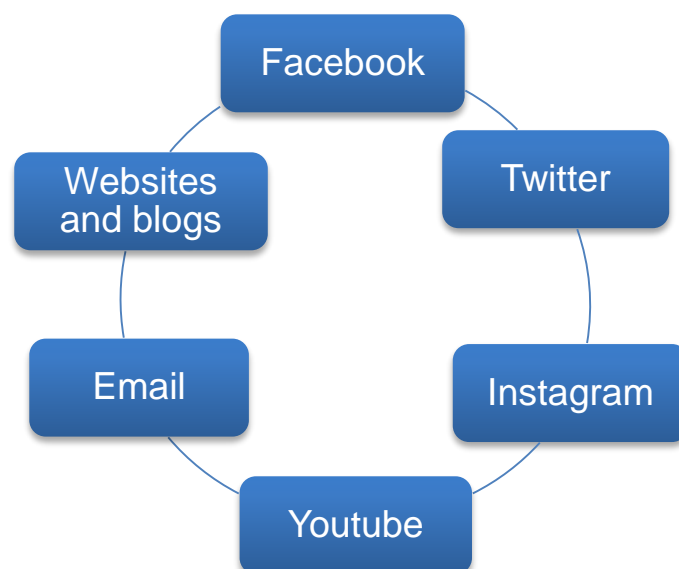

Figure 26: Technological channels of communication

Branding

Branding creates customer value, because it reduces both the effort and the risk of buying things. It therefore give suppliers an incentive to invest in quality and originality, and it also enhances the customer's experience aesthetically and psychologically (Clifton, 2009:xvii). Though branding set out initially to sell consumer products, it often does more than that – it connects products with bigger ideas (Jones, 2017:3).

Tickets and subscriptions

Arts marketers seek out innovative methods to expand their audience base and ensure frequent attendance among existing audiences, but they are concerned that their organisation's already high ticket prices, or potential necessary price increases, will create a barrier to the success of their audience-development strategies (Bernstein, 2007:119). According to Kaiser (2012:64), single-ticket sales account for most of income earned, but single tickets are also the most expensive to market, since marketing officers struggle to convince single-ticket buyers to attend every concert. Furthermore, single-ticket sales are affected by poor reviews and bad weather. Because subscriptions appear to strengthen the relationship, it is easier to convince subscribers to attend (Robinson[18], 2015: online).
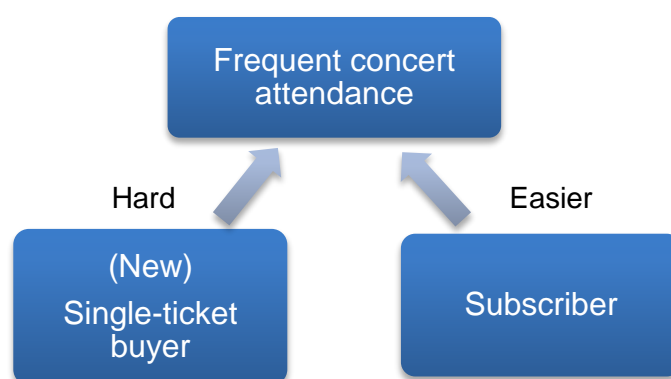

Figure 27: Attracting audiences

---

[18]Jill Robinson is the president and CEO of The Results Group for the Arts (TRG Arts), a consulting firm that teaches arts and cultural professionals a patron-based approach to increasing sustainable revenue.

However, subscription rates are falling as a result of reduced levels of discretionary income and the complications of scheduling attendance; thus orchestras are building subscription initiatives by offering discounts or subscriber-only benefits (Kaiser, 2012:62).

<u>Sub-question 2</u>

What themes emerged from the analysis of the data on the audience-development strategies of three university symphony orchestras in South Africa? (Chapter 4 – Case Study – Article 2)

After completing the analysis of the data obtained from the interviews and information sources of the three participating orchestras, the following main superordinate themes (Figure 28) emerged and are listed in no particular order.

Lack of administrative infrastructure	Lack of funding	Communication and technology	Branding
Programming and audience engagement	Tickets and subscriptions	Potential audience	Audience attendance
	Challenges	Market segmentation	

Figure 28: Superordinate themes from data analysis

These superordinate themes were each placed in separate tables. The subordinate themes were placed within the appropriate table under each major theme, as this simplified the data-analysis process. The subordinate themes and their respective sub-themes stemming from the superordinate themes are illustrated in Table 4.

Table 4: Subordinate and sub-themes stemming from superordinate themes

SUPERORDINATE THEME 1
Lack of administrative infrastructure
Subordinate themes
1st theme: No official marketing team 2nd theme: Lack of time 3rd theme: Lack of marketing knowledge 4th theme: Employment status
SUPERORDINATE THEME 2
Lack of funding
Subordinate themes
1st theme: Major obstacle 2nd theme: Sponsorships and bursaries 3rd theme: Numerous expenses
SUPERORDINATE THEME 3
Communication and technology
Subordinate themes

1st theme: Facebook
    1st sub-theme: Posts and tagging
    2nd sub-theme: Digital posters and photos
2nd theme: Mailing lists
3rd theme: Posters
4th theme: Radio

SUPERORDINATE THEME 4
Branding
Subordinate themes
1st theme: Versatile brand 2nd theme: Official university brand 3rd theme: Brand voice music

SUPERORDINATE THEME 5
Programming and audience engagement
Subordinate themes
1st theme: Music information 2nd theme: Audience contact 3rd theme: Balanced programme 4th theme: Competitions and customer feedback
SUPERORDINATE THEME 6
Tickets and subscriptions
Subordinate themes
1st theme: Points of purchase 2nd theme: Discount programmes 3rd theme: Season tickets
SUPERORDINATE THEME 7
Potential audience
Subordinate themes
1st theme: Different cultural backgrounds 2nd theme: Students 3rd theme: Younger audiences
SUPERORDINATE THEME 8
Audience attendance
Subordinate themes
1st theme: Decline – depends on circumstance 2nd theme: Increase – change in venue and starting times
SUPERORDINATE THEME 9
Challenges
Subordinate themes
1st theme: Competition 2nd theme: Budget 3rd theme: Attracting students

SUPERORDINATE THEME 10
Market segmentation
Subordinate themes
1st theme: Current audience older generation
2nd theme: Mostly working class
3rd theme: Overall same marketing strategy
4th theme: Want younger audiences

These themes and subthemes are discussed below in narrative form, incorporating quotes from participants in the discussion.

5.4   Discussion

The three orchestras selected for this study adapted to the changing economic environment and audience expectations and in some cases expanded their existing audience-development strategies. However, it became evident that the general problem among these orchestras was the decline in audience attendance for concerts, whether this was because of a failure to attract younger audiences, racially diverse audiences or audience members in general. It was also found that these orchestras tend to prefer the comfort of pre-existing audience-development strategies and rarely constructed new strategies that are specifically developed for their respective orchestras' needs and requirements. Funding also seemed to be a major challenge and hindered the orchestras from reaching their true audience-development potential. A lack of administrative infrastructure proved to be a challenge, since these orchestras do not have the staff capacity to tackle certain dilemmas on a constant basis.

Lack of funding and administrative infrastructure

The limited amounts of available funding call for a more simplified structure for the orchestra and its management as well as a stronger protocol in the relationship between the orchestra and its management (Castener, 1999:285). Thus it is important for the participating orchestras to select their audience-development

strategies carefully and make use of intensive market and audience research to ensure that they achieve the best impact with the smallest financial output. The orchestras should also consider selecting one orchestral marketing officer who is qualified or has the necessary time and experience to take charge of all marketing and audience-development initiatives. The idea is that financial and organisational responsibilities should rest with the marketing officer and not with musicians, who should focus on their performance standards as well as developing the next generation of musicians (Bathurst, 2007:32; Chong, 2002:147). It is suggested that the staff who are responsible for making managerial decisions and those who are involved in the organisations' operational team should be appointed permanently to prevent hierarchical challenges in the communication process in the management team.

Communication and technology

There appears to be an overall consistency of use between the participating orchestras when it comes to communication and technology. All three participating orchestras make use of Facebook for advertising purposes, although not all of them are equally effective. While orchestras A and C seem to be achieving maximal impact with Facebook by constantly updating their posts and sharing events, photos and videos, orchestra B seems to be less effective. Orchestra B's Facebook page is rarely updated and posts are not often shared; their Facebook following appears to be greatly affected by the lack of updating and thus they tend to only use the main university Facebook page. Orchestra B also tends to leave marketing strategies to the official communications department (OCD) of the university, which means that they do not have the opportunity to personify their marketing campaign. All three orchestras make use of extensive mailing lists, which is a good method of staying in touch with your current audience base.

Posters also play a role in the participating orchestras' marketing and audience-building, but there is some debate among the orchestras about how effective the use of posters is in today's internet-driven society. According to Wakefield *et al.* (2010:1261)*,* traditional marketing campaigns make use of media which reach large audiences, most frequently posters, and print media, but exposure to such

messages is generally passive, resulting from an incidental effect of routine use of media. But it is necessary to still incorporate posters in your audience-development strategy as new technologies (example, the internet, mobile phones and personal digital assistants) requires audiences to "actively choose to seek information", for example, by clicking on a web link (Wakefield *et al.,* 2010:1262). Thus it is safe to say that posters are still relevant today as novice computer users would prefer obtaining information in a simple fashion.

Programming and audience engagement

All the participating orchestras make use of personal contact during concert intervals or after concerts to engage with their audiences. This method is very effective to build relationships with the audience base. Orchestra A also posts information about the concert and music two months before each concert to engage their audience. Orchestra A is also considering adding customer feedback strategies, where the audience might be able to suggest music they would like to hear, as well as introducing visual elements such as pictures or video clips, to help the audience through the listening process. Orchestra C makes use of a discount programme, which offers discounts for all concerts to people who sign up at the beginning of the year. They also make use of commemoration dates when planning their concert programme and competitions to attract their audiences. Orchestra B makes use of mailing lists and a balanced programme to engage its audiences. These orchestras make use of a variety of methods to engage their audiences. Programme considerations such as using famous music, or offering a more balanced programme to incorporate memorable tunes and more traditional music, not only attracts audiences but also educates them by presenting music they are less familiar with. Other methods that might be considered by these orchestras are listed below.

Table 5: Possible methods to enhance audience engagement

Method	Description
Photo contests	The orchestra can prompt audiences to post a photo to the orchestra's Facebook page of themselves dressed up as a composer of music related to the programme or orchestra. The most creative could win a prize or even tickets
Facebook live campaign	These campaigns enable interacting with the audience base in a real-time manner, which adds authenticity and "realness" to the orchestra's social media pages.
Snapchat stories	The orchestra can post Snapchat stories on Facebook to illustrate "a day in the life" of an orchestra member or manager. This will assist in the building of relationships between the orchestra and the audience.

Market segmentation

Market segmentation is crucial for any company, as it allows them to reach a high share of a market segment or niche (McMillan, 2013:2). Implementing segmentation of consumers enables the organisation to identify new opportunities for their product or services; organisations should not underestimate segmentation as it "is the basic building block for effective marketing planning and audience building" (McDonald & Dunbar, 2004:40). It was a little concerning to see that orchestra A has not identified a clear market segment. Even though they try to attract younger and older audience members, their strategies to do so seem to be exactly the same. According to Strauss and Frost (2016:223), different strategies should be used to attract different segments of the market. Thus it is no surprise that they receive feedback from some people indicating that they were not even aware of the concerts, even after orchestra A took a lot of trouble advertising it. They simply failed to connect with that segment of the market. Orchestra B has a more serious predicament. Since they only make use of the official communications department (OCD) of the University for their marketing and audience development needs, they are obliged to conform to the university's market segmentation principles. Their webpage (created by the OCD) is formal and two-toned in colour and leaves little room for artistic creativity; this might be the reason why the current market segment attracted to their concerts seems mostly to be working class, above 40 years old and married. Orchestra C has a clear

and distinct market segment which they target. Most of their focus is student based, targeting music schools and music groups. However, they still leave room for their older-generation audiences and also make use of different strategies to target them, for example, the discount programme scheme.

Branding

Brand strength relies on creating a unique, vibrant and meaningful identity for a brand (Biel, 1997:199). This, in my opinion, could be the most fun aspect of establishing your product or organisation. So it was surprising to see that 2 of the 3 participating orchestras are not making use of the possibilities which branding could entail. Brands are one of an organisation's most valuable intangible assets, as they influence the customers' perceptions and drive loyalty (Yu *et al.*, 2008:41). Jacobs (2003:24) stated that "branding is more than a company logo or tagline, but it is the company's promise". According to Bernstein (2007:193), "it is an organizing principle so broad and so definitive that it can shape and direct just about anything an organisation does". Effective branding has a direct impact on organisations, as consumers are far more inclined to support brands they know and trust (Maity, 2017:64). Orchestra A does not have a clear brand and tends to change its image with every concert. Even though this could be an exciting way of marketing their concerts, it does not establish a lasting trademark among their consumers. Orchestra B is not involved in establishing its brand since the official communications department of the university is responsible for the orchestra's marketing tactics. Thus orchestra B is obliged, again, to conform to the university's brand, which does not necessarily leave much room for the orchestra's artistic freedom. Orchestra C is the only orchestra of the three participating orchestras of this study to have a brand voice, but after examining their social media channels, I found that the idea of their brand does not seem to come across strongly enough. They have identified their brand voice to be 'music, education and entertainment' and though all three of these aspects are fairly visible in their marketing scheme, this still does not have a lasting impact on customers' perceptions. If one should think of country music, the image that immediately jumps to mind is jeans, cowboy hats, cowboy boots and, of course, line dancing. If one should think of symphony orchestras, the image of formal attire and wealthy people comes to mind. This makes it even more imperative for these

participating orchestras to put an effort in their brand voice and to ensure that the image they want to portray reaches and engages their audiences.

Tickets and subscriptions

It is vital for managers of arts organisations to balance the integrity of the art form and the research for income, if they are to maintain the development of the art form while ensuring a sustainable financial outcome for their activities (Boyle, 2007:127). Ticket prices and subscription packages should be carefully considered by university symphony orchestras, since they are essentially non-profit organisations. Orchestra A has a variety of ticket-buying points, which makes it easy for any customer to purchase a ticket. The orchestra does not make use of subscription packages, since they present only a few concerts per year and thus the orchestra would not really benefit from such a strategy at present. However, they have been considering implementing the use of block bookings, where customers would receive a discount if they were to book 10 or more seats at a time. Orchestra B provides an online ticket-selling channel and tickets are also sold at the door before each concert. Orchestra C makes use of online ticket-selling methods, door sales and subscription packages. Orchestra C is the only one of the three participating orchestras to use subscription packages, since they present enough concerts per year to justify such a scheme. At this point subscription packages seem to be unnecessary, considering that university symphony orchestras only have a certain number of concerts a year, which would make the use of single-ticket sales more sensible. However, it would be a positive step to consider discounts and block bookings for customers who tend to buy more than 10 tickets at a time. This would ensure return on attendance, which in turn leads to customer loyalty.

5.5   Contribution to knowledge

My primary purpose in this study was to reassess the concept of audience development for symphony orchestras by approaching it from a new perspective. So far most studies on audience development for symphony orchestras focused on professional orchestras and did not consider smaller, non-profit orchestras such as university symphony orchestras. Also, research on audience-development strategies

for symphony orchestras has to date mostly been conducted in America on American symphony orchestras, while little to no research has been done on audience-development strategies for symphony orchestras within the South African context. In this study I tried to shift the focus to South African university symphony orchestras and to give an account of the challenges they encounter regarding audience development.

5.6 Research completed within the past seven years in the South African context

There has been little research done on audience development for symphony orchestras in general in South Africa and even less research on university orchestras. In the past seven years I identified two graduating Master's students whose research focused on the sustainability of symphony orchestras in South Africa.

Polina Burdukova (2010), a Master of Music graduate at the University of Pretoria, focused her study on *'an analysis of the status of orchestras in South Africa'*. She focused her attention on full-time orchestras that persevered within changing conditions such as the restructuring of the arts and culture policy in the light of the post-apartheid government's new priorities. She also explored new concepts for the operation of an orchestra and how new strategies emerged to ensure the sustainability of symphony orchestras in South Africa.

In March 2017 Odile Marissa Lesch completed her Master of Music degree at the University of Stellenbosch. Her study focused on the '*Cape Town Philharmonic Orchestra's youth development and education programme* (YDEP) *and its contribution to transformation and diversity within the CPO'*. She also explored the economic empowerment of the YDEP and its role in the Western Cape.

5.7   Recommendations

For managers

It is important for managers to be aware of how an orchestra is structured and what the workload is to ensure optimal functionality. Two-way communication between the marketing officers and conductors is important. Marketing officers should consider the recommendations made by conductors, as well as vice versa, and should realize that they function as a whole unit and contribute directly to the success of the orchestra itself. In this way worker empowerment, ownership and a relationship of trust will prevail between marketing officers and conductors. It is recommended that marketing officers be properly trained in implementing the principles of marketing and audience development, communication, problem solving, think tanks, and standards for measuring internal and external customer satisfaction. Through these development initiatives, teams will develop the necessary skills and abilities to perform their tasks efficiently and effectively. Furthermore, the way an organisation comes across and how it explains what it does has an immense influence on buying decisions; thus orchestras must consider developing a clear and distinctive brand for themselves.

In the light of the above, I recommend that management teams of university symphony orchestras use this information as a basis for evaluating and updating their audience-development strategies. Management teams should assess and adapt their current approach to audience development and also adopt new approaches through which a wide range of audiences could be reached. This means embarking on aggressive audience-development programmes to maximize the effectiveness of their results.

Further research

A prominent researchable aspect of audience development for university orchestras, which became evident through the data analysis process, is the lack of attendance by younger audiences. It has become clear that the ratios between younger or student-based audiences and older generation audiences who attend symphony

concerts are greater within the latter category. Could this really indicate that younger or student-based audiences simply do not have a taste for symphony concerts, or could the approach through which these concerts are marketed and presented have an influence on their indifference towards symphony productions? It is also suggested that research related to the audience-development strategies of other arts organisations in South Africa be explored, as this could be of value to the field of audience development for university symphony orchestras in South Africa. As funding is the most important constraint currently being experienced by university symphony orchestras in South Africa, methods of effective fundraising for non-profit organisations could be explored and adapted to suit the needs and capabilities of these orchestras.

5.8   Limitations and implications of the study

Qualitative research is often criticized for being too subjective.[19] However, it should be noted that every effort was made to address these in the study: Themes explored in the study were directed by the literature and not by my own opinions, with additional topics being introduced by participants. The conductor of one of the participating orchestras declined to participate in the study and valuable data may have been lost as a result of this. Besides demonstrating the benefits of audience-development strategies for symphony orchestras, this study also recommended specific activities which the management teams of university orchestras might implement to ensure the growth and retention of their audience base.

5.9   Conclusion

This study explored the audience-development strategies that were used by three university symphony orchestras in South Africa. Throughout the study it became clear that there are numerous audience-development strategies available to university symphony orchestras. These strategies can be used to suit the marketing needs of the orchestras. However, due to the size, experience, and financial and administrative deficiencies of the orchestras, it is important that the marketing

---

[19]The subjective nature of the data that can be obtained from interviews and case studies might be open to misinterpretation and observer bias (Atieno, 2009:14).

officers develop a personalized strategy that is supportive and effective in regards to their specific needs.

"One of the best ways to learn about connecting with an audience is to observe great leaders who are known for their great connection and communication skills. Learn from them, and adopt what you can into your own style".
John C. Maxwell[20]

---

[20]John C. Maxwell is an internationally recognized leadership expert, speaker and author.

BIBLIOGRAPHY (CHAPTER 1, 3 AND 5)

Atieno, O. P. 2009. "An Analysis of the Strengths and Limitation of Qualitative and Quantitative Research Paradigms." *Problems of Education in the 21st Century* 13: 13-18.

Bathurst, R. 2007. "Letting Go of the Reign: Paradoxes and Puzzles in Leading an Artistic Enterprise." *International Journal of Arts Management* 9 (2): 24-45.

Bedell, R. 2012. "Audience Development: Texas Symphony Orchestras." Master's program, University of Oregon.

Bernstein, J. S. 2007. *Arts Marketing Insights: The Dynamics of Building and Retaining Performing Arts Audiences*. San Francisco: Jossey-Bass.

Bernstein. 2014. *Standing Room Only: Marketing Insights for Engaging Performing Arts Audiences*. 2nd ed. New York: Palgrave MacMillan.

Biel, A. L. 1997. "Discovering Brand Magic: The Hardness of the Softer Side of Branding." *International Journal of Advertising* 16 (3): 199-210.

Boyle, S. 2007. "Single Serve Or Package Deal? A Study of Regular Attendees to Symphony Orchestra Concerts." *International Journal of Nonprofit and Voluntary Sector Marketing* 12: 127-134.

Braun, V. and V. Clarke. 2006. "Using Thematic Analysis in Psychology." *Qualitative Research in Psychology* 3 (2): 77-101.

Bronstein, F. 2004. "An American Orchestra." In *Inside the Minds: Performing Arts Business*, edited by K. Russ and M. Wickenheiser, 21-39. Boston, MA: Aspatore Books.

Brown, A. S. and R. Ratzkin. 2011. *Making Sense of Audience Engagement*. San Francisco: The San Francisco Foundation.

Burdukova, P. 2010. "An Analysis of the Status of Orchestras in South Africa." Master of Music, University of Pretoria.

Burnard, K. and R. Bhamra. 2011. "Organisational Resilience: Development of a Conceptual Framework for Organisational Responses." *International Journal of Production Research* 49 (18): 5581-5599.

Carcary, M. 2009. "Research Audit Trail - Enhancing Trustworthiness in Qualitative Inquiry." *The Electronic Journal of Business Research Methods* 7 (1): 11-24.

Carlson, J. A. 2010. "Avoiding Traps in Members Checking." *The Qualitative Report* 15 (5): 1102-1113.

Carver, G. and C. Beardon. 2005. *New Visions in Performance: Innovations in Art and Design*. Netherlands: Routledge.

Castener, X. 1999. "The Tension between Artistic Leaders and Management in Arts Organisations: The Case of the Barcelona Symphony Orchestra." In *From Maestro to Manager: Critical Issues in Arts and Culture Management*, edited by M. Fitzgibbon and A. Kelly, 279-416. Dublin: Oak Tree Press.

Chong, D. 2002. *Arts Management*. London: Routledge.

Clark, H. 1996. *Using Language*. Cambridge: Cambridge University Press.

Clifton, R. 2009. "Brands and Branding." In *The Economist: Brands and Branding*. 2nd Edition ed., 3-12. Canada: John Wiley.

Creswell, J. W. 2007. *Qualitative Inquiry and Research Design: Choosing among Five Approaches*. London: SAGE.

Creswell, J.W. 2009. *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches*. Thousand Oaks: SAGE.

Creswell, J.W. 2014. *Research Design*. International student ed. London: SAGE.

Crowe, S., K. Creswell, A. Robertson, G. Huby, A. Avery, and A. Sheikh. 2011. "The Case Study Approach." *BMC Medical Research Methodology* 11 (1): 1.

Denzin, N.K, Lincoln, Y.S. 2011. *The SAGE handbook of qualitative research*. London: SAGE

Elliott, D. J. and C. Fowler. 1994. *Winds of Change: A Colloquium in Music Education*. New York: American Council for the Arts.

Friese, S. 2014. *Qualitative Data Analysis with ATLAS.Ti*. 2nd ed. London: SAGE.

Gale, C. 2015. "Research Methodology Applied to a Comparative Case Study of the Deinstitutionalization of Children in Bulgaria and Ukraine." *Scottish Journal of Residential Child Care* 14 (3): 85-98.

Gillin, P. 2009. *Secrets of Social Media Marketing: How to use Online Conversations and Customer Communities to Turbo-Change Your Business*. Fresno: Quill Drive Books.

Gilmer, L. A. 2008. "Attracting Arts Audiences: An Examination of Historical Perceptions and Current Marketing Strategies of the Symphony Orchestra in the United States." Honours program, University of Tennessee.

Goodrick, D. 2014. *Comparative Case Studies*. Florence: UNICEF.

Gore, E. 2008. "Symphonies and Community Engagement: Analysis of Organisational Culture in the Performing Arts." Arts administration graduate programme, University of Oregon.

Guo, Z. and J. Sheffield. 2007. "Critical Heuristics: A Contribution to Addressing the Vexed Question of so-Called Knowledge Management." *Systems Research and Behavioural Science* 24 (6): 613-626.

Jacobs, G. S. 2010. "The Viability of Music as an Academic Subject at Secondary School Level." Master of musicology, University of South Africa.

Jacobs, R. 2003. "Turn Employees into Brand Ambassadors." *ABA Bank Marketing* 35 (3): 22-26.

Jones, R. 2017. *Branding: A very Short Introduction*. Oxford: Oxford University Press.

Kaarbo, J. and R. k. Beasley. 1999. "A Practical Guide to the Comparative Case Study Method in Political Psychology." *International Society of Political Psychology* 20 (2): 169-391.

Kaiser, M. M. 2012. "Strategic Planning in the Arts: A Practical Guide." Artsmanager.com, last modified 21 August 2012, accessed October 2, 2017, http://www.hkaaa.org.hk/uploads/hkaaa/201208/20120821_120217_34uRC0PAzP_f.pdf

Kecskes, I. and F. Zhang. 2009. "Activating, Seeking, and Creating Common Ground: A Socio-Cognitive Approach." *Pragmatics and Cognition* 17: 331-355.

Knotts, A. 2015. "Accessibility Over Appeal: Developing Classical Music Audiences through Community." Honours program, Appalachian State University.

Kotler, P. and J. Scheff. 1997. *Standing Room Only: Strategies for Marketing the Performing Arts*. Boston: Harvard Business Press.

Le Comple, M. D. and J. P. Goetz. 1982. "Problems of Reliability and Validity in Ethnographic Research." *Review of Educational Research* 52 (1): 31-60.

Lesch, O. M. 2017. "The Cape Town Philharmonic Orchestra's Youth Development & Education Programme and its Contribution to Transformation and Diversity within the CPO." Master of Music, Stellenbosch University.

Lewis, F. A. 2015. "Provision of Music Education in the Western Cape through Focus Schools for the Arts." MMus, University of Pretoria.

LoBiondo-Wood, G. and J. Haber. 1998. *Nursing Research: Methods, Critical Appraisal, and Utilization.* 4th ed. St. Louis, MO: Mosby.

Lin, P. 2008. "Challenges of Developing Audiences for Symphony Orchestras in Twenty-First Century." Master's program, University of Akron.

Lincoln, Y. S. and E. Guba. 1985. *Naturalistic Enquiry.* Beverly Hills, CA: SAGE.

Maher, M. L., A. Cicognani, and S. Simoff. 1996. "An Experimental Study of Computer Mediated Collaborative Design."IEEE Computer Society Washington, 19 - 21 June 1996.

Maity, A. 2017. "A Comparative Study of Branding Strategies Harnessed by Indian Cement Manufacturers." *IUP Journal of Brand Management* 14 (2): 64-69.

Martorella, R. 1985. *The Sociology of Opera.* New York: Praeger.

Masterman, G. and E. H. Wood. 2006. *Innovative Marketing Communications: Strategies for the Events Industry.* Burlington: Routledge.

Mauskapf, M. G. 2012. "Enduring Crisis, Ensuring Survival: Artistry, Economics, and the American Symphony Orchestra." Doctor of Philosophy, University of Michigan.

McDonald, M. and I. Dunbar. 2004. *Market Segmentation: How to do it, how to Profit from it.* Oxford: Elsevier Butterworth-Heinemann.

McMillan, J. 2013. *How to Market Your Business.* USA: Motivation Matters.

Meredith, J. 1993. "Theory Building through Conceptual Methods." *International Journal of Operations and Production Management* 13 (5): 3-11.

Merkle, C. A. 2014. "Building the Modern American Orchestra: Significant Literature on Major Aspects of the Orchestra Business Model in the United States." Master of Arts, American University.

Merriam, S. B. 2002. *Qualitative Research in Practice: Examples for Discussion and Analysis*. San Francisco: Jossey-Bass.

Merriam, S. B. 2009. *Qualitative Research: A Guide to Design and Implementation*. Third edition ed. San Francisco: John Wiley.

Merriam, S. B. and E. J. Tisdell. 2016. *Qualitative Research: A Guide to Design and Implementation*. 4th ed. San Francisco: John Wiley.

Miles, M. B. and A. M. Huberman. 1994. *Qualitative Data Analysis: An Expanded Source Book*. 2nd ed. Newbury Park: SAGE.

Oliver-Hoyo, M., Allen, D. 2005. The use of triangulation methods in Qualitative Educational Research. *Journal of College Science Teaching.* Online. p.42-47

Orb, A., L. Eisenhauer, and D. Wynaden. 2001. "Ethics in Qualitative Research." *J Nurs Scholar* 33 (1): 93-96.

Osterwalder, A. and Y. Pigneur. 2010. *Business Model Generation: A Handbook for Visionaries, Game Changers, and Challengers*. New Jersey: John Wiley.

Park, H. 2010. "Communicating with Audiences: Strategic Marketing of Music Festivals.".

Patton, M. Q. 1990. *Qualitative Evaluation and Research Methods*. 2nd ed. Beverly Hills, CA: SAGE.

Patton, M. Q. 2015. *Qualitative Research & Evaluation Methods: Integrating Theory and Practice*. 4th ed. BeverlyHills: SAGE.

Polit, D. F. and B. P. Hungler. 1999. *Nursing Research: Principles and Methods*. 6th ed. Philadelphia: J.B. Lippincott.

Reeves, T. C. and J. G. Hedberg. 2003. *Interactive Learning Systems Evaluation*. Englewood Cliffs, NJ: Educational Technology.

Richards, H. M. and L. J. Schwartz. 2002. "Ethics of Qualitative Research: Are there Special Issues for Health Services Research?" *Fam Pract* 19 (2): 135-139.

Richardson, L. 2000. "Writing: A Method of Inquiry." In *Handbook of Qualitative Research*, edited by N. K. Denzin and Y. S. Lincoln. 2nd ed., 923-948. Thousand Oaks: SAGE.

Rizkallah, E. G. 2009. "A Non-Classical Marketing Approach for Classical Music Performing Organisations: An Empirical Perspective." *Journal of Business & Economics Research* 7 (4): 111-124.

Robinson, J. 2015. "Relationship Matter: New Data on how Subscription and Membership Impact Revenue." TRG Arts, last modified 24 September 2015, accessed October 23, 2017, http://www.trgarts.com/Blog/BlogPost/tabid/136/ArticleId/345/Relationships-matter-new-data-on-how-subscription-and-membership-impact-revenue.aspx.

Rule, P. and V. John. 2011. *Case Study Research*. Pretoria: Van Schaik.

Saldaña, J. 2014. *Thinking Qualitatively: Methods of Mind*. Singapore: SAGE.

Sanjari, M., F. Bahramnezhad, F. K. Fomani, M. Shoghi, and M. A. Cheraghi. 2014. "Ethical Challenges of Researchers in Qualitative Studies: The Necessity to Develop a Specific Guideline." *Journal of Medical Ethics and History of Medicine* 7 (14): 1-6.

Smart, P. R., D. Mott, K. Sycara, D. Braines, M. Strub, and N. R. Shadbolt. 2009. "Shared Understanding within Military Coalitions: A Definition and Review of Research Challenges."United Kingdom, 31 March - 1 April 2009.

Stake, R. E. 1995. *The Art of Case Study Research.* London: SAGE.

Strauss, A. and J. Corbin. 1990. *Basics of Qualitative Research*. Newbury Park, CA: SAGE.

Strauss, J. and R. Frost. 2016. *E-Marketing*. New York: Routledge.

Vaismoradi, M., H. Turunen, and T. Bondas. 2013. "Content Analysis and Thematic Analysis: Implications for Conducting a Qualitative Descriptive Study." *Nursing and Health Sciences* 15: 398-405.

Varbanova, L. 2013. *Strategic Management in the Arts*. New York: Routledge.

Wakefield, A., B. Loken, and R. C. Hornik. 2010. "Use of Mass Media Campaigns to Change Health Behaviour." *NIH Public Access* 376 (9748): 1261-1271.

Withey, E. 2009. "From the Concert Hall to Your Computer: Berlin Philharmonic's Webcasts Unique." *Edmonton Journal, online.* September, 3, 2009 p.65

Yin, R. K. 2014. *Case Study Research: Design and Methods*. 5th ed. Los Angeles: SAGE.

Yu, C., P. Zhao, and M. Bastin. 2008. "Understanding Retailer Branding: From the Perspective of Consumers' Shopping Value." *Journal of Chinese Marketing* 1 (2): 41-47.

ADDENDUM A: CONSENT FORM

Consent for Participation in Interview for Research

I volunteer to participate in a research project conducted by MM Swanevelder from the North-West University, Potchefstroom. I understand that the project is designed to gather information about audience-development strategies of university symphonic orchestras. I will be one of approximately six people being interviewed for this research and all information obtained from me, will be used as data for this study.

1. My participation in this project is voluntary. I understand that I will not be paid for my participation. I may withdraw and discontinue participation at any time without penalty.

2. If I feel uncomfortable in any way during the interview session, I have the right to decline to answer any question or to end the interview.

3. Participation involves being interviewed by the researcher. The interview will last approximately 20-30 minutes. Notes will be written during the interview. An audio tape of the interview and subsequent dialogue will be made. If I don't want to be taped, I will not be able to participate in the study.

4. I understand that the researcher will not identify me by name in any reports using information obtained from this interview, and that my confidentiality as a participant in this study will remain secure. Subsequent uses of records and data will be subject to standard data use policies which protect the anonymity of individuals and institutions.

5. Faculty and administrators from my campus will neither be present at the interview nor have access to raw notes or transcripts. This precaution will prevent my individual comments from having any negative repercussions.

6. I understand that this research study has been reviewed and approved by the research committee of the North-West University, Potchefstroom.

7. I have read and understand the explanation provided to me. I have had all my questions answered to my satisfaction, and I voluntarily agree to participate in this study.

8. I have been given a copy of this consent form.

_____   _____
Participant's Signature   Date

_____   _____
Signature of Principal Investigator   Date

ADDENDUM B

ARTICLE: CHAPTER 2

Audience-development strategies of symphonic orchestras: a conceptual framework

Arts Marketing: an international journal (a.k.a Arts and the Market)

Information for prospective authors

Submit to the journal

Submissions to *Arts and the Market* are made using ScholarOne Manuscripts, the online submission and peer review system. Registration and access is available at http://mc.manuscriptcentral.com/aatm.

If you are unable to find the information you need in the author guidelines or our author resources (http://emeraldgrouppublishing.com/authors/index.htm) section, please email manuscriptcentral@emeraldinsight.com for assistance. Please quote the journal name, your contact details and the information you require.

Registering on ScholarOne Manuscripts

If you have not yet registered on ScholarOne Manuscripts, please follow the instructions below:

- Please log on to: http://mc.manuscriptcentral.com/aatm
- Click on Create Account
- Follow the on-screen instructions, filling in the requested details before proceeding
- Your username will be your email address and you have to input a password of at least 8 characters in length and containing two or more numbers
- Click Finish and your account has been created.

Submitting an article to Arts and the Market on ScholarOne Manuscripts

- Please log on to Arts and the Market at
http://mc.manuscriptcentral.com/aatm with your username and password. This will take you through to the Welcome page (To consult the Author Guidelines for this journal, click on the Home Page link in the Resources column)
- Click on the Author Centre button
- Click on the submit a manuscript link which will take you through to the Manuscript Submission page
- Complete all fields and browse to upload your article
- When all required sections are completed, preview your .pdf proof
- Submit your manuscript

Review process

Each paper is reviewed by the editor and, if it is judged suitable for this publication, it is then sent to at least two independent referees for double blind peer review.

Copyright

Articles submitted to the journal should not have been published before in their current or substantially similar form, or be under consideration for publication with another journal. Please see Emerald's originality guidelines for details. Use this in conjunction with the points below about references, before submission i.e. always attribute clearly using either indented text or quote marks as well as making use of the preferred Harvard style of formatting. Authors submitting articles for publication warrant that the work is not an infringement of any existing copyright and will indemnify the publisher against any breach of such warranty. For ease of dissemination and to ensure proper policing of use, papers and contributions become the legal copyright of the publisher unless otherwise agreed.

The editor may make use of iThenticate software for checking the originality of submissions received. Please see our press release for further details.

Third party copyright permission

Prior to article submission, authors should clear permission to use any content that has not been created by them. Failure to do so may lead to lengthy delays in publication. Emerald is unable to publish any article which has permissions pending.

The rights Emerald requires are:

1. Non-exclusive rights to reproduce the material in the article or book chapter.
2. Print and electronic rights.
3. Worldwide English language rights.
4. To use the material for the life of the work (i.e. there should be no time restrictions on the re-use of material e.g. a one-year license).

When reproducing tables, figures or excerpts (of more than 250 words) from another source, it is expected that:

1. Authors obtain the necessary written permission in advance from any third party owners of copyright for the use in print and electronic formats of any of their text, illustrations, graphics, or other material, in their manuscript. Permission must also be cleared for any minor adaptations of any work not created by them.
2. If an author adapts significantly any material, the author must inform the copyright holder of the original work.
3. Authors obtain any proof of consent statements.
4. Authors must always acknowledge the source in figure captions and refer to the source in the reference list.
5. Authors should not assume that any content which is freely available on the web is free to use. Authors should check the website for details of the copyright holder to seek permission for re-use.

Emerald is a member of the STM Association and participates in the reciprocal free exchange of material with other STM members. This may mean that in some cases, authors do not need to clear permission for re-use of content. If so, please highlight

this upon submission. For more information and additional help, please follow the [Permissions for your Manuscript](#) guide.

Committee on Publication Ethics (COPE)

Emerald supports the development of, and practical application of consistent ethical standards throughout the scholarly publishing community. All Emerald's journals and editors are members of the [Committee on Publication Ethics](#) (COPE) which provides advice on all aspects of publication ethics. Emerald follows the Committee's [flowcharts](#) in cases of research and publication misconduct, enabling journals to adhere to the highest ethical standards in publishing. For more information on Emerald's publication ethics policy, please click [here](#).

Copyright forms

Where possible, Emerald seeks to obtain copyright for the material it publishes, without authors giving up their scholarly rights to reuse the work.

Assigning copyright to Emerald allows us to:

- Act on your behalf in instances such as copyright infringement or unauthorized copying
- Protect your moral rights in cases of plagiarism or unauthorized derivative works
- Offer a [premium service for permission requests](#)
- Invest in new platforms and services for the journals or book series you have published in
- Disseminate your work as widely as possible, ensuring your work receives the citations it deserves
- Recoup copyright fees from reproduction rights organisations to reinvest in new initiatives and author/user services, such as the [Research Fund Awards](#) and the [Outstanding Doctoral Research Awards](#).

If an article is accepted for publication in an Emerald journal authors will be asked to submit a copyright form through ScholarOne. All authors are sent an email with links to their copyright forms which they must check for accuracy and submit electronically.

If authors cannot assign copyright to Emerald, they should discuss this with the journal Content Editor. Each journal has an Editorial Team page which will list the Content Editor for that journal.

Editorial Services

Emerald is pleased to partner with Peerwith to provide editorial support for authors wishing to submit papers to Emerald journals. Peerwith is a platform for author services, connecting academics seeking support for their work with the relevant expert who can help out with language editing and translation, visuals, consulting, or anything else academics need to get their research submission-ready.

Transparency and Openness Promotion (TOP) Guidelines

Emerald is a signatory of the Transparency and Openness Promotion (TOP) Guidelines, a framework that supports the reproducibility of research through the adoption of transparent research practices. Emerald encourages authors to cite and fully reference all data, program code and other methods in their article. References for data sets and program codes should include a persistent identifier, such as a Digital Object Identifier (DOI). Persistent identifiers ensure future access to unique published digital objects, such as a text or data sets. Persistent identifiers are assigned to data sets by digital archives, such as institutional repositories and partners in the Data Preservation Alliance for the Social Sciences (Data-PASS). When citing data we advise authors to follow appropriate international and national procedures with respect to data protection, rights to privacy and other ethical considerations. For further guidance please refer to our publication ethics guidelines. For an example on how to cite data sets, please refer to the References section below.

Final submission

The author must ensure that the manuscript is complete, grammatically correct and without spelling or typographical errors. Before submitting, authors should check their submission completeness using the available Article Submission Checklist. Proofs will be emailed prior to publication.

Open access submissions and information

Emerald currently offers two routes for Open Access in all journal publications, Green Open Access (Green OA) and Gold Open Access (Gold OA). Authors who are mandated to make the branded Publisher PDF (also known as the "Version of Record") freely available immediately upon publication can select the Gold OA route during the submission process. More information on all Open Access options can be found here.

Manuscript requirements

Please prepare your manuscript before submission, using the following guidelines:

Format	Article files should be provided in Microsoft Word format. LaTex files can be used if an accompanying PDF document is provided. PDF as a sole file type is not accepted, a PDF must be accompanied by the source file. Acceptable figure file types are listed further below.
Article Length	Articles should be between 6000 and 8000 words in length. This includes all text including references and appendices. Please allow 280 words for each figure or table.
Article Title	A title of not more than eight words should be provided.

Author details	All contributing authors' names should be added to the ScholarOne submission, and their names arranged in the correct order for publication. • Correct email addresses should be supplied for each author in their separate author accounts • The full name of each author must be present in their author account in the exact format they should appear for publication, including or excluding any middle names or initials as required • The affiliation of each contributing author should be correct in their individual author account. The affiliation listed should be where they were based at the time that the research for the paper was conducted
Biographies and acknowledgements	Authors who wish to include these items should save them together in an MS Word file to be uploaded with the submission. If they are to be included, a brief professional biography of not more than 100 words should be supplied for each named author.
Research funding	Authors must declare all sources of external research funding in their article and a statement to this effect should appear in the Acknowledgements section. Authors should describe the role of the funder or financial sponsor in the entire research process, from study design to submission.
Structured Abstract	Authors must supply a structured abstract in their submission, set out under 4-7 sub-headings (see our "How to write an abstract" guide for practical help and guidance): • Purpose (mandatory) • Design/methodology/approach (mandatory)

	- Findings (mandatory) - Research limitations/implications (if applicable) - Practical implications (if applicable) - Social implications (if applicable) - Originality/value (mandatory) Maximum is 250 words in total (including keywords and article classification, see below). Authors should avoid the use of personal pronouns within the structured abstract and body of the paper (e.g. "this paper investigates..." is correct, "I investigate..." is incorrect).
Keywords	Authors should provide appropriate and short keywords in the ScholarOne submission that encapsulate the principal topics of the paper (see the How to... ensure your article is highly downloaded guide for practical help and guidance on choosing search-engine friendly keywords). The maximum number of keywords is 12. Whilst Emerald will endeavor to use submitted keywords in the published version, all keywords are subject to approval by Emerald's in house editorial team and may be replaced by a matching term to ensure consistency.
Article Classification	Authors must categorize their paper as part of the ScholarOne submission process. The category which most closely describes their paper should be selected from the list below. **Research paper.** This category covers papers which report on any type of research undertaken by the author(s). The research may involve the construction or testing of a model or framework, action research, testing of data, market research or surveys, empirical, scientific or clinical research.

Viewpoint. Any paper, where content is dependent on the author's opinion and interpretation, should be included in this category; this also includes journalistic pieces.

Technical paper. Describes and evaluates technical products, processes or services.

Conceptual paper. These papers will not be based on research but will develop hypotheses. The papers are likely to be discursive and will cover philosophical discussions and comparative studies of others' work and thinking.

Case study. Case studies describe actual interventions or experiences within organisations. They may well be subjective and will not generally report on research. A description of a legal case or a hypothetical case study used as a teaching exercise would also fit into this category.

Literature review. It is expected that all types of paper cite any relevant literature so this category should only be used if the main purpose of the paper is to annotate and/or critique the literature in a particular subject area. It may be a selective bibliography providing advice on information sources or it may be comprehensive in that the paper's aim is to cover the main contributors to the development of a topic and explore their different views.

General review. This category covers those papers which provide an overview or historical examination of some concept, technique or phenomenon. The papers are likely to be more descriptive or instructional ("how to" papers) than

	discursive.
Headings	Headings must be concise, with a clear indication of the distinction between the hierarchy of headings. The preferred format is for first level headings to be presented in bold format and subsequent sub-headings to be presented in medium italics.
Notes / Endnotes	Notes or Endnotes should be used only if absolutely necessary and must be identified in the text by consecutive numbers, enclosed in square brackets and listed at the end of the article[21].
Figures	All Figures (charts, diagrams, line drawings, web pages/screenshots, and photographic images) should be submitted in electronic form. All Figures should be of high quality, legible and numbered consecutively with arabic numerals. Graphics may be supplied in colour to facilitate their appearance on the online database. • Figures created in MS Word, MS PowerPoint, MS Excel, Illustrator should be supplied in their native formats. Electronic figures created in other applications should be copied from the origination software and pasted into a blank MS Word document or saved and imported into an MS Word document or alternatively create a .pdf file from the origination software. • Figures which cannot be supplied as above are

---

[21]For uniformity within this dissertation, footnotes were placed at the end of each page as they arise

	acceptable in the standard image formats which are: .pdf, .ai, and .eps. If you are unable to supply graphics in these formats then please ensure they are .tif, .jpeg, or .bmp at a resolution of at least 300dpi and at least 10cm wide. • To prepare web pages/screenshots simultaneously press the "Alt" and "Print screen" keys on the keyboard, open a blank Microsoft Word document and simultaneously press "Ctrl" and "V" to paste the image. (Capture all the contents/windows on the computer screen to paste into MS Word, by simultaneously pressing "Ctrl" and "Print screen".) • Photographic images should be submitted electronically and of high quality. They should be saved as .tif or .jpeg files at a resolution of at least 300dpi and at least 10cm wide. Digital camera settings should be set at the highest resolution/quality possible.
Tables	Tables should be typed and included in a separate file to the main body of the article. The position of each table should be clearly labelled in the body text of article with corresponding labels being clearly shown in the separate file. Ensure that any superscripts or asterisks are shown next to the relevant items and have corresponding explanations displayed as footnotes to the table, figure or plate.
References	References to other publications must be in **Harvard** style and carefully checked for completeness, accuracy and consistency. This is very important in an electronic

	environment because it enables your readers to exploit the Reference Linking facility on the database and link back to the works you have cited through CrossRef.

You should cite publications in the text: (Adams, 2006)[22] using the first named author's name or (Adams and Brown, 2006) citing both names of two, or (Adams *et al.*, 2006), when there are three or more authors. At the end of the paper a reference list in alphabetical order should be supplied: |
| *For books* | Surname, Initials (year), *Title of Book*, Publisher, Place of publication.

e.g. Harrow, R. (2005), *No Place to Hide*, Simon & Schuster, New York, NY. |
| *For book chapters* | Surname, Initials (year), "Chapter title", Editor's Surname, Initials, *Title of Book*, Publisher, Place of publication, pages.

e.g. Calabrese, F.A. (2005), "The early pathways: theory to practice – a continuum", in Stankosky, M. (Ed.), *Creating the Discipline of Knowledge Management*, Elsevier, New York, NY, pp. 15-20. |
| *For journals* | Surname, Initials (year), "Title of article", *Journal Name*, volume issue, pages.
e.g. Capizzi, M.T. and Ferguson, R. (2005), "Loyalty trends for the twenty-first century", *Journal of Consumer Marketing*, Vol. 22 No. 2, pp. 72-80. |

---

[22]For uniformity within this dissertation, page numbers were included.

For published conference proceedings	Surname, Initials (year of publication), "Title of paper", in Surname, Initials (Ed.), *Title of published proceeding which may include place and date(s) held*, Publisher, Place of publication, Page numbers. e.g. Jakkilinki, R., Georgievski, M. and Sharda, N. (2007), "Connecting destinations with an ontology-based e-tourism planner", in *Information and communication technologies in tourism 2007 proceedings of the international conference in Ljubljana, Slovenia, 2007*, Springer-Verlag, Vienna, pp. 12-32.
For unpublished conference proceedings	Surname, Initials (year), "Title of paper", paper presented at Name of Conference, date of conference, place of conference, available at: URL if freely available on the internet (accessed date). e.g. Aumueller, D. (2005), "Semantic authoring and retrieval within a wiki", paper presented at the European Semantic Web Conference (ESWC), 29 May-1 June, Heraklion, Crete, available at: http://dbs.uni-leipzig.de/file/aumueller05wiksar.pdf (accessed 20 February 2007).
For working papers	Surname, Initials (year), "Title of article", working paper [number if available], Institution or organisation, Place of organisation, date. e.g. Moizer, P. (2003), "How published academic research can inform policy decisions: the case of mandatory rotation of audit appointments", working paper, Leeds University Business School, University of Leeds, Leeds, 28 March.

For encyclopaedia entries (with no author or editor)	*Title of Encyclopaedia* (year) "Title of entry", volume, edition, Title of Encyclopaedia, Publisher, Place of publication, pages. e.g. *Encyclopaedia Britannica* (1926) "Psychology of culture contact", Vol. 1, 13th ed., Encyclopaedia Britannica, London and New York, NY, pp. 765-71. (For authored entries please refer to book chapter guidelines above)
For newspaper articles (authored)	Surname, Initials (year), "Article title", *Newspaper*, date, pages. e.g. Smith, A. (2008), "Money for old rope", *Daily News*, 21 January, pp. 1, 3-4.
For newspaper articles (non-authored)	*Newspaper* (year), "Article title", date, pages. e.g. *Daily News* (2008), "Small change", 2 February, p. 7.
For archival or other unpublished sources	Surname, Initials, (year), "Title of document", Unpublished Manuscript, collection name, inventory record, name of archive, location of archive. e.g. Litman, S. (1902), "Mechanism & Technique of Commerce", Unpublished Manuscript, Simon Litman Papers, Record series 9/5/29 Box 3, University of Illinois Archives, Urbana-Champaign, IL.
For electronic sources	If available online, the full URL should be supplied at the end of the reference, as well as a date that the resource was accessed.

	e.g. Castle, B. (2005), "Introduction to web services for remote portlets", available at: http://www-128.ibm.com/developerworks/library/ws-wsrp/ (accessed 12 November 2007). Standalone URLs, i.e. without an author or date, should be included either within parentheses within the main text, or preferably set as a note (roman numeral within square brackets within text followed by the full URL address at the end of the paper).
For data	Surname, Initials (year), *Title of Data Set*, Name of data repository, available at: Persistent URL e.g. Campbell, A. and Kahn, R.L. (1999), *American National Election Study, 1948*, ICPSR07218-v3, Inter-university Consortium for Political and Social Research (distributor), Ann Arbor, MI, available at: http://doi.org/10.3886/ICPSR07218.v3

ADDENDUM C:

ARTICLE: CHAPTER 4
Audience-development strategies of three university symphony orchestras in South Africa

<u>Musicus</u>

Information for prospective authors

Submission requirements

Authors should confirm that their article is original work and not under consideration elsewhere.

Presentation

Authors should submit three copies of their article on A4 paper, together with an electronic file. Please ensure that the electronic file is exactly the same version as the hard copy, and that they are the latest and final version. This is essential both for initial submission and if you are asked to revise and resubmit. The full title of the article should be supplied on the title page. The article should be typed in double-spacing (including all notes and references) on one side of the paper only, and between 5 000 and 8 000 words in length. Do not attempt layouting. All notes should be kept to a minimum and appear at the end of the article before the list of references[23]. Figures and tables should not be embedded in the text[24], but be saved as separate files at the end of each article with their position clearly marked in the text. Indicate clearly in which format they were generated. Please supply typed captions including sources and acknowledgements.

An abstract in both English and Afrikaans of 200 words in length, covering the main factual points and statement of objective or problem, method, results and

---

[23]For uniformity within this dissertation, footnote/notes are placed at the end of each page as they arise.
[24]For uniformity within this dissertation, figures and tables are placed in the article as they arise

conclusions, should accompany an article plus a list of at least six keywords for abstracting and indexing services. Foreign based authors need only an abstract in English and the editor will take responsibility for the translation into Afrikaans.

All articles shall be critically reviewed by at least two referees.

Please supply short biographical details of each author as well as the name, mailing address, telephone and facsimile numbers, e-mail address, and affiliation and country of each corresponding author at the time of the work.

Where to send articles

All correspondence concerning articles should be directed to:

The Editor: Musicus
Directorate Music
University of South Africa
P O Box 392
UNISA
0003
Pretoria
Republic of South Africa

Tel: + 27 12 429 2913
Fax: + 27 12 429 3644
E-mail: shortme@unisa.ac.za

References

The Chicago Manual of Style author –date system is used, that is, references are cited in the text by the author(s) name(s), the year of publication and the page number(s) in brackets, for example (Apollonia 1973, 370), as a key to the full list of all references that appears at the end of the article. The list of references should include every work cited in the text. Ensure that dates, spelling and titles used in the text are accurate and consistent with those listed in the references.

Examples

In text

(Sturkin 1997, 20–30) book

(Schellinger, Hudson and Rijsberman 1998) three-author book

(Secher et al. 1996, 243) (Note: et al. is not italicised) multiple-author book

(Michelangelo 1999, 122–134) a translated book

(UNDP 2003, 14) organisation as author

(Anon. 1547).

(Garcia 1987, vol. 2) book volume

(Johnson 1979, sec. 24) section

(Wiens 1983) chapter in a multi-author book

(Weber, Burlet and Abel 1928) edition

(Allison 1999, 26) journal

(Wright 1968–1978, 2:241) multivolume work

(Barnes 1998, 2:244255, 3:29) journal volume number with page reference

(Tulchin and Garland 2000) series

(H. J. Brody, pers. comm.) personal communication

(Kurland and Lerner 2000, chap. 9, doc. 3) part of a document

(Fischer and Siple 1990, 212n3) note

(Schwarz 2000) unpublished thesis

In reference list

Allison, G. W. 1999. The implications of experimental design for biodiversity manipulations. American Naturalist 153 (1):26–45.

Anon. 1547. Stanze in lode della donna brutta. Florence.

Kurland, P. B. and L. Lerner, eds. 2000. The founder's constitution. Chicago: University of Chicago Press. (accessed 2 April 2004).

Michelangelo, 1999. The complete poems of Michelangelo. Trans. J. F. Nims. Chicago: Chicago University Press.

Schellinger, P., C. Hudson and M. Rijsberman, eds. 1998. Encyclopedia of the novel. Chicago: University of Chicago Press.

Schwarz, G. J. 2000. Multiwavelength analysis of classical carbon–oxygen novae (outbursts, binary stars). Ph.D. thesis, Arizona State University.

Secher, J. A., S. M. Pfaffilin, F. L. Denmark, A. Griffen and S.J. Blumenthal, eds. 1996. Women and mental health. Baltimore: Johns Hopkins University Press.

Sturkin, M. 1997. Tangled memories. Berkeley and Los Angeles: University of California Press.

Swidler, A. 1986. Culture in action. American Sociological Review 51:273–286.

Tulchin, J. S. and A. M. Garland, eds. 2000. Social development in Latin America: The politics of reform. Woodrow Wilson Center Current Studies on Latin America. Boulder, CO: Lynne Rienner.

UNDP see United Nations Development Programme. United Nations Development Programme. 2003. The economic cost of AIDS. Pretoria: University of South Africa Press.

Weber, M. H. M. de Burlet and O. Abel. 1928. Die Saugetiere. 2nd ed. 2 vols. Jena: Gustav Fischer.

Wiens, J. A. 1983. Avian ecology: An iconoclastic view. In Perspectives in ornithology, ed. A. H. Brush and G. A. Clark Jr, 355–403. Cambridge: Cambridge University Press.

Wright, S. 1968–1978. Evolution and the genetics of populations. 4 vols. Chicago: University of Chicago Press.

ADDENDUM D: ETHICS DOCUMENT

NORTH-WEST UNIVERSITY
YUNIBESITI YA BOKONE-BOPHIRIMA
NOORDWES-UNIVERSITEIT ®
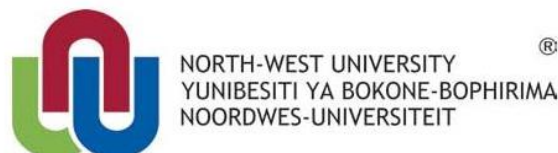
Private Bag X6001, Potchefstroom,
South Africa, 2520

Tel: (018) 299-4900
Faks: (018) 299-4910
Web: http://www.nwu.ac.za

Institutional Research Ethics Regulatory Committee
Tel: +27 18 299 4849

Email : Ethics@nwu.ac.za

ETHICS APPROVAL CERTIFICATE OF PROJECT

Based on approval by the **Research Ethics Committee of the Faculty of Arts (FA-REC)** at the meeting held on **2017-02-22**, the North-West University Institutional Research Ethics Regulatory Committee (NWU-IRERC) hereby **approves** your project as indicated below. This implies that the NWU-IRERC grants its permission that, provided the special conditions specified below are met and pending any other authorisation that may be necessary, the project may be initiated, using the ethics number below.

Project title: Audience-development strategies of three university symphony orchestras in South Africa.	
Project Leader/Supervisor: Dr Yvonne-Marie Brand	
Student: M. Swanevelder	

Ethics number:

N	W	U	-	0	0	3	6	5	-	1	7	-	A	7
Institution				Project Number						Year			Status	

Status: S = Submission; R = Re-Submission; P = Provisional Authorisation; A = Authorisation

Application Type: N/A
Commencement date: 2017-02-22   **Expiry date**: 2018-11-25   **Risk**:   N/A

Special conditions of the approval (if applicable):

- The questionnaire must be presented to the ethics committee for ethical evaluation.
- Translation of the informed consent document to the languages applicable to the study participants should be submitted to the FA-REC (if applicable).
- Any research at governmental or private institutions, permission must still be obtained from relevant authorities and provided to the FA-REC. Ethics approval is required BEFORE approval can be obtained from these authorities.

General conditions:

While this ethics approval is subject to all declarations, undertakings and agreements incorporated and signed in the application form, please note the following:

- *The project leader (principle investigator) must report in the prescribed format to the NWU-IRERC via FA-REC:*
  - *annually (or as otherwise requested) on the progress of the project, and upon completion of the project*
  - *without any delay in case of any adverse event (or any matter that interrupts sound ethical principles) during the course of the project.*
  - *Annually a number of projects may be randomly selected for an external audit.*
- *The approval applies strictly to the protocol as stipulated in the application form. Would any changes to the protocol be deemed necessary during the course of the project, the project leader must apply for approval of these changes at the FA-REC. Would there be deviated from the project protocol without the necessary approval of such changes, the ethics approval is immediately and automatically forfeited.*
- *The date of approval indicates the first date that the project may be started. Would the project have to continue after the expiry date, a new application must be made to the NWU-IRERC via FA-REC and new approval received before or on the expiry date.*
- *In the interest of ethical responsibility the NWU-IRERC and FA-REC retains the right to:*
  - *request access to any information or data at any time during the course or after completion of the project;*
  - *to ask further questions, seek additional information, require further modification or monitor the conduct of your research or the informed consent process.*
  - *withdraw or postpone approval if:*
    - *any unethical principles or practices of the project are revealed or suspected,*
    - *it becomes apparent that any relevant information was withheld from the FA-REC or that information has been false or misrepresented,*
    - *the required annual report and reporting of adverse events was not done timely and accurately,*
    - *new institutional rules, national legislation or international conventions deem it necessary.*
- *FA-REC can be contacted for further information via Yvette van der Merwe (13128388@nwu.ac.za) or 018 285 2301.*

The IRERC would like to remain at your service as scientist and researcher, and wishes you well with your project. Please do not hesitate to contact the IRERC or FA-REC for any further enquiries or requests for assistance.

Yours sincerely

Prof LA Du Plessis
Digitally signed by
Prof LA Du Plessis
Date: 2017.04.20
08:36:59 +02'00'

Prof Linda du Plessis
Chair NWU Institutional Research Ethics Regulatory Committee (IRERC)