

# AMERICA'S SYMPHONY ORCHESTRAS

*And How They Are Supported*

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*by*

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*and*

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*New York*

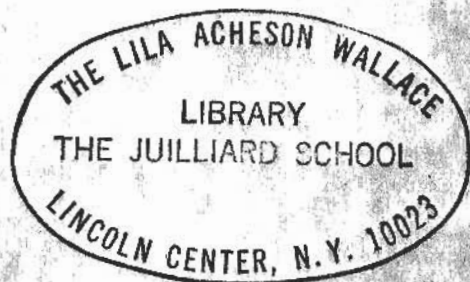
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a single year. A broadcast of the New York Philharmonic-Symphony Orchestra is estimated to reach as many as 10,000,000 listeners.

In spite of these large figures, it must be borne in mind that the number of individuals attending symphony concerts is a much smaller total. For example, the large proportion of total admissions to major orchestra concerts represented by season subscribers probably reduces the total number of individuals attending them to less than half a million. The size of the radio and summer audiences suggests the existence of a large potential market for symphony concerts, which is not yet being exploited. A greater knowledge of the extent and characteristics of this potential market for symphony concerts would be of inestimable value to symphony orchestras in planning the types of services to be offered and the conditions under which they can be made attractive to as many people as possible.

Although it has been beyond the scope of this study to engage in the extensive consumer research regarding the characteristics of the potential audience, limited surveys of actual audiences suggest some interesting conclusions as to why people attend symphony concerts. Even these must be considered as purely experimental in that their results apply mainly to the communities studied and are merely indicative of the type of information that more comprehensive surveys might yield. Surveys were made by means of questionnaires distributed to audiences at concerts. In Los Angeles, 869 questionnaires were returned, and in Grand Rapids, 1,009. A similar survey was made in Harrisburg, Pennsylvania, and, although the

results generally confirmed those secured in the other cities; the sample was too small for statistical treatment.<sup>1</sup> In Grand Rapids, 64 per cent of the questionnaires were returned by subscribers, and 36 per cent by nonsubscribers; in Los Angeles, 59 per cent by subscribers, and 41 per cent by nonsubscribers.

The symphony audience, as revealed by the Grand Rapids and Los Angeles surveys, is a comparatively young one. The median age of concert goers in Grand Rapids was twenty-seven years, and thirty-three years in Los Angeles. Subscribers for the comparatively expensive Los Angeles regular series were considerably older than those buying single admissions, with a median age of thirty-eight years, as compared to twenty-nine years for nonsubscribers. The lower median age of nonsubscribers suggests that many younger members of the community cannot afford the price of a season subscription and therefore are limited to the purchase of single tickets. The generally lower median age of the Grand Rapids audience, and the very slight difference between subscribers and nonsubscribers, may be explained partly by the low cost of a series ticket—\$7 for 7 concerts—and by the fact that 1,000 season tickets are distributed through the Board of Education to students at \$1 for the season. Women comprised 70 per cent of those answering questionnaires in Grand Rapids, and 74 per cent in Los Angeles. Virtually all of the audience in both cities had attended high school, while 49 per cent of the Grand Rapids concert goers, and 72 per cent of the Los Angeles

<sup>1</sup> See Appendix C for the questionnaire used in the surveys. Because of limited funds, only the simplest tabulations have been made.

audience had attended college. Ten per cent of those answering in Grand Rapids had pursued postgraduate studies, and 27 per cent in Los Angeles.

Students represented the largest group in the Grand Rapids audience—21 per cent. Other important occupational groups answering the questionnaire were housewives, 14 per cent; clerical workers, 12 per cent; teachers, 10 per cent; semiprofessional workers, 8 per cent; professional people, 5 per cent; salesmen, 7 per cent; and semi- and unskilled workers, 4 per cent. There was very little difference in the occupations of subscribers and nonsubscribers. In Los Angeles the occupational group having the highest representation was housewives, with 24 per cent. Students ranked second with 19 per cent, and teachers third with 15 per cent. Other important groups were semiprofessional workers, 11 per cent; clerical workers, 7 per cent; and professional people and salesmen, 3 per cent each. Persons who had retired also represented 3 per cent of those answering the questionnaire. Approximately 90 per cent of the audience were native-born Americans in Los Angeles, and 96 per cent in Grand Rapids, while in both cities 60 per cent were of American parentage. No particular national group was outstanding among the parents of these concert audiences, beyond the natural racial distribution of the community.

The great majority of these audiences have had some education in music, for only 12 per cent reported that they had had none. Seventy-four per cent of those answering questionnaires in both cities had had instrumental instruction, principally piano. In Grand Rapids, 44 per

cent, and in Los Angeles, 57 per cent had taken courses in music appreciation, while 28 per cent in Grand Rapids, and 38 per cent in Los Angeles had studied harmony. It is somewhat surprising to find that 47 per cent of the audience in Grand Rapids had attended concerts before the age of eighteen, and 33 per cent in Los Angeles.

### *Factors Interesting Audiences in Symphonic Music*

While many factors undoubtedly have combined in interesting these audiences in symphonic music, the influence of which they are most conscious is repeated attendance at concerts. In Grand Rapids, 38 per cent mentioned this factor, and in Los Angeles, 31 per cent. The great significance of this lies in the fact that these people realize that their interest and pleasure in symphony concerts have developed with increasing familiarity and knowledge. In other words, symphonic music grows upon the listener with repeated exposure. Aside from concerts themselves, broadcasting has been the most important force in building interest in symphonic music among the audiences surveyed. Of those returning questionnaires in Grand Rapids, 31 per cent mentioned radio as a means through which they became interested, while 22 per cent did so in Los Angeles. Radio has been somewhat more important in influencing nonsubscribers than subscribers. This is true of both cities. In Grand Rapids, 36 per cent of the nonsubscribers credited broadcasting, as compared to 28 per cent of the subscribers; in Los Angeles, 27 per cent of the nonsubscribers, and 18 per

cent of the subscribers. The study of an instrument has served to interest a considerable proportion of these audiences—17 per cent in Grand Rapids, and 16 per cent in Los Angeles—while listening to symphony records ranked next and was mentioned by 12 per cent in Grand Rapids and Los Angeles. A rather larger percentage of nonsubscribers than subscribers in Los Angeles attributed their interest in symphonic music either to recordings or the playing of an instrument.

Although 47 per cent of those returning questionnaires in Grand Rapids said that they had attended children's concerts before the age of eighteen, only 3 per cent indicated that they had become interested in symphony music in this way. In Los Angeles, 33 per cent had attended children's concerts, and 4 per cent considered them an important influence. At first glance these figures might cast a doubt on the value of children's concerts. However, several features serve to explain these apparent discrepancies. Relatively few children's concerts are given during a season and children seldom have the opportunity for repeated attendance. Furthermore, there is usually a lapse of years between attendance at them and at the regular concert series. It is not surprising, therefore, that their influence is completely overshadowed in the memory of those answering questionnaires by the repeated effects of radio, phonograph, and concert attendance as adults. In view of these considerations, the 3 and 4 per cent who attributed their interest in symphonic music directly to children's concerts are a hopeful sign of what may be accomplished with more intensive and consistent development of this field.

The seeming inconsistency between 2.5 per cent in both cities, who attributed their interest in symphony concerts to music appreciation courses and the large number having received such instruction, is also partly explainable by the lapse of time between these courses and attendance at concerts. Nevertheless, it is reasonable to suppose that both children's concerts and music appreciation courses have laid the foundation for listening to radio and phonograph records which later culminated in an active interest in symphony concerts.

### *Musical Preferences*

The differences in the average age and education of the audiences, as well as in programming and the cost of attending concerts, between Grand Rapids and Los Angeles are reflected in the musical preferences expressed by the audiences. Only 59 per cent of those answering the questionnaire in Grand Rapids preferred serious music, while 35 per cent favored light compositions, and 4 per cent indicated a partiality for popular music. In Los Angeles, 95 per cent showed a preference for serious music. The same factors are the cause for 53 per cent of the Grand Rapids audience preferring symphony orchestras to other forms of musical rendition, as compared with 77 per cent in Los Angeles. On the whole, preferences in Grand Rapids were more widely scattered, with 11 per cent favoring vocal solos, 9 per cent opera, 9 per cent instrumental solos, and 6 per cent light opera. In Los Angeles, instrumental solos were the only form,



other than symphonic music, for which a marked preference was indicated—9 per cent. It is interesting to note that 84 per cent of nonsubscribers in Los Angeles preferred symphonic music, as against 68 per cent of the subscribers. This leads to speculation as to the extent to which subscribers may be impelled by social motives rather than by preference for symphonic music.

Approximately three-quarters of those answering the questionnaire in both cities expressed the desire to have concerts by the orchestra alone, as well as performances featuring guest artists included in the regular series. In Grand Rapids, 20 per cent preferred concerts with soloists, and only 3 per cent concerts of the orchestra alone, as compared to 10 per cent and 8 per cent, respectively, in Los Angeles. Nonsubscribers in Los Angeles showed a greater preference for guest artists than did subscribers—15 per cent as against 7 per cent. That guest artists are more essential to the success of concerts in Grand Rapids than in Los Angeles is further indicated by the fact that audiences in the former city desired an average of 8 out of 10 concerts with soloists while Los Angeles audiences expressed a preference for but 6 out of 10. Vocal soloists were the most popular form of guest artist in Grand Rapids and were preferred by 36 per cent, followed by pianists with 28 per cent, and violinists with 21 per cent. Pianists were preferred by 59 per cent of the audience in Los Angeles, violinists by 18 per cent, and vocal soloists by 14 per cent.

Notwithstanding the differences in general preferences, Grand Rapids and Los Angeles audiences were

remarkably similar in their choices of favorite composers and symphonic compositions. In both cities, Beethoven, Tschaiikowsky, and Brahms were among the four favorite composers. Wagner ranked third in Grand Rapids, while Sibelius ranked fourth in Los Angeles. Schubert, Mozart, and Franck also ranked among the first ten composers, in order of preference, in the two cities. Ravel, Rimsky-Korsakoff, and Johann Strauss were among the ten favorite composers in Grand Rapids, while Sibelius, Bach, and Richard Strauss were included among those in Los Angeles.

TABLE XV. TEN RANKING COMPOSERS PREFERRED BY GRAND RAPIDS AND LOS ANGELES AUDIENCES

Composer	LOS ANGELES		GRAND RAPIDS	
	Percentage of Total Mentions	Rank	Percentage of Total Mentions	Rank
Beethoven .....	20.7	1	12.2	1
Brahms .....	13.1	2	6.7	4
Tschaiikowsky ...	11.4	3	11.9	2
Sibelius .....	6.2	4	..	..
Mozart .....	5.9	5	3.3	8 <sup>a</sup>
Franck .....	5.0	6	2.6	10
Wagner .....	4.9	7	10.9	3
Bach .....	3.9	8	..	..
Schubert .....	3.6	9	4.0	5
Richard Strauss ..	2.9	10	..	..
Ravel .....	..	..	3.6	6
Johann Strauss ...	..	..	3.5	7
Rimsky-Korsakoff. .	..	..	3.3	8 <sup>a</sup>
Debussy .....	..	..	2.6	9

<sup>a</sup> Tie for eighth rank.

Beethoven's Fifth, Seventh, and Ninth symphonies were among the ten highest ranking compositions in both cities, while the Third also was included in Los Angeles. The Fifth ranked first in Grand Rapids, and second in Los Angeles. Tschaikowsky's Fifth Symphony ranked second in Grand Rapids, and third in Los Angeles. All four Brahms symphonies were included among the ten ranking compositions in Los Angeles, and only the First in Grand Rapids. It is most significant that all of the compositions included among the ten ranking favorites in both cities are part of the standard symphonic repertoire.

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Composition	LOS ANGELES		GRAND RAPIDS	
	Percentage of Total Mentions	Rank	Percentage of Total Mentions	Rank
Franck—D Minor .....	3.8	1	1.6	7 <sup>a</sup>
Beethoven—Fifth .....	3.6	2	3.0	1
Tschaikowsky—Fifth .....	2.8	3	2.9	2 <sup>b</sup>
Brahms—First .....	2.7	4	1.7	6
Beethoven—Seventh .....	2.7		1.8	5
Beethoven—Ninth (Choral) .....	2.7	5	1.4	9
Beethoven—Third ( <i>Eroica</i> ) .....	2.2		..	..
Brahms—Fourth .....	2.2	..	..	..
Tschaikowsky—Sixth ( <i>Pathétique</i> ) ..	2.1	6	2.1	4
Schubert—Eighth ( <i>Unfinished</i> ) ..	1.6	7	2.8	3
Tschaikowsky—Fourth .....	1.5	8	1.3	10
Brahms—Second .....	1.3	9	..	..
Brahms—Third .....	1.2	10	..	..
Ravel— <i>Bolero</i> .....	..	..	2.9	2 <sup>b</sup>
Rimsky-Korsakoff— <i>Scheherazade</i> ..	..	..	1.6	7 <sup>a</sup>
Dvořák—Fifth ( <i>New World</i> ) .....	..	..	1.5	8

<sup>a</sup> Tie for seventh rank.

<sup>b</sup> Tie for second rank.

Questioning as to the most convenient time of the week for symphony concerts indicated a general preference for those currently used by the orchestras. Friday evening, when the Grand Rapids concerts are now presented, was indicated as being convenient for 74 per cent of the audience, while 13 per cent mentioned Thursday evening and Saturday afternoon, and 9 per cent Sunday afternoon. The three times currently in use in Los Angeles for symphony concerts were among those stated as being most convenient: Thursday evening, 39 per cent; Saturday evening, 25 per cent; and Friday afternoon, 24 per cent. In addition, 25 per cent mentioned Friday night as a satisfactory time for concerts, and 15 per cent Sunday afternoon. It would seem, therefore, that audiences generally have accommodated their plans for the week to the customary symphony concert dates and probably prefer to have these remain unchanged.

An attempt was made also to determine why nonsubscribers did not purchase tickets for the whole season. While slightly more than one-quarter of those answering the questionnaire in both cities found the time of week inconvenient for attendance throughout the entire series, the influence of the high cost of the full subscription, and the tendency to shop around for the most interesting programs and soloists, were especially prominent in Los Angeles. Forty-five per cent of nonsubscribers gave the high cost of a season ticket as their reason for not buying it, while 43 per cent stated that they attended concerts only when certain compositions or guest artists were featured. In Grand Rapids, only 33 per cent of the non-

subscribers replied that the price of a season ticket had been prohibitive. The small number of concerts per season—7—and the consequent limited opportunity to hear a symphony orchestra, undoubtedly serves to explain the fact that 17 per cent of the Grand Rapids nonsubscribers attended only when features or artists of particular appeal were presented. Nonsubscribers attended an average of 5 concerts a season in Grand Rapids, and 6 concerts in Los Angeles. The existence of a market in both cities, which may bear further investigation, was indicated by the fact that 26 per cent of the nonsubscribers in Grand Rapids, and 30 per cent in Los Angeles had previously been season-ticket holders.

#### *Listening to Symphony Broadcasts*

In view of the influence of radio in awakening interest in symphonic music, the tastes and habits of concert audiences regarding symphony broadcasts are important. The nation-wide broadcasts of the New York Philharmonic-Symphony Orchestra, the Ford Sunday Evening Hour, and the NBC Symphony concerts are listened to by a large proportion of concert-goers in both cities. The Philharmonic-Symphony Sunday afternoon concerts ranked first in Los Angeles and were listened to regularly by 84 per cent of those returning questionnaires, and second in Grand Rapids with 63 per cent. The NBC Symphony ranked second in Los Angeles with 47 per cent, and third in Grand Rapids with 33 per cent. The Ford Sunday Evening Hour came first with 69 per cent in Grand Rapids, and third in Los

Angeles with 41 per cent. In Los Angeles, however, the Standard Symphony Hour, which for many years has been sponsored by the Standard Oil Company of California, tied for second place with the NBC Symphony.

As might be expected, concert audiences derive more enjoyment from attendance at concerts than from radio listening. Sixty-one per cent in Grand Rapids, and 69 per cent in Los Angeles, reported that they enjoyed symphonic music over the radio less than in the concert hall. Only 10 per cent in Grand Rapids, and 7 per cent in Los Angeles, found radio listening more satisfactory, while 29 per cent and 24 per cent, respectively, showed no preference. More significant, therefore, is the report from 43 per cent of the Grand Rapids audience, and 32 per cent in Los Angeles, that they have been attending concerts more often since they have been listening to symphonic music over the radio than formerly. Only 4 per cent in Grand Rapids, and 7 per cent in Los Angeles, stated that they have been attending concerts less frequently.

Forty per cent of the Grand Rapids, and 61 per cent of the Los Angeles, audiences own recordings of symphonic music, but 82 per cent and 66 per cent, respectively, of these audiences reported that they preferred the radio to records.

In spite of their limitations, these data suggest a few conclusions of merchandising significance. The testimony of audiences as to the effects of radio, the phonograph, and music education, both in interesting them in symphonic music and getting them to attend concerts, suggests that there is an expanding potential audience as



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these forces themselves continue to reach more people. There are strong reasons to believe that a wide market exists among young people, above the student age, which has still to be completely exploited. For example, the relatively younger nonsubscribers in Los Angeles profess a greater interest in symphony music than do subscribers, while many of them indicate that they cannot afford present series tickets. If special series could be developed at a cost within their means, and particular appeal be made to this group, a significant addition might be made to operating income. Even if this is not possible, Los Angeles evidence raises the question whether a more vigorous promotion of single ticket sales among this group would not be profitable. From a merchandising point of view, the chief value of these surveys is the indication they give of the wealth of practical information that might be obtained through more comprehensive studies of audiences and the general public.

#### *Adapting Concerts to Public Demand*

A discussion of the question of adapting concerts to the public demand involves a consideration of two problems: the extent to which present concerts meet the public taste as to kind and manner of presentation, and the possibility of developing new and more attractive forms of concerts. The latter possibility is rather remote, for most of the necessary forms of service seem to have been established in many cities. However, the potential market which seems to exist among younger people above high-school age suggests that managements might give

serious study to the desirability of designing concerts to reach this particular group.

There is no doubt that in many cities existing concert series can be brought more in accordance with public taste, both as to content and the conditions under which they are presented. Not infrequently there exists the possibility of increasing the attractiveness of regular series concerts without impairing artistic standards. In some instances, programs have been lacking in variety and balance, and, in others, concerts have been too long. It would therefore be profitable for managements, and even more for conductors, to re-examine carefully the psychology of their communities with regard to symphonic music and to reappraise their own efforts in meeting the conditions imposed by this psychology.

As stated previously, it is probable that "pop" concerts can be made successful only if they are kept distinctive in character from the regular series. The increasing demand for better music on the part of audiences has caused programs of many of these concerts to become similar to those of the regular series. Because of this situation, completely distinctive series, such as the Boston "Pops" which do not pretend to offer regular symphonic fare, seem to have the greatest chance of being profitable. These, however, can be given only where adequate facilities exist.

Children's concerts have been demonstrated to be most successful where they have been closely co-ordinated with the public school system. In view of the fact that these concerts are a public service, and admissions, where charged, cannot begin to cover cost, attention might well