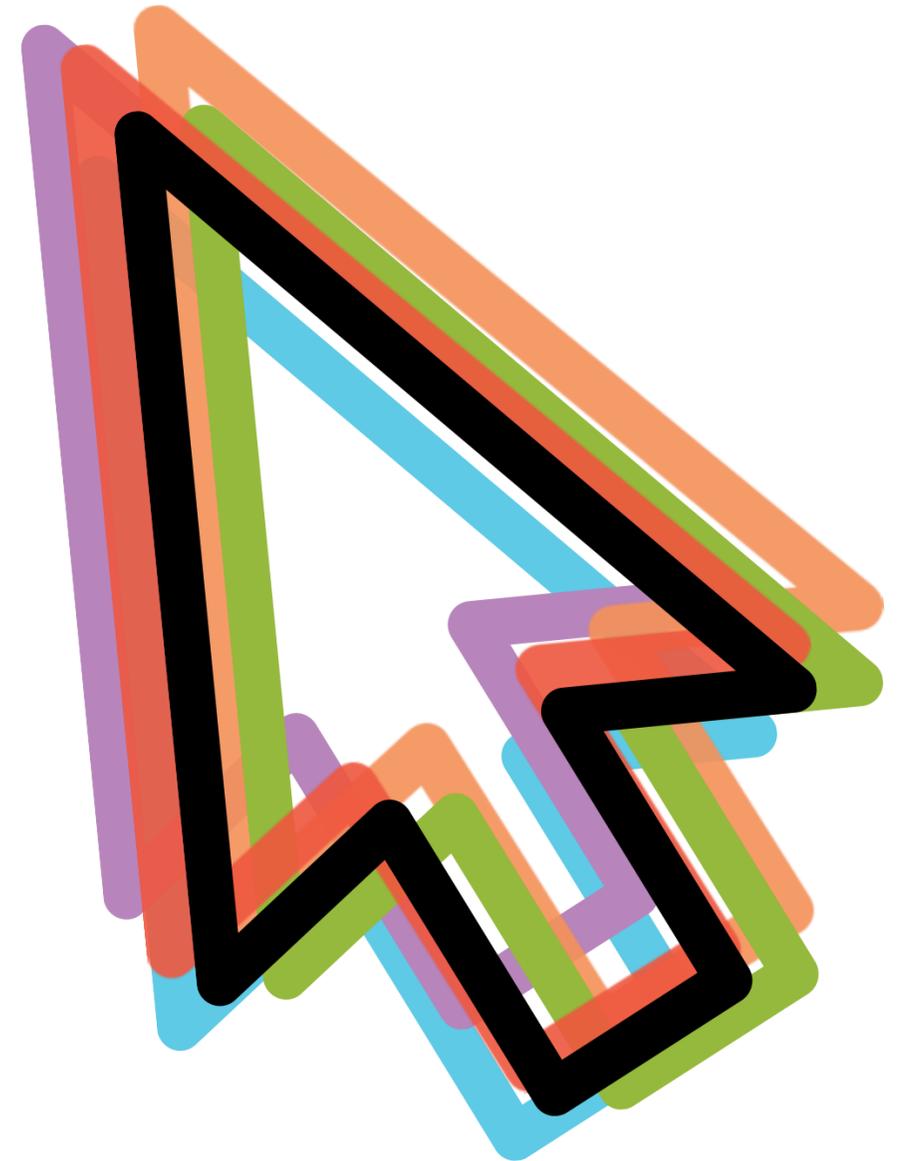




ORCHESTRAS
ORCHESTRES | CANADA

**THE FUTURE OF THE
DIGITAL ORCHESTRA
AUDIENCES**

**L'AVENIR DE L'ORCHESTRE
NUMÉRIQUE
PUBLICS**

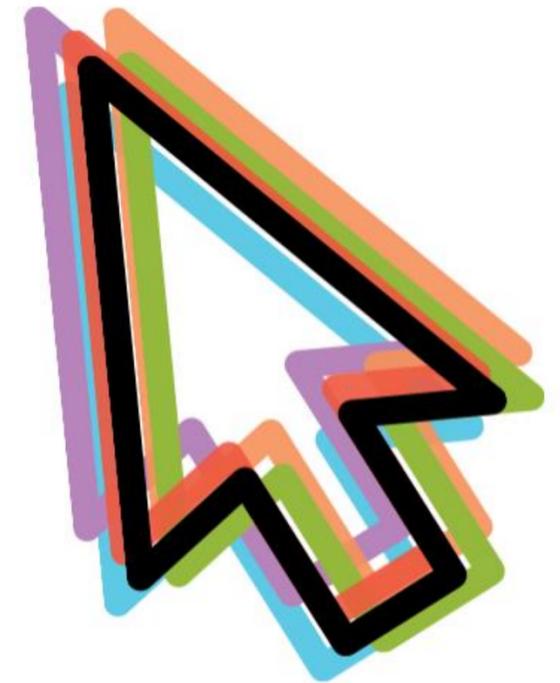


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du Canada

THE FUTURE OF THE DIGITAL ORCHESTRA AUDIENCES

L'AVENIR DE L'ORCHESTRE NUMÉRIQUE PUBLICS



Janet Bwititi
Director, Marketing & Sales
Calgary Philharmonic



Tanya Derksen
VP of Artistic Production
Philadelphia Orchestra



Vicki Young
Managing Director
Manitoba Chamber Orchestra



LOGISTICS

**Please keep your video/audio muted.
We are recording.**

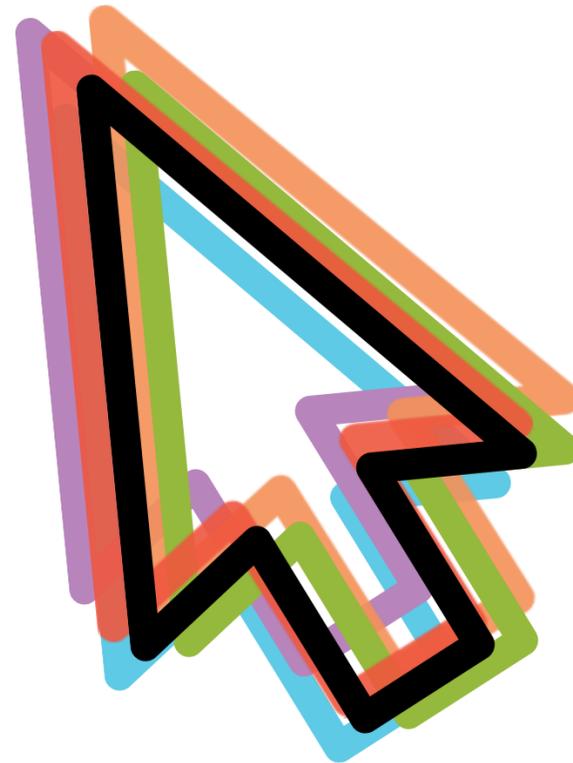
**Q&A portion near end. Type your
questions in chat!**

Instructions in chat to enable:

- **Live simultaneous interpretation in English and French.**
- **Viewing slide decks in English or French.**

**English closed-captioning from
Rev.com.**

**Recording + summary resources in the
coming weeks.**



LOGISTIQUE

**Veillez garder votre vidéo/audio en
mode silencieux. Nous enregistrons.**

**Une partie questions-réponses est
prévue vers la fin. Posez vos questions
dans le *chat*!**

Instructions dans le *chat* pour activer.

- **L'interprétation simultanée en direct en anglais et en français.**
- **La possibilité de visionner des diaporamas en anglais ou en français.**

Sous-titrage en anglais de Rev.com.

**Enregistrement + résumés dans les
semaines à venir.**



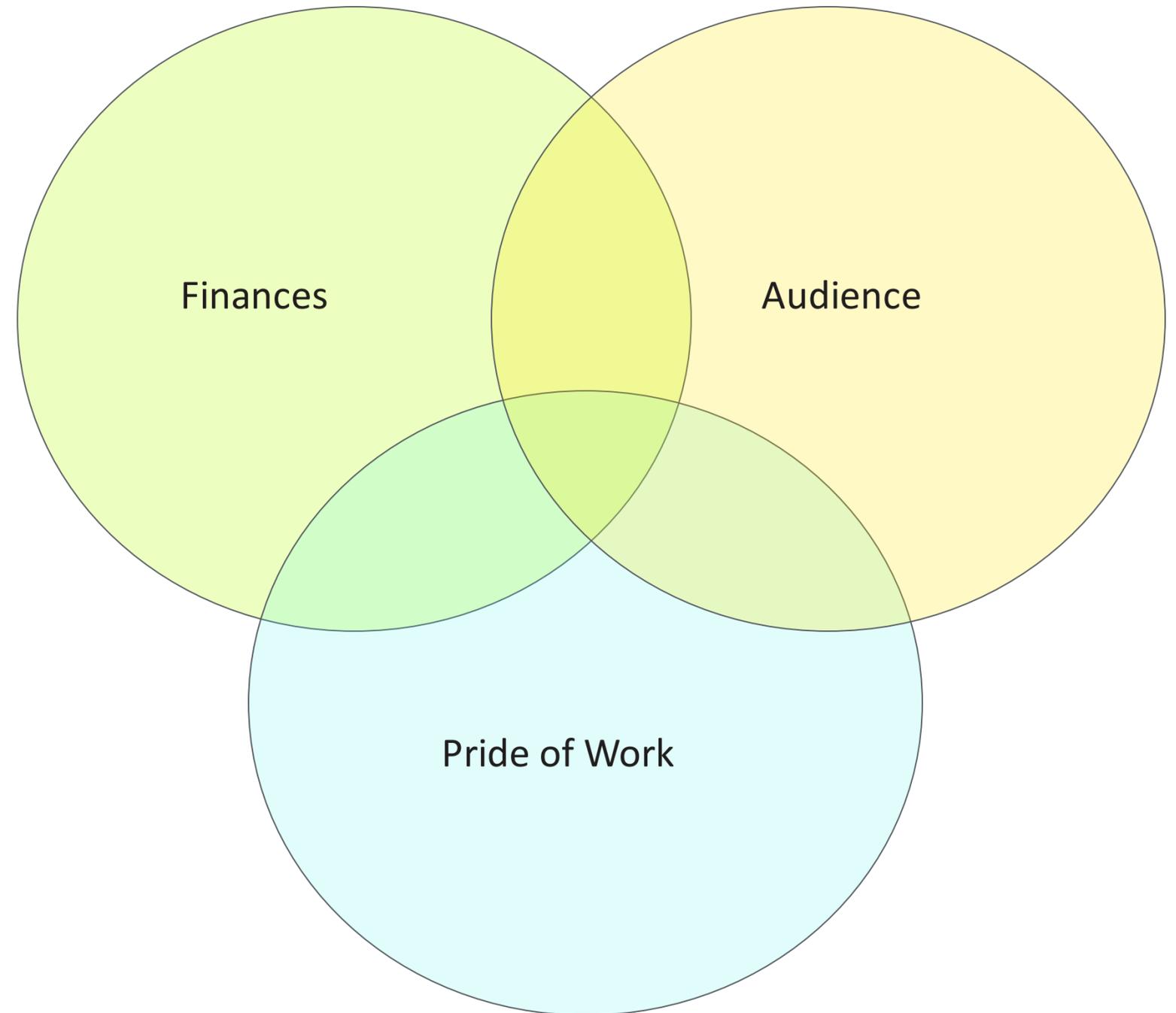
Audience Forum

Interview Findings

Michael Morreale

Three forums about three connected considerations

- Three elements that matter to success in digital
- **Audience:** Will happen if digital creates a great experience they value
- **Finances:** Has to be financially sustainable
- **Pride of Work:** If people are proud of the experience they create for the audience, they will be inspired to do more...



Audience: What we found

- Audiences embraced digital music produced by orchestras in the pandemic
- A wide variety of approaches
- Patrons respond to high quality video and audio and offerings became more sophisticated as time went on
- Today people will buy tickets for digital
 - Tomorrow, likely core audience in fewer numbers
- Digital can increase reach to new geographies
- Hard to predict behaviour in a post-pandemic world

By October 2020 84% of orchestras tried at least 1 digital initiative.

Core Audience... Retain and strengthen

- Orchestras reported they maintained subscribers and donors, through:
 - Using digital to continue to program; and
 - Offering compelling stories
- Conversion of in-person subscriptions to donations and/or digital tickets was generally seen as successful
- The difficult question: How does digital meet the needs of the core audience when live concerts return?

Organizations broadened their use of digital to solidify relationship with subscribers and single ticket buyers.

Initiatives to augment concerts with social experiences included:

- Virtual donor lounge
- Concert signature cocktail
- Virtual lobby - enter before the concert
- Chat during performances
- Performances behind a paywall with free social media content
- Musician home videos
- Musician, guest artist and music director talks

New Audience... Reach and grow

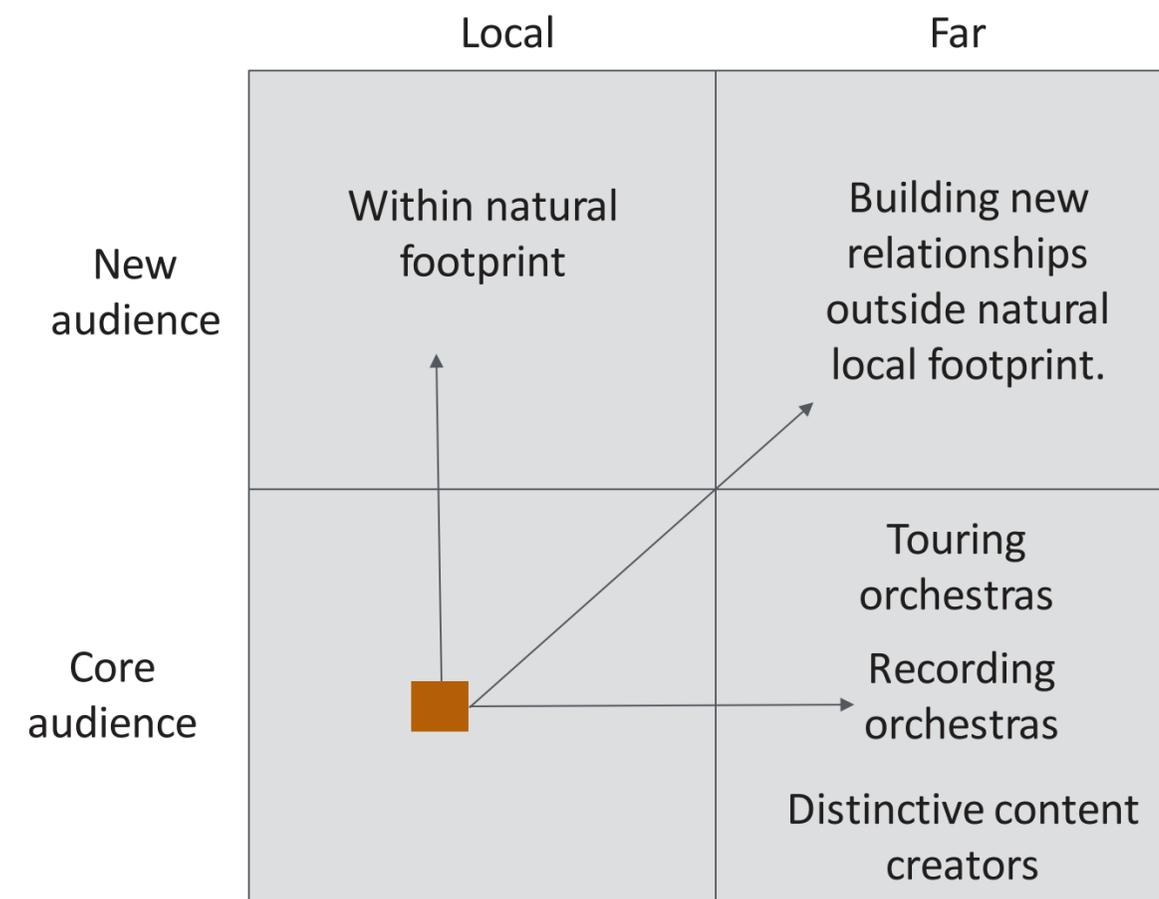
- Orchestras are also enthusiastic about the potential to reach new audiences with on-line concerts and there were reports of varying degrees of success.
 - VSO efforts to build audience in BC outside of Vancouver have been successful. Targeted 1000 Households, now at 4,000 HHs.
 - MCO report audiences of 1000-2000 for free concerts (live audiences average 850) in the fall and over 1 million listens on Spotify.
 - OSM: up to 30% new buyers; audiences reaching 5 - 6,000
 - Calgary's fall season reached 10,000 unique viewers through 9 concerts, including lots of non-subscribers
 - Against the Grain Messiah Complex benefited from PR, word of mouth and TSO's data base to reach > 100,000 viewers

New Audience: Digital outreach

- When your geographic target market is a **province**:
 - Digital extends reach to unserved communities
 - Examples: Manitoba Chamber Orchestra & Newfoundland
- Artistic partnerships involving digital to reach non-traditional symphony audiences
 - Longueuil with Claude Dubois
 - Calgary Phil is building relationships with partners from indigenous and minority communities to develop new works specifically developed for digital

What is your focus?

- Digital has been very effective in cementing the support of local, core audience
- It has also shown potential to attract *new* audience that is local
- It offers the potential for growth of audience at a distance, and a number of organizations have explored this with encouraging results
- Where are your digital audience(s) in future?
- Consider: What is the logic for targeting net new audience that are not within your natural footprint?



Note: Footprint is flexible.

Post pandemic audience behaviour

- Culture goers predict they will consume less digital content
- They will not abandon digital entirely, and will view paid content.

How will culture goers change their consumption of digital?	Ave during pandemic		Ave post pandemic
Viewing free content	68%	➡	27%
Viewing paid content	13%	➡	7%

From : Arts Response Tracking Study –Wave 4

Conducted by Nanos for Business / Arts, released March 2021

Audience: Implications

- No best model has emerged for audience development
- Orchestras cannot at present reliably predict audience uptake for digital or live
- Situation requires continued experimentation, flexibility and a focus on learning
- Some orchestras told us that digital was not going to be a major offering going forward
 - Potential can be limited by competition and geography
- Now is a good time to learn about what new digital patrons want and are willing to pay for

THE ARTS FIRM INC.

This project is supported by the

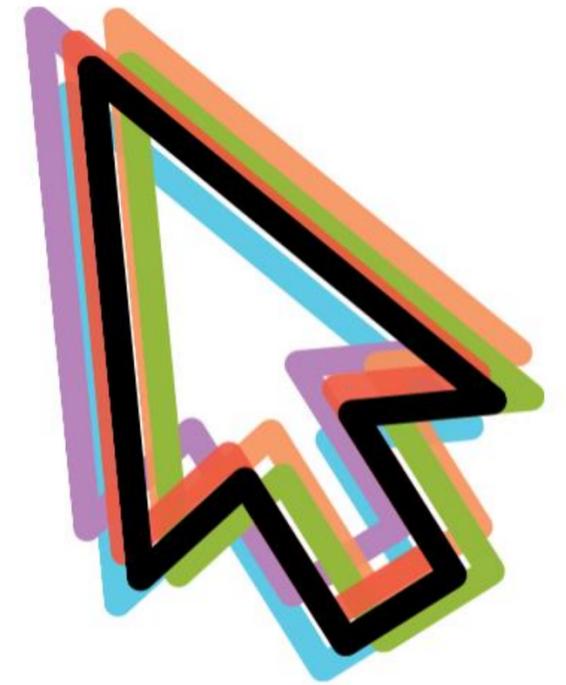


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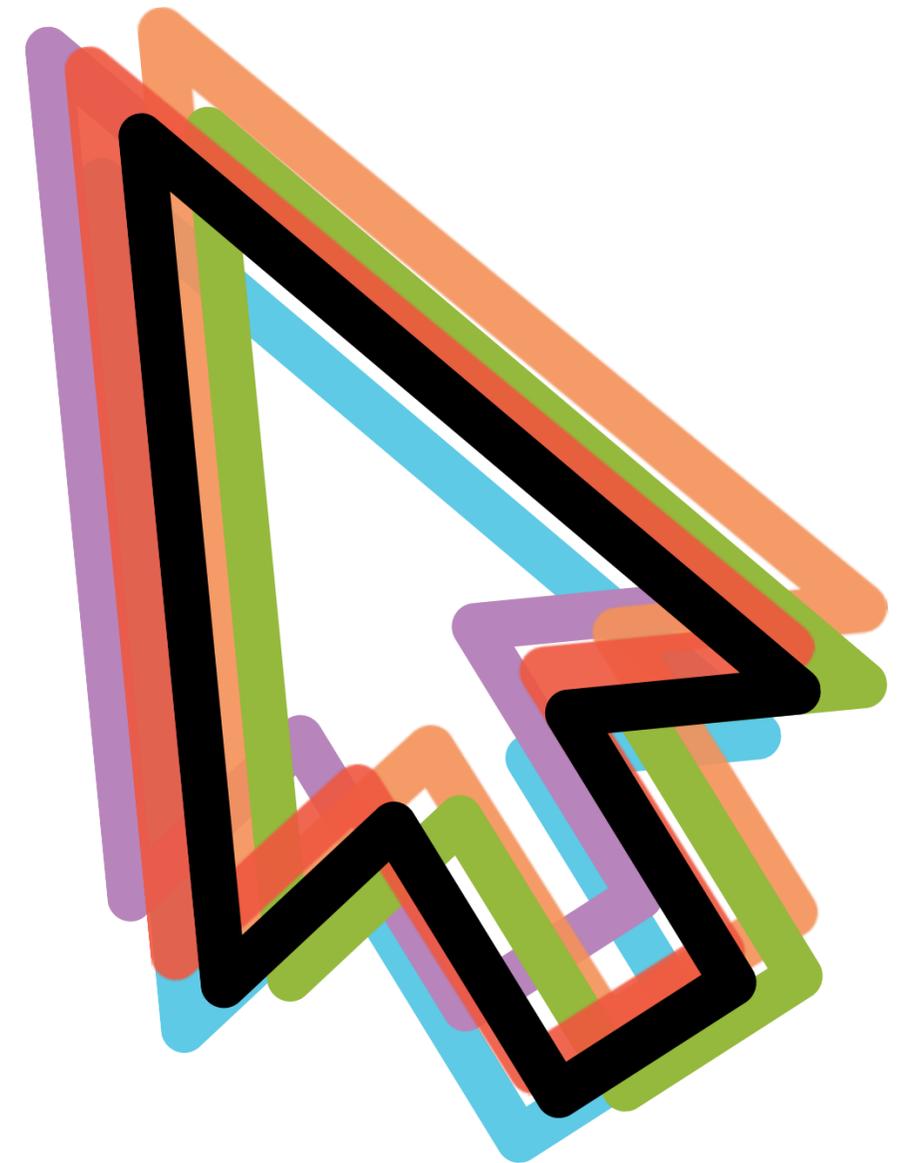


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Janet Bwititi

**Director, Marketing & Sales
Calgary Philharmonic Orchestra**



**L'avenir de
l'orchestre numérique
PUBLICS**

Our Digital Journey



CALGARY
PHILHAR|MONIC
ORCHESTRA

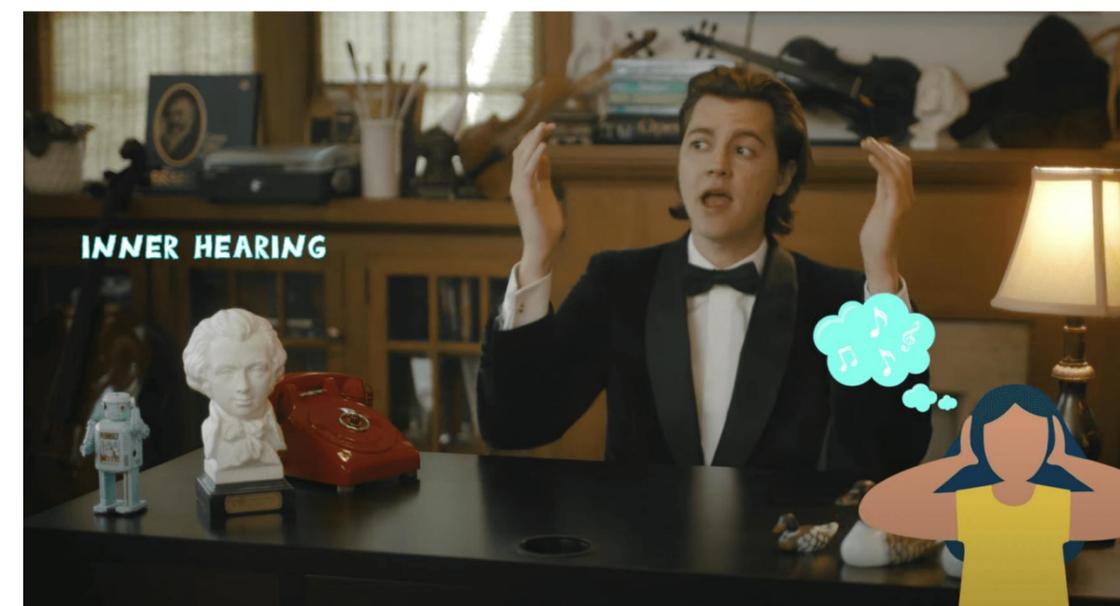
2017 to 2020: Live-streaming



- Accessibility and reach
- High-quality audio, cinematic look
- Five live-streams annually
- YouTube, free to view



Spring 2020: An Orchestra Adventure



- Children and families
- Four-part series, 30-minute episodes
- Long-term educational resource
- YouTube, free to view



Fall 2020: Virtual Concert Series



- Solo, Duet, Trio, Quartet, Quintet ...
- Nine concerts
- Free with registration, donation



Spring 2021: City Spaces Series



- Solos and duets at city landmarks
- Paired with existing live-stream
- Six concerts
- Free with registration, donation



Fall and Spring: Revenue Model

- Free with registration
- Donation ask, no suggested amount
- Registrations with donations: 35%
- Average donation: \$41.05
- Donation per registration: \$5



Core / Local Audiences

- Targeted email campaigns
- Musician stories: videos, blogs
- Social media ads
- Subscriber hub 7% → 12%
- Explainer video, FAQs, call centre



New Digital Audiences

- Calgary landmarks
- Restaurant partnerships
- Unique concept, high media coverage
- Free, no risk
- New registrations: 65%



Beyond Calgary

- Live-streams: United States, Canada
- An Orchestra Adventure: 61% outside Canada
- KSPS-PBS, schools
- Fall / Spring Virtual Concerts: 13% outside Calgary



The Why

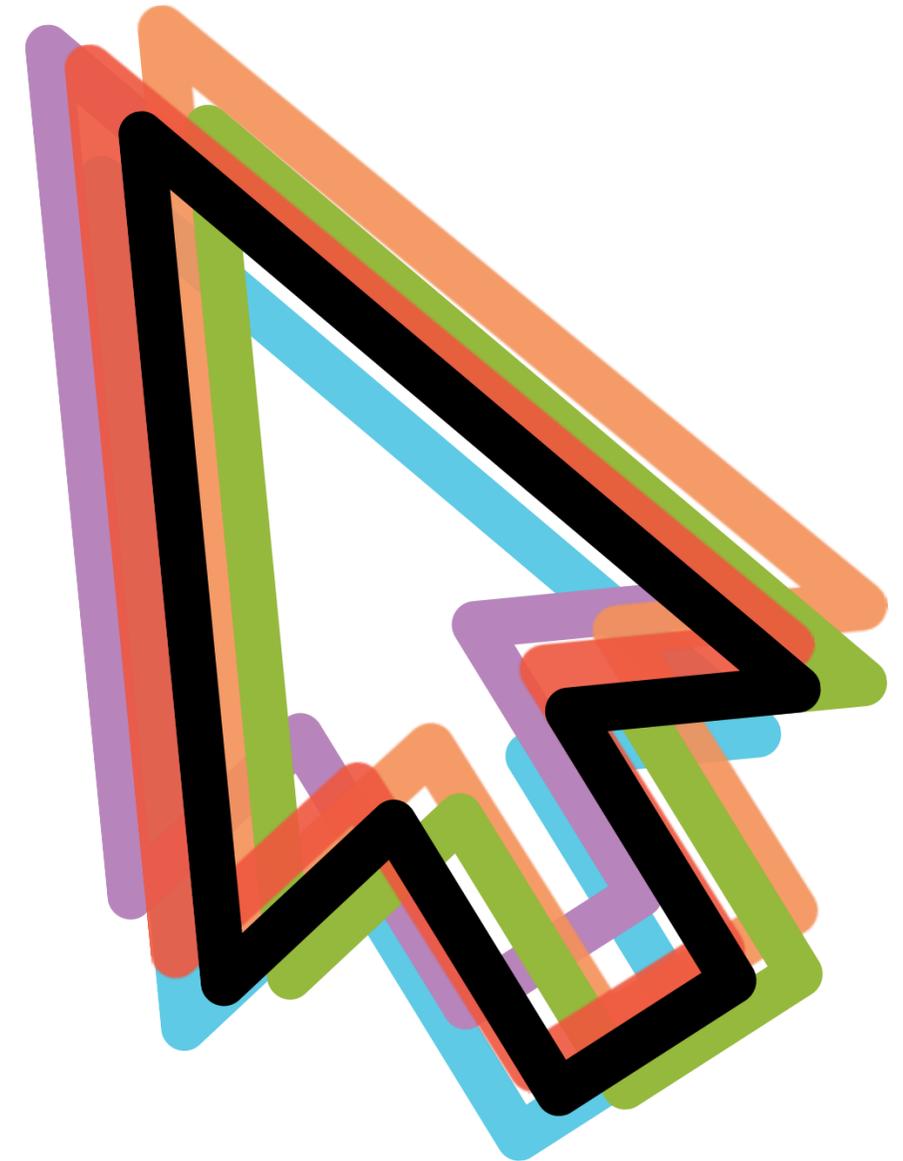
“In the COVID crisis this past year, these concerts were powerful beacons in the darkness.”



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Vicki Young
Managing Director
Manitoba Chamber Orchestra



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Digital audiences are here to stay

The Manitoba Chamber Orchestra online

A modest pre-pandemic presence

YouTube channel subscribers: 1,000

Spotify streams: 800,000

YouTube views since pandemic:

Free concert of chamber works: 6,757

Free concert with local bands: 7,653

First paid online concert: 425

Annual audience for concerts: 6,000



Digital audiences are growing:
they are responsive to marketing efforts,
suggesting a demand beyond
our live concert audience

Reaching our core, local audience

Move quickly: free digital content hub and bi-weekly radio program; these also justify regular updates. Some patrons are waiting for live concerts.

Focus on the known: feature local musicians, favourite/international soloists

Exclusive content:
not available on other sites

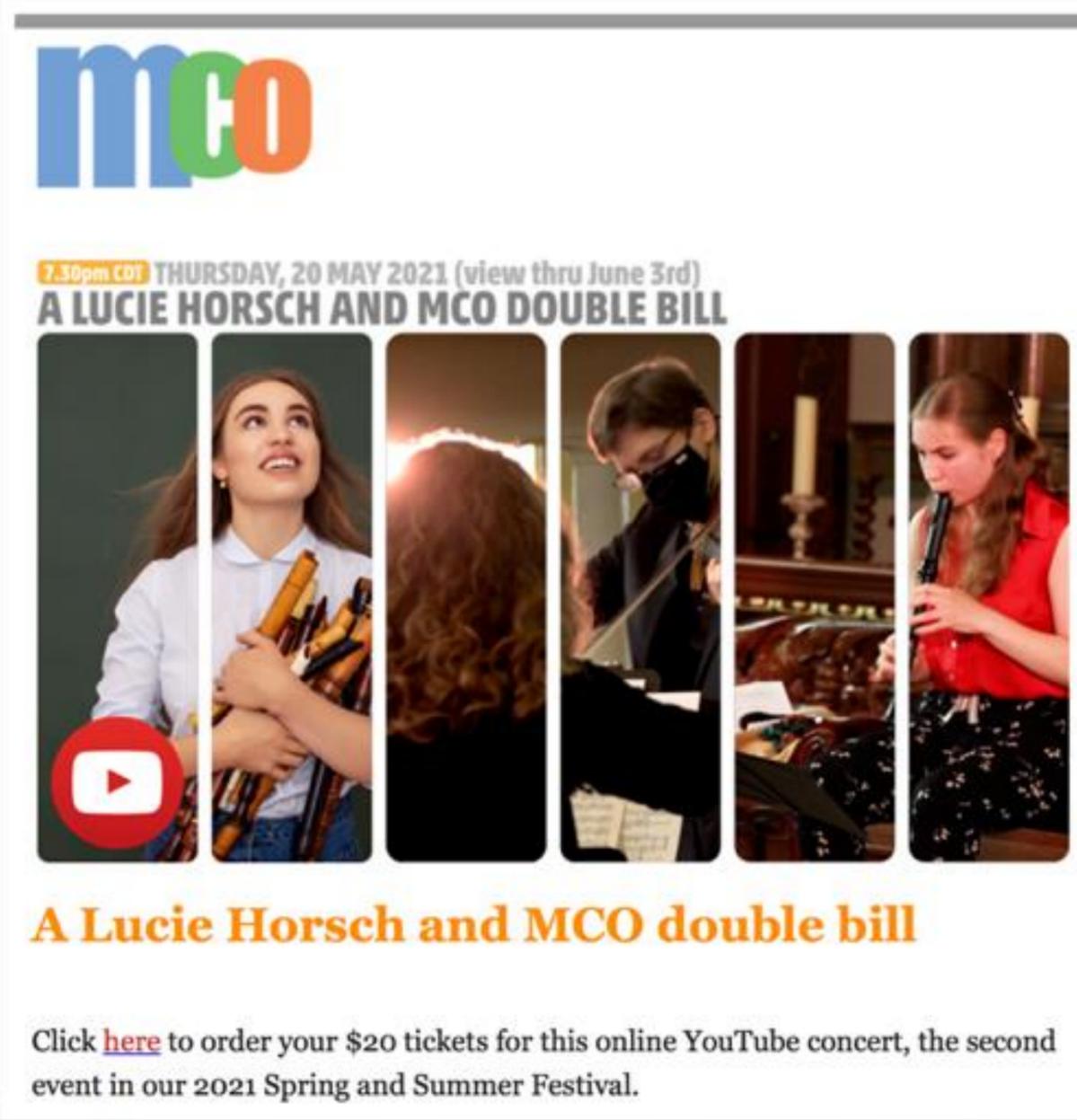


Reaching our core, local audience

Sense of urgency: time-limited access for paid content

Free or affordable: \$20 per household, share links with up to five households

Add value: Learning Guides, program



The graphic features the MCO logo at the top left. Below it, the text reads "7.30pm CDT THURSDAY, 20 MAY 2021 (view thru June 3rd)" and "A LUCIE HORSCH AND MCO DOUBLE BILL". A row of six vertical images shows Lucie Horsch playing various instruments: a flute, a clarinet, a violin, a piano, and a saxophone. A red YouTube play button icon is overlaid on the first image. Below the images, the text "A Lucie Horsch and MCO double bill" is displayed in orange. At the bottom, a call to action reads: "Click [here](#) to order your \$20 tickets for this online YouTube concert, the second event in our 2021 Spring and Summer Festival."

mco

7.30pm CDT THURSDAY, 20 MAY 2021 (view thru June 3rd)
A LUCIE HORSCH AND MCO DOUBLE BILL

A Lucie Horsch and MCO double bill

Click [here](#) to order your \$20 tickets for this online YouTube concert, the second event in our 2021 Spring and Summer Festival.

Recruiting new digital subscribers

Serve the digital market: content designed for the digital marketplace

Free, digitally marketed content: recruits new YouTube subscribers

Seek out expertise: We partnered with a YouTube influencer with over 400,000 followers and gained 400 subscribers to our channel

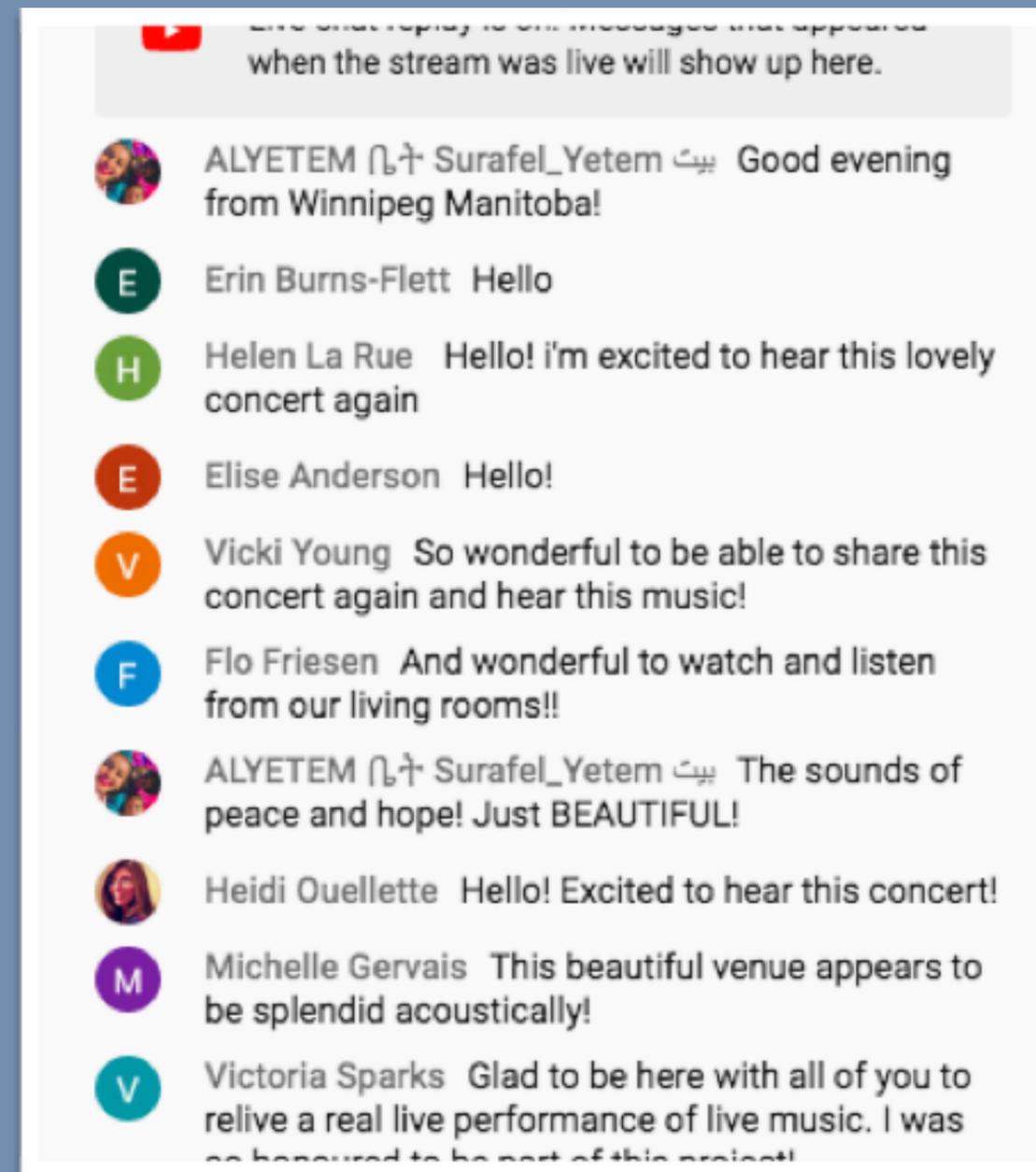


Recruiting new digital subscribers

Regular posting: high-quality content keeps viewers and algorithms engaged

Aggregate the numbers: house content in one place and link to that so viewer numbers accumulate; this helps with algorithms and facilitates rights compliance

Create online community: YouTube Live and YouTube Premiere events bring people together in the chat function



Recruiting digital audience members from outside our region

International soloists:
exclusive recital by Stephen
Hough attended by people in
the US and Japan

*Engage with musicians,
publicists:* encourage sharing
to their networks

*Make it easy to buy and
watch:* automated links and
24-hour access

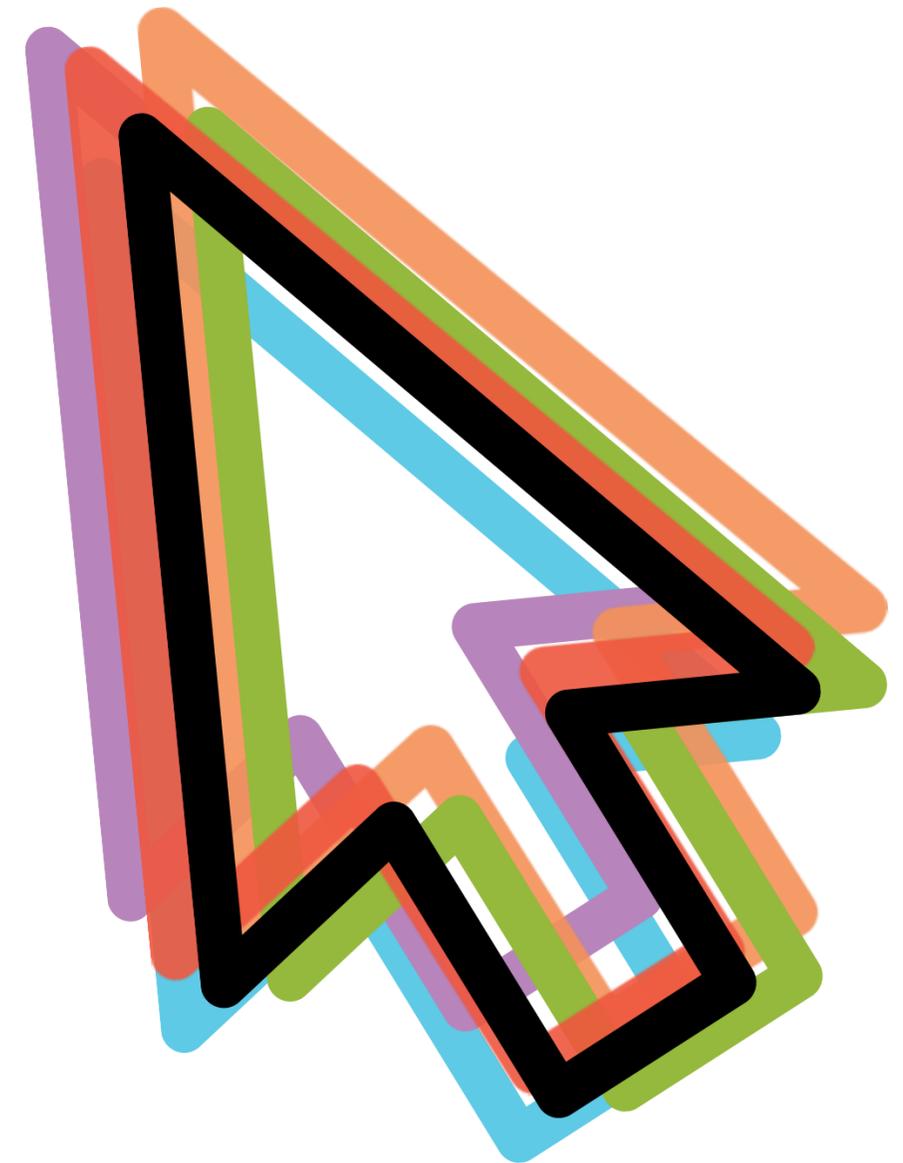


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Tanya Derksen

**Vice President of Artistic Production
The Philadelphia Orchestra**



**L'avenir de
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The Philadelphia Orchestra
Yannick Nézet-Séguin Music Director

AUDIENCES: The Future of the Digital Orchestra

May 21, 2021

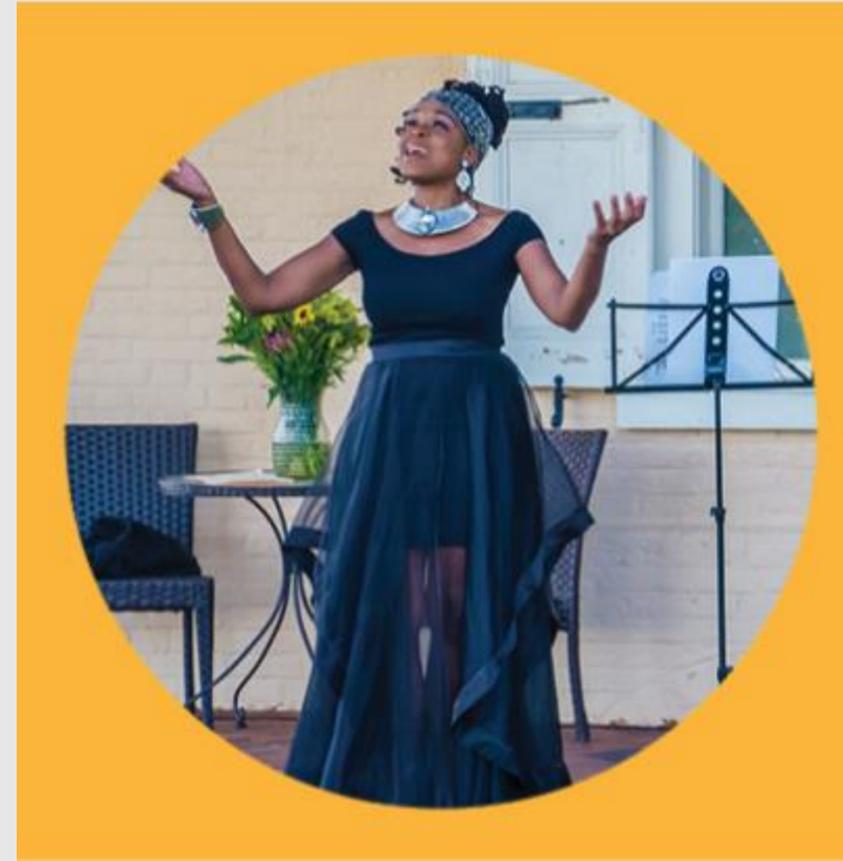
Digital Stage



ThePhiladelphiaOrchestra



Our City Your Orchestra



ThePhiladelphiaOrchestra





Overview

From October 2020 – February 2021, more than 9,000 households purchased tickets to performances on our Digital Stage.

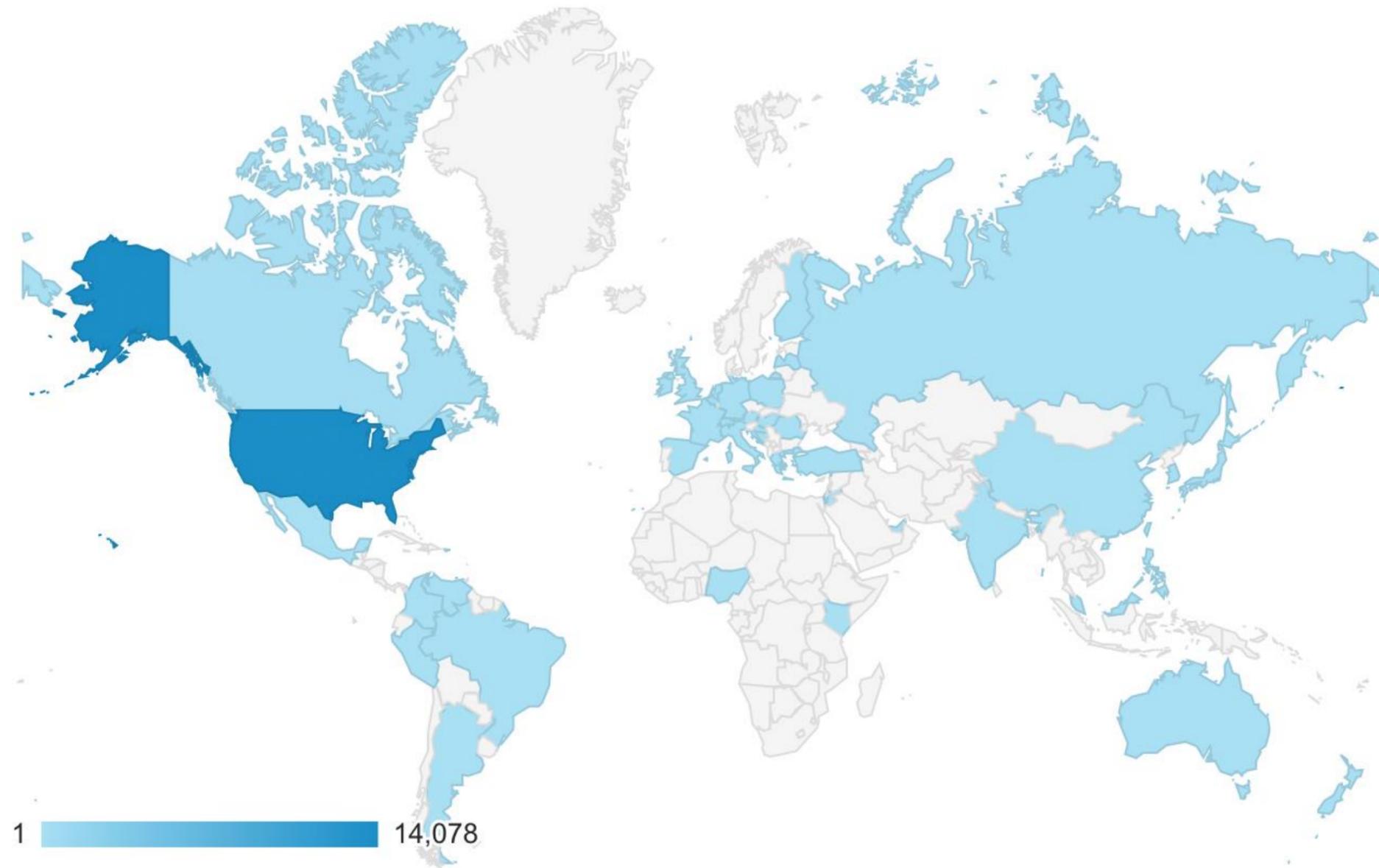
- 37.6% of ticket buyers are new patrons of the Orchestra
- 56% of new ticket buyers live outside of the Philadelphia metro region
- More than 5% of our audience comes from outside of the U.S.

Audience Statistics

- Digital Stage
 - 70% local market (Philadelphia Metropolitan Statistical Area)
 - 30% out of market
 - 23% across the US
 - 7% from outside the US (Canada being the top international country)
- Pre-COVID live audiences
 - 88% local market
 - 12% out of market Digital Stage

Global Audience

From October 2020 – Feb. 14, 2021, audiences tuned in to Digital Stage performances from six continents and 45 countries:

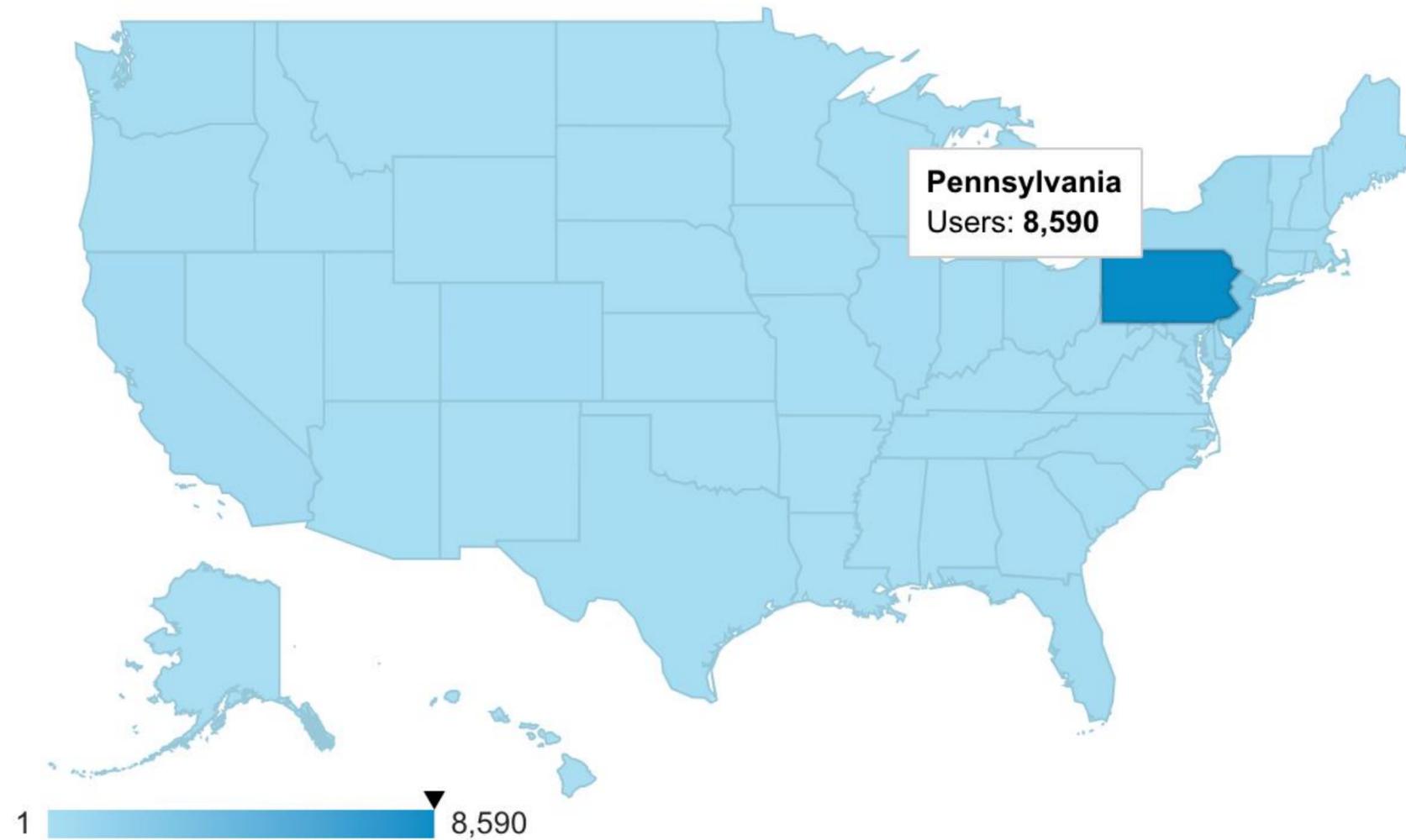


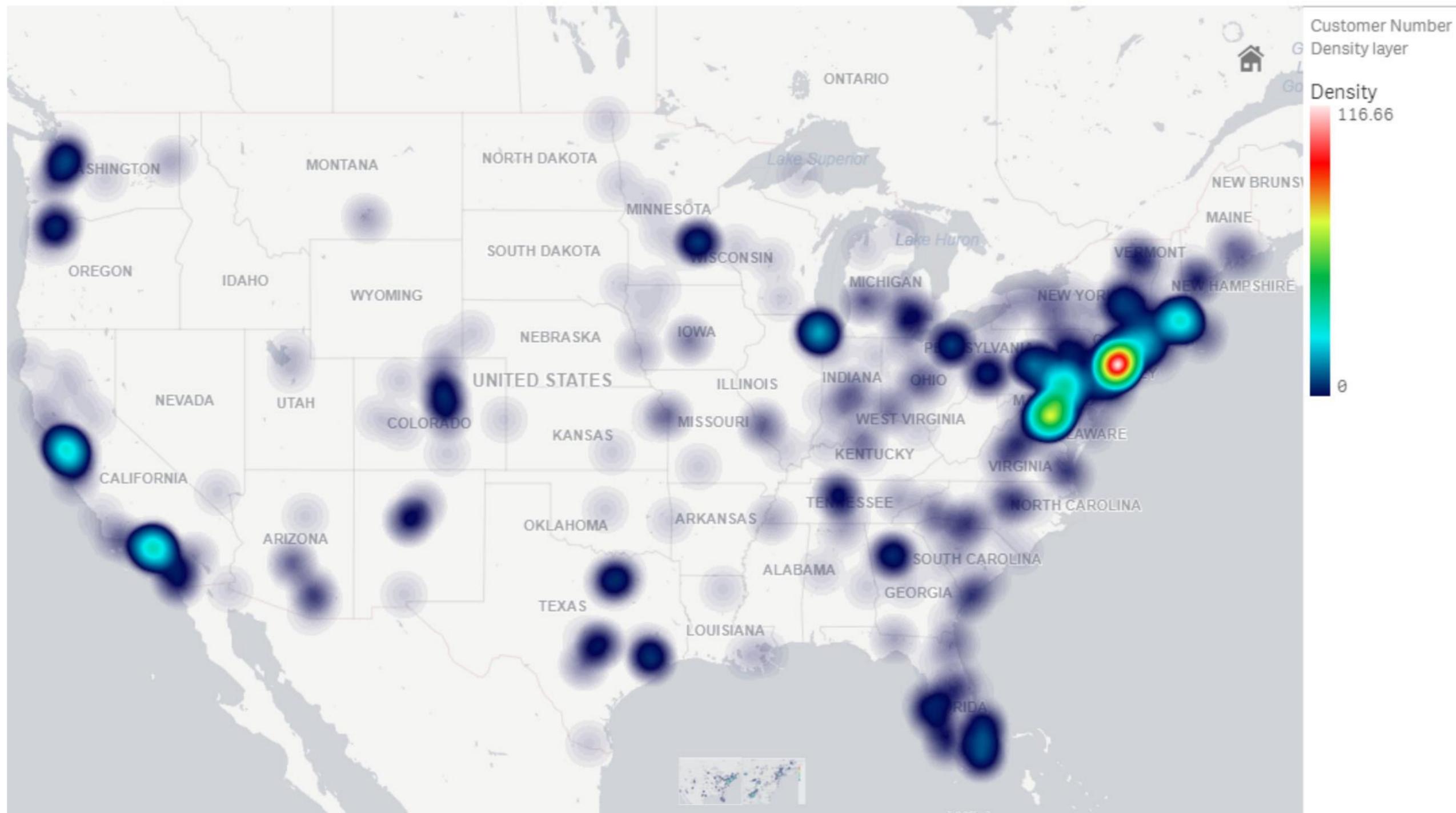
Source: Google Analytics



National Audience

Our Digital Stage audience covers all 50 states, with 36% of viewers tuning in from outside of the Philadelphia metro region.





Digital Stage KPIs - Marketing

- Revenue per concert: Avg \$17,500 (Range: \$11,484 - \$28,293)
- Paid tickets: Avg 1,331 households



Digital Stage





*“Although I enjoy attending live performances by the orchestra, I have absolutely, thoroughly enjoyed the Philadelphia Orchestra’s events throughout this pandemic year. I already have a digital ticket to every spring event. **I hope that as we finally bring the pandemic under control, the orchestra will consider continuing to provide online concerts in addition to live performances in Verizon Hall. Thanks again for your wonderful music!**”*

Keith Minnich

Wyomissing, Pennsylvania

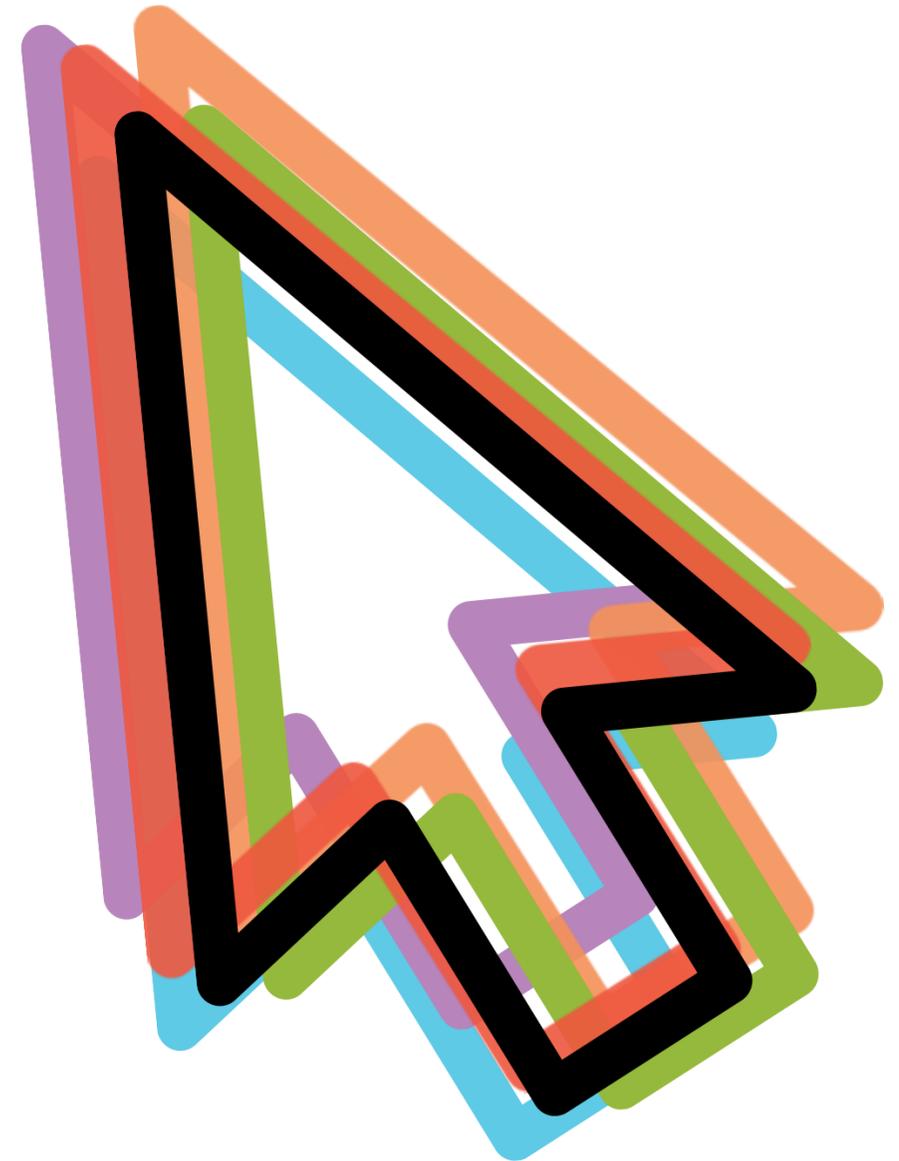
December 30, 2020



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