



INITIATORS  RESPONDERS:

# A New Way to View Orchestra Audiences

A continuing discussion of issues, practices and changes in symphony orchestra organizations.



This is the fourth in a series of issues briefs designed to continue the discussion we began a decade ago with partners in the symphony orchestra field in the John S. and James L. Knight Foundation's Magic of Music initiative.\*

We encourage you to send comments about these topics and suggestions for future issues in this series to [publications@knightfdn.org](mailto:publications@knightfdn.org) or to visit [www.knightfdn.org](http://www.knightfdn.org).

The next issue will examine innovations in concert formats and why audiences respond to value-added classical music experiences. Future issues will explore other lessons learned and applied by the 15 participating orchestras as they worked in partnership with each other.

\*The name "Magic of Music" is used with permission of The Magic of Music Inc., which creates special moments through music for thousands of critically/terminally ill and handicapped children and adults throughout the United States.

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**Understanding *why* people attend orchestra concerts is an important first step in regenerating the audience base. The social context surrounding concert attendance – independent of the program itself – is a key to unlocking more demand. While some classical music lovers act on their interest and organize concert outings, three times as many do not. This essay considers how orchestras and other arts groups might capitalize on “Initiators” – people who enjoy creating cultural experiences for their friends and family.**

## **Initiators and Responders: A New Way to View Orchestra Audiences**

**Alan Brown**

Two observations from recent studies illustrate the paradox of latent demand for live orchestra concerts. Results of a national survey of U.S. adults conducted in 2001 by the John S. and James L. Knight Foundation suggest that half of the people who most enjoy going to classical music concerts do not act on their interest. In other words, their positive attitudes about concert going do not translate into regular attendance. What’s keeping so many classical music lovers at home?

The same study tells us, ironically, that some of the people who do attend orchestra concerts actually have negative attitudes about concert going. That some people in the audience are less than enthralled with the concert experience is old news. But how did they get there in the first place? What got them out of the house?

From opposite ends of the same continuum, both of these observations point to the presence of some other motivating factor that drives or impedes attendance – namely social context.

A mounting body of research suggests that who invites you to a concert has as much to do with your decision to attend as other factors such as the program, guest artists, etc. Indeed, the vagaries of social context cast a long shadow on demand for arts programs.

If you work with an orchestra, this means many of your potential attendees are sitting at home waiting for a friend to phone or e-mail with an invitation. They have a positive attitude about attending your concerts. But no matter how many brochures you send, it’s unlikely they’ll ever act on their interests without an external stimulus – an invitation from a friend or family member. They are “Responders.”

A smaller group of consumers is likely to do the inviting, research suggests. These “Initiators” – think of them as Type A cultural consumers – are the glue that holds together your audience. They do something instinctively that marketers in other sectors spend millions of dollars cajoling customers to do: recommend a product to friends.

As orchestras and other arts organizations struggle to attract audiences in an increasingly difficult marketing environment, this simple idea – that some people, quite naturally, are Initiators while others are Responders – offers hope for reinvigorating a marketing system in need of conceptual repair.

This essay analyzes the deep veins of social context surrounding arts attendance and sounds a clarion call for experimentation and investment in new marketing relationships. The first section describes the two customer typologies, drawing on Knight Foundation research and other recent studies. The second section discusses the connection between social context and personal selling. Examples illustrate how some orchestras use social opportunities to enhance the concert-going experience and attract new audiences. A final section imagines a new marketing paradigm based on Initiators and Responders.

## Initiators and Responders

First, some definitions. In the *Classical Music Consumer Segmentation Study*<sup>1</sup>, Responders are defined, quite simply, as people who “strongly agree” with this statement:

*“I’m much more likely to attend cultural outings if someone else invites me.”*

Think of Responders as the good folks who would love to attend your programs but who will probably never pick up the telephone to find out what seats are available or get a group together.

Initiators, on the other hand, are defined as people who “strongly agree” with the following statement:

*“I’m the kind of person who likes to organize outings to cultural events for my friends.”*

Initiators are constantly scanning the media for things to do. They are naturally inclined to bring people together – and don’t mind doing the organizing work (see sidebar, p.3).

In the survey of U.S. adults conducted in 2001, 18 percent of those considered to be “culturally active” (i.e., any arts attendance in the past year) identified themselves as Initiators using this definition, compared to 56 percent who identified themselves as Responders.<sup>2</sup> In other words, there are three times as many Responders as Initiators in the population of culturally active adults.

Surveys of 15 orchestra audiences conducted in 2002 revealed something different. Across

<sup>1</sup>Classical Music Consumer Segmentation Study: How Consumers Relate to Classical Music and Their Local Orchestras, Audience Insight LLC, published in 2002 by the John S. and James L. Knight Foundation.

<sup>2</sup>The two typologies are not mutually exclusive; people can identify as both or neither.

the 15 orchestras, 11 percent of subscribers and 13 percent of single-ticket buyers identified as Initiators. Put another way, the incidence of Initiators in the orchestra audience is *lower* than the incidence of Initiators among culturally active adults.

This seems counterintuitive, doesn't it? After all, one could reasonably expect actual ticket buyers to be more proactive in terms of bringing people together around concerts than the average culture-consuming adult.

Perhaps the subscription marketing relationship, which requires advance commitment and hefty sums of money paid up-front, is not conducive to initiating. After all, committing yourself to a schedule of concerts six to 12 months in advance is one thing, but getting a group of people with different lifestyles and priorities to commit to the same schedule is another matter entirely.

Ticket sales data and lifestyle trends point to shortened planning horizons, diversification of cultural tastes and heightened expectations of what constitutes a successful leisure experience.

Sooner or later, arts organizations must embrace the growing number of omnivorous and independent-minded single-ticket buyers who enjoy arts activities but won't subscribe.

## Understanding Initiators

Categorically, Initiators are attractive consumers, in terms of both behaviors and attitudes. According to the *Classical Music Consumer Segmentation Study*:

- They are twice as likely as those who are not Initiators to be "very interested" in attending concerts by the local orchestra (33 percent vs. 15 percent).
- They are more likely to be "extremely interested" in arts activities generally (24 percent vs. 8 percent).
- They are more likely to say that arts activities play a "major role" in their lives (58 percent vs. 23 percent).
- They attend significantly more performing arts events (7.9 per year vs. 4.1).
- They actively scan the media for things to do (58 percent are "always looking for cultural activities to do" vs. 16 percent).
- They are more likely to be very interested in learning more about classical music (26 percent vs. 9 percent).
- They are more likely than those who are not Initiators to be single (36 percent vs. 22 percent), younger (average age is 42 compared to 48), female (60 percent vs. 53 percent), and African-American (25 percent vs. 10 percent) or Hispanic (17 percent vs. 9 percent).

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## Social Context and Personal Selling

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“Our mission is the orchestration of social interaction, in which the performance is a piece, but only a piece, of what we’re called to do,” observes Ben Cameron, executive director of Theatre Communications Group.<sup>3</sup>

The importance of social interaction as a pretext for arts attendance might seem obvious. But in some respects it is revelatory, as well. For artists, arts managers and board members who focus quite naturally on producing the art, the idea that the art is not necessarily the primary cause for attendance can be disheartening.

If the promise of spending quality time with friends is the aphrodisiac that sells tickets, as Mr. Cameron indicates, then we must learn how better to mix that elixir.

Instead, arts groups spend a lot of money trying to convert Responders into Initiators. The research suggests, however, that as many as 85 out of 100 concert attendees do not have the psychological profile of an Initiator. In other words, most of our marketing messages reach people who are not inclined to organize cultural outings.

Responders are people who react to invitations from other people. Even though they may have positive attitudes about attending performances, converting their interest into purchase behavior is unlikely. Marketing arts programs to Responders is a little like trying to convince geese to fly north for the winter instead of south – they’re just wired differently.

Would it not be more productive to find a new way to market to Responders indirectly through their Initiator friends?

In a marketing system, Initiators look like resellers – middlemen in the sales equation between arts organizations and audiences. Remember Tupperware parties? The Fuller Brush man? The Avon lady? Turning customers into salespeople is hardly a new idea.

Viral marketing, the strategy of encouraging individuals to pass along a marketing message to others, is all around us. Pay attention to your junk mail and you’ll see all sorts of rewards for referring your friends to a product or service. Airlines, real estate agents and political candidates do it all the time. Any time you see a hot button on a web page that says “e-mail this message to a friend,” it’s not just the message you’re being asked to pass along, but your credibility as well. Most of us see this for what it is – a ploy to trade on our personal connections for someone else’s gain.

But arts programs are fundamentally different from most other products and services in several important respects. To start with, the product itself is art, a life-giving currency with transformative power. Inviting friends to an arts event isn’t at all like inviting them to a sales pitch for vacation time-shares.

<sup>3</sup>Ben Cameron, Executive Director, Theatre Communications Group, opening keynote address at the Dance/USA Winter Council meeting, January 2003 (available through Dance/USA).

Word of mouth remains a powerful source of information for cultural consumers because many people are starved for unbiased information about cultural activities. Objective information is hard to come by, and the sales language used by some arts groups doesn't accurately portray the real value.

When an unbiased suggestion comes with an opportunity to spend time with someone you care about, the cost-benefit equation gets a lot more attractive.

The benefits of arts participation accrue not only to the Responders, but also to Initiators. Focus-group research suggests that some Initiators derive meaning and satisfaction from the process of creating cultural experiences for their friends – the drama of putting it all together. The salesman, in this case, is richly compensated in social capital.

So why don't arts groups hold motivational meetings to empower legions of aspiring sales associates to make their quotas, enhance their incomes and earn the coveted pink Cadillac? Maybe they should.

In fact, many do, in one form or another. Consider, for example, the Ravinia Festival's Ravinia Dollars sales program, which began 50 years ago as a volunteer effort to generate advance ticket revenue for the popular summertime festival in suburban Chicago. The basic offer hasn't changed: for \$20 you get \$25 worth of Ravinia Dollars, which can be redeemed for tickets to any festival performance. For decades a volunteer chairperson in each Chicago suburb recruited a committee of ticket sellers who in turn sold ticket booklets to their friends.

"It was a very social thing," according to Julia Kirchhausen, Ravinia's director of marketing and public relations. Today, most of the \$500,000 in annual sales of Ravinia Dollars move through Ravinia's web site and box office and retail outlets such as Borders Books and Music, although volunteers are still out there selling.

Gala benefit committees also draw on the tried and true pyramid model of volunteer ticket selling. Committee members recruit table captains (not always Initiators, regrettably) who invite their friends to buy tickets. One of the cardinal rules of fund raising – that the solicitor should be a peer of the one being solicited – relates back to the power of social context; the chances of a favorable reply are much higher if the one doing the asking is esteemed in the eye of the prospect. And the personal appeal – a phone call or visit, with the right preparation – is much more effective than the absent appeal (or, worse, the digital appeal), again because of the social weight attached to the message.

The same peer principle of fund raising applies to everyday ticket selling. Although the commitment threshold (i.e., dollar amount) is lower, the potential benefits to arts groups are substantial.

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## Orchestrating Social Value

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Creating targeted social occasions around performances is a familiar value enhancement strategy for orchestras and other arts presenters and producers, although efforts in this vein yield mixed results.

Numerous orchestras offer preconcert receptions in connection with specific concerts programmed for new or casual attendees. The Baltimore Symphony, for example, offers martini bars and jazz in the lobby as a prelude to concerts in its popular Symphony with a Twist series, now in its third season. The Pittsburgh Symphony offers a similar cocktail-themed Thursday night series called Symphony with a Splash – billed as “the coolest networking happy hour” in combination with concerts.

The Atlanta Symphony’s new Symphony 360 program, designed as an introductory experience for newcomers to classical music, includes a socializing component. But Charles Wade, the ASO’s vice president for marketing and communications, is looking beyond twists and splashes.

“We’re not hanging our hat on that,” says Wade. “We’re trying to get beyond martinis and focus instead on opening a door for people who want to learn how classical music happens.”

A somewhat different approach to using social context as a lever for audience development is the Louisiana Philharmonic’s Find the Phil series, which was designed specifically as a viral marketing event for younger, web-savvy singles and couples. Small ensembles are featured, playing unusual repertoire. Each concert takes place at a different location around New Orleans, but the location isn’t announced right away. Instead, the orchestra provides a series of clues on the FindThePhil.com web site and via e-mail. People are asked to forward the messages to friends who, in turn, are invited to register on the web site. At the concerts everyone (including the Responders who accompany their friends) gets registered, due in no small part to a ticket discount incentive.

“We pretty much get everyone to give us their contact information,” said Dennis O’Hara, the LPO’s marketing director.

Although these programs are not designed specifically for Initiators, they offer ticket buyers a value enhancement in the form of a social opportunity. Younger classical consumers, Knight Foundation research suggests, are more likely to attach importance to the social aspect of attendance, especially if they are not familiar enough with classical music to select programs based on repertoire. The social promise, although tangential to the music, might be what triggers attendance.

The success of such efforts is limited, however, to the extent that those who attend are strangers to begin with. At a typical gathering of 300 young professionals, for example,



there may be 100 or so social cells – small groups of people who make plans to attend together. Watch carefully and you may notice that not a great deal of intermingling takes place at these types of events. Conversation tends to happen within the individual social cells. Often, there is not a lot of time (or inclination) to make new friends, if that is a desired outcome.

Focus group data and individual interviews with culturally active adults suggest that many use arts programs as a means of investing in their personal relationships.<sup>4</sup> While arts organizations sell artists and repertoire, consumers are buying spiritual journeys, emotional therapy and better relationships. In other words, concertgoers are buying something different from what they're being sold, from a value standpoint.

If social context is the spark that fires so much of arts participation, then future audience growth requires structural improvements in the types of marketing relationships we offer, even holding aside product issues (i.e., what's happening on stage, which will be addressed in the next Issues Brief). What's needed, and quickly, are new models for customer-centered marketing relationships with the goal of offering consumers a menu of involvement opportunities that fit into their lifestyles and reinforce their self-perceptions.

A good place to start might be designing a marketing support system for Initiators.

## Imagining a New Sales Paradigm

Imagine if you could know tomorrow which of your customers are Initiators. Imagine if a new field in your customer database mysteriously appeared, flagging those who like to organize cultural outings for their friends. Or imagine you've just concluded a prospect campaign to identify Initiators and you have in a box 2,000 postcards with the names and addresses of people who like to organize cultural activities.

What would you do with them? If you could design a new marketing program for these people, what would it look like? How would the marketing relationship play out? How frequently would you communicate with them? What offers would you create for them and, by extension, their Responder friends? How would you reward them to encourage higher and higher levels of participation?

Identifying Initiators is the first challenge. High frequency single-ticket buyers and customers who purchase more than three or four tickets at a time might be good candidates. A pointed and comprehensive exchange of information is necessary in order to get the information needed to begin a new relationship at a deeper level. This might take the form of an opt-in online survey or a mail-return postal survey. These Initiator profiles would be loaded into a database, ideally the same one that holds ticket sales data. The profile questionnaire might include:

<sup>4</sup>Also see *The Values Study: Rediscovering the Meaning and Value of Arts Participation*, by Alan Brown, a report from Connecticut Arts Division on qualitative research conducted by 20 Connecticut arts groups in 2003.

- Level of agreement with the Initiator and Responder statements
- Level of interest in participating in a new special service for Initiators
- Connections with the people you like to invite (e.g., church friends, neighbors, school alumni groups, coworkers)
- Desired frequency of activities and level of logistical support desired
- Types of activities desired (e.g., symphony, theater, opera, ballet, art exhibits, lectures)
- Specific preferences for artists, genres, repertoire
- Attitudes about contemporary works
- Level of interest in different types of themes (e.g., spirituality)
- Special needs in terms of access, seating preferences, etc.
- Interest in value-added educational activities

Prior to collecting this information, of course, you need to think about the relationship you're offering to these newly found Initiators. Will the relationship be managed online, or will you offer the option of a telephone relationship with a specially trained concierge or cultural coach (sales associate) who handles their account? Would they like to sign up to receive personalized reminders about upcoming events or left to decide on their own?

## You Do the Math

Say that a typical Initiator brings six people to your events five times a year. That's 30 tickets annually. They might be willing to pay full price if you offer them good seats and high quality personal service.

The typical subscriber, in contrast, might buy a pair of subscriptions for a series of six performances. That's 12 tickets annually.

If these assumptions hold true, then one Initiator is worth three subscribers on an annual basis, holding aside the fact that most subscriptions are discounted. Compared to what is spent acquiring a new subscriber, arts groups should be willing to spend 250 percent more on acquiring a new Initiator.

A more relevant analysis from an economic standpoint would be the discounted present value of the lifetime Initiator relationship – including second order attendance (by Responders) attributable to the Initiator.

Would they like help when it comes to getting invitations out to friends and fulfilling ticket requests, or do they like to handle the logistics themselves? Some Initiators, research suggests, prefer to handle the logistics of RSVPs, buying tickets and getting reimbursed (or not), because the process of doing so, independent of the outcome, helps them feel that they're doing something worthwhile for their friends.

The key to designing successful relationships with Initiators is giving them the flexibility to interact with you the way they want to. Audience survey results indicate that much of the core audience for traditional arts programs is not yet acclimated to online purchase, which is still very much correlated with age.

The objective is to build trusted relationships with Initiators over time, to the point where you can contact them on a regular basis to suggest programs for their group, and even handle the inviting and fulfillment for them, if they choose.

Imagine receiving an e-mail from Carla, one of your best friends, asking if you'd like to join her for an upcoming performance, with dinner beforehand. All you have to do is check your calendar and reply, clicking on a link that takes you to Carla's RSVP web page, where you can see who else is coming, decline or accept the invitation, and pay for your ticket by credit card.

Unknown to you, Carla's concierge at the symphony actually sent out the e-mail invitations (with permission from Carla, of course) and is fulfilling the ticket orders and making sure everyone gets seated together. Carla, who is in Hong Kong on business, gets updated electronically with an RSVP list.

This scenario is not as far-fetched as you might think. In fact, it's just about here. Several important new efforts are under way to create online invitation tools for orchestras and other arts groups, drawing on the basic networking ideas behind popular web sites like [evite.com](http://evite.com) and [friendster.com](http://friendster.com).

The Louisiana Philharmonic, in partnership with Carrollton Technology Partners of New Orleans, is working on new software for its web site that facilitates the process of inviting others to concerts. A demo version can be viewed at [group.lpomusic.org](http://group.lpomusic.org). The new application (unnamed as yet) allows people to send a customized invitation, similar to an online greeting card, to a list of friends' e-mail addresses. The Initiator may elect to buy everyone else's tickets or opt for the pay-if-you-go alternative. Response tracking is automated. The LPO also plans to use the new program for fulfilling ticket orders generated through group sales.

Separately, six orchestras are collaborating with consultants Rebecca Krause-Hardie and Jon Hardie of SymphonyWorks on a new web-based application for Initiators, called the Organization Relationship Building Invitation Tool (ORBIT). A prototype version can be viewed at [www.artsdev.org](http://www.artsdev.org) (see sidebar, p.10).

## ORBIT: Innovation from Research

The new Organization Relationship Building Invitation Tool (ORBIT), developed by SymphonyWorks for a partnership of six orchestras, is a marriage of technology, sociology and culture. It is one of the few innovations on the horizon that could lead to audience growth among younger, culturally active adults. The project grew out of an orchestra partnership created through Knight Foundation's Magic of Music Initiative, including the orchestras of Long Beach, Kansas City and Detroit.

The orchestras' marketing directors wanted to take advantage of research findings related to social context, and saw an opportunity in Initiators and Responders.

"Research said that a lot of potential attendees just need to be asked," said Julie Stapf, director of marketing and sales for Detroit Symphony Orchestra Hall. "If people just need to be asked, then we need a new tool that helps people do the asking."

To launch the project, SymphonyWorks put together an entrepreneurial nonprofit/commercial investment group and invited three more orchestras (Philadelphia, Atlanta and St. Louis) to join.

"The first point of contact with many customers is the web," notes Rebecca Krause-Hardie, who designed ORBIT with Large Animal Games, a New York-based web development firm. "ORBIT provides a way for Initiators to start a relationship with the orchestra online, on their own, and at the moment of first contact."

As customers surf an orchestra's web site and select a program, they are prompted with an unexpected proposition: "Would you like to invite friends?" Clicking on the prompt takes them into the ORBIT system. Once in ORBIT, they can personalize an invitation and e-mail it to any number of friends. ORBIT users can remain anonymous or register to use other features, such as automated response tracking. To complete the sale, users are directed back to the orchestra's online ticketing system.

What's so attractive about these software innovations is their potential usefulness to a wide range of cultural organizations, not just orchestras and not just large institutions. The same applications might be useful and accessible to smaller organizations, although this raises a thorny issue.

If you're planning a cultural outing with friends, it's nice to have a couple of options in case, for example, a particular concert date is inconvenient for one reason or another. Consumers benefit from choice. Because of this, marketing programs for Initiators are better suited for large organizations that can offer a full menu of programs from which Initiators may choose.

On a practical level, any marketing program for Initiators will be limited by the amount of available programming. Arts groups that offer only a few performances a year will have difficulty engaging Initiators in a more or less fluid relationship. The logical solution, one might argue, is to add nonperformance activities to the menu, such as social and educational activities, or, better yet, combine program offerings across institutions.

The marketing directors of the six test orchestras contributed much to the initial design. The group wanted to make the experience feel safe. Thus, the ORBIT system treats the exchange of e-mail between Initiators and Responders as private and confidential, which means the orchestras cannot have the e-mail addresses of the Responders without permission.

The orchestras can log into the site, post performance information, update sales messages and change the look and feel of their design templates.

According to Stapf, the low risk to the orchestra – the low level of staff support required to maintain the ORBIT system and the relatively low cash outlay on a per-orchestra basis – made the decision to get involved easy.

As with most technological innovations, there are many challenges and a long list of features that will have to wait to be developed for later versions of the software.

The appeal of ORBIT as a self-administered online tool may be attractive to orchestras, but it is likely to appeal to a relatively narrow but growing segment of classical music lovers who are agile in the online environment. It would be interesting to see a parallel track of development for a new marketing program designed for Initiators more comfortable with a human customer interface, more along the lines of the group sales model.

Another challenge associated with ORBIT is that it creates a database of Initiators separate from the ticketing and other databases an institution might use for donors, e-mail addresses, etc. Krause-Hardie says that future versions of ORBIT will include more transparent features such as the ability to make restaurant reservations, added administrative flexibility in customizing invitation templates, and integrating the ORBIT data gathering tool with other customer data. Eventually, Krause-Hardie hopes, the tool will be used by consortia of arts groups who see value in jointly marketing their programs.

## **Toward a More Customer-Centered Marketing Model**

Consumers struggle to consolidate information about cultural offerings in their area. In many cities, there's just too much information to absorb, whether it arrives by snail mail, e-mail or via the media. As a result, a lot of desired cultural events slip through the fingers of even the most determined cultural consumers.

This is an opportunity staring us in the face. As the number and type of cultural activities available to the public increase, consumers need more and more help taking advantage of them. How long it will be until a commercial ticket broker steps into this market space with a premium service, including social and educational enhancements, while nonprofits wrestle with each other?

It's time to consider new possibilities. The fundamental approach to selling arts programs

hasn't changed in 40 years. Subscription is just one type of customer relationship, and it is clear that we need to build value around other kinds of marketing relationships as well, particularly those that reward loyalty without advance commitment.

Why shouldn't orchestras be able to sell tickets to the opera or ballet, or vice versa? Why wouldn't orchestras organize music clubs, friendship groups that meet monthly, much like book clubs, to listen to music, meet with musicians, and attend concerts together? The linchpin, of course, is the organizer – the person who initiates the group and holds it together.

Assume for a moment that you are an Initiator, and imagine calling your trusted cultural concierge or logging into an automated system like ORBIT and having a full choice of theater, dance, music, visual arts and literature activities – with the possibility of related educational and social activities – for your next outing. This is the future of cultural marketing.

Today's orchestras need new models of customer-centered marketing and new ways of engaging audiences on their own terms. Consumers are growing accustomed to designing their own customized experiences. As emphasis shifts to value, more arts leaders will see how they might benefit from each others' missions, and more will understand that, unlike Ford and GM, the symphony wins when the opera sells a ticket.

Alan Brown is a researcher and consultant in the nonprofit arts sector. Prior to forming his own consulting practice, Alan served as president of Audience Insight LLC and associate principal of AMS Planning & Research Corp., where he studied audiences, visitors and patterns of cultural participation in almost every major market in the United States. From 2000 to 2002, he directed the *Classical Music Consumer Segmentation Study* for the John S. and James L. Knight Foundation and 15 orchestras.

Copies of the *Classical Music Consumer Segmentation Study* are available through Audience Insight. To order copies, e-mail [info@audienceinsight.com](mailto:info@audienceinsight.com).

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