Audience development in the classical and contemporary music sectors in Quebec: A response to market fragmentation?

By Xavier Roy, André Courchesne and François Colbert (2014)

Chaire Rémi et Carmelle-Marcoux, HEC Montréal
Observatoire international de création et de recherche en musique, Université de Montréal

Abstract

Audience development has been, for many years, a significant challenge and a topic of research in the high arts, especially for the classical and contemporary music sectors. The patterns of classical music consumption were carefully analyzed since Belk and Andreasen (1980) identified the factors of future attendance and Paterson and Kern (1996) identified eclectic behaviors among classical music attendees. Since then, orchestras, opera houses and new music groups have developed cross-marketing campaigns with popular music as well as other art forms, optimized ticket pricing and subscription offers, focused on specialized and free events to reach potential new audiences, and developed a number of marketing strategies to reach out to younger audiences, including through new media.

Based on financial data from publicly funded classical and new music groups in Quebec, this research shows a general fragmentation of public support, reflecting a larger trend of market fragmentation in the performing arts. However, expected decreases in subscriptions and, to a lesser extent, single tickets' revenues were not confirmed. By analysing the data according to the organizations' level of income and type of music, the research shows no significant change in marketing expenses, except for a shift towards audience development activities, especially for large scale organizations. This shift may be an indication that music organizations are responding to market fragmentation by reallocating their marketing expenses towards long-term audience development strategies instead of traditional publicity and advertising.

Introduction

Audience development has been a significant challenge and a topic of research for many years in the high arts, especially in the classical and contemporary music sectors. The patterns of classical music consumption were carefully analyzed since Belk and Andreasen (1980) identified the factors of future attendance and Paterson and Kern (1996) recognized eclectic behaviors among classical music attendees. Moreover, it seems that high arts organizations are confronted to new challenges since the turn of the 21st century. The classical music audience is traditionally highbrow, more educated, wealthier and older (Tepper et al.: 2008). This client group is rapidly aging (Donnat, 2011, Garon, 2009) and the need to attract younger music attendees is more accurate than ever: the average age of the opera patron is now estimated to be around 60 years old (Agid and Tarondeau: 2010) and, based on 2006 data from the Metropolitan Opera, that age is increasing 'at the rate of a year every year' (Higgins: 2011).

As well, a number of arts organizations around the world report a change in the consumption patterns of their clientele, identifying lower responses to advance sales and subscription offers. In recent years, many major classical and contemporary organizations in North America had to cease their activities for financial reasons, many of them because of the increasing difficulty to retain patrons (particularly subscribers) and to attract new ones (Los Angeles Times: 2014).

Amy Singer Kaissar described how challenging this trend has been for arts organizations in the United States:

> Nationwide, a seismic shift in ticket buying trends is underway. The subscriber, the member, and the season ticket holder are not renewing. They may still be coming, but they are not purchasing tickets up front and in bulk. This shift, which began in the late 1990s and continues today at an ever-increasing rate, cannot be ignored. This sea change affects theatres, museums, symphonies, opera companies, trade organizations, sports teams and more. For theatres, long dependent on a guaranteed audience who pays up front, the waning is critical. In order to halt this loss of subscriptions, organizations must keep up with the times (Kaissar: 2005).

In Quebec, the box office pressure for classical and contemporary music organizations has been traditionally lower than in the United States, since public support accounts for a larger share of operating revenues. However, some authors have argued that strong public support in the performing arts might also lead to oversupply (Urfalino: 1989, Throsby: 2003). Lower entry-level barriers encourage new organizations to get in the market to fulfill the new eclectic tastes of audiences, resulting in higher artistic and audience fragmentation (Courchesne & Colbert: 2012).

Market fragmentation in the performing arts has been an important topic of debate amongst artists, arts administrators and analysts for over 15 years in Quebec (Cloutier: 1999). As well, an increase in the number of publicly funded organizations and a relatively stable demand have had an impact on the health of the performing arts sector in Quebec (Baillargeon: 2014). For example, a recent analysis of the arts market conducted by the newspaper of record Le Devoir, indicates that the number of plays presented yearly by theatre companies in Quebec more than doubled over a 22-year period, while the number of performances increased only by 14% (Le Devoir: 2014).

This research will show that supply of classical and contemporary music in Quebec is increasing while demand is stable, bringing a higher fragmentation in terms of public support. Even if this increase is bringing more diversity and innovation to the artistic practice, it may result in increased competition for music consumers' time and resources, making it harder for them to select and support their favorite artists, especially in niche markets (Schwartz, 2008).

Despite the economic recession, single ticket and subscriptions revenues have remained globally stable. As well, contrary to expectations, the higher market fragmentation did not result in increased marketing expenses as a share of operating budgets. However, classical and contemporary music organizations are spending a larger share of their marketing budgets on specific audience development activities, moving away from traditional publicity and advertising, possibly to respond to market fragmentation through long-term audience development strategies.

Methodology

For the purpose of this research, all classical and contemporary music organizations receiving operating grants from the main public funding agency in Quebec, the *Conseil des arts et lettres du Québec*[1] (CALQ) were included in the survey. These organizations were classified according to the type of music they produce and their budget size, as shown in Tables 1 and 2. This type of segmentation will allow us to propose a comparative analysis of subsectors of classical and contemporary music and identify how each sector responds to market trends.

Table 1: Number of classical and contemporary music organizations supported by the CALQ 2005-2006 to 2010-2011, according to type of music

	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Chamber Music	4	5	4	11	12	11
Contemporary Music	9	9	9	20	23	23
Early Music	5	7	7	8	8	7
Symphonic Music and Opera	15	15	15	18	19	19
TOTAL	33	36	35	57	62	60

Table 2: Number of classical and contemporary music organizations supported by the CALQ 2005-2006 to 2010-2011, according to budget size

	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
Less than $250,000	8	9	11	23	32	29
$250,000-$499,999	8	8	6	16	11	12
$500,000-$999,999	7	9	8	7	8	9
$1M and over	10	10	10	11	11	10
TOTAL	33	36	35	57	62	60

The data was collected through the arts organizations' final reports to the CALQ based on their audited financial statements. Data includes total revenues and expenses, subscriptions' and single tickets' revenues as well as communication, promotion and marketing expenses, including audience development activities.

[1] The *Conseil des arts et lettres du Québec* (CALQ) was established in 1992 after the publication of Quebec's first cultural policy. As an arm's length agency, it supports artists and arts organizations in architecture, cinema, circus, craft, dance, digital arts, multidisciplinary arts, music, storytelling, theatre, video, visual arts and writing.

Analysis

1.1 Evolution of public funding for classical and contemporary music organizations

The first observation of this research is the increase in the number of organizations receiving CALQ operating grants, which almost doubled between 2005-2006 and 2010-2011. In fact, the number of classical and contemporary music organizations receiving operating support jumped from 33 (2005-2006) to 60 (2010-2011), with a peak at 62 organizations in 2009-2010 (Table 1). Since the total amount distributed in operating grants in the music sector was quite stable, this resulted in a general decrease in the average operating grant (Figure 1). Between 2005-2006 and 2010-2011, the average operating grant in the music sector went from $468,728 to $207,114 (in constant dollars), representing a 56% decrease over a six-year period (Figure 2).

This increase in public funded organizations seems generalized in all CALQ's operating programs: the number of publicly funded organizations in all disciplines increased from 326 in 2003-2004 to 431 in 2010-2011 (CALQ: 2003-2011). During the same period, the total amount distributed in operating grants in all disciplines by CALQ increased at a slower pace, resulting in a 24,7% decrease in the average operating grant.

Figure 1: Increase rate in the number of music organizations receiving CALQ operating grants compared to the total music operating grants increase rate
2005-2006 to 2010-2011 (constant dollars)

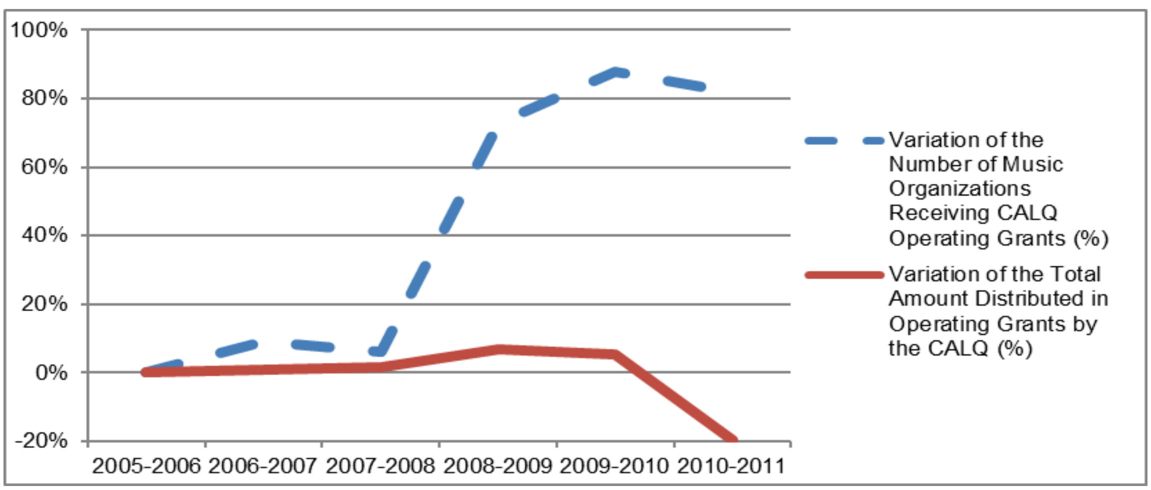
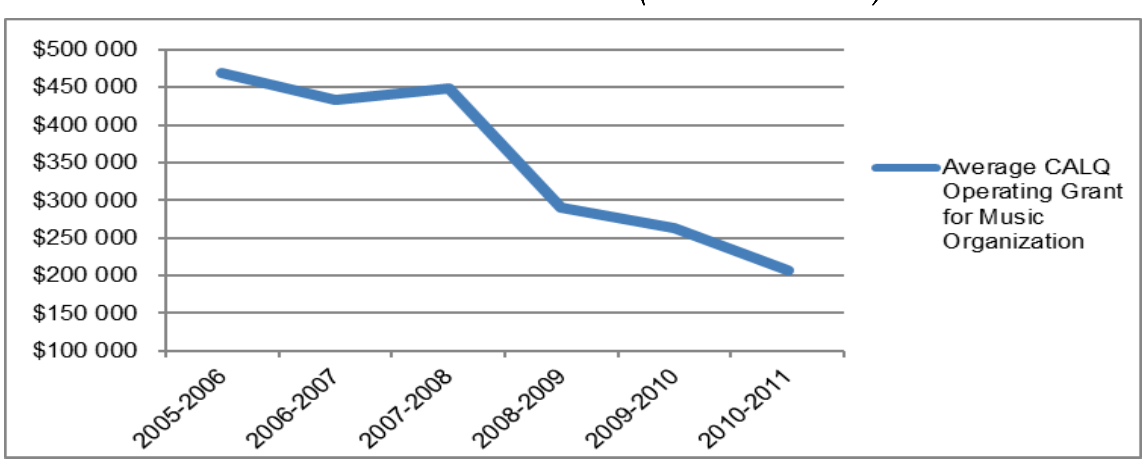


Figure 2: Decrease in the average CALQ operating grant to music organizations
2005-2006 to 2010-2011 (constant dollars)



As shown in Figure 1, there was relative stability in both the number of publicly funded organizations and the amount available in operating grants until 2007-2008. In 2008-2009, the data shows a significant increase in the number of publicly funded organizations in Quebec, following a revision of all major operating grant programs:

> This year [2008-2009], the Council revised its financial aid programs according to the needs of an artistic practice shaped by regional, generational and technological factors, while taking into consideration aboriginal realities, cultural diversity and the importance to adjust support to creation and touring. […] Concrete accomplishments resulted from this operation: by making its programs more accessible to emerging artists and authors, as well as organizations incorporated within the last five years, CALQ supported increasingly their excellence and dynamism. As a result, the number of funded organizations doubled (CALQ: 2008-2009 [translation]).

As stated in this excerpt, CALQ focused its funding programs towards younger artists and organizations, probably to respond to the challenges of younger artists to bring their career to a higher level without public support (Doyon: 2014). As shown in Table 1, the significant increase in the number of publicly funded music organizations started in 2008-2009 and was concentrated among small budget-size organizations (*Less than $250,000*). Table 2 indicates that, according to the type of music, the main increase in the number of publicly funded organizations took place in contemporary and chamber music, where public support was extended to emerging organizations with smaller budgets

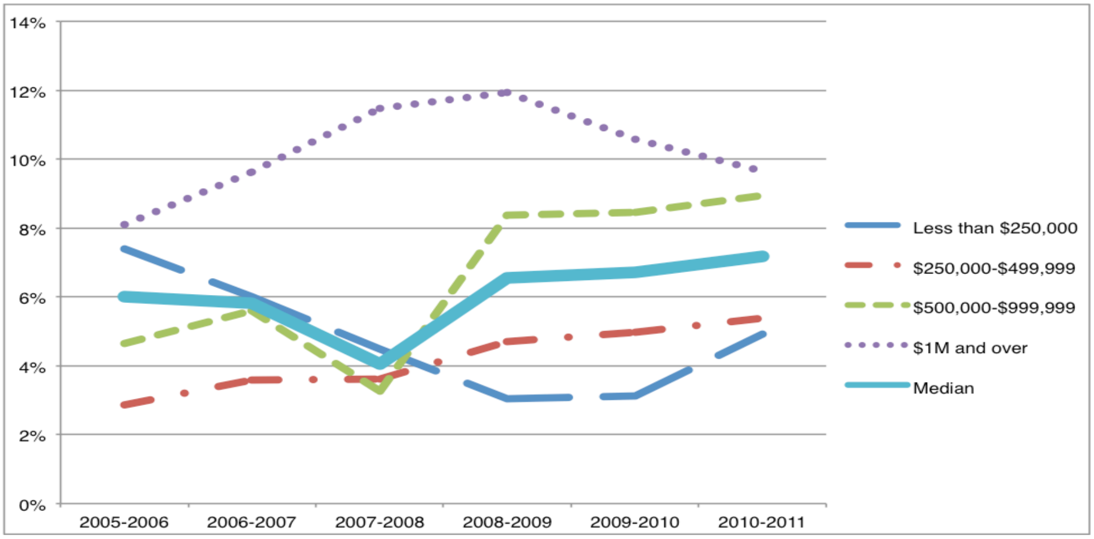
1.2 Evolution of ticket sales and subscriptions

The increase in the number of publicly-funded organizations and the decrease in the average operating grant are raising a number of questions related to the market of classical and contemporary music in Quebec: Did this increased fragmentation have an impact on single tickets' and subscriptions' sales revenues? If so, are the results more pronounced for a type of music or a revenue category?

1.2.1. Single tickets' sales

The analysis of single tickets' sales reveals that the bigger the organization's budget, the more it will rely on these sales as a share of its revenues. For example, over the 2005-2006 to 2010-2011 period, single ticket sales represented between 8% and 12% of large organizations' operating budgets (*$1M and over*). For smaller organizations, single ticket sales represented between 3% and 7% of their total budget. The median share of single tickets' sales has varied between 4% and 7% over this period.

Figure 3: Share of single ticket sales in total revenue
by size of income (constant dollars)



The larger share of large organizations could be explained by a more established client base often built up over decades (Flanagan: 2012). As David Patmore noted: “long-established organizations are likely to have developed comprehensive and productive print distribution lists that have been pruned and grown through trial and error, and constant review” (Patmore in O’Reilly *et al.*: 2014).

The slow decrease of the share of single ticket sales for large organizations (*$1M and over)* started one year after the recession in 2008-2009. Apart from the recession, this slow decrease could be related to a decrease in disposable income in Quebec (Institut de la statistique, 2012) and in time available for leisure activities (Institut de la statistique, 2013). Also, the steep decrease of the share of single ticket revenues for small organizations (*Less than $250,000)* occurred simultaneously to the increase in the number of publicly-funded organizations in this segment: as the number of organizations in this segment almost quadrupled over the period (Table 2), their single ticket sales less than doubled. Market fragmentation seems to have increased competition for single ticket sales for smaller organizations.

The analysis of ticket sales according to the type of music reveals that opera houses and symphony orchestras (*Symphonic Music and Opera*) have the highest share of single ticket revenues: from 2005-2006 to 2010-2011, they represent between 9% and 13% of their total revenue (Figure 4). On the other hand, contemporary music organizations rely very little on ticket sales: over the period, their ticket sales represented less than 2% of their operating budget.

Figure 4: Share of single ticket sales in total revenue
by type of music (constant dollars)

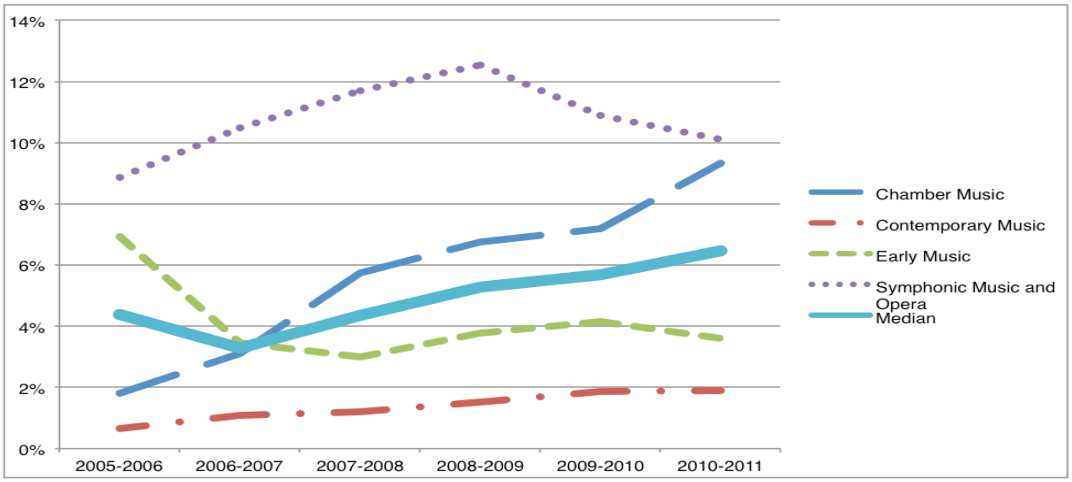


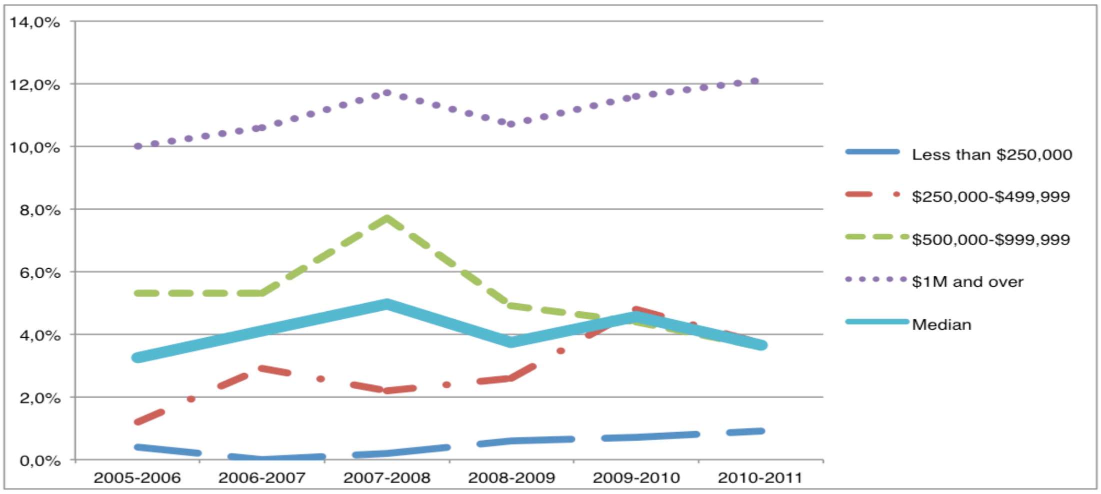
Figure 4 shows as well that for *Early Music*, *Chamber Music*, *Contemporary Music* segments, single ticket sales represent, on average, less than 10% of their total revenues, revealing their high reliance on public support and other types of revenues, as well as the high financial risk of self-production for organizations evolving in niche markets. However, the share of single ticket revenues in the *Chamber Music* segment increased steadily from 2% to 10% over the period. In this segment, increased fragmentation in the number of publicly supported organizations resulted in a decrease of average total revenue and an increase in the share of their ticket sales in relation to their total revenue.

1.2.2. Subscriptions

The traditional business model for music organizations has been based on subscriptions for a long time, as pointed out in Danny Newman's book *Subscribe Now!* (1977). However, considering the diminution of leisure time and disposable income (Institut de la statistique: 2013), we should anticipate a decrease in subscriptions' revenues, especially for organizations with the highest share of revenues from this source.

Figure 5 shows that, over the 2005-2006 to 2010-2011 period, the median share of subscriptions in total revenue has been relatively stable. Surprisingly, the large organizations' segment has increased its revenues from subscriptions, while the higher fragmentation seems to have a stronger impact on smaller organizations' subscription revenues.

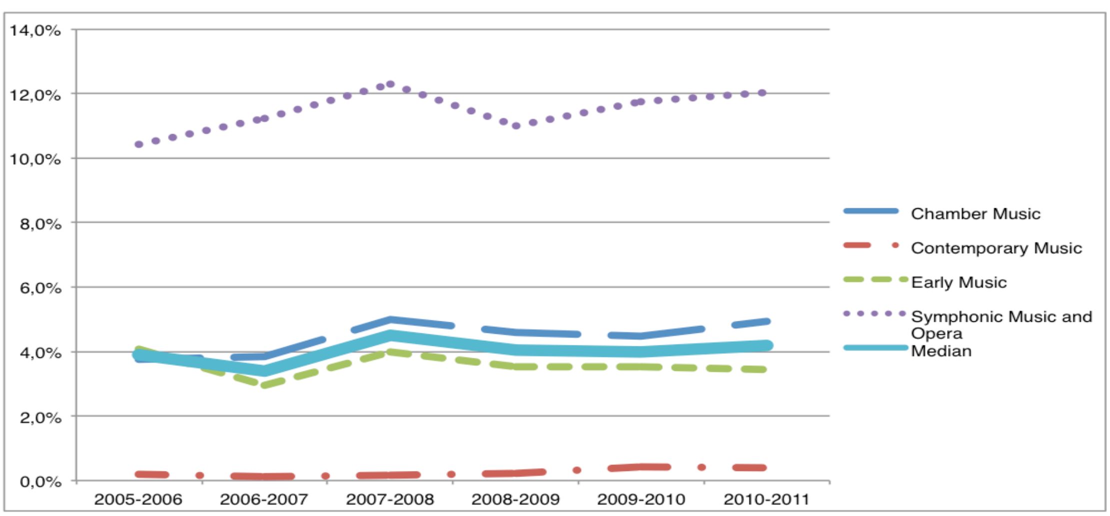
Figure 5: Share of subscriptions in total revenue, by size of income



The analysis of subscription revenues on total revenue, when compared by type of music, shows stability over the period, except for the recession year (2008-2009). However, even if the number of publicly-funded organizations more than doubled over the period for contemporary and chamber music, the share of subscription revenues over total revenue in these segments was stable.

In addition, Figure 6 shows a major distinction among music organizations: contemporary music organizations barely sell subscriptions, whereas symphony orchestras and opera houses have the highest share of subscriptions in their total revenue. There seems to be very distinct practices of subscriptions in each segment of music, which could be explained by the length of seasons and the diversity of venues for a number of chamber, contemporary and early music ensembles.

Figure 6: Share of subscriptions in total revenue, by type of music



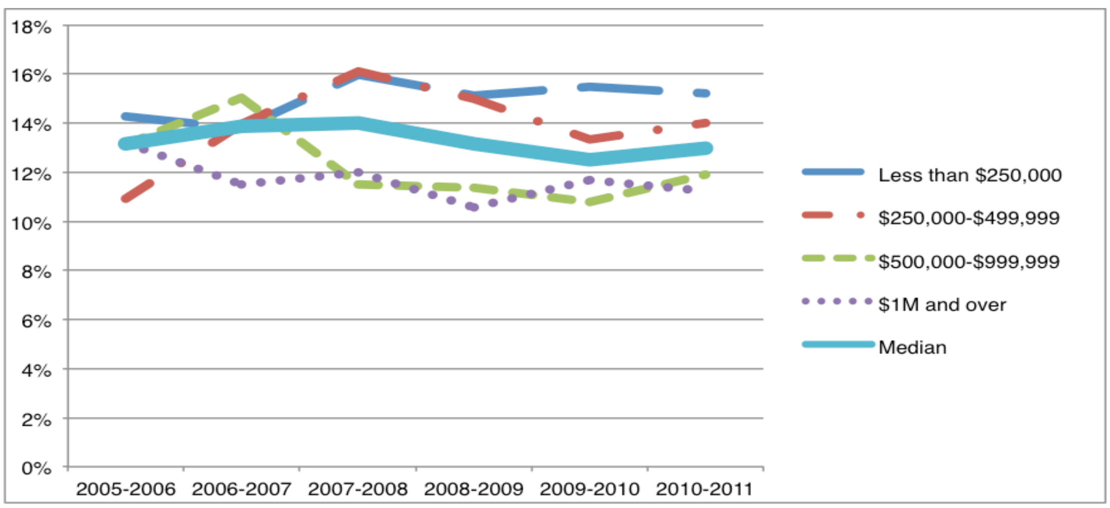
1.3. Marketing and audience development expenses

Previous results showed that market fragmentation in music had a relatively low impact on box office revenues: subscription revenues were relatively stable as a share of total revenues and single tickets' sales decreased slightly for larger organizations, starting in 2008-2009. The next section analyzes how organizations managed their marketing and audience development budgets to differentiate themselves in a saturated market.

1.3.1. Marketing expenses

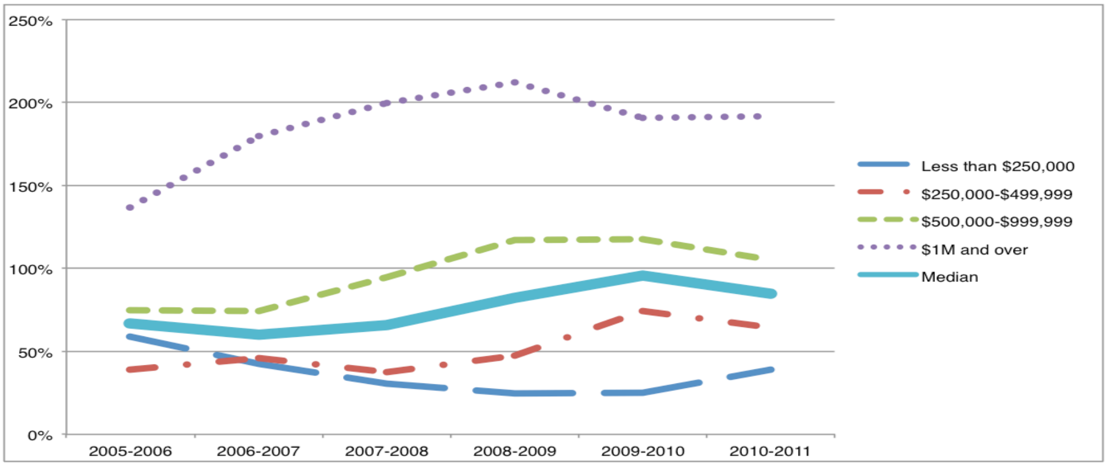
Figure 7 shows that the size of an operating budget does not have a major impact on the share of the budget dedicated to marketing expenses. This percentage has been relatively stable for all sizes of organizations with a median value between 13% and 14%. Therefore, market fragmentation did not have a major impact on the proportion of marketing expenses spent by classical and contemporary music organizations.

Figure 7: Share of marketing expenses in operating budget, by size of income



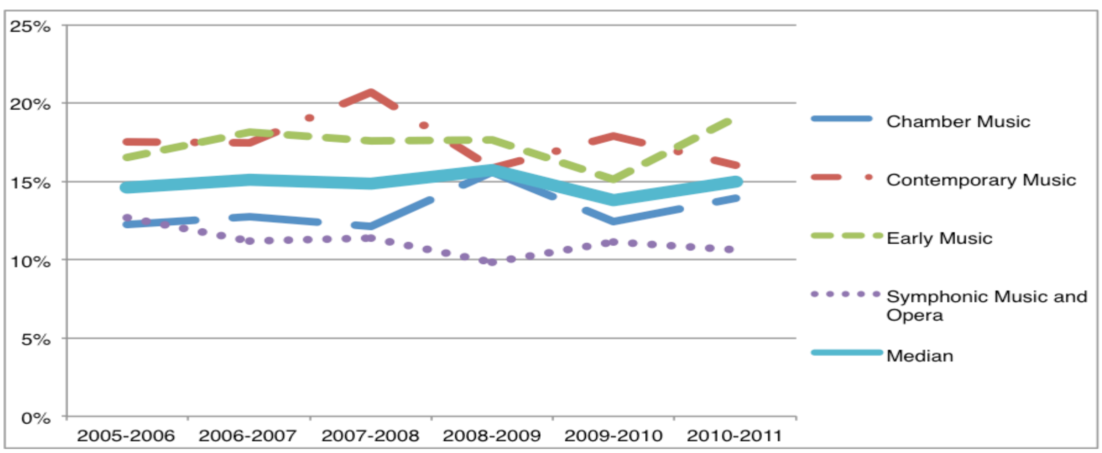
However, an analysis of the return on marketing expenses (box office revenues/marketing expenses) indicates a peak year in 2008-2009 for large-scale organizations. Figure 8 shows that the two larger segments did not regain this level after the recession: globally, these organizations have reduced their marketing expenses, but not in the same proportion as their box office revenues declined, leading to a lower return. As stated in *The Perilous Life of Symphony Orchestras* (Flanagan: 2012), the recession as well as increased competition for time and money are probably linked to the diminishing returns of these investments.

Figure 8: Return on marketing expenses, by size of income



When compared by type of music (Figure 9), the share of marketing expenses is higher than the median for *Early Music* and *Contemporary Music*. These organizations have very specialized repertoires and will probably tend to attract customers who are already interested in their specific repertoire. Considering that the share of single ticket sales for the *Contemporary Music* segment was very stable during the period and that the share of marketing expenses in the operating budget varied more, it seems that this niche audience is probably less sensitive to marketing campaigns than other segments.

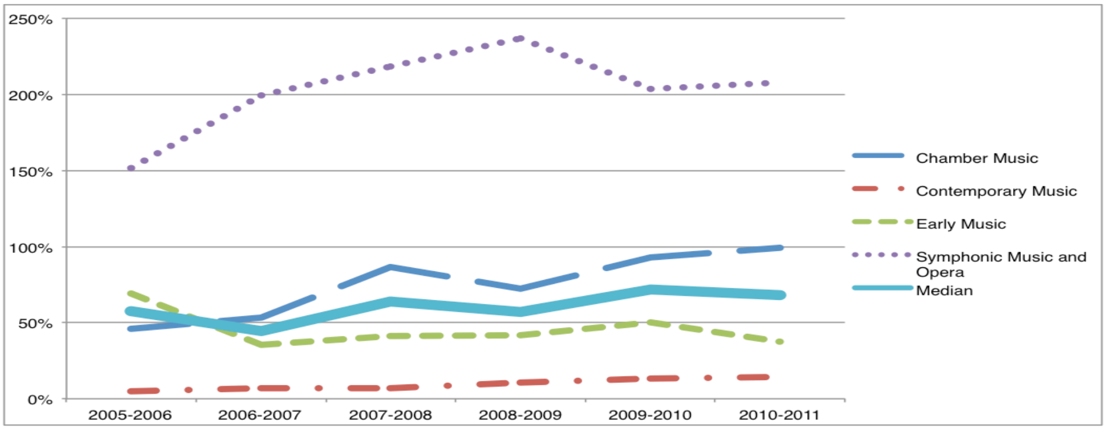
Figure 9: Share of marketing expenses in operating budget, by type of music



The analysis of the return of marketing expenses indicates, however, that *Chamber Music and Contemporary Music* have an increasing return of their marketing expenses on box office revenues (Figure 10). On the other hand, *Early Music* organizations have a declining return, explainable by stable market expenses combined with a decline in ticket sales for the most recent year. Finally, *Symphonic Music and Opera* organizations have the highest return on marketing expenses, which increased until 2008-2009, led by an increase in ticket and subscription revenues and stable marketing budgets. The negative variation between 2008-2009 and 2010-2011 may be explained by decreasing single ticket revenue for this segment

(Figure 4).

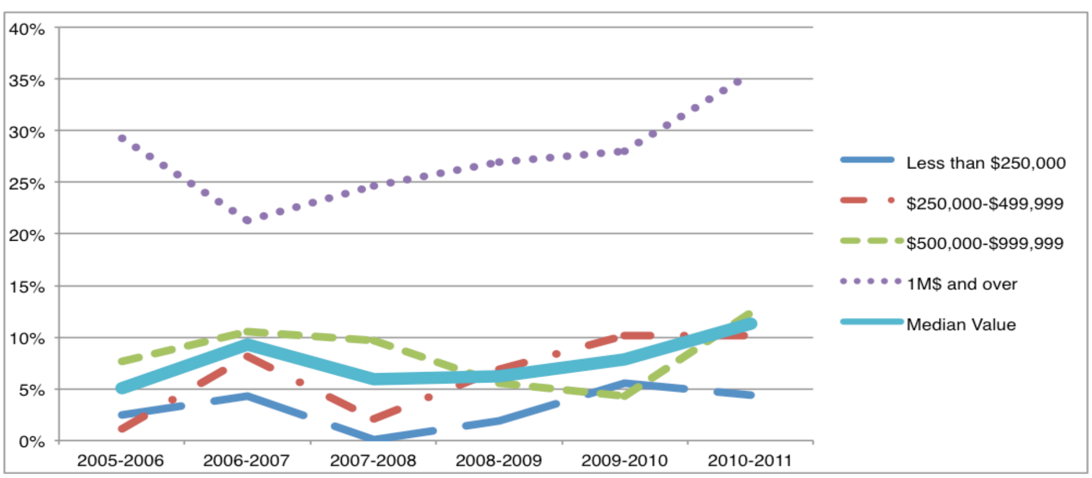
Figure 10: Return on marketing expenses, by type of music



1.3.2. Audience development expenses in total marketing expenses

Audience development activities include educational and cultural mediation activities in partnership with schools and associations, pre-concert lectures, public rehearsals, subscription campaign expenses, excerpts of concerts in public spaces, lessons and conferences, among others. As seen in Figure 11, the larger the budget of a music organization, the larger the share of marketing expenses allocated to audience development activities. Since subscription campaign expenses are included in these expenses, and since larger organizations depend more on subscriptions (see Figure 5), it is logical that they invest a higher share of their marketing budget in these activities.

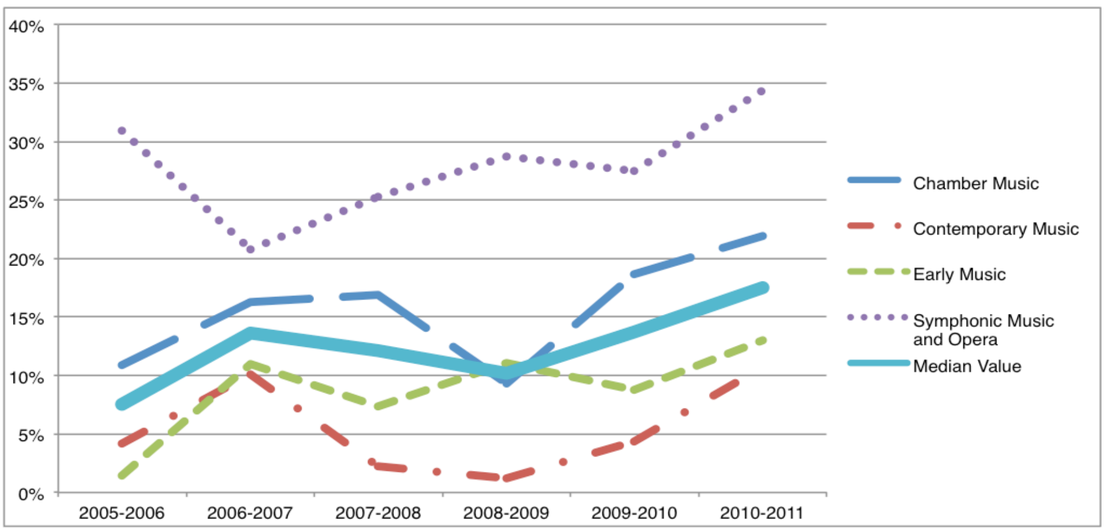
Figure 11: Share of audience development expenses in marketing budget, by size of income



As well, the increase of audience development expenses in all segments is also an indicator of the value given to accessibility by music organizations and to the need to engage with their community.

Figure 12 shows that the importance given to these activities is also differentiated by the type of music. For example, the *Symphonic Music and Opera* segment is investing the largest share of its marketing expenses in audience development activities (21%-34% over the period). At the opposite end of the spectrum, *Contemporary Music* organizations dedicate a small share of their marketing budget to audience development activities (1%-11% over the period). The very low share dedicated to audience development activities by *Chamber Music* and *Contemporary Music* organizations in 2008-2009 can be explained by the number of newly publicly funded organizations in these segments. As shown in Tables 1 and 2, these two segments had the highest increase of relatively younger organizations, which could have more concern for short-term marketing strategies than long-term audience development activities.

Figure 12: Share of audience development activity budget in marketing budget, by type of music



Considering that single ticket sales and subscriptions have been relatively stable for all types of organizations over the period, the increase in audience development expenses may be explained by different factors. In relation to market fragmentation, a shift towards audience development activities for all segments may indicate a focus on new marketing strategies instead of traditional publicity and advertising. On the other hand, the stable level of subscriptions for large organizations, except for the recession year, may be explained by a larger investment in subscription campaign expenses to counter the impact of lower return of marketing expenses in more recent years.

Conclusion

The objective of this research was to analyze if fragmentation in the contemporary and classical music market had an impact on music organizations' box office revenues and marketing expenses. The analysis showed that there has been a strong increase in the number of organizations funded through the operating program of CALQ in 2008-2009, particularly for organizations with smaller budgets in the *Contemporary Music* and *Chamber Music* segments. This increase did not have, globally, a strong impact on the share of single ticket sales; neither did it influence the share of subscription revenues.

Data on box office revenues revealed different patterns according to segments. For large organizations, a drop in single ticket sales, possibly due to the recession, may have been compensated in part by subscription revenues linked to a significant increase in audience development activities. A future research may analyze if these variations could be explained by attendance statistics and pricing strategies. Also, an analysis of the *Contemporary Music* and *Chamber Music* segments may indicate higher competition due to higher fragmentation. This could be determined by a future research on the number of performances, attendees and attendance rates for each segment.

Finally, over a six-year period, the share of marketing expenses in the operating budget has been stable, even with higher competition due to market fragmentation. However, the share of audience development activities in the marketing expenses has significantly increased in almost every segment over the same period. The definition of audience development activities is wide and covers different activities aimed at different segments, as this quote from a report of the Knight Foundation suggests:

> Discussions with "casual listeners" suggest that some, if not most, want to be able to appreciate the music a little more and want help negotiating other aspects of the concert experience. They want to become better listeners but can't do it by themselves. Pre-concert lectures and annotated program notes appeal mostly to those who are already knowledgeable about the art form. These devices are not long-term solutions to "experience enhancement" for casual listeners. (Knight Foundation: 2002)

Since the audience of classical and contemporary music concerts is rapidly aging and that competition for leisure time and disposable income is increasing, it will be interesting to analyze in future studies if organizations with higher audience development expenses will have better results at renewing their audience than other organizations. Also, further researches could analyze the impact of specific audience development activities, in relation to the organization's type of music and budget size, in order to help these organizations to maximize the impact of these activities.

References

Agid, P., J.-C. Tarondeau. (2010). *The Management of Opera*, London: Palgrave McMillan, 288 p.

Baillargeon, S. (2014). Le salut par la diffusion. Montréal: *Le Devoir,* April 27th, p. A10.

Baumol, W. J., & Bowen, W. G. (1966). *Performing arts, the economic dilemma: a study of problems common to theater, opera, music, and dance*, New York: 20th Century Fund, 582 p.

Belk, R. W., A. R. Andreasen. (1980). 'De Gustibus Non Est Disputandem: A Study of the Potential for Broadening the Appeal of Performing Arts' in *Advances in Consumer Research*, J. C. Olson, ed. Ann Arbor: Association for Consumer Research, pp. 109-13.

Bernstein, J. S. (2007). Arts marketing insights: the dynamics of building and retaining performing arts audiences. San Francisco, Jossey-Bass: 320 p.

Bouder-Pailler, D. (2008). Personal Time and Social Time: Their Role in Live Performance Attendance. *International Journal of Arts Management, 10*(3), 38-48.

Cloutier, R. (1990). *Le beau milieu.* Montréal: Lanctôt Éditeurs, 142 p.

Colbert, F., & Martin, D. J. (Eds.). (2008). *Marketing Planning for Culture and the Arts: Fundamental Principles and Practices for Building an Effective Marketing Campaign*. Presses HEC Montréal, 154 p.

Colbert, F., Brunet, J., Ravanas, P., Restuccia, M., Rich, D., St-James, Y. (2012). *Marketing Culture and the Arts (4th edition)*, Montreal: Gaétan Morin Éditeur, 2012, 320 p.

Colbert, F. (2009), Beyond Branding: Comtemporary Marketing Challenges for Arts Organisations, *International Journal of Arts Management*, 12(1), 14-20.

Conseil des arts et des lettres du Québec. *Rapport annuel 2004-2005*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Conseil des arts et des lettres du Québec. *Rapport annuel 2005-2006*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Conseil des arts et des lettres du Québec. *Rapport annuel 2006-2007*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Conseil des arts et des lettres du Québec. *Rapport annuel 2007-2008*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Conseil des arts et des lettres du Québec. *Rapport annuel 2008-2009*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Conseil des arts et des lettres du Québec. *Rapport annuel 2009-2010*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Conseil des arts et des lettres du Québec. *Rapport annuel 2010-2011*. Retrieved from [http://www.calq.gouv.qc.ca/publications/rapann_sommaire.htm]

Courchesne, A., F. Colbert. *Limites et possibles de la politique culturelle*. Montréal : HEC Montréal. Retrieved from [http://www.gestiondesarts.com/media/wysiwyg/documents/Courchesne_Colbert.pdf]

Doyon, F. (2014). Les arts vivants à l'heure des choix. Montréal : *Le Devoir,* April 27th, p. A8.

Donnat, O. (2011). Pratiques culturelles, 1973-2008. *Culture études*, (7), 1-36.

Flanagan, R. J. (2012). The Perilous Life of Symphony Orchestras: artistic triumphs and economic challenges. New Haven: Yale University Press. 240 p.

Fraser, P, I. Fraser. 'Creating the opera habit: marketing and the experience of opera' in *The Routledge Companion to Arts Marketing,* O'Reilly, D.., R. Rentschler and T. A. Kirchner (eds). New York City: Routledge, 2014, pp. 393-404.

Garon, R. (2009). Évolution des publics des arts et de la culture au Québec et aux États-Unis: mise en perspective. *Loisir et Société/Society and Leisure*, *32*(1), 73-97.

Higgins, C. (2011). Opera's battle for the big screen. London: *The Guardian* Media, December 8th. Retrieved from [http://www.theguardian.com/music/2011/dec/08/opera-big-screen-peter-gelb]

Hill Strategies (2010). *Les facteurs dans les activités culturelles au Canada.* Retrieved from [http://www.arts.on.ca/AssetFactory.aspx?did=2512]

Hill Strategies (2012). *Analyse financière et statistique de 50 orchestres canadiens : 2004-2005 à 2010-2011.* Retrieved from [http://www.hillstrategies.com/fr/content/analyse-financi%C3%A8re-et-statistique-de-50-orchestres-canadiens-2004-2005-%C3%A0-2010-2011-0]

Institut de la statistique du Québec (2012). *Revenu primaire des ménages, revenu disponible des ménages et PIB aux prix du marché par habitant, Canada, provinces et territoires, 2008-2012* Retrieved from [http://www.stat.gouv.qc.ca/statistiques/economie/comptes-economiques/revenu-menage/rp_can-hab.htm]

Institut de la statistique du Québec (2013). *Moyenne quotidienne de temps consacré par la population totale aux activités principales de l'emploi du temps, selon le sexe, Québec, 1986, 1992, 1998, 2005 et 2010*. Retrieved from [http://www.stat.gouv.qc.ca/statistiques/conditions-vie-societe/emploi-temps-loisirs/tab10_act_detail_qc_86-2010.htm]

Kaiser, M. M. (2008). *The Art of the Turnaround: Creating and Maintaining Healthy Arts Organizations.* Waltham: Brandeis University Press, 204 p.

Kaissar, A. (2005). *Theatre Subscriptions in a Changing World.* New York City: Columbia University: 156 p.

Knight Foundation. (2002). *Classical Music Consumer Segmentation Study*: *How Americans Relate to Classical Music and Their Local Orchestras.* Miami: Knight Foundation, 129 p.

Kolb, B. M. (2001). The decline of the subscriber base: a study of the Philharmonia Orchestra audience. *International Journal of Arts Management*, 3(2), 51-59.

Lebrecht, N. (1997). *Who Killed Classical Music? Maestros, Managers, and Corporate Politics*. Secaucus: Birch Lane Press, 455 p.

Newman, D. (1987). *Subscribe Now! Building Arts Audiences through Dynamic Subscription Promotion.* New York City: Theatre Communications Group, 300 p.

NG, D. (2014). San Diego Opera will close in 'sign of the times'. Los Angeles: *Los Angeles Times*, March 20th. Retrieved from [http://www.latimes.com/entertainment/arts/culture/la-et-cm-san-diego-opera-closes-20140321-story.html]

Patmore, D. 'The marketing of orchestras and symphony concert' in *The Routledge Companion to Arts Marketing,* O'Reilly, D.., R. Rentschler and T. A. Kirchner (eds). New York City: Routledge, 2014, pp. 384-392.

Peterson, R. A., G. Rossman. 'Changing Arts Audiences – Capitalizing on Omnivorousness' in *Engaging Art – The next great transformation of America's Cultural Life*, Tepper, S. J., B. Ivey. New York City: Routledge, 2008, pp. 307-342.

Peterson, R. A. and R. M. Kern (1996). Changing Highbrow Taste: From Snob to Omnivore, *American Sociological Review*, 61 (5), 900-07.

Rabkin, N., E. C. Hedbgerg. (2011). *Arts education in America: What the declines mean for arts participation*. National Endowment for the Arts, 134 p.

Ravanas, P. (2008). Hitting a High Note: The Chicago Symphony Orchestra Reverses a Decade of Decline with New Programs, New Services and New Prices. *International Journal of Arts Management, 10*(2), 68.

Schuster, J. M. 'Comparing Participation in the Arts and Culture' in *Engaging Art – The next great transformation of America's Cultural Life*, Tepper, S. J., B. Ivey. New York City: Routledge, 2008, pp. 49-84.

Schwartz, B. 'Can There Ever Be Too Many Flowers Blooming' in *Engaging Art – The next great transformation of America's Cultural Life*, Tepper, S. J., B. Ivey. New York City : Routledge, 2008, pp. 239-256.

Urfalino, P. (1989). Les politiques culturelles: Mécénat caché et académies invisibles. *L'Année sociologique. 39*(3).

Throsby, D. (2010). *The Economics of Cultural Policy*. Cambridge: Cambridge University Press. 277 p.

Wiggins, J. (2004). Motivation, Ability and Opportunity to Participate: A Reconceptualization of the RAND Model of Audience Development. *International Journal of Arts Management, 7*(1), 22-33.