

THE STUDY IN SUMMARY

Orchestral Audiences

A NATION-WIDE STUDY - 2013/2014 SEASON



Seeing the Forest
for the Trees

ASSOCIATION
FRANÇAISE DES
ORCHESTRES
AFO

Orchestral Audiences

A NATION-WIDE STUDY - 2013/2014 SEASON

Study commissioned by Association Française des Orchestres, and entrusted to Aristat Agency, headed by Xavier Zunigo and Loup Wolff.

The AFO expresses its gratitude to the partners who provided their support for this study, alongside the association and its thirteen partner orchestras.



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Key Issues in Running a Nation-Wide Study on Audiences

Classical music audiences have, for decades now, given rise to impassioned discussions which could be made the focus of full-fledged sociological study in and of itself. The said discussions invariably end up pointing to underlying political issues that would deserve to be substantiated by scientific data. Assumed to be aimed at an expert, wealthy audience, classical music struggles to convey the message that it no longer offers itself up to listeners as it did in the past century and that its audience has profoundly changed: well-anchored in the present day and impacted by the upheavals in our society, the changes of which it also reflects, classical music - and the institutions that spread it - is trying to find its way, between heritage and creation, cultural democratisation and assertion of its intrinsic values.

Oddly enough, until now, there was no nation-wide study specific to this area of study, providing objective fodder for debate. The only information available up to this point came from the regular studies conducted on Engagement in Cultural Activities in the French Population (PCF). That source, however, in that it focused on the French population as a whole, gives priority to a quantitative approach that highlights first and foremost inequalities in access to culture. It offers little in the way of explanatory factors and, more importantly, is light on detail as to each of the practices on which it focuses.

At the impetus of the AFO, which jointly funded the study along with the thirteen participating orchestras, and with the support of Crédit Coopératif and Audiens Group, the Study on Orchestra Audiencies was entrusted to Aristat Agency, founded by researchers Xavier Zunigo and Loup Wolff.

The aim was to produce a snapshot of today's reality, based on confirmed data, in such a way as to bring out key understandings on which the public authorities and professionals will be able to take action: what are the traits that characterise orchestra audiences? For what reasons do the said audiences attend concerts? In order to bring to light who music-lovers are, how their practices take root and how their enthusiasms for music develop, deeper insight into the complexity of French society is needed.

It is through such insight that many a preconceived notion can be tempered, as the many backgrounds, musical preferences and behaviours found amongst concert-goers are unco-

vered. Greater familiarity with the existing audience would most definitely be an asset for institutions eager to establish themselves as citizens making a positive contribution to the regions in which they are based.

From the outset, it was decided that the Study on Orchestra Audiencies should encompass any and all individuals attending, at least occasionally, performances of symphonic music. As we will see, the range thus established included individuals with little engagement and, in as such, belonging to the audiences in which institutions will be intent on building loyalty. However, it by definition does not take into account those never frequenting the said institutions. Although it would be worthwhile to do so, this is a population that appears particularly difficult to grasp: being defined by non-engagement, it offers little in the way of material for an investigative effort aspiring to move past statements of opinion and aimed at anchoring analysis in observable behaviours. Consequently, even though the study does offer a substantial amount of information about audiences at the outer edges of the most loyal concert-goers, it was not designed to look into the populations that remain remote from the said cultural form.

With the democratisation of culture, the question of how to attract new attendees is the other major topic of debate as relates to classical music audiences. Average age has become the central focus within that context. A variety of theories have been put forth as to how it should be interpreted: is high average age a characteristic intrinsic to a form of art for which appreciation develops with maturity – in which case, it should not be upsetting? Or is the ageing of classical music audiences an indication that the next generation is not just around the corner? Can these figures be looked at independent of demographic shifts in French society? The study brings out audience ages, one of the factors characterising a population that remains staunchly uniform. It also sheds light on a concert-goer life cycle that can be seen starting from as early as the 18-30 year age group. That factor, of key importance, puts musical policy-makers face to face with their responsibilities, both in terms of reflection and action: how can the data uncovered by the study be understood and used to consolidate the presence of classical music across all countries, to the benefit of our nation's audiences, artists and cultural vitality?

Key Findings

METHODOLOGY

- ▶ 13 participating orchestras
- ▶ 234 paying concerts studied over Season 2013/14
- ▶ 11,400 questionnaires and 125 individual interviews
- ▶ Study limited to concert-goers age 18 and above

The study offers detailed insight into orchestral audiences, which turn out to be more diverse than they are generally depicted to be, including:

- ▶ **eat diversity in modes of socialisation to music:**
45.4% of audiences embark on their "career as concert-goer" in their adult years.
- ▶ **Real uniformity across social classes:**
More than 48% of audiences do not belong to the upper socio-professional categories.
- ▶ **Differentiation in tastes:**
 - Music lovers - driven first and foremost by interest in hearing specific works - do not form the majority of audiences (34%).
 - 29.6% of attendees cite the enjoyment in sharing a concert experience with friends or family.

THE AMBIGUITIES OF THE AUDIENCE AGEING ISSUE

While the audience ageing identified in the PCF studies was not contradicted by this most recent study, it should be read in a more nuanced manner:

- ▶ The trend is not more prominent now than it was in previous decades.
- ▶ The tools needed to grasp it in all of its complexity are lacking:
 - repeated studies recording shifts and variations in audiences
 - consideration for demographic shifts in the French population
 - consideration for shifts in level of engagement by age group

NEW AUDIENCE INFLUX DYNAMICS AND "THE CONCERT-GOER'S CAREER"

- ▶ A significant percentage is formed by young audiences:
 - 7.9% under age 18
 - 10% ages 18-30
- ▶ Return intentions are high and relatively similar across age groups.
- ▶ A substantial share of audiences came to classical music in their adult years (secondary + inverse secondary socialisation), attesting to the fact that engagement is established over an extended period.

ANTAGONISM BETWEEN AUDIENCE REJUVENATION AND SOCIAL DIVERSIFICATION

- ▶ Audiences arising from secondary socialisation are socially more diverse, but also older.
- ▶ Attendees need to be left time to build their "careers", so as to attract audiences that have not necessarily received an upbringing that leads to engagement.

THE CONCERT EXPERIENCE, WIDELY-VARYING CONCERT-GOER PROFILES

Reflecting an overall change in the way audiences experience culture, while concert-goers do pay particular attention to the music itself, many of them also emphasise the importance of the environment: the concert hall and the services offered there.

- ▶ 37.7% of audiences highlight the concert hall as a substantive criterion on which they assess their experience of performances, more so than the performers and the works.

THE POSITIVE EFFECTS OF EDUCATIONAL AND CULTURAL OUTREACH ON AUDIENCE-BUILDING

12% of concert-goers surveyed come as a result of their children's influence. That which sociologists refer to as "inverse secondary socialisation" is the direct result of the educational and cultural outreach (ECO) in which orchestras engage. The target population of educational and cultural outreach does not fall within this study's scope. Across the panel of orchestras studied, however, it accounts for approximately 226,000 attendees over a total audience population of 1,154,000, or 20% of the audience.

It is essential that educational and cultural outreach be taken into account in the future, when looking into the average age of classical music audiences and avenues for attracting new members.

THE PROSPECTS REMAIN OPEN

The study's findings also bring out the need for supplementary research, whether specific to orchestras or extended to other parties active in shaping music or culture. The need for such studies is clear, for instance, as regards the target population of educational action, which has not been the focus of a specific study as of yet. Similarly, the study calls attention to the weakness of educational policy assessment plans (and the challenges these face), whether with respect to cultural outreach offered by orchestras, or more broadly, the partnerships between professionals in culture and those in education. This study is thus a stage in a process for which professionals have been calling with all the more might as public and private sources are tightening their purse-strings: a process of greater and informed dialogue between political decision-makers, researchers and professionals, serving an abounding, inventive culture that is at the disposal of all audiences.

The Methodology: Ambitious and Innovative

SAISIR LA DIVERSITÉ

Vested with highly-differentiated public service missions in widely-varying local environments, the orchestras that are standing members of the AFO perform some 3,000 concerts each season across the nation, reaching 1.5 million concert-goers. The study was developed with the aim of fully capturing the diversity found on the ground and building enough statistical volume to make the resulting analyses unchallengeable as a result of their robustness.

The study was run over the 2013-2014 Season's ten months, during which 234 concerts were studied. For each orchestra, concerts were selected with the aim of forming a representative sample of the season, both in terms of repertoire and place of performance, or where applicable, instrumentation.

With the participation of 13 orchestras¹ across France, the study effectively illustrates the diverse range of artistic undertakings and regions across France.

To wit, three orchestras address audiences in Paris and the Greater Paris Region². The other ten orchestras illustrate the diverse range of environments found by region, and in which orchestras work to fulfil their missions in production, outreach, creation and audience development.

The national report was drawn up by aggregating the findings for each orchestra. The national averages consequently encompass a wide variety of audiences: those of the large and medium-sized cities in which orchestras can lay claim to a home concert hall, or those

¹ Orchestre de Paris and Salle Pleyel took part in the study jointly.

² Orchestre de Paris and Salle Pleyel, Orchestre de Chambre de Paris, Orchestre national d'Île-de-France.

KEY FACTS AND FIGURES ABOUT THE STUDY :

13 participating orchestras

**234 paying concerts studied
over Season 2013/14**

**11,400 questionnaires
and 125 individual interviews**

**Study limited to concert-goers
age 18 and above**

attending concerts performed across often-sprawling regions, by orchestras vested with a regional outreach mission, under significantly-varying conditions³.

A TWO-FOLD METHODOLOGY APPLIED IN ORDER TO CROSS THE QUALITATIVE AND QUANTITATIVE APPROACHES

The study made use of innovative administration methods. As lengthy questionnaires handed out during concert evenings tend to over-represent the most loyal concert-goers – and thus the most typical – more inclined to give themselves over to the demands of writing out a response to a lengthy series of questions in the performance hall. In addition, audience member readiness to respond to such a questionnaire varies significantly depending on entourage: attendance with friends or family members does not facilitate the time-consuming process of filling out a document during the event. In order to prevent the distortion that would result from this, a simplified procedure was selected: on concert evenings, only participation slips were handed out. Concert-goers were then re-contacted by e-mail or phone, at a time more convenient to them.

The participation slip return rate averaged 9.5%. The questionnaire response rate following repeat contact amounted to an average of 55.4%.

Ultimately, 11,400 concert-goers having attended one of the concerts selected responded to the questionnaire

Via a supplementary study module, Aristat Agency then conducted on-the-ground checks to compare the characteristics of the respondent population with those of the audiences noted by the study team on-site. The comparison made it possible to confirm that the responses gathered were not skewed by the participant recruitment process.

Lastly, having access to comprehensive information regarding the 2013-2014 season, including that of actual audience metrics taken during performances, Aristat produced a weighting system for the respondent base, in order to improve representativeness. Attesting to the quality of the sample taken, however, the weighting remained marginal and only very moderately affected results.

125 individual interviews were held, with participants who had given their consent to be contacted further to responding to the questionnaire.

The interviews made it possible to interpret the statistical findings and better understand the underlying behaviours.

A TIGHTLY-DELINEATED AND INTENTIONALLY-RESTRICTIVE STUDY SCOPE

Working from the tenet that the characteristics specific to symphonic music audiences warrant a distinct study in and of themselves, the study team chose to focus on them alone, and thus produce the first national study of this kind. Vocal performances were thus excluded from the concert sample.

For legal and practical reasons, the study's scope was defined as including only concert-goers ages 18 and above, and concerts were selected solely from the paying segment. Outreach activities offered to youth audiences, whether specially-developed concerts or workshops, were thus not taken into account. Also excluded from the study's scope were activities of a social nature. The share accounted for by educational and cultural outreach (ECO) in total orchestra audiences should be specified, however. Across the panel of orchestras studied, ECO audiences amount to approximately 226,000 attendees over a total audience population of 1,154,000, or 20% of the audience.

These figures show the importance of the educational and cultural outreach implemented by orchestras and the potential they offer in terms of audience development.

Lastly, with the aspiration of producing an initial mapping of orchestra audiences and in order to objectivate the resulting data, the study intentionally gives priority to a sociological, rather than a marketing-based approach.

³ The most noteworthy examples of regional outreach are offered by: Orchestre des Pays de Savoie, Orchestre d'Auvergne, Orchestre national d'Île-de-France, Orchestre national des Pays de la Loire.

THE PARTICIPATING ORCHESTRAS

- 1 Opéra de Rouen Normandie
- 2 Orchestre d'Auvergne
- 3 Orchestre de Chambre de Paris
- 4 Orchestre de Paris / Salle Pleyel
- 5 Orchestre des Pays de Savoie
- 6 Orchestre National Bordeaux Aquitaine
- 7 Orchestre National de Lorraine
- 8 Orchestre Symphonique Saint-Etienne-Loire
- 9 Orchestre National de Lyon
- 10 Orchestre National des Pays de la Loire
- 11 Orchestre National d'Île-de-France
- 12 Orchestre National du Capitole de Toulouse
- 13 Orchestre Philharmonique de Strasbourg

A Dynamic Perspective on the Age of Audiences

THE HIGH ATTENDANCE LEVELS POSTED BY THE 60-70 AGE GROUP CANNOT BE SEEN, ALONE, AS GROUNDS FOR CONCLUDING THAT AUDIENCE AGEING IS GAINING SPEED.

Beyond the issue of ageing itself, which must be handled very carefully in order to yield solid findings, and which for the moment is not buttressed by conclusive data, the central issue pertains to how strong new audience influx dynamics actually are. The Study on Orchestra Audiences by nature offers a snapshot view, and is thus ill-suited to dynamic interpretation. However, it does make it possible to identify the main avenues along which efforts are being undertaken to attract new audiences across the concert-going population. The resulting data reveal angles for better understanding the dynamics in play – each of which deserve to be ultimately verified, by extending from existing research, in all viable directions.

AUDIENCE AGE AND ATTRACTING NEW AUDIENCES

AVERAGE AGE/MEDIAN AGE

The study focused on attendees of paying concerts ages 18 and above.

One question nonetheless made it possible to identify those audience members who had come with minors, with a distinction made between those above and under age 15. This information then made it possible to estimate the percentage of young listeners across all audiences, and thereby to determine the average age of the total audience population (in an exception to the study scope, limited to those above 18).

Q1BIS.
{ IF YOU ATTENDED WITH FAMILY } WERE YOU WITH:

- o Your parents
- o Children under age 15
- o Children above age 15
- o Other family members

Table 1
AVERAGE AGE AND MEDIAN AGE

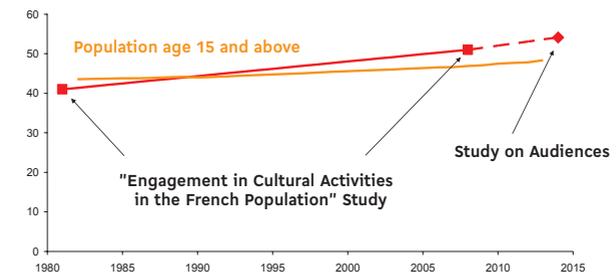
	All audiences including those under age 18	Audiences ages 18 and above
Average age	54,1	57,7
Median age ⁴	59	63

y taking into account only part of the orchestra's activities - that run as part of the standard paying performance offer - the average and median ages listed above do not include the audiences of concerts specifically dedicated to young people, and cultural outreach, which if included would significantly rejuvenate the population. Across the panel of orchestras studied, educational and cultural outreach audiences amount to approximately 226,000 attendees over a total audience population of 1,154,000, or 20% of the audience.

THE AMBIGUITIES OF THE AUDIENCE AGEING ISSUE

The average age observed in the study extends the trend identified by the two previous Studies on Engagement in Cultural Activities in the French Population, which showed an average age of 41 in 1981 and 51 in 20085. This trend appears to be more prominent than the overall ageing of the French population.

Graph 1
AVERAGE AUDIENCE AGE
Scope: all audiences, including those under age 18.

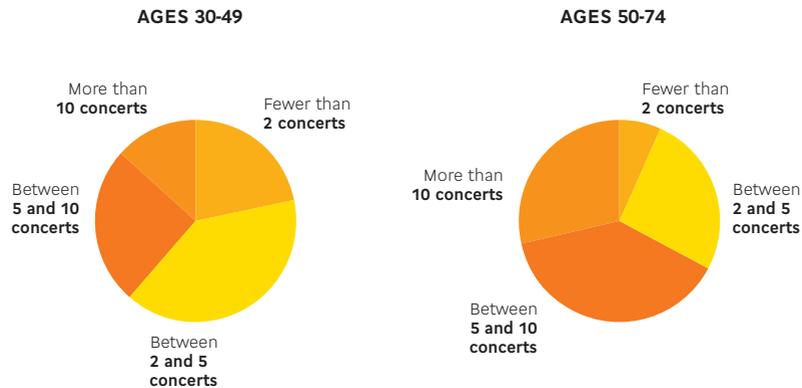


⁴ Information supplementing the average age data, median age being defined as the age that divides the audiences into two numerically equal parts: 50% of the audience is under age 59 (and 50% of the audience is above that age).

⁵ Individuals above age 15 reporting attendance at one "classical" (including all forms) concert at least over the course of the last twelve calendar months.

Any comparison with the results of the said study should be read with caution, however: underpinning the PCF and AFO-Aristat studies are radically differing methodologies⁶. Lastly, the figures resulting from the PCF studies focus on French people above age fifteen, having attended at least one classical concert (defined as including all forms) over the year elapsed (in 1981 and 2008 respectively). The study on orchestral audiences, in contrast, deals with the characteristics of all concert-goers having attended performances given by the thirteen partner institutions. Concert-goers having attended more than one performance in 2013-2014 are thus counted as many times as they attended and impact the overall average by as much. As it is the oldest concert-goers who most are the most frequent attendees found in concert halls (see Graph 2), the average aged listed in this study is, by construction, greater than that yielded by the PCF study.

Graph 2
FREQUENCY OF CONCERT ATTENDANCE
 Concert attendance is more frequent over a single season in those ages 50 to 74 compared to those ages 30 to 49.



⁶ The first are household studies run across the general population and contain a far broader range of questions than the latter, in that they are designed to cover all cultural practices.

All in all, the three-year gap between the average ages identified in the PCF 2008 study and the study herein appear to illustrate the extension of an historical trend toward audience ageing, although this cannot be substantiated robustly. The results of this study make it possible to show, however, that if the audience has indeed aged, the trend is no longer as prominent today as it was at the start of the 1980s.

The study makes it possible to reach conclusions based on more than averages and to observe trends in audience membership. Depicting the audience age breakdown, Graph 4 shows a peak, which marks the numerical importance of concert-goers in the group of those ages 60-70. This peak in attendance overlaps with the baby-boomer generation, born between 1945 and 1955, and which, in French demographics, is distinctive for its large size. Classical concerts, historically an attractive genre for audiences in this age group, is now in a distinct situation in that, for another few years, this age group also stands out as a generation of particular numerical significance. As a demographic trend that is by nature transitory, the peak being seen today is destined to fade out mechanically over the next few decades - heightening the importance of younger generations in orchestra audiences, whereby methods for attracting new members will be discussed in the following chapter.

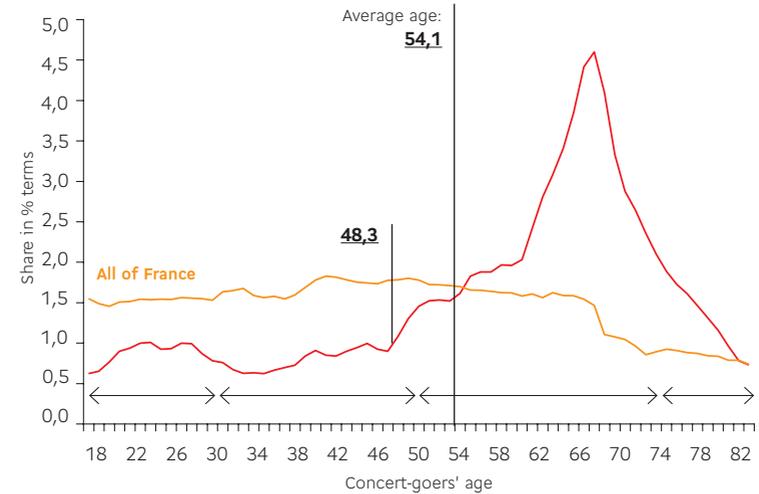
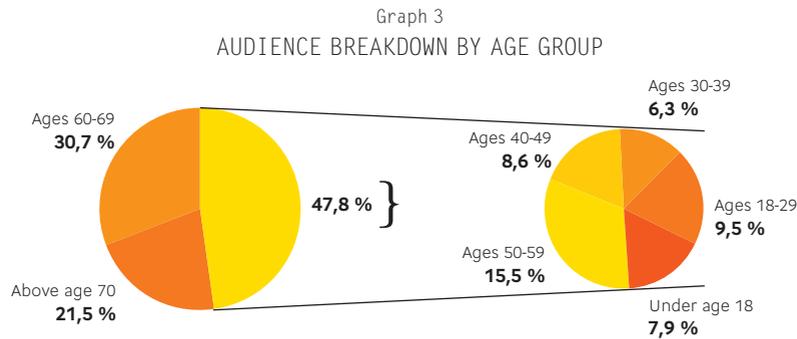
The data available alone, however, are not adequate for addressing the issue of ageing directly. A number of contextual factors confuse the message that might be sent out, the current situation being determined by this specific moment in French demographics. In addition, attention would need to be focused on how concert attendance frequency has changed across different age groups. As stated above, audiences in the 50-74 age group attend more concerts on average than those in the 30-49 age group, over a single season. The presence of the former in all audiences over the season stands out all the more as they are counted multiple times. Studying the ageing dynamic thus means taking into account concert attendance frequency and changes therein over the past decades. To our knowledge, the statistical tools currently available cannot be put to use in this manner.

Were the AFO-Aristat Study to be repeated in the medium term (5 to 10 years), under methodological conditions identical in every way, these questions could be addressed with the appropriate acuity.

Bringing in New Audiences and "The Career of a Concert-Goer"

NEW AUDIENCE INFLUX DYNAMICS ARE IN PLAY IN THE 18-30 SEGMENT AND IN THOSE AROUND AGE 50.

Beyond the issue of ageing, the question of new audience influx dynamics has emerged, and it is important that it be addressed in a differentiated manner, based on the share accounted for by each age group.



Graph 4
AGE DISTRIBUTION ACROSS AUDIENCES

Graph 4 makes it possible to identify four age groups:

Audience-members ages 18/29: this age group is well-represented, showing a spread similar to that of the French population, even though the study did not include audiences attending youth outreach events or free concerts - prime meeting places for orchestras and young audiences.

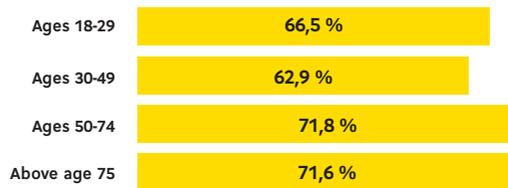
Audience-members ages 30/49: the spread here is broadening compared to the French population's curve. This situation, which matches that of engagement in other cultural activities, is due to individuals' starting families and entering the working world, leaving less free time available for cultural activities.

Audience members ages 50/74: the earlier years of this segment stand out for the strong surge in population, which can be ascribed to a return of availability and re-channelling of free time toward engagement in cultural activities. This age group is all the more represented that, as we saw early, it posts higher frequency of attendance at concerts over a single year than does any other age group.

Age 75 and above: audience engagement is on the decline, primarily for reasons of accessibility to concert venues (public transport, hours, etc.).

In reality, the opinions recorded in each age group as to intention to return "in the near future" to a concert hall are similar in order of magnitude: 62.9% of those ages 30-49 state that the plan to return in the near future, as compared to 71.8% of those ages 50-74. As the former post less regular attendance levels than the latter, the significance of this finding is dependent on the meaning of the term "in the near future": the audience categories state similar intentions to return to the concert hall, but the said return will, on average, take place later in the former group than in the second - most likely due to reasons of family and/or professional availability.

Table 2
INTENT TO RETURN TO CONCERT HALL
 Share of audience members having "booked or planned to book seats for another symphonic concert in the near future."



These findings lend credence to the interpretation that new audience influx dynamics are in play and continue to have impact.

The study shows attendance levels in the 18-30 age group which might come as unexpected to some. This is because the PCF study showed a drop in attendance levels at classical music concerts in those ages 15/24, the figure falling from 8% in 1981 to 4% in 2008. While not challenging that finding, which was the result of a research framework vastly different from our own, our study shows that on the scale of that particular audience, musical institutions do manage to reach the 18-30 population.

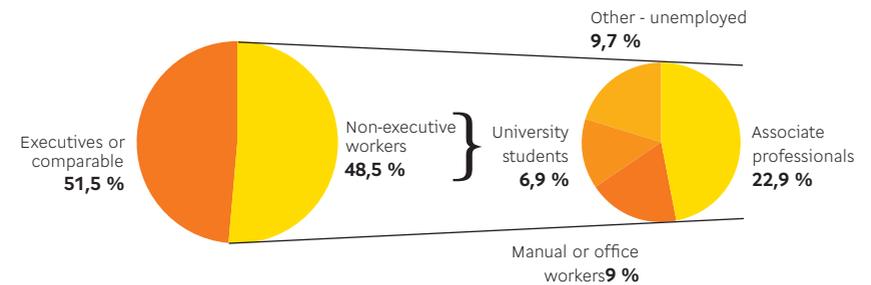
The sharp increase in attendance levels in concertgoers around age 50 is more an illustration of new audience influx than it is of audience ageing. These individuals resume in engagement in cultural activities, having developed their first taste through socialisation to classical music either in childhood or during their adult years, as described in the study.

Q32.
 HAVE YOU BOOKED OR DO YOU PLAN TO BOOK SEATS FOR ANOTHER SYMPHONIC CONCERT IN THE NEAR FUTURE?
 Yes
 No

Diversity in audiences' social backgrounds

THERE IS AN EVEN SPLIT IN SOCIAL BACKGROUNDS BETWEEN EXECUTIVE AND NON-EXECUTIVE WORKERS.

Graph 5
SOCIO-PROFESSIONAL CATEGORIES IN AUDIENCES
 Scope: audiences ages 18 and above.



The audience breakdown by social category confirms that executives and those of comparable status (the self-employed and entrepreneurs) are in the majority, accounting for 51.5% of attendees. However, non-executives nonetheless account for over 48% of the audience.

These figures are an invitation to refrain from underestimating the possible connecting points in this audience and the internal dynamics that structure it. While it is an ascertained fact that the well-off attend classical music concerts, it is not the only prevailing reality. Manual and office workers account for 9% of audiences, students for 7% and associate professions (teachers, nurses, technical workers, foremen, etc.) for almost one-fourth of audiences (22.9%).

The Origins of Taste for Classical Music: Primary and Secondary Socialisation

45% OF AUDIENCES ARE INTRODUCED TO CONCERTS IN THEIR ADULT YEARS. 12% OF AUDIENCES BECOME FAMILIAR WITH ORCHESTRAL CONCERTS THROUGH THEIR OWN CHILDREN, MAKING FOR THE FIRST QUANTITATIVE INDICATOR OF THE IMPACT OF EDUCATIONAL OUTREACH.

By cross-comparing the individual interview results with the questionnaire responses, the study team was able to identify the pathways through which individuals had come to become interested in classical music concerts, essentially four types of socialisation to concerts.

The results hold a wealth of information and provide a qualitative - and also measurable - supplement to the debate on new audience influx. The questionnaire was divided into different sections, exploring one the following aspects:

- ▶ The socio-professional profile of concert-goers
- ▶ The circumstances surrounding their concert attendance
- ▶ Their experience of the concert itself
- ▶ Their engagement in cultural activities in general

Statistical analysis of the responses and correlations thereto brought to light four profiles according to which individuals were initiated to classical music concerts, summing up the various points in time and processes by which they developed their appetite for the genre over the course of their lives.

Graph 6

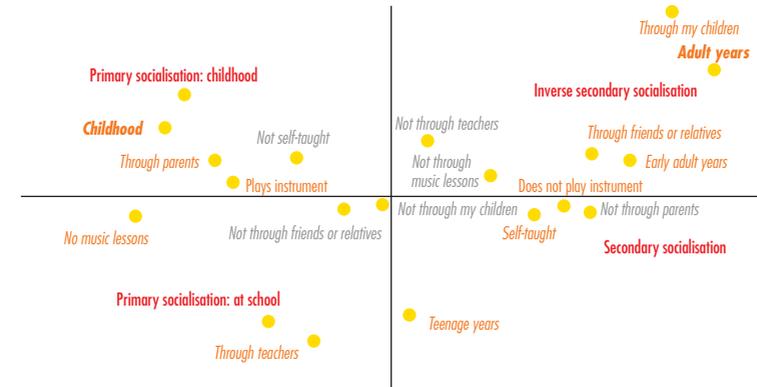
AN ANALYTICAL DEPICTION OF TYPES OF SOCIALISATION

Scope: audiences ages 18 and above.

This graph was produced through Multiple-Component Analysis (MCA).

In bold italics: the point which the respondent identified as his/her introduction to classical music

In italics: the individuals (or institutions) through whom/which the introduction took place.



The analytical depiction suggests four socialisation modes, which also refer to four points in a lifetime. It includes the distinction between primary socialisation, which refers to the process of becoming introduced to the genre during childhood, and secondary socialisation, which encompasses various paths taken by those initiated to classical music in their adult years. Each mode is sub-divided into two categories.

Table 3

AN ANALYTICAL DEPICTION OF TYPES OF SOCIALISATION

IN CHILDHOOD:	DURING ADULT YEARS:
<p>Primary socialisation: childhood (31.1% of audiences)</p> <ul style="list-style-type: none"> - Introduced very early (childhood) - By their parents - By playing a musical instrument 	<p>Secondary socialisation (33.5% of audiences)</p> <ul style="list-style-type: none"> - Introduced in early adult years - Thanks to the influence of relatives or friends, or even independently - By playing an instrument though rarely
<p>Primary socialisation: at school (23.5% of audiences)</p> <ul style="list-style-type: none"> - Introduced early (childhood and, most of all, teenage years) - Through school or music lessons - By playing an instrument through infrequently 	<p>Inverse secondary socialisation (11.9% of audiences)</p> <ul style="list-style-type: none"> - Introduced to music by the influence of own children (hence the term "inverse") - Introduced late in adult years - By playing an instrument though very rarely

The study unsurprisingly confirmed the importance of socialisation in childhood, within the family or school environment, identified as being relevant to 55% of audiences. However, those who came to orchestral music in their adult years still account for a significant share of audiences: nearly half (45%).

Primary socialisation in childhood is particularly well-represented as a pattern in the well-off classes and proceeds from a rationale of passing on cultural capital. It is often found in conjunction with the playing of a musical instrument.

Graph 7
**CATÉGORIES SOCIO-PROFESSIONNELLES
 SELON LES MODES DE SOCIALISATION**
 Retirees having taken part in the survey were classified according to their last status when employed.



Executive-level workers having been socialised to classical music later in life are no rare occurrence, however: executives form the largest share of the "secondary socialisation" category, demonstrating the importance of the effects of life-long learning, both social and cultural. Meanwhile, it is in the category having experienced "inverse secondary socialisation" that the greatest social diversity is found: it holds more manual workers, office workers and intermediate professions.

One-third of audiences is thus made up of individuals who first become familiar with classical music as self-taught concert-goers, or through individuals encountered over the course of their lives, who guide or pass on their knowledge (friends, relatives). This finding shows just how important the audience "support" (concerts with introductions, documentary resources, etc.) provided by some orchestras is.

One of the study's most remarkable findings lies in the positive impact of educational and cultural outreach identified with regard to attracting new audiences. It shows that 11.9% of the concert-goers whose statements placed them in the "inverse secondary socialisation" category come to performances because their children need to be accompanied there. The qualitative interviews then revealed them to be an audience category eager to give their children (or grand-children) access to forms of culture with which they personally had little contact. In so doing, however, part of that audience population opened up a new realm of cultural engagement for itself, distinct from its initial aim to ensure that culture was passed on. In other words, above and beyond the long-term effects on children, educational programmes have immediate effects, in that they contribute to attracting new audiences.

Once again, the study results brought out the wide range of "career pathways" in the concert-going population and invite readers to steer clear of foregone conclusions. Furthermore, while the importance of introducing individuals to classical music at young age was confirmed, it remains that people can embark on a concert-going career at any age, and that the door does not close with the end of childhood.

Rejuvenation and Democratisation: A Contradictory Injunction?

THE STUDY POINTED OUT ANTAGONISM BETWEEN CONCURRENT EFFORTS TO REJUVENATE AND FOSTER SOCIAL DIVERSIFICATION IN AUDIENCES.

When cross-compared by social category and age group, the study findings showed a correlation between the two variables, which were generally inversely proportional, with each orchestra:

- ▶ Where the average age was younger than the national average age, the audience was more likely to be home to higher socio-professional categories.
- ▶ In contrast, where social diversity was greater than at the national average, in most cases, the average age exceeded the national average age.

The explanation for these variations can be found in the socialisation modes described above. Primary socialisation, meaning that which takes place during childhood, is more frequently specific to privileged social classes, which more systematically go about passing cultural capital on to the next generations. Such individuals enjoy the benefit of opportunities (conservatory attendance, engagement in cultural activities, etc.) which foster the start of a career as music-lover, from an early age. It is for this reason that the most privileged audiences are also those that come to concert halls the earliest. In certain cases, the audience's youth is closely correlated with a concentration of executives in the said population, and thus a lack of openness to other components of society.

Table 4
AVERAGE AGE BY SOCIALISATION MODE
Scope: audiences ages 18 and above.

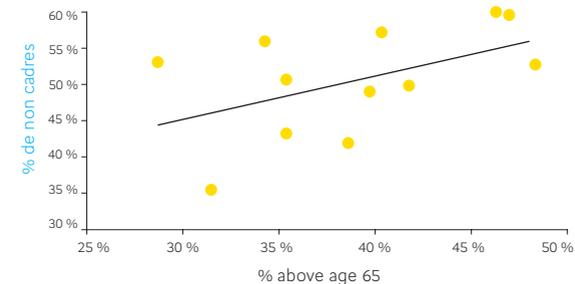
SOCIALISATION	AVERAGE AGE
Primary - childhood	54,0
Primary - at school	57,5
Secondary	59,4
Inverse secondary	61,5

The term secondary socialisation refers to those concert-goers who, in their adult years, first became familiar with classical music, either of their doing, or through chance encounters with others. As their competence as music-lovers develops over time, those found in this population are automatically older and tend to age the audience. Some "concert-goer careers" take time to build, and an older audience is sometimes the sign of greater openness.

This correlation creates tension between the concurrently-issued political injunctions to both rejuvenate and socially diversify audiences.

A positive correlation between average age and the degree of social diversification can be found in orchestra audiences. Illustrating the said correlation, the graph below shows, in anonymised form, the share of non-executive and audience members above age 65 attending concerts by the thirteen partner institutions. On average, a 1-point increase in the share of audiences above age 65 translates into an additional 0.6 point in non-executive audience members.

Graph 8
RELATIONSHIP BETWEEN AUDIENCE AGE AND SOCIAL DIVERSIFICATION
Scope: audiences ages 18 and above.



The Concert Experience, Widely-Varying Concert- Goer Profiles

FROM THE EXCEEDINGLY MULTI-FACETED PROFILES IDENTIFIED, MOST PROMINENTLY STANDS OUT THE FACT THAT EXCLUSIVE MUSIC-LOVERS ARE NOT IN THE MAJORITY (34%). THE ATTENDEES WHOSE PRIME AIM IS TO ENJOY A SHARED EXPERIENCE WITH FRIENDS OR FAMILY ACCOUNT FOR 29.3% OF THE AUDIENCE.

A large section of the study questionnaire is dedicated to better understanding, first of all, the frequency and types of cultural activities in which individuals engage, and secondly, the criteria used in selecting concerts and assessing the concert experience. The resulting lengthy series of questions brought out five concert-goer profiles:

The "prototypical classical music-lover" population (18.5%): Their engagement is centred on listening to classical music, is less likely to include interest in finding out something new, and is even less driven by the opportunity to explore the repertoire. For this audience population, enjoyment in the venue ("the opportunity to go out and spend time in a nice setting") and the outing as a chance to plan a time of socialisation ("the opportunity to share the moment with others") are very much secondary aspects in their experience of concerts.

The "curiosity-driven classical music-lover" population (15.7%): These audience members, like those belonging to the previous group, cite music as the central component of their experience as concert-goers. Just as likely to enjoy "major works from the reper-

toire" and attentive to the quality of their inner experience (many of them emphasise the "emotion which the work stirs"), they stand out for their resolutely more eclectic enjoyment and interest in "becoming familiar with new works".

The "socialising" population (29.6%) : These are audience members who cite as their prime motivation enjoyment in sharing a concert experience with others (family or friends), specifically the emotion and newness with which it is connected. While they are not indifferent to the purely musical aspects, these audience members, very large in number, structure their concert experience around shared enjoyment and interaction with those accompanying them.

The "layman occasional concert-goer" population (15.3%) : This population is characterised by low-intensity engagement in music-related activities, attesting to a more remote experience of live concerts than the previous categories. Often found accompanying others (for instance music-lovers or socialising attendees), audience members in this population - while often experiencing in a positive manner - do not express enthusiasm with respect to music itself, instead emphasising criteria connected with the performance dimension: in particular, they state that they enjoy "watching the musicians perform on stage" as well as the "opportunity to go out and spend time in a nice setting".

The "distant concert-goer" population (20.9%) : This category of concert-goers appears particularly insensitive to criteria connected with "the opportunity to hear great works from the repertoire" or "the emotion which the music stirs". These are audiences that come from afar, and have a distant connection with both the genre (they infrequently attend classical concerts) and the venue itself. Sometimes attending only as they pass through town, these are audiences for whom the outing was an opportunity (packaged as a tourist activity, a ticket purchased as part of a group outing) and not something in which they would usually engage.

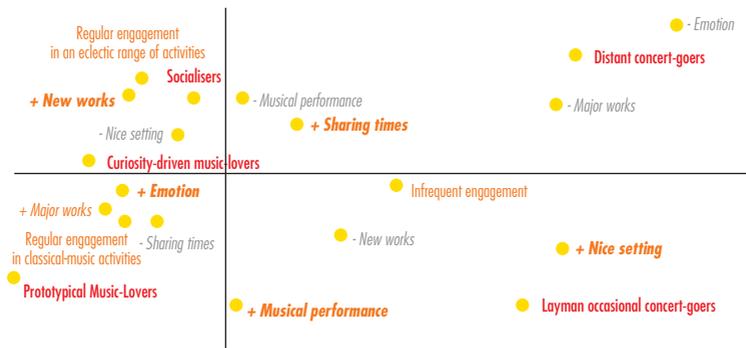
Statistical analysis of this data shows little correlation between the above concert-goer profiles and socio-professional categories. It is here, however, that the different internal dynamics structuring the classical concert experience – the main distinctive feature of which lies in its being collective by definition, yet sensorially individual – stand out most strikingly. The motives for attending appear starkly divided, and support the tenets which each group holds with regard to the others: insiders versus occasional attendees, conservatives versus progressives, etc.

The main traits characterising each of these categories should not be read as being mutually-exclusive. The categories simply establish a relative hierarchy between the characteristics, the breakdown of which is furthermore uneven across the audience groups overall. Graph 9 makes it possible to better understand how these categorisations are structured.

The Importance of the Concert Environment

WHILE THE EMOTION STIRRED BY THE MUSIC IS THE MAIN TRIGGER FOR ATTENDING A CONCERT, THE PERFORMANCE HALL AND ENVIRONMENT ARE ESSENTIAL CONTRIBUTORS TO THE ACTUAL EXPERIENCE.

Lastly, the study made it possible to look into concerts as experienced by respondents during the event itself and gain a greater understanding of that which, in their words, makes the concert experience enjoyable. It should first be noted that the emotion generated and works performed are listed primarily as making for concert-goer enjoyment in principle. The performance hall ("an opportunity to go out and spend time in a nice setting") initially appears a secondary criterion in this.



Graph 9
ANALYTICAL DEPICTION OF CULTURAL PRACTICES
Scope: audiences ages 18 and above.

This graph was produced through Multiple-Component Analysis (MCA).
In bold italics: the criteria listed specifically as being more important ('+') or less important ('-') relative to others in assessing performances attended.
In normal font: intensity of engagement in cultural activities (reading books, listening to music, going to the theatre, cinema, museum, other stage performances).

This categorisation offers insight into the criteria used and deeper motivations driving individuals to attend concerts. Here too, they bring greater perspective to the picture of a cultural activity reserved only for insiders. A significant share of the audience highlights forms of satisfaction that are not intrinsically connected with the artistic dimensions of concerts.

The music in and of itself is placed at the top of list by only 34.2% of the audience: the prototypical music-lovers and the curiosity-driven music-lovers. They stand out for their high level of engagement in cultural activities, which can be assumed to give them a degree of competence that enables them to finding their way through the range of concerts on offer.

Socialisers, which make up the second-largest group, with 29.6% of audiences, emphasise the emotional aspect, and find it important to share the outing with their loved ones. Lastly, occasional concert-goers, for lack of enough musical competence, focus their responses on more exterior factors.

Distant concert-goers form the population most difficult to grasp, as precisely their responses do not give establish any hierarchy in the various dimensions of the concert experience. The study confirmed that the category is made up of a large number of people who do not give impetus to the concert outing, but instead accompany a guiding person.

Table 5
ANALYSIS OF MOTIVES FOR CONCERT ATTENDANCE
Responses to the question, "Please rate from 1 to 10 what your particularly enjoy in this type of event."

The opportunity to hear major works	8,7
The emotion stirred by the music	9,0
The musicians' performance on stage	7,8
The opportunity to go out and spend time in a nice setting	6,5
The opportunity to share times with others	7,3
The opportunity to be introduced to new works	8,0

The picture changes significantly when respondents are asked to apply the questions to their most recent concert experience, assessing it in that light. Taking a relative approach, in other words, basing our conclusions on the response that received the highest rating out of the many received, it turns out that a large number of audience members have a particularly positive experience of the concert hall (37.7%). The performers are listed by 20.5% of respondents and the works by 12.3%. Lastly, in 29.5% of the questionnaires received, no single aspect could be identified due to uniform ranking of all assessment criteria ("undetermined").

Clearly, the performance hall (the venue, as well as the surrounding environment) is a central component in the reported quality of the concert experience. While it is not socially substantiable to give this criterion priority, it remains fundamental in the experience itself, regardless of the audience category considered.

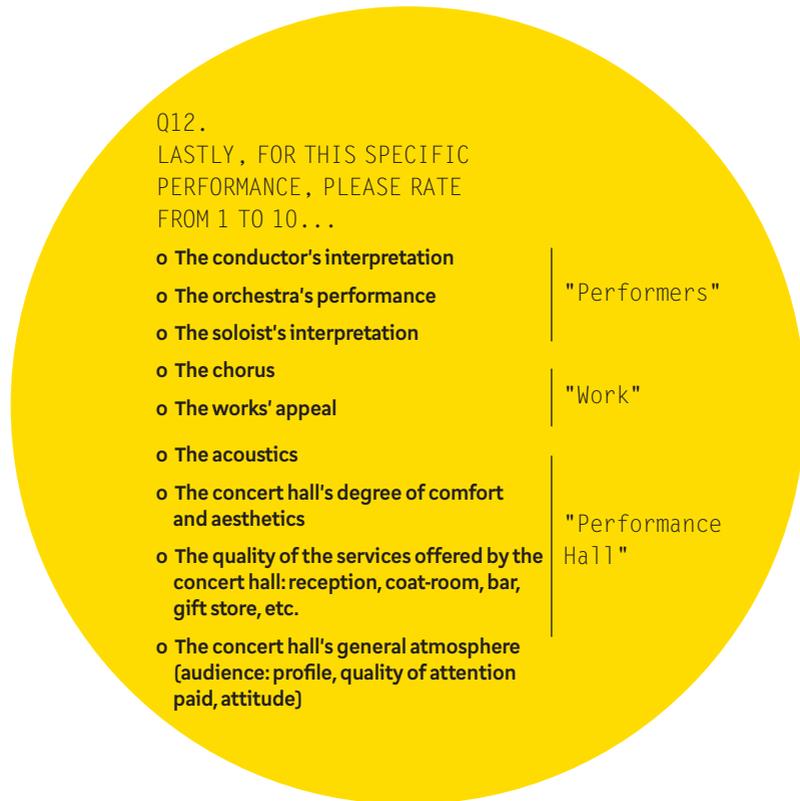


Table 6
CRITERIA USED TO ASSESS THE CONCERT EXPERIENCE
Scope: audiences ages 18 and above.

	Performance Hall	Performers	Work	Not determined
Total	37,7	20,5	12,3	29,5
Prototypical classical music-lovers	38,9	22,2	15,9	23,1
Curiosity-driven music lovers	37,3	23,4	12,2	27,0
Socialisers	39,0	22,3	12,5	26,2
Layman occasional concert-goers	43,5	18,6	9,5	28,4
Distant concert-goers	30,7	15,7	10,8	42,8

■ Performance Hall
■ Performers
■ Work
■ Not determined

ARISTAT is an innovative and independent institution founded in 2010 by a sociologist and statistician hailing from academia and research. The team is composed of a core staff of five and works in close connection with a network of specialists in the human and social sciences (academics, researchers, INSEE experts), experts (work organisation consultants, consultants to local authorities) and survey-takers.

For four years now, the agency, dedicated to research, has been engaged in analysis and exploration of public and social policies, conducting qualitative and quantitative surveys on behalf of various institutions: ministries, administrative agencies, local authorities, companies and associations. In this capacity, ARISTAT has in recent years produced social and local-level diagnostic studies (e.g., for ANRU, Paris City Hall), public policy assessments (e.g., for CNAF, French Ministry of Culture), analyses of social and cultural trends (e.g., for Bibliothèque Publique d'information) and decision-making task forces (e.g.: for CNFPT, Plaine Commune).

Dedicated to conducting full-fledged action-research, the agency is original in that it has adopted a resolutely-innovative approach, making extensive use of the most recent knowledge and methodologies developed in the social sciences. Maintaining close ties with the scientific innovative community, it is able to produce research work of the highest standard. By way of illustration, the agency concurrently runs scientific research in sociology (in conjunction with some of France's finest academic institutions such as EHESS, Ecole Normale Supérieure, and research laboratories such as LSQ [INSEE], CSE [CNRS] and Lab'Urba [UPEC Université Paris Est]) which give it access to in-depth theoretical knowledge of the subject matter with which it deals and enhances the analysis it produces. Alongside this, ARISTAT places particular emphasis on ensuring that its analyses are pragmatic and developed using methods that enable operational use of all of the studies it runs, so that these can be used to serve action and be incorporated into the public policy planning on which it works.

Aristat's work promotes the idea that the production of objective diagnostic reports and pragmatic solutions must be based on a scientific and transparent scientific approach. This interconnection is the unwavering pre-requisite for effective consulting and is sought after by both public and private decision-makers.

Xavier Zunigo : With a PhD in Sociology (EHESS/ENS), this specialist in quantitative and qualitative public policy assessment wrote his thesis on such questions as public policy for managing unemployment in working-class youth, and the assessment of government agency work in integration institutions. He has since extended his areas of research, heading numerous diagnostic review projects on social, cultural and urban policies.

Loup Wolff : A member of the INSEE Board (where he was responsible for such projects as the Study on Employment) Currently a member of the Centre for Research on Employment, his areas of research cover relations between health and labour, in connection with employment pathways and ageing. A specialist in statistical methodologies as applied to studies, he oversaw the administration and deployment of the Study on Symphonic Music Audiences. Loup Wolff writes an editorial column for the weekly "Le 1", in which he comments on a figure connected with the latest news events. He is also a violist and was a Board Member of the amateur symphonic orchestra, Ut Cinquième, which has been working for over twenty years to bring the treasures of our musical heritage to the broadest possible audiences

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ASSOCIATION FRANÇAISE DES ORCHESTRES

The AFO is a professional association of orchestras in France, founded upon the impetus of permanent orchestras, with the support of the DGCA-Ministry of Culture, in 2000. As an observer of the profession, the AFO coordinates information collection and sharing about the activity of its member orchestras. As a resource centre, the AFO works with orchestras on the issues shared across their activities: professional training, publications, further training. Lastly, as a spokesperson for the profession, the AFO contributes to defining cultural policy and international cooperation: themed meetings, events, and the European network of orchestras. The AFO runs activities for the European Network of Orchestras. The AFO is a member of the European organisations Pearle and Culture Action Europe.

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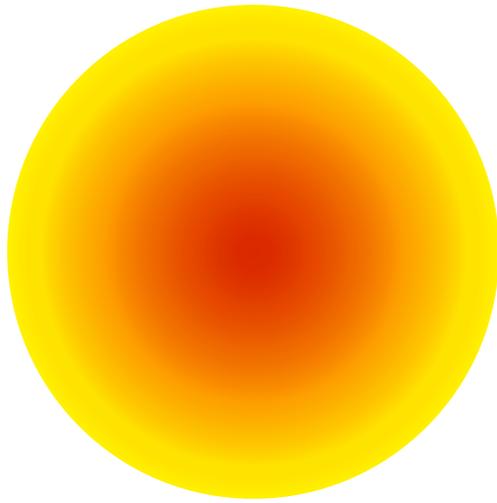
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