



The Seattle Symphony and Music Director Ludovic Morlot acknowledge the audience at Benaroya Hall.

Brandon Palocz

The Seattle Symphony, Market Research, and NUCCs. NUCCs?

To connect with the “new urban cultural consumers” — NUCCs—moving into a rapidly changing downtown, the Seattle Symphony launched a wide-ranging audience-research program. Informal concert formats, focus groups, and post-performance surveys have yielded fresh insights and a rise in ticket sales—plus some surprises.

By Judith Dobrzynski

In 2015, the Wallace Foundation launched its \$52 million Building Audiences for Sustainability (BAS) initiative. The endeavor seeks to address concerns about declining audiences for a number of major art forms and to help arts organizations strengthen their audience-building efforts, see if that contributes to their financial sustainability, and develop insights for the wider arts field. As part of the BAS program, the Seattle Symphony is using research to target new audiences in downtown Seattle, where the population is growing at twice the rate of the city's overall population. Presented here are the initial findings from the Seattle Symphony's process of pinpointing previously untapped audiences, conducting focus groups and surveys, learning the preferences of new and seasoned symphony visitors, and adjusting programming while maintaining core artistic principles. This article is part of a series from the Wallace Foundation describing the early work of some of the 25 performing arts organizations participating in the ongoing BAS initiative and is reprinted by permission. Visit www.wallacefoundation.org/SeattleSymphony for more on the Building Audience Sustainability initiative and to watch a video about the Seattle Symphony's market research.

For years now, downtown Seattle has thrummed with the sound of earth movers and cranes, as corporations like Amazon, Microsoft, and Google moved into the area and new residential buildings went up. The noise could be unbearable. But to the Seattle Symphony, the rumble—and the influx of people it brought into the neighborhoods surrounding Benaroya Hall—sounded like opportunity knocking.

When Simon Woods became president and CEO in May 2011, followed that fall by the arrival of Ludovic Morlot as music director, the Seattle Symphony's audience was shrinking. During the 2011-12 season, its core Masterworks concerts were selling at just 63 percent of paid capacity. Something had to be done.

As the orchestra began to consider changes, officials kept its mission—to unleash the power of music, bring people together, and lift spirits—top of mind. Tacitly, that statement implied being a vital part of the city. And, as Woods says, “When you think about Seattle, I think about two things more than anything else which make up the values of this city. One is about innovation and the other is about community.” (In November, Woods was named chief executive director of the Los Angeles Philharmonic, and has since departed the Seattle Symphony.) Guided by those principles, the orchestra set out to capitalize on downtown Seattle's growth spurt. The staff believed that if they could identify and appeal to this growing population, they could arrest the downward slide in sales and lure new, younger listeners to Benaroya Hall.

“There was this population of people living downtown who [we thought] would love the opportunity to just walk to the

Woods. “We want to do the programming that brings in the largest audiences.” But, he adds, they also want to present music that provokes and challenges the audience.

Assumptions and Hypotheses

Other than where they lived or worked—in nine nearby ZIP codes—little was known about this prospective audience, which the Seattle Symphony later began to call “new urban cultural consumers,” or “NUCCs” (pronounced “nucks”). The staff guessed that this group would be significant in number, tech-savvy, urbane, experience-oriented, and eclectic in their musical tastes. They figured they would be young, mostly Millennials, with some Gen X-ers and baby-boomers, too.

Meanwhile, the orchestra devised three concert formats, all less formal than Mas-



Seattle Symphony staff members meet regularly to assess their programming, sales, and community engagement efforts, says Charlie Wade (right), the orchestra's senior vice president for marketing and business operations.

symphony,” says Charlie Wade, the orchestra's senior vice president for marketing and business operations.

To attract these potential listeners, the orchestra generally tried to play to their assumed musical inclinations. “We want to think about people's preferences,” explains

terworks, all launched during the 2012-13 season, and all marketed under the “Listen Boldly” umbrella. While they were never intended to be a formal series or viewed as a stepping stone from one concept to the next, there was some initial thinking that they might spur general interest in the

Visit www.wallacefoundation.org/SeattleSymphony for more on the Wallace Foundation's Building Audience Sustainability initiative and to watch a video, produced by Stephanie Carter of WNET New York Public Media and directed by Bob Hercules, about the Seattle Symphony's recent market research.



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At one of the Seattle Symphony's Sonic Evolution concerts, Mike McCready, lead guitarist for the Seattle-based grunge band Pearl Jam, performs with the orchestra.

orchestra and therefore potentially in the core Masterworks concerts.

One format, called "Sonic Evolution," blends the orchestra's classical prowess with the musical styles of local bands and sometimes incorporates video. In the words of Elena Dubinets, vice president of artistic planning, the series "embraces the popular music legacy of Seattle." For the inaugural "Sonic Evolution" concert, the Seattle Symphony played the first orchestral piece written by electro-acoustic "alt-classical" composer William Brittle: *Obituary Birthday* (A Requiem for Kurt Cobain), in memory of the Nirvana founder who was a key member of the Seattle grunge scene. Other "Sonic Evolution" concerts have featured performers from groups like Mad Season and Pearl Jam.

"Untitled," the second new concept, is a 10 p.m. chamber music concert that presents challenging twentieth- and twenty-first-century compositions in Benaroya Hall's darkened lobby, whose capacity is about 500. With its intimacy, club-like atmosphere, sit-where-you-like character (choices include tables and cushions on the floor, as well as chairs), and dramatic lighting, *Untitled* was aimed at a youthful audience that would like edgy music. Scheduled three times per season, these concerts present works by, for example, modernist John Cage and by Trimpin, a sound sculptor/musician whose piece featured chimes and a preprogrammed piano.

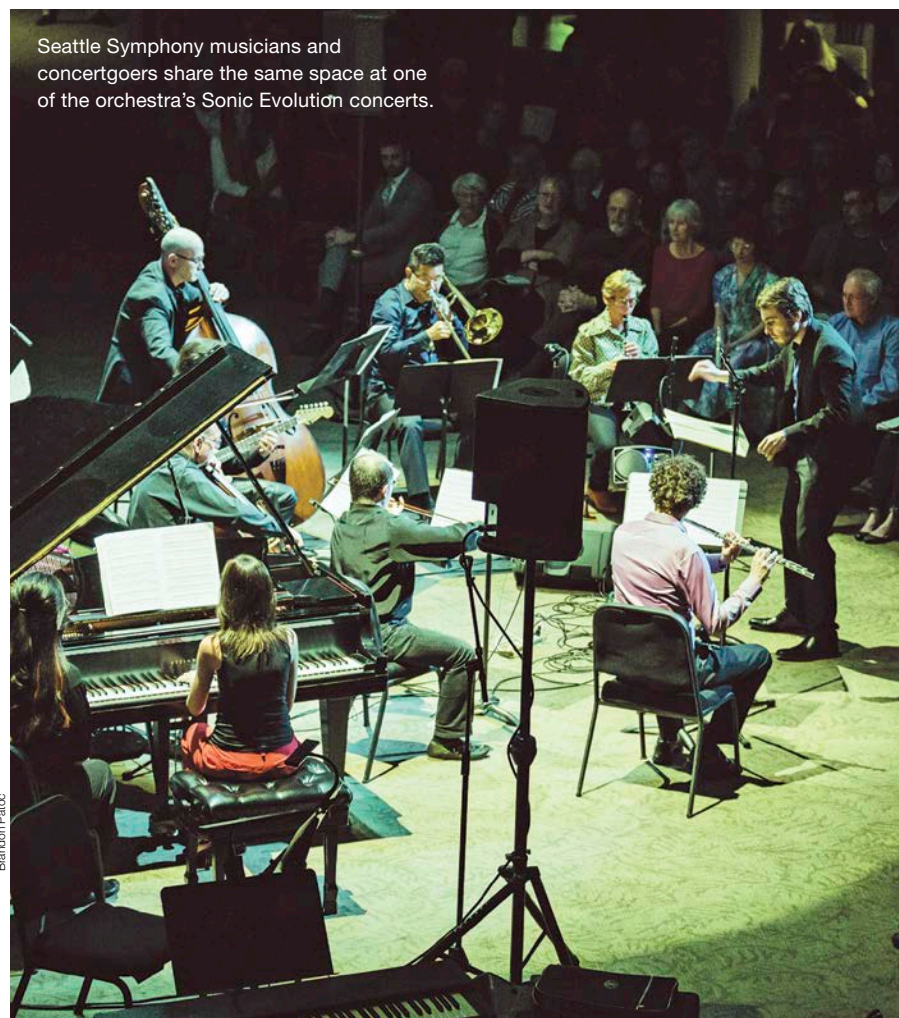
"Untuxed" starts at 7 p.m., lasts no more

than 75 minutes, and offers classical music drawn from the Masterworks series to busy people who might have avoided the longer, later, costlier core series. An early program featured works by Beethoven, Dvořák, Max Bruch, and John Adams.

Even from the start, more seemed to ride on Untuxed, which is set in the main

hall on Friday nights and offered five times per season. Assuming that these concerts would be an introduction to classical music for young attendees, the orchestra drafted bassist Jonathan Green to act as host, providing insight about the program. It also invited concertgoers to mingle with the musicians, go backstage for a tour, or sit on stage. Breaking down another presumed barrier, the orchestra requested that the musicians wear casual attire, signaling that the audience could do likewise. At Untuxed concerts, blue denim is more prevalent than black.

After a strong start in ticket sales for Untuxed, orchestra staff began to wonder if Untuxed could become an "on-ramp" to Masterworks—if the young newcomers, liking what they heard, would then buy tickets to the longer concerts. Wade says their hope was to "provide our audience with this sort of introductory music that would then get them moving to our core series, and that would be great." Still, staff recognized that Untuxed might also be an "off-ramp": If many ticket buyers defected from the Masterworks program to the shorter, cheaper program, that would be a negative, revenue-depleting result.



Seattle Symphony musicians and concertgoers share the same space at one of the orchestra's Sonic Evolution concerts.

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Market Research

All of this was conjecture until the Seattle Symphony received a Building Audiences Sustainability grant from the Wallace Foundation to conduct audience research. Following traditional protocols in market research, it began with focus groups, which provide qualitative perceptions. Those comments could then be used to draft questions for a quantitative study.

In July 2015, an outside contractor conducted focus groups, each with seven to nine college-educated participants, male and female, ages 21 to 64. Two groups, the “musically inclined,” had purchased tickets to at least two different musical genres (classical, Latin, jazz, opera, blues,

The Seattle Symphony's research-based marketing and programming efforts reach beyond new urban cultural consumers, and are paying off overall. For the 2016-17 season, the orchestra sold 74 percent of Masterworks' paid capacity, continuing an almost steady increase since 2011-12.

pop, or rock) in the last year and were not averse to attending classical concerts. The other five groups were segmented by their attendance at one of the Masterworks, Untitled, Untuxed, or Sonic Evolution performances. During two-hour sessions, orchestra administrators watched (unseen) as participants reviewed marketing materials and video excerpts of concerts, providing feedback on their habits, motivations, and preferences. In the fall, the orchestra followed up with a survey to patrons and non-patrons, receiving responses from a total of 2,084 people.

The results provided encouragement, confirming that NUCCs existed in sizable numbers and were good prospects for the symphony: Some 83 percent professed an interest in the arts. The orchestra also learned that NUCCs included not only Millennials but also more Gen X-ers and older empty-nesters, returning to the city from the suburbs, than originally suspected.

For all three concerts formats, added entitlements like backstage tours and an M.C.

LISTEN BOLDLY : NEW CONCERT FORMATS



SONIC EVOLUTION

Blends the orchestra's classical prowess with the musical styles of local bands and sometimes incorporates video. For the inaugural concert, SSO played the first orchestral piece ever written by electro-acoustic “alt-classical” composer William Brittelle—*Obituary Birthday (A Requiem for Kurt Cobain)*.



UNTITLED

Chamber music concert that presents challenging 20th- and 21st-century compositions. Aimed at a youthful audience that would like edgy music. Scheduled three times per season, these concerts present work, for example, by modernist John Cage and by Trimpin, a sound sculptor/musician whose piece featured chimes and a preprogrammed piano.



UNTUXED

Begins at 7:00 p.m. and lasts no more than 75 minutes and offers classical music drawn from SSO's Masterworks series to busy people who might have avoided the longer, later, costlier core series. An early program featured works by Beethoven, Dvořák, Max Bruch and John Adams.

were often appreciated but not essential. It was the music itself that drove attendance. In fact, Untuxed's strong initial sales had tailed off for that reason. Audiences did not want to hear the pieces by, say, Bruch and Adams that were on that early program; they preferred works like Vivaldi's *Four Seasons*, Copland's *Symphony No. 3*, and Bernstein's *Candide Overture*—nothing more adventurous. “Untuxed is actually the most conservative audience that we have,” says Wade; they wanted music that they “know and love.” In post-performance interviews at a 2017 concert, several people confirmed that. “Programming plays a big role in my selection of the Untuxed series,” said one audience member. “I love the fact that it is ‘the best of.’” Another, who found the music “relaxing,” agreed, and was

drawn by Untuxed's early start and short span. “I am going to be able to make it home for my kids' bedtime, and that means a lot to me,” she said.

The Seattle Symphony was more accurate in programming the other new concerts. Untitled—the 10 p.m. concerts that offer challenging modern music—attracted a somewhat older audience, on average, than expected. But in addition to appreciating the informal atmosphere and staging, they are die-hard music lovers who also attend other Seattle Symphony concerts. “Those who come for Untitled are probably the most passionate about the symphony overall,” says Dubinets—a notion confirmed by after-concert interviews. Concertgoer Mike Castor said, “It's definitely the music—the really inventive

WHAT IS A NUCC?

(new urban cultural consumer)



GEN XERS

MILLENNIALS

BABY BOOMERS

Live in the nine ZIP codes surrounding Benaroya Hall—nearly **40,000** households in 2017
Projected to grow by nearly **6%** between 2017 and 2020

Comprised of young, tech-savvy, urbane **millennials** and **gen xers** as well as **empty nesters**
who are likely to enjoy the conveniently located symphony

43% of NUCC households have a millennial decision-maker, versus **24%** in the SSO's total market

2/3 have attended college and some have attained advanced degrees

About **40%** have an annual income of at least **\$75,000**

Source: Wallace Foundation

programming. It's awesome to see such experimental and modern music being put on display this way, and it's equally awesome to see how many people come to see it and are very excited by it."

Patrons of the genre-bending Sonic Evolution concerts appreciated the concerts' connection to Seattle and the blend of musical genres—and said they would return. Having found their audiences, Sonic Evolution and Untitled will continue as part of SSO's programs, without the need for major tweaks or more research.

Untuxed was another story.

Course Corrections

The symphony had been programming Untuxed partly on what was easiest—which pieces were being rehearsed at particular moments during the season, for example, and could slip into Untuxed without a fuss. "We were falling into a bit

of the trap that a lot of organizations do," says Wade. "You become more focused on what's convenient for you internally versus what your audience actually wants."

So while "Masterworks programming remained what it was, this healthy mix of traditional, progressive, interesting, and new and familiar," Wade says, Untuxed required a pivot. For it, the orchestra began "cherry-picking" only the most familiar and best-loved works by well-known composers from its repertoire.

Though some musicians were initially hesitant about the changes, Dubinets says they accepted them because they were supported by research. "Musicians don't enjoy seeing empty halls, so we had to make it work," she points out. And it did: During the 2016-17 season, Wade reports, there was a 40 percent increase in attendance for Untuxed, compared with the 2015-16 season.

Perhaps disappointingly, the research also indicated that Untuxed was not going to be an on-ramp for Masterworks. Analysis of the ticket-purchase database shows that for the past four seasons (through February 2017), only about 1 percent of first-time Masterworks ticket buyers had first purchased Untuxed tickets. And among those patrons who attend both Untuxed and Masterworks concerts, most (55 percent to 65 percent, depending on the year), bought their Masterworks tickets first.

The upshot: Untuxed, like Sonic Evolu-

The Seattle Symphony's experience with building new audiences has helped foment change within the organization. Information, once held close by administrators, is shared with all departments. The programming process, once the sole purview of the music director's office, is symphonywide.

tion and Untitled, is a separate program or brand extension—neither more nor less. But all three are valuable, even without affecting attendance at the core Masterworks concerts, because they draw new audiences to Benaroya Hall.

There was good news in the market research, too. In the 2016-17 season, about 17 percent of Untuxed ticket buyers were first-time attendees, up from 9 percent in the 2015-16 season—which because the sample is small is not statistically significant but is directionally encouraging. Overall, first-time buyers of both Masterworks and Untuxed tickets are significantly younger than experienced ticket buyers—for the last three seasons, their median age is 46 versus a median age of 59 for experienced buyers. That is evidence that the orchestra is on the right track in pursuing NUCCs.

The numbers suggested that the Seattle Symphony would benefit from marketing outreach to NUCCs. The orchestra's penetration of this market has increased every year since 2014, with a cumulative total of about 12 percent over the whole period—

about double its penetration in Seattle outside the NUCC ZIP codes. Still, for the last two years NUCCs made up only about 7 percent of the total symphony audience. There is plenty of room to grow.

Engagement and Relationships

To attract more NUCCs, the orchestra decided to pump up marketing, starting with more digital efforts. The symphony hired a digital marketing manager in the summer of 2016 to create a larger online and social media presence, including more videos.

The Seattle Symphony also created the position of corporate and concierge accounts manager, held by Gerry Kunkel, to reach out to corporations, hotels, condominiums, and apartments downtown. On a recent sales visit to the concierge of an apartment building, Kunkel's pitch led with "the possibility of sharing the symphony with your homeowners and your tenants." He explained the varied programs, from Masterworks to Harry Potter movie nights, and said he could give tenants ticket discounts, generally 15 percent off the online price and sometimes a waiver of the 12 percent handling fee.

Since his hiring in April 2016, Kunkel has signed up about 70 companies, 30 residential buildings, and most downtown hotels, bringing in ticket sales of \$177,000 from new patrons or those who'd not bought a ticket in more than a year. But is the cost of this outreach worth it? Early evidence suggests yes. The investment in digital marketing led to \$3.7 million in digital ticket sales in the 2016-17 season, much more than the preceding year (though the orchestra does not have an exact number). Kunkel's efforts have yielded sales that far exceed, by multiples, the cost of hiring him.

These marketing efforts reach beyond NUCCs, and are paying off overall. For the 2016-17 season, the orchestra sold 74 percent of Masterworks' paid capacity, continuing an almost steady increase since the 2011-12 low of 63 percent.

To encourage newcomers to return, the Seattle Symphony now also focuses on improving the customer experience. It has scheduled sessions with a highly regarded hospitality industry consultant to train employees, from box office to parking attendants. In workshops, they learn to welcome guests warmly, with a smile, to



Benaroya Hall, home of the Seattle Symphony

anticipate their needs, to say "you're welcome" and "certainly" rather than the more offhand "no problem" and "whatever."

The orchestra has also created a "Surprise and Delight" program for new subscribers, as several orchestras have done in recent years. In it, staff members greet them by name when they arrive at Benaroya Hall and tell them the Seattle Symphony is glad they've come. "What we found," says Wade, "is that the people that we greet renew at a significantly higher rate than people that we don't greet." In the 2016-17 season, that tally was 41 percent versus 29 percent.

At each concert, about 35 new members also hear a buzz when their ticket is scanned, and are told to go to the information desk. "They are looking curious," Kunkel says—and about five to seven of the 35 never go to the desk, he adds. Those who do, however, are thanked and given free drink tickets. "Their concern falls away," says Kunkel, who works the desk, "and they get a big smile on their faces."

The Learning Journey

The Seattle Symphony's experience with building new audiences has helped foment change within the organization. Information, once held close by administrators, is shared with all departments. The programming process, once the sole purview of the music director's office, is symphonywide.

"Now," says Dubinets, "we have month-

ly season-planning meetings with representatives from all departments. We look at all sides of our activities. It's not just programming. It's not just what happens behind the scenes. It's also what happens in the front of house and with donors and on social media. And we look at this whole package as we plan the seasons."

For example, she continues, in planning the 2018-19 season, the group realized that the Untuxed series did not contain enough "old chestnuts." After much mulling, and solving a scheduling issue, the team moved Rachmaninoff's popular Piano Concerto No. 2 from Masterworks to the Untuxed series and substituted a less-well-known piece in the Masterworks lineup.

The orchestra is also increasing its engagement efforts to its young neighbors, who the symphony now knows are ripe for cultivation. "Part of our strategy in the coming year is going to be, let's bring quartets or let's bring trios and let's perform in one of the larger condominium buildings or at a corporate event," Wade says.

That won't be the end. "There's a lot we don't know about NUCCs," Wade says. In new focus groups in fall of 2017, the orchestra planned to delve into how this demographic buys tickets, how they might be approached to become members, what information they would like, and how they are best reached digitally. The answers will provide a better guide to the rapidly transforming future of the symphony—and the city. **S**