

AUDIENCE OUTLOOK MONITOR

Qualitative Research Executive Briefing: Orchestra Patron Experiences with Digital Programming Before, During, and After the COVID-19 Pandemic

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WolfBrown

Over the past 15 months, the Audience Outlook Monitor survey has delved deeply into questioning around digital content. While this information provides a good deal of insight, the marketplace for “online cultural programs” is still in its infancy. Much remains to be learned about how cultural consumers feel about online programming, how large the marketplace is, and what kinds of digital content could play a strategic role in mission fulfillment.

While the pandemic brought a tidal wave of digital programming, in many cases, much of this programming served as an emergency replacement for live programming. As the pandemic subsides and organizations reopen for live programs, significant questions remain as to how digital content will play a strategic role in mission fulfillment moving forward. We have learned for certain through Audience Outlook Monitor that demand for digital content is high and will likely remain with us for years to come. We have also learned that different kinds of organizations will have very different approaches to digital content, based on their disciplinary focus, artistic vision, budget size and capitalization, region/locale, partnerships, and technical capabilities.

With so many organizations producing so much digital content, it struck us that a helpful place to start understanding consumers’ relationships with online programming would be to conduct a sort of mini-ethnography of the digital landscape through the eyes of orchestra audiences. In April of 2021, the WolfBrown team interviewed twenty COVID-19 Audience Outlook survey respondents in Cleveland, Madison, Nashville, Miami, Omaha, Oregon, Costa Mesa, San Diego, Philadelphia, and Tucson. To be eligible for an interview, survey respondents must have reported that digital programming would play a role in their cultural life even after they can resume attending live performances in person (i.e., roughly 60% of all respondents). All interviewees had purchased tickets or subscriptions to their local symphony within the last three years and so is important to keep in mind that the findings reflect an active and engaged classical music audience.

In reading this research summary, it is essential to understand both the unique value and the limitations of qualitative data. With qualitative research, one cannot assume that the results proportionately reflect the views of the population as a whole; that is, one never knows whether the

comments offered by a single respondent (or even views shared by the majority of the respondents) reflect widely held sentiments in the population, or whether the perspectives are uncommon.

In our conversations, interviewees were invited to share their journey with digital programming since the pandemic began and what role they think digital might continue to play in their lives. Many interviewees, including some who were simply unaware of, or even opposed to, online programs before the pandemic, shared that they were exposed to new art forms, artists, or organizations through digital programming during the pandemic.

The findings that follow explore four themes that emerged as audience members described the value of digital programming: **quality, access and convenience, discovery, and bonding/intimacy**. There was great enthusiasm among these interviewees for continued online engagement with live-streamed, recorded, and interactive orchestral programs.

Value Element: Quality

Live vs. Pre-Recorded: When it comes to preference for pre-recorded or live streamed digital programs, interviewees had clear preferences on both sides. Some reported that knowing a program is live provides a level of excitement closer to what they experience in the hall and provides more impetus to attend because you have to watch when the program is taking place and or miss out. Other interviewees shared that they like the production quality and time flexibility provided by pre-recorded programs and the ability to re-watch sections of the programs multiple times. In short, the interviews suggest substantial markets for both live streamed and pre-recorded/produced programming.

At Home vs. In Venue: Overall, interviewees shared that they have been impressed by the quality of the digital programs they have watched. While many interviewees miss the excitement and energy of a live performance, one in five interviewees shared that they find the experience of watching at home to be of a higher quality than the experience of watching in person.

Value Element: Access and Convenience

Lowering Social Barriers: Some interviewees shared that it is easier to both attend and focus during digital programs because social barriers and distractions are removed. Several interviewees commented on the ease of attending a cultural program without needing to dress up and others shared that they can focus on the performance more without the distraction of looking around the hall at the other audience members or being disrupted by nearby noise.

Lowering Distance & Schedule Barriers: Over half of the interviewees shared that digital programming has allowed them to watch productions from around the country and the world. Interviewees shared how much easier it has been to attend digital programs as they don't need to allow time for traffic and parking and they can watch when they want removing scheduling conflicts that has often been a challenge in the past.

Lowering Cost Barriers: Several interviewees commented that many digital programs have been offered for free or at a very affordable ticket price and that this has also allowed them to attend more programs. Interviewees who are parents or educators shared that this is of special importance to them as it allows them to bring students to more shows or attend without the cost of a babysitter.

Lowering Health Barriers: Importantly, digital programs also provide access to audience members who could not attend in person due to physical limitations or illness.

Value Element: Discovery

Some interviewees are using digital programming to educate themselves about art forms they enjoy but with which they have a limited background. Other interviewees were introduced to new organizations and art forms during the pandemic because of digital programs and shared that they plan to visit these organizations in person as venues reopen.

Across the interviews we saw that interviewees are finding these new experiences in distinctively different ways, sometimes stumbling upon them, sometimes receiving them through emails from organizations, and sometimes getting recommendations from friends. This seemingly haphazard process for finding digital content highlights the opportunity for arts organizations to play a role in curating a selection of online programs to help audiences in their journey to explore a new genre or be exposed to new artists.

Value Element: Bonding/Intimacy

Throughout our conversations interviewees shared how digital programs have helped them feel connected to organizations, artists, and even friends and family members during the pandemic. While we often think of digital programs as lacking the social element of an in-person experience, there are unique ways that digital programs can build relationships. Some interviewees shared that they have built connections with conductors and artists online.

Some interviewees have become power users of digital programs, setting up their homes to support high-quality video and audio experiences, advising friends on how to improve their at-home experience, and even inviting friends over to share the performance. These interviewees may expose others in their social circle to new artists and art forms while strengthening their own bonds.

Digital Strategies

All in all, these interviews highlight some of the unique artistic, educational and social value that digital programs offer and the opportunities for digital programs to become an essential part of both audience development and accessibility strategies long-term. Overall the findings suggest several digital strategies for further development and analysis:

- **Product line extension/expansion**
 - Digital content as a means of expanding the paid audience for core programs
- **Brand projection and accessibility**
 - Digital content as a means of maintaining patron relationships or increasing accessibility for audiences who experience challenges to attending in-person
- **Engagement around core programs**
 - Digital content as a means of deepening impact and engagement with live programs
- **Retention**
 - Digital content as a means of reducing churn and increase frequency
- **Audience development**
 - Digital content as a means of education, exposure, and expanding aesthetic boundaries