



UNDERSTANDING AUDIENCES FOR JAZZ

Heather Maitland

1. Executive Summary

The project was carried out by Heather Maitland in collaboration with EMJAZZ' five key partners: Derby Jazz, Leicester Jazz, Lincoln Jazzpac, Northants Contemporary Jazz and Nottinghamshire Jazz Steps.

It was commissioned by EMJAZZ, the regional development agency for jazz in the East Midlands, as part of "Rhythm-A-Ning", a project funded by the Lottery through Arts Council England's Grants for the Arts.

The brief was designed to provide very focused intelligence to the participating jazz promoting organisations. None of these organisations have their own venues and all are dependent on the box office facilities of the venues with which they work. These venues vary in their nature from a bar/restaurant to local authority run theatres and concert halls. This variety is reflected in the data capture capacity of their box office systems.

The research focused on audiences at 23 concerts and gigs in January and February 2009 at 14 venues ranging from Trudy Kerr to Dog Soup via Darius Brubeck. The methodology included:

- Questionnaire survey which achieved 65% response rate
- Box office data analysis at five venues
- Online survey
- Focus groups with 51 participants
- Analysis of marketing effectiveness
- Analysis of sales statistics
- Secondary research
- Mosaic analysis

1.1 What are audiences like?

The core audience of frequent jazz attenders is smaller than might be expected. On average, audiences buy tickets for fewer than two jazz gigs a year.

Analysis of both the questionnaire responses and box office data identified the following types of attender:

Jazz Avid	Attends live music frequently, mainly at jazz	15%
Jazz Occasional	Occasionally attends live music with jazz more frequent than other styles	9%
Musical Omnivore	Attends live music frequently but jazz is not their main interest	47%
Jazz Focused Musical Omnivore	Attends live music frequently with jazz as their main interest	17%
Dipper	Occasionally attends live music but jazz is not their main interest	9%
Rare sighting	Rarely attends live music	4%

They are local with between 88% and 96% of ticket buyers coming from within a 30 minute drive of the venue.

The majority are aged over 45. Around 45% of both ticket buyers and attenders are women.

1.2 What do audiences think of what the promoters do?

Audiences are highly satisfied with the quality and range of gigs, and with the experience offered by the venues. On average they gave the gigs in January and February a score of 8.6 out of ten. All but two gigs were given scores of ten out of ten by at least some attenders. All those given low scores by a small number of attenders were also given maximum scores by others. There are some minor issues which need tackling at individual venues.

1.3 What else do they attend?

Around a quarter of ticket buyers are frequent attenders at the venue with jazz making up a small proportion of their overall purchases. Their other attendance at the venue reflects the nature of the programme at each venue.

1.4 Why do they attend jazz?

Focus group participants showed a marked preference for one of two distinct approaches to music:

- Analytical response
- Emotional response

Motivations of those making an analytical response to music:

- Discovering unfamiliar music
- Seeing a favourite musician
- Musical/historical context
- Technical excellence
- Specific instruments or a combination

Motivations of those making an emotional response to music:

- Feeling the music
- The whole experience
- Atmosphere
- Good company

Implications for programming and marketing

- Emotional response to music is real, resulting in changes in cerebral blood flow, heart rate, respiration and electrical impulses in the brain
- The response is linked to parts of the brain involved in reward, emotion and arousal
- It is triggered by excitement, pleasantness and, in particular, familiarity
- It is more difficult to have an emotional response to unfamiliar music
- Music with high levels of dissonance triggers unpleasant emotions
- The ability to make an analytical response is dependent on having done a lot of listening
- Knowledge is about perceiving similarities and differences
- Analytical responders have a context within which they can make sense of new musical experiences – there is a lot they can compare it with
- Giving information to someone without the context, emotional responders, just highlights how much they don't know

1.5 Barriers to attendance at jazz

- Jazz is too broad to get a handle on
- Lack of a frame of reference makes it risky
- Single-minded experience
- Too much of a risk to persuade anyone else to come
- Perceptions of jazz
- Finding a pathway
- Music is not an important part of their life
- Inflexible musical preferences

1.5.1 Is price a barrier?

- Audiences feel that current ticket prices offer good value for money
- It may cap the frequency of attendance of some Jazz Avids already attending very frequently

1.5.2 What stops young people coming to jazz?

Just as with other audiences, they divide into analytical and emotional responders. The barriers are:

- Unfamiliarity
- Feeling intimidated
- No entry points from their own music
- Perceptions of jazz as a formal genre
- They don't think in genres
- They dislike being compelled to listen as they value social interaction and want to comment to their friends about what they are seeing and hearing
- They are bewildered by the conventions of the performance and audience behaviour

1.6 How do audiences choose what to attend?

- Previous knowledge and experience
- Looking for clues
- "A shot in the dark"

How do young people choose what to listen to?

- Personal recommendations
 - Friends and boyfriends
 - Links through MySpace friends
 - *Later with Jools Holland*
 - Recommendations on music websites like i-Tunes
- Links to their own experience
 - MySpace influences, looking for reference to something they like too
 - Familiar entry points

1.7 Programming patterns

- Audiences prefer gigs on Thursdays, Fridays and Saturdays, although a quarter have no preference
- Two thirds prefer an 8pm start

1.8 Is promoters' marketing effective?

Most focus group participants complained that it was hard to find out about live jazz in their area because you need to know where to look for it or who to ask. Even if they join a mailing list they say they only get information irregularly. A few actively search for information either about what is on locally or about favourite bands and soloists.

Because most audience members are interested in a wide range of music, if non-jazz events come to their attention more easily, then those are the ones they will attend.

When they do find information about gigs, it doesn't persuade them to attend.

Key copywriting issues:

- Name dropping
- It all sounds the same
- It is too intellectual
- Off putting jargon

Brochures

"When initially I looked at the flyer, it was really City Council. They're all the same format and the same logo. It's not pleasing at all."

Derby focus group

"I get the stuff from Nottingham and they have some really good stuff on but I don't seem to get the stuff from Leicester. I've had one mailing shot from here, the last one."

Leicester focus group

Websites:

- Relatively low numbers of visitors
- Focused on the die-hards
- Poor search engine optimisation
- Not sales focused.
- There need to be more
 - Links to venue online ticketing with every event
 - Phone numbers everywhere
 - Maps and directions
 - Links from musicians' websites and MySpace pages
 - Music samples
 - Links to online videos

1.8.1 Is there potential to increase numbers?

The participating promoters believe that the audience for a poorly-attended gig consists only of jazz enthusiasts because it has not attracted a more general audience. Box office data supports this view: the more tickets sold for an event, the greater the proportion of infrequent attenders.

1.9 How can we reach potential attenders?

- The highest potentials for growth are to:
 - Get more Musical Omnivores to include jazz in their menu
 - Focus on the waverers

1.9.1 Key Tasks

- Create atmosphere

- Informal, friendly venues
- Seating layout
- Lighting
- Food and drink
- Interaction with the musicians
- Interaction between audience members
- Interaction with the promoters
- Build confidence among the waverers
 - Elicit responses rather than give information
 - Post-show discussions (not talks)
 - Interaction with the musicians
 - Discovery gigs for grown-ups
- Communications
 - Capture more names and addresses at the box office
 - Look after it better
 - Put your brochure in people's hands through direct mail
 - Invest more in design
- Write for the waverers
 - Describe what the music is like
 - Use vivid verbal imagery
 - Talk about influences
 - Talk about the musicians as people
 - Recommendations from people they can connect with
- Make more effective use of images
- Drive people to your websites
- Raise the media profile of jazz off the arts pages

1.9.2 Developing young audiences

- Young people do not prefer risky music
"I'd prefer something really edgy and out there or some old guys playing proper jazz in a smoky room."
- But the music that is 'edgy' is also familiar
"The Dust Collectors, I think they're really fantastic."
- Presentation
 - Informality
 - Atmosphere
- Involve young people
 - Recruit young ambassadors to make recommendations and help spread the word
- Communications
 - Visuals and samples, not words
 - Get publicity to where they are
- Entry points
 - Collaborations with local organisations that appeal to young people
 - Cross-artform collaborations
 - Promote events not concerts

About Heather Maitland

Heather Maitland is an arts consultant, researcher and commentator based in the East Midlands but working throughout the world. She is the Research Associate at the Centre for Cultural Policy Studies, University of Warwick. She is chair of the European Blues Association.

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About EMJAZZ and Rhythm-A-Ning

East Midlands Jazz Promoters Forum (EMJAZZ) is the regional development agency for jazz in the East Midlands. It was formed in 2004 by its five core partners Derby Jazz, Leicester Jazz House, Lincoln Jazzpac, Northampton Jazzco and Nottinghamshire Jazz Steps and became a Community Interest Company in 2009. It is an Arts Council of England Regular Funded Organisation.



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