

## Manly Warringah Choir – Audience Survey, May 2017

### Background:

Manly Warringah Choir conducted an audience survey in conjunction with its 6 May 2017 concert, in which it performed Brahms' 'A German Requiem'. The Choir's Management Committee wished to gain better understanding of how the Choir is viewed by its audience so it can improve the various aspects of its operation. To that end, the purpose of the survey was to:

- Gain understanding on who our audience is
- Explore the impact of the various marketing activities associated with the concert
- Explore the audience's preferences relating to various aspects of the concert.

In order to administer the survey two Choir members randomly handed one hundred people in the audience a survey form to which a stamped, addressed envelope was appended. They asked people to fill in the survey form in their own time and post it. Three hundred people purchased tickets for this concert. With 100 forms handed out, this means that one third of the audience was surveyed.

Sixty four people returned a complete survey, representing a satisfactory response rate of 64%.

The Choir conducted a similar survey in December 2010. On that occasion a survey form was placed on each of the 300 seats and people were asked to fill it in and hand it to survey collectors at the end of the survey. The response rate for the 2010 survey was much smaller at 24%.

Response was satisfactory not only in its rate but also in its quality: there are very few instances of no response to particular questions or for multiple responses when only one is called for. Where this did occur, percentage response is worked out of the total of responses, not out of 64.

The tables below provide the survey results and are followed by comments. (Because of rounding up, percentages do not always add up to 100.) Where applicable the 2010 survey results are provided for comparison.

### Survey results:

#### Question 1: Where do you live?

|                                     | Number | Percentage 2017 | Percentage 2010 |
|-------------------------------------|--------|-----------------|-----------------|
| On the Northern Beaches             | 49     | 76              | 80              |
| In Sydney, but not Northern Beaches | 12     | 20              | 19              |
| In Australia, but not Sydney        | 3      | 4               | 0               |
| Overseas                            | 0      | 0               | 1               |
| Total                               | 64     |                 |                 |

The vast majority, over three quarters, of our audience lives in the Northern Beaches area. One fifth reside in Sydney but not in the Northern Beaches. There is little change in residence pattern since the 2010 survey.

**Question 2: How did you hear about the concert? (You may circle more than one option)**

|   | Number | Percentage 2017 |
|---|--------|-----------------|
| I heard about it from a choir or orchestra member | 46     | 52              |
| I saw a poster                                    | 9      | 10              |
| I read about it in the Manly Daily                | 9      | 10              |
| By word of mouth                                  | 9      | 10              |
| I received an e-mail about it                     | 7      | 8               |
| I saw an electronic flyer                         | 3      | 4               |
| I saw a paper flyer                               | 2      | 2               |
| I heard it mentioned on the radio                 | 0      | 0               |
| Not sure  | 0      | 0               |
| Other   | 3      | 4               |
| Total   | 88     |                 |

Hearing about the concert from a choir or orchestra member is by far the most common means of finding out about the concert, nominated by almost half of respondents. A poster, an article in the Manly Daily and word-of-mouth were each nominated by about one tenth of respondents. We embarked on an intensive posters distribution throughout the area and there was a positive article in the Manly Daily before the concert. There is no way of knowing how this contributed to the nomination of these. Given the large database of people who regularly receive e-mail about the concerts to which an electronic flyer is attached, it is surprising that so few recalled receiving an e-mail or an electronic flyer.

**Question 3: How often do you attend Manly Warringah Choir concerts?**

|                                   | Number | Percentage 2017 | Percentage 2010 |
|-----------------------------------|--------|-----------------|-----------------|
| I come to all/almost all concerts | 35     | 54              | 44              |
| I come to concerts occasionally   | 18     | 28              | 37              |
| This is the first time            | 11     | 17              | 19              |
| Total                             | 64     |                 |                 |

We have loyal audience and loyalty has strengthened since 2010. In 2010 just over two fifths came to all or almost all the concerts. In 2017 this proportion has increased to well over one half. The proportion for whom this was the first concert has remained steady over the years: about one in five.

**Question 4: Please circle any of the venues below in which you have listened to a concert in the last six months**

|                                       | Number | Percentage 2017 |
|---------------------------------------|--------|-----------------|
| Sydney Opera House                    | 30     | 28              |
| City Recital Hall, Angel Place        | 25     | 24              |
| The Concourse, Chatswood              | 18     | 17              |
| A church in the Northern Beaches      | 13     | 12              |
| A church outside the Northern Beaches | 10     | 9               |
| Independent Theatre, North Sydney     | 5      | 5               |
| Other                                 | 5      | 5               |
| Total                                 | 106    |                 |

Despite the fact that the vast majority of our audience resides in the Northern Beaches, when people go to concerts other than ours, they do so outside Sydney's north. Significantly larger proportions go to the Sydney Opera House and/or the City Recital Hall, Angel Place than do to closer venues such as a church in the Northern Beaches, The Concourse in Chatswood or the Independent Theatre. This may further strengthen the finding (see Table 5) that most of our audience is made up of friends: people are going to out-of-area venues when there are no friends involved

**Question 5: How would you describe your relationship to the choir?**

|  | Number | Percentage 2017 | Percentage 2010 |
|--|--------|-----------------|-----------------|
| I am a family/friend of a choir member                           | 48     | 76              | 64              |
| Neither I nor anyone in my party know anyone who performed       | 5      | 8               | 23              |
| I am a family/friend of an orchestra member                      | 4      | 6               | 0               |
| I don't know anyone who performed but came with someone who does | 4      | 6               | 11              |
| I am a family/friend of the conductor or soloists(s)             | 2      | 3               | 1               |
| Total  | 63     |                 |                 |

By far the largest proportion – three quarters - of our audience is made up of family or friends of a choir member. Furthermore, this proportion has increased markedly since 2010. Since 2010 there is a slight increase in the proportion that are related to an orchestra member.

Fewer than one in ten of the audience did not know anyone who performed, a significant decrease since 2010 when just under one quarter were 'strangers'

**Question 6: Please consider the aspects below and rate each between '1' – 'very bad' and '10' – 'excellent'**

| Aspect   | 8 to 10 rating |    | 5 to 7 rating |    | 1 to 4 rating |   |
|--|----------------|----|---------------|----|---------------|---|
|  | No.            | %  | No.           | %  | No.           | % |
| The overall enjoyment o the evening<br>(Rated by 60 respondents) | 55             | 92 | 4             | 6  | 1             | 2 |
| The choice of the program<br>(Raged by 60 respondents)           | 50             | 83 | 10            | 17 | 0             | 0 |
| The standard of the performance<br>(Rated by 59 respondents)     | 52             | 88 | 7             | 12 | 0             | 0 |
| The ease of buying tickets<br>(Rated by 58 respondents)          | 52             | 90 | 4             | 7  | 2             | 3 |
| The concert venue<br>(Rated by 60 respondents)                   | 51             | 85 | 8             | 13 | 1             | 2 |
| Parking arrangements<br>(Rated by 56 respondents)                | 26             | 46 | 25            | 44 | 5             | 9 |

Other than parking which was particularly problematic in this concert due to a clash with other events in the Chapel area, we get very high ratings for all aspects of the concert. Digging somewhat deeper into the data, ratings of 10 were given by:

- 50% for the overall enjoyment of the evening.
- 46% for the choice of the program.
- 42% for the standard of the performance.
- 65% for the ease of buying tickets
- 43% for the concert venue.
- 27% for the parking arrangements.

**Question 7: Consider the statements below and place a circle around the three that best describe what motivated you to come to this concert**

|  | Number | Percentage 2017 |
|--|--------|-----------------|
| I feel loyal to choir member(s)                      | 37     | 21              |
| I find the venue appealing                           | 32     | 18              |
| I love Brahms' 'A German Requiem'                    | 28     | 16              |
| I like the ambiance of the event                     | 30     | 17              |
| I believed the concert would be good value for money | 18     | 10              |
| I feel loyal to the choir                            | 14     | 8               |
| I like to be present at community events             | 9      | 5               |
| I herd about the choir and wanted to try them out    | 5      | 3               |

Consistent with the fact that the vast majority of our audience is a family or friend of a choir member, loyalty to a choir member is the most common motivation to attend, nominated by about one in five. This is clearly loyalty to a choir member, not to the choir as a body, identified by fewer than one in ten. The appeal of the venue, love of Brahms' 'A German Requiem' and the ambiance of the event are also significant motivating factors.

**Question 8: In future concerts, what kind of program would you prefer?**

|   | Number | Percentage 2017 |
|---|--------|-----------------|
| A program made up of both choral and orchestral works | 47     | 76              |
| A program made up of choral works only                | 15     | 24              |
| Total   | 62     |                 |

While the majority – four fifths would prefer a program made up of both choral an orchestral works, there are quite a few – one quarter - who would prefer a program made up of choral works only.

**Question 9: In future programs, what kind of accompaniment to the choir would you prefer?**

|                                      | Number | Percentage 2017 |
|--------------------------------------|--------|-----------------|
| A full orchestra                     | 37     | 55              |
| A small chamber-like ensemble        | 24     | 36              |
| Very few instruments, say two pianos | 6      | 9               |
| Total                                | 67     |                 |

Over half would prefer a concert with a full orchestra. The preference for a full orchestral may have been influenced by the fact that this survey followed a concert with a large orchestra. The fact that a considerable proportion (45%) would prefer a small chamber-like ensemble or a concert with very few instruments, may suggest a fairly strong approval of concerts with less than a full orchestra. Given the financial benefit of performing with less than a full orchestra, there is no reason to expect resentment from the audience if we perform with a chamber orchestra or even a smaller arrangement.

**Question 10: In future what is your preferred time for the Manly Warringah Choir concerts?**

|                     | Number | Percentage 2017 |
|---------------------|--------|-----------------|
| Sunday afternoon    | 31     | 42              |
| Saturday evening    | 23     | 31              |
| Saturdays afternoon | 16     | 22              |
| Sunday evening      | 3      | 4               |
| Total               | 73     |                 |

Sunday afternoon is the most preferred time for our concerts, selected by over two fifths of respondents. Furthermore, there is a strong preference for afternoons over evening concerts. Only one third would prefer an evening concert and Sunday evening is definitely not a popular time.

At the end of the survey respondents were asked to suggest what they would like to hear in future programs.

42 responded to this question. The specific suggestions made were:

- Handel's Messiah (3 respondents)
- Jenkins' The Armed Man (3 respondents)
- Mozart's Requiem (3 respondents)
- Fauré's Requiem (2 respondents)
- Verdi's Requiem (2 respondents)
- Hayden's Creation (2 respondents); and one each of:
- Mozart's Great Mass in C Minor
- Rutter's Gloria
- Jenkins' Gloria
- Gounod's St Cecilia Mass

Britten's Ceremony of Carols  
Britten's War Requiem  
Hayden's Nelson Mass  
Walton's Belshazzar's Feast  
Bernstein's West Side Story  
Vaughan Williams' Benedicte  
Thomas Tallis' Spem in Alium  
Dvorak's Requiem  
Orff's Carmina Burana  
Ramirez' Misa Criolla  
Edwards' Dawn Mantra  
Mendelssohn's Elijah  
Elgar's The Dream of Gerontius  
Beethoven's Ode to Joy

Some respondents mentioned composers without specifying the works. The composers mentioned were:

Mozart, Beethoven, Handel, Bach, Monteverdi, Purcell, Mahler.

In addition some made general comments:

Four respondents mentioned opera choruses. Other general suggestions were:

Lighter choral music

Not unknown works

One well known and one different piece

Anything from the choral repertoire

Popular classics

Anything, but not 'Lieders'

Anything joyous, light, foot tapping.

Some respondents spontaneously added comments on the survey page. The negative ones:

"It is disrespectful that our first Australians are not recognized at each concert"

"Needs a detailed evacuation procedure"

"Smaller orchestra so we can hear the choir"

"Seating is disappointing as you can't see choir or orchestra at the back"

"The music was too loud. Over-powered the choir"

"The performance was reduced in appeal by the percussions dominating. Where was the poor old harpist?"

"The orchestra is often too loud."

It should be noted that these are spontaneous comments; not responses to set questions. That makes these comments quite robust and suggest that there is a perception that the orchestra overwhelmed the choir.

And the positive comments:

"Our first time, hopefully not last."

"Beautiful, spiritual and exciting form of music. All music is marvellous when sung well"

"Thank you. A great evening"

"I have loved every concert since I found out about them six years ago"

"Thank you. All wonderful music"

"Wonderful! Magic!"

"I think Carlos deserves a gold medal and lots of money to continue this great community service"

"Thanks to you all for your loyal and amazing service to music"

"Thank you for a wonderful concert. It was marvellous"

"Your choices have been excellent. I am no expert"

## **Conclusions and recommendations:**

The main messages emerging from the survey are:

- We are truly a community choir. We have a loyal audience that is largely made up of our family and friends who mostly live in the Northern Beaches.
- We please our audience. They like what we sing and how we sing it; they like the venue and the ambiance.
- Our audience have a preference for concerts with a full-scale orchestra but would be willing to accept smaller ensembles.
- There is a perception that the orchestra may overwhelm the sound of the choir.
- Afternoon concerts are preferred to evening ones.

Action to be considered following this survey:

- The 'family/friends' sector of our audience is probably saturated. There is not much we can do to increase audience loyalty or attract a larger audience made up of family and friends. However, there could be a marketing opportunity through increased exposure in the Manly Daily and placement of posters.
- It is unlikely that any marketing opportunities beyond our area would reap benefits. If we wanted to extend our exposure, we would have to engage in more intensive marketing.
- We should consider having all or two of our yearly concerts in the afternoon rather than evening.
- We need not expect strong disapproval if for financial or other reasons we perform with less than a full orchestra.
- We can't look to our audience for advice on the content of our repertoire.
- By and large we should stick with what we are doing. There might be a small opportunity to shift those who are only moderately satisfied to greater levels of satisfaction.

Naomi Roseth  
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