

Notes Toward an Agenda for Research on Orchestras*

Based on presentations and discussion at the Princeton Conference on Research on Orchestras, April 11, 2008, Mountain Lakes House, Princeton University; and on the subsequent online blog/discussion, May 26 – June 6, 2008.

Paul DiMaggio, Compiler

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The following research agenda is based on extensive notes from the April 11 meeting and from transcripts of an online discussion that took place between May 26 and June 6. These forums were organized by Princeton University's Center for Arts and Cultural Policy Studies with support from the Andrew W. Mellon Foundation. The compiler's role was to organize the ideas that came out of the full-day meeting into a draft and to amend that draft on the basis of the online discussion.

In managing the process through which this document developed, the Princeton Center sought to contribute to an ongoing conversation that is taking place in venues across the orchestra world; and to provide a resource for students in and instructors of courses in cultural policy, arts management, the economics or sociology of the arts, and related topics. We leave the job of prioritizing the topics listed herein to organizations working on behalf of the orchestra field or to individual researchers and research institutions. The Center would not wish to dictate an agenda even if it could. There will *not* be a *final* version of this document because research agendas, by their nature, are always open, adjusting to new real-world problems, new theoretical tools or new technologies of data collection or data analysis, or to the recognition that issues that may not have appeared important in the past have become more crucial than they once were thought to be.

This document is divided into four parts: the Orchestra, the Audience, the Music, and the System. Needless to say, this is but one possible way of organizing this material and not necessarily the best. For each question, a number of research tools are suggested. Certain tools – e.g., surveys of orchestras and case studies – could be used to address numerous questions. From the standpoint of research planning, it would be prudent to piggyback as many high-priority research questions appropriate to any particular method in which one invests. (For example, it is more efficient to field one 60-minute survey of orchestras than six 10-minute surveys.) Organizational ethnography (extended daily participation in the life of the orchestra by a researcher or research team), a method that by its nature addresses many questions at once, also has much to recommend it.

I. The Orchestra as an Organization

This section focuses on research on economic and organizational conditions that influence the behavior of orchestras and the people in them. Questions are divided into four partially overlapping categories: Organizational questions; financial questions; questions about innovation; and questions about recruitment, careers, and labor relations.

A. Organizational

I-A-1. How do orchestras plan and what kinds of planning (facilities, strategic, artistic, year-to-year) do they do? What structures do orchestras and boards have for planning? How do they define planning? What are the stages of the planning process, who provides input into planning, and who participates at each stage? What is the periodicity of strategic planning? How are plans used after they are devised? To what extent has benchmarking become a component of (or substitute for) systematic planning, and what are the advantages and disadvantages of modeling orchestras on other orchestras? Tools: ongoing organizational surveys and case studies.

I-A-2. How do orchestras budget? What is the process (and how does it vary among orchestras)? How do orchestra boards and executive directors think about financial goals: Net revenue maximization? Deficit avoidance? To what extent do they attempt to maximize net revenues, total revenues, total attendance, or performance quality (when there are tradeoffs among these)? How are net revenues distributed (or saved) in good years? How are economies achieved in bad years? What is the process by which orchestras deal with unexpected losses or windfalls? To what extent can or do orchestras plan to reduce revenue volatility by seeking to reduce dependence on less stable relative to more stable revenue sources? Tools: Case studies, ethnographies, econometric analyses.

I-A-3. Professor Flanagan notes that given the similarity in activities and markets that large orchestras face, he has found a stunning diversity of business models, revenue structures, expenditures, endowment returns, contribution patterns, and so on. Given expectations that best practices would diffuse throughout the industry, what explains this diversity? Tools: Survey data on orchestra practices, case studies.

I-A-4. What predicts the failure of orchestras? Are there characteristic sequences that lead to failure, or diagnostic signs on balance sheets that predict organizational demise? Under what conditions do orchestra leaders revert to first principles and dig in their heels against change in the face of crisis? How many orchestras *have* failed, and how does this number compare to rates of demise in other industries? What predicts failure rates in the industry as a whole over time? What failure rate should we expect in a healthy orchestra industry? Are there models for planned obsolescence, re-launch, receivership or regeneration? What has been the long-term sequel to orchestra failure where it has occurred? Under what circumstances have orchestras been resurrected (or new orchestras founded in the same city) and under what organizational form and what auspices (By musician cooperatives? By the boards? By new founding boards?) What has been the rate of creation of new orchestras over time, and how has it changed (and why)? Tools: Econometric analysis, demographic models, archival research, case studies.

1-A-5. How do organizations understand their capacity to engage in community programs? How do they decide to participate in a new civic alliance or develop a new creative affiliation, and how do they think about the tradeoffs and opportunity costs (in terms of staff time and other resources)? Tools: Case studies.

1-A-6. What are the characteristics of successful leadership in orchestras, how do they vary from leadership of other kinds of organizations, and how may they vary among different types of orchestras, and among different roles (executive director, trustee, artistic director) within the orchestra itself? Tools: Case studies, interviews.

1-A-7. Given the complexity of orchestras (in size and differentiation of roles), what factors influence participant commitment and shared ownership of the orchestras' goals? To what extent and under what conditions do orchestras develop shared cultures, and with what effects on commitment and performance? Tools: Multiple case studies (employing both survey and interview methods).

B. Financial

I-B-1. What is the financial impact on orchestras of building performance facilities? How do trends in revenues and expenses differ for orchestras that do and do not own their halls respectively? Are there characteristic features of balance sheets for orchestras that have recently built a hall? Tools: econometric analysis, case studies.

I-B-2. What percentage of personnel expenses are allocated to players, artistic directors, guest soloists, and guest conductors, and how has this changed over time? What share of personnel expenses are allocated to administrative staff and/or outside contractors, and how has this changed over time (and with economic cycles)? To what extent do these changes reflect differences in orchestras' goals or in the goals of orchestra patrons? To what extent do these trends vary among types of orchestras? Tools: Repeated surveys.

I-B-3. Are orchestras spending too much money on marketing? Too little? What about development? How would the answers vary for different types of orchestras? For capital campaigns as compared to other kinds of development activities? And how can an orchestra know? Tools: Econometric analysis.

I-B-4. How might one's analytic conclusions about economic trends, and the causes of those trends, differ depending upon whether one restricts "concert revenues" to revenue from ticket sales, as opposed to treating some portion of contributed and grant income as a function of the number and/or quality of performances? What percentage of concert revenues reflect different product lines – e.g., classical, pops, chamber and educational concerts? Tools: Surveys of orchestras and econometric analysis.

I-B-5. How inexorable is the cost disease? Put another way, how can we distinguish cyclical economic distress from long-term structurally-induced decline? What about

orchestras makes the cost disease (insofar as it exists) more (or less) inexorable in its long-term effects than in the rest of the U.S.'s increasingly service-based economy? Are there alternative models to explain long-term change in orchestra revenues and expenses? Are there models that focus on health rather than pathology? Tools: econometric analysis, case studies.

I-B-6. Given that both orchestras and theatres are subject to cost pressures, as well as (in the case of large orchestras and theatres) similar factors such as the burdens of maintaining performance spaces, dealing with competition for audience, pricing appropriately, and so on, how do the economic profiles of orchestras and theatres compare? What can we learn about the distinctive problems facing orchestras by comparisons to other nonprofit performing-arts institutions? What can we learn from comparative research on orchestras and colleges, which face similar issues (although the latter for now face decidedly more favorable demand conditions), especially around fund-raising and endowment? Tools: Econometric analysis, case studies, industry analysis.

I-B-8. How price-sensitive is consumer choice in the orchestra field? How does the price elasticity of subscriptions compare to that of single tickets? Are there different groups of audience members (and potential audience members) for whom other entertainment options are perceived as more or less substitutable for classical-music concerts? Are there circumstances in which reducing prices could increase total revenue (either by increasing ticket sales or increasing revenue from donations)? Tools: Econometric analysis.

I-B-9. To what extent do orchestras use (or how might they use) what economists refer to as "price discrimination" to enhance long-term revenues? For example, how prevalent are programs that offer reduced-price tickets to young people, and how effective are these at building future audiences? To what extent might price incentives be targeted to other new attenders, whose choices may be more price-sensitive than audience members who already value orchestra concerts highly? Tools: Econometric analysis, interviews.

I-B-10. To what extent is ticket pricing influenced by competitive pressures in an orchestra's community, both from other providers of musical programming and from other performing-arts organizations? Tools: Econometric analysis.

C. Innovation

I-C-1. How do experiments become innovations (systematic attempts at planned change, given an opportunity to succeed) and how do innovations come to the attention of the field as a whole? Under what circumstances are innovations judged to be successful, and how does the collective judgment of success correspond to objective measures? Tools: Case studies, diffusion analysis.

I-C-2. How does research enter into organizational change? How do orchestras vary in the ability to identify knowledge needed for change, to acquire that knowledge, to draw

appropriate inferences from it, and then to act upon it? What explains such variation? How can university-based researchers communicate research results in ways that make them accessible – findable *and* comprehensible – by decision makers? How can the field as a whole exploit and disseminate the results of the research that has been done? Tools: Orchestra survey (to identify types and extent of research) and case studies of efforts to use research in change initiatives.

I-C-3. What are the effects of unplanned change? Case studies of orchestras' responses to unanticipated disruptions – disruptions that cannot themselves be attributed to pre-existing conditions – may be revealing. Examples: Loss by death of music director or other key leadership; unexpected loss of a performance venue (e.g., due to natural disaster). How do such incidents change organizational power structures (if only temporarily) and what are the effects on behavior? How do orchestras learn (if at all) from unplanned innovations that are improvised to cope with emergencies? Tools: Case studies.

I-C-4. What do leaders in orchestras perceive as the most important innovations in the field in the last decade? How have they learned about them? To what extent have they used them in their own orchestras and, if so, how? To what extent do the field's understandings about notable innovations and perceptions of their success square with evidence of innovation outcomes? Tools: Canvass of field leaders and case studies.

D. Recruitment, careers, labor relations

I-D-1. If we were to compare orchestras that responded to financial challenges by hardening their bargaining positions to those that responded to such challenges by increasing transparency and sharing financial information with the union, how would these orchestras differ in terms of such outcomes as (a) avoidance of financial crisis; (b) incidence of work stoppages; (c) player retention and morale; (d) long-run financial solvency and survival? Can we explain why orchestras take the approach that they take? To what extent do trustee orientations vary depending on the industry from which they are recruited and the traditions of labor relations within that industry? To what extent do orchestras tend to persist in a particular approach to labor relations and to what extent do they oscillate between approaches? Tools: Case studies, interviews with union and management representatives, trustees, community stakeholders.

I-D-2. How do people enter the labor market for orchestra managers and, especially, executive directors? How long is a typical term of employment for an executive director, and how do top managers move through executive positions during the course of their careers? What incentive structure do these career patterns impose on executive directors, and how do these incentives either discourage or encourage different forms of innovation? For what kinds of individual characteristics and values does the search process tend to select? Tools: Survey of current and former executive directors, interviews with managers and trustees.

I-D-3. How do orchestras recruit trustees? Has the pool of potential trustees changed? How do orchestras fare in competition with other nonprofits in recruiting attractive trustees? How long do trustees typically serve on boards and what incentives influence their behavior as board members? To what extent have corporations become more active in providing trustees to orchestras? Do individuals who serve on boards, in effect, as representatives of corporations exhibit different levels of commitment or play different roles than board members with long-standing personal relationships to the orchestra? How do orchestras manage commitment? What is the effect on the orchestra of length of term, term limits, continuity (or discontinuity) in board leadership? Tools: Census of trustees of several orchestras over time, interviews and case studies.

I-D-4. To what extent have orchestras and unions agreed upon contracts that build flexibility and accommodation into labor-management relations between contract negotiations – e.g., evergreen contracts, intermittent bargaining, and other devices? What flexibility-inducing mechanisms have been most effective, from the standpoints of labor and management? What can we learn from successes and failures? Tools: Interviews with union and management representatives, organizational surveys, case studies.

I-D-5. How has the musician's role changed – in terms of allocation of time among types of service, and in terms of participation in advisory or decision-making bodies in the orchestra itself – and how does it vary from orchestra to orchestra? How are variations in musician activities related to job and career satisfaction and commitment? Tools: Ongoing organizational surveys, survey research with musicians, musician focus groups.

I-D-6. How many orchestras include musicians on the board? Where musicians have joined the board, what has been the impact, if any, on labor relations, morale, retention, and performance quality? Tools: Repeated organization-level surveys, case studies, interviews with union representatives and trustees.

I-D-7. How have orchestra players changed in their aspirations, expectations and skills? How do these change over the course of their professional careers? To what extent and in what ways do musicians develop skill in business aspects of musical presentation like promotion, fund-raising, community relations, and management? Tools: Cohort analysis; panel studies of orchestra members.

I-D-8. What means do musicians in different kinds of orchestras use to augment their incomes? What role does teaching play in this mix? What is the impact of orchestras (through the individual teaching activities of their members) on music education within their community? To what extent (and in what types of orchestras) do musicians augment their income by playing in other kinds of ensembles? What other activities are prominent sources of supplementary income? To what extent do musicians derive satisfaction from these income-supplementing activities? Tools: Musician surveys; community studies.

I-D-9. What do young people taking the first steps into musical careers hope for and expect, and how has this changed over time? What explains the choice to major in music

in college or to attend a conservatory? What explains success and retention in musical performance after school? Research should focus not just on individual characteristics like talent and motivation, but also on the network of relationships that sustain a musical community. Tools: Panel surveys of cohorts of music students, network analysis.

II. The Audience and Community

This section focuses on research on orchestra audiences, actual and potential.

II-1. What percentage of people of different kinds (e.g., variation in age, gender, race, education, income, place of residence, family structure, and so on) are orchestra attenders at any point in their life? What percent attend concerts with some regularity (e.g., at least four times in one year, or at least once a year for three or more consecutive years)? How does this compare to attendance rates in any given year? How does it change over the life course? What accounts for the movement of persons in and out of the orchestra audience, and in and out of intensive-attender and regular-attender statuses? How do people come to love classical music? What are the feeder mechanisms or pathways that set people on a course to become classical-music listeners? Tools: Life history interviews, panel (repeated-interview) studies.

II-2. What explains the intergenerational decline reported by the Surveys of Public Participation in the Arts in rates of attendance at classical-music concerts between 1982 and 2002? Why are the boomers and subsequent generations not aging into attendance at the same rate as previous generations? How has the number of concerts attended by people who attend any changed over that time period? What role might such factors as new forms of competition for entertainment time and dollars, increases in ticket prices at many venues, and changes in the work force and in family structure have played in the decline? If we were able to distinguish between attendance at orchestra concerts and attendance at other kinds of classical-music concerts, would we find similar or different patterns in each? How do the results of national sample surveys converge or diverge from data on ticket sales and attendance trends gathered from orchestras themselves, and how might discrepancies be explained?

II-3. What can we learn about the relationship between programming and attendance? To what extent will musically literate non-attenders respond to orchestra initiatives in the form of new concert formats and/or new repertoire? To what extent will such initiatives drive away the current audience? Is there a point at which the rate of new members attracted exceeds the rate of old members alienated (and is this different depending on the time span over which one studies the process)? Are there ways to segment the audience to bring in a new audience without losing the old? And what would the answers be if one looked instead at the relationship between programming and *contributed income*? Tools: Statistical analysis of attendance and program data; case studies of orchestras that are “outliers,” with unusually positive outcomes.

II-4. How have the orchestra's community-based activities changed in number and type? What do orchestra members, staff, and trustees mean when they speak of "the community"? How do they assess the effectiveness of community activities? Tools: Ongoing survey of orchestras (to track change), intensive interviewing.

II-5. Are orchestras replenishing their pools of major contributors? What constitutes a "major contribution" and how has this changed over time? What are the demographics of the most generous donors (especially the age distribution) and how have those demographics changed over time? Are baby boomers aging into big-donor status (for orchestras) as have previous generations in the past? Tools: Analysis of donor data from a sample of orchestras over time, analysis of *Giving USA* and similar surveys over many years, interviews with development staff.

II-6. To what extent, if any, is contributed income responsive to performance quality? To repertoire? What explains audience perceptions of concert quality? If we use the presence and duration of standing ovations as an index of audience perception of quality, to what extent is it a consequence of the quality of the playing as a whole (as musicians, critics, or other experts might evaluate it), the virtuosity of specific performances, the familiarity of the repertoire, other qualities of the programming, program framing (e.g., venue, formality, extent and nature of conductor's comments to audience), the star quality of guest performers, or dynamics internal to the audience itself (e.g., whether a critical mass of members stand and when they do, contagion of enthusiastic applause, and so on). Tools: Econometric analysis, research at the level of concerts, audience surveys.

II-7. How are orchestras using new media? Who are these reaching – subscription audience, single-ticket buyers, non-attenders from region, people outside of the orchestra's region – and how does this vary and with what effects? How does the use of new media (and old) influence both attendance and contributed income? Tools: Review of in-house research, case studies.

II-8. How large is the audience for various types of new music (e.g., old compositions not previously performed, new compositions in traditional orchestral styles, new compositions diverging from familiar genres)? How and to what extent have orchestras captured it, either through regular programming or through small ensembles in special concert spaces? To what extent are orchestras trying to capture this audience? Tools: Interviews, case studies of exemplary programs, market analyses, selected MSAs.

II-9. Who are the young classical-music listeners who are not yet orchestra audience members, and how do their tastes evolve? How do they discover classical music? How do orchestras market to them? Can we use online music sites devoted to classical music, or social networking sites that invite users to name their favorite recordings, to identify young classical-music fans, and to trace the evolution of networks among such fans, in order to (a) identify a sample of serious young classical music listeners who may not be in the orchestra audience; (b) learn about their musical tastes and practices; and (c) track the diffusion of tastes across networks (e.g., Facebook users in a college or university)?

Tools: Analysis of online data and follow-up surveys and interviews, with cooperation of proprietors of websites whenever possible; collection of panel data to track evolution of tastes and networks of a sample of young listeners at regular intervals over a decade or more.

II-10. What degree of overlap exists between audiences for orchestras' programming in classical music, pops, and chamber music? How do these concert types compare with respect to price elasticity and audience commitment (as measured by voluntary donations and year-to-year retention)? Tools: Surveys of orchestras, case studies, econometric analysis.

II-11. What is the relationship between attending classical-music concerts and consuming classical music through radio and recordings? To what extent and under what conditions are these activities complements? To what extent and under what conditions are they substitutes? Tools: Sample surveys, econometric analysis.

III. The Music

This section focuses on research on orchestras' artistic mission and on the institutional conditions for preservation of and innovation in classical and fine-arts music (including training and careers of players and composers).

III-1. Where are composers in the fine-art tradition having their works performed? What is the role of the orchestra in the broader system that sustains new music, and how has it changed over time? What roles are played by universities, grantmakers, independent music venues, private patrons, and the media in this system, and how have these roles evolved? How do the answers differ for different kinds of new music and for composers at different stages of their careers? Tools: Cohort analysis (e.g., of graduates of selected music schools), life-history interviews, fieldwork, sampling of new works with intensive interviewing.

III-2. How has the orchestral repertoire evolved? If we update the Mueller's database of repertoires through the present, what changes will we see (in the incidence of new music, rediscovered classics, American composers, and so on) and why have those changes (if we indeed find them) occurred? Tools: Collection of data from orchestra archives and statistical analysis.

III-3. How do orchestras choose their repertoire? Who is involved, what categories do participants use to classify musical works, what kinds of knowledge (based on research, experience or common belief) enters into these decisions, and how do the procedures and premises tend to direct outcomes? What economic factors influence programming? Perhaps most important: Do the answers vary among orchestras and with what consequences? Tools: Field observation, decision analysis.

III-4. How does programming outside the established canon influence subscription renewals and single-ticket sales? What are the distinctive effects of (a) early music, (b) American composers, (c) contemporary composers, (d) chamber orchestras or mixed ensembles? If, as many in the industry appear to believe, there *are* negative effects, can we identify orchestras that are exceptions and understand how they are able to innovate programmatically without negative consequences? Tools: Survey of orchestras, econometric analysis, case studies.

III-5. To what extent have orchestras become more homogeneous or distinctive in their “sounds”? What aspects of “the sound” have become more distinctive, which more similar to other orchestras? How can we explain both aggregate trends and cases that deviate from those trends? Tools: Analysis of sound recordings, interviews with critics, case studies.

III-6. What is the role of universities and of orchestras in commissioning, sponsoring, and supporting composers of significant new music? To what extent do their efforts overlap? To what extent do they serve different niches within the new-music world? Are there examples of successful collaborations between universities and orchestras around new music? Tools: Surveys of orchestras, adding questions to ongoing surveys of universities or scraping data from university websites, case studies.

III-7. To what extent is programming related to the demographics of the local community or of the local audience? To what extent, if any, has this changed over the past half-century? Tools: Analysis of census data, audience surveys, program analysis, and case studies.

III-8. How do new pieces enter the orchestral repertoire? To what extent are they embedded in larger programs (e.g., featuring several works by a single composer over the course of a season)? To what extent are they performed more than once (in a given orchestra or in the field as a whole), and what predicts multiple performances? How are programs formed and where does initiative for new or little-played works come from? What is the role of networks linking particular conductors, soloists, musicians, and artistic administrators to groups of composers? How influential are direct links between composers and audiences? How do the answers vary depending upon the niche that an orchestra occupies (e.g., whether it is the only classical-music provider in its MSA or one of several classical-music organizations in a large urban area)? Tools: Interviews, network analysis.

III-9. How many orchestras market distinctive series (i.e., with different program content, and not just different marketing techniques) to different audience segments? How are these segments identified and characterized? How successful have such efforts been? Tools: Interviews with orchestra managers and marketing staff, review of marketing data, case studies of exemplary programs.

III-10. What do orchestra players listen to? What music do they play for fun? What percentage of players of different cohorts and national backgrounds enjoy pop music, jazz, rock music, world music, electronic and related music, or rap? What percentage actually have performed in these genres in the past? What percentage play them today? What, if anything, might the answers to such questions suggest about new ways of configuring orchestra members into new types of services that might be attractive to players and orchestra managements alike? Tools: Survey of orchestra musicians.

III-11. How is the presentation of new music influenced – either positively or negatively - by collective bargaining agreements? What, for example, is the role of contract provisions referring to rehearsal time, extended techniques or decibel level in encouraging or discouraging the presentation of different kinds of new music? How do musicians feel about different kinds of new music performance? What can we learn from orchestras in which unions and management have arrived at innovated ways to do new music well within the framework of collective bargaining? Tools: Case studies, player surveys, interviews with union and management.

III-12. How do young composers feel about writing for orchestras? When they plan their careers, how do they anticipate making a living? Tools: Survey and interviews of composition graduates from leading conservatories; interviews with selection of young composers who have achieved notable success.

III-13. How does the public (or the various segments of the public that orchestras might hope to lure to concerts) categorize performed music? Is classical music a category that the important demographic segments still use to think with? If you asked what “classical music” is, what would they say? What if you asked them about what kind of music orchestras play? Can getting in closer touch with the sometimes implicit categories that people use to classify musical types help orchestras learn how to talk about themselves and their programs more effectively? Tools: Field observation in orchestra lobbies, interviews and focus groups.

IV. The System

This section focuses on research on the *ecology* of classical music: on interactions among orchestras and their environments at the national and community levels.

IV-1. With whom do orchestras compete for customers? With whom do they compete for contributed income? With whom do they compete for the services of musicians, professional staff and trustees? If we define an industry as a set of organizations that produce products and services that consumers view as potential substitutes, to what industry do orchestras belong and with what other types of organizations do they share that industry? Potential methods: econometric analysis of revenues; organizational demography (survival analysis of competing populations); case studies and interviews; career histories of consumers, musicians, patrons, staff, trustees; longitudinal analysis of

orchestra share of the market for live performances of all kinds in several communities as a function of competitive dynamics (with controls for population demographics).

IV-2. With whom are orchestras positively interdependent? What are the means through which organizations gain access to players, staff, new repertoire, patrons, trustees, political influence and customers? In what forms of ongoing relationships (with community organizations, government agencies, other arts organizations and businesses) do organizations engage, and how are these relationships related to organizational performance and survival? Tools: Interviews, network analysis, community studies.

IV-3. What organizations (formal and informal) constitute the musical life of a community? In a given community, what relationships (defined not just as cooperation or rivalry, but as flows of persons, funds, or ideas) exist among music schools (or independent teachers), primary and secondary school art programs, colleges and universities, clubs and coffeeshouses, informal music venues, performers and composers in every genre, manufacturers and sellers of musical instruments and related technologies, support personnel (e.g., providers of lighting, sound, recording, and rehearsal space), local media, and orchestras? To what extent does the richness of a community's musical life and the density of relationships within the musical communities benefit symphony orchestras and, in turn, benefit from their presence and vitality? Tools: Geographic/spatial methods, organizational census techniques, fieldwork, organizational surveys, econometric/statistical analysis of panel data, comparison of matched communities with and without symphony orchestras.

IV-4. Many people believe that fewer students are taking music classes in elementary and high school than in the past, that the decline has been going on for some time, and that it influences the ability of orchestras to build new audiences. What does the evidence show about trends in in-school music classes over the past 50 years? How has the content of such classes and, especially, the exposure of student to classical music, changed during that period? How have trends varied, if at all, by school type, community socioeconomic level and racial composition, community type (inner city, suburb, or outside MSA), and region? If there *have* been declines in public-school music education, to what extent have these been compensated for (if at all) by community music schools, private pre-college programs, private instruction, or youth orchestras? What are the relative effects of direct participation in music-making and passive exposure on adult interest in and participation in music? Tools: Review of existing studies, including unpublished dissertations in educational research; archival research in a sample of school districts; analysis of SPPA data correlating youthful experiences with adult participation; case studies of effective orchestra programs.

IV-5. What can we learn from practices in Asia and South America about the development of appreciation for classical music and orchestras? Tools: Interviews, case studies of particular national programs, literature reviews.