

# **EFFECTIVE MARKETING BY CLASSICAL MUSIC PROMOTERS**

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## **9 CASE STUDIES IN HIGH LEVEL AUDIENCE GROWTH**

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## CONTENTS

PART I - INTRODUCTION AND HOT TIPS .....	
PART II - CASES.....	
THE BENCHMARKING MODEL .....	
1. Traditional Building of Subscription Series – Östgöta Wind Symphonics.....	
CUSTOMER RELATIONSHIP MANAGEMENT .....	6
2. Traditional CRM – Concerto Copenhagen .....	6
3. Web-based CRM – The Royal Danish Theatre .....	
4. Systematic Large Scale CRM – Royal Liverpool Philharmonic Orchestra I.....	
5. Group CRM – Royal Liverpool Philharmonic Orchestra II.....	
6. Supply and Demand – Die Deutsche Kammerphilharmonie Bremen II .....	
EFFECTIVE LEADERSHIP ATTITUDES AND PERSPECTIVES .....	
Introduction .....	
7. Entrepreneurship – Die Deutsche Kammerphilharmonie Bremen I.....	
8. Crisis Leadership – Vanemuine Theatre .....	
Leadership Character Traits .....	
Arts Marketing and Leadership Attitudes.....	
PART III - CONCLUDING WORDS.....	
Reflections on the Hot Tips.....	
APPENDICES .....	
AWARD WINNING ADVERTISEMENT CAMPAIGN .....	
9. Advertisement Campaigns – Tonhalle Düsseldorf and Düsseldorfer Symphoniker .....	
RESOURCES .....	
Recommended Literature.....	
Associations and Networks .....	
Training .....	
The Team Behind this Report .....	
Acknowledgements .....	

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## INTRODUCTION

### Purpose and target readers of this report

The starting point of this report was (1) to identify classical music concert promoters which had recently experienced very strong growth in audience numbers and (2) to describe the central factors behind this growth. The aim is to identify and spread knowledge on success factors behind effective marketing campaigns in our branch. The hope is that more promoters of fine arts events will be able to increase audience numbers and ticket income with less input of working hours and money.

The primary target readership of the report is board members, executive management as well as marketing managers and personnel of organisations active within the fine arts. Although the report is mainly concerned with classical music and opera the findings are probably easy to adapt to other genres of high class music and the fine arts such as jazz, ballet, modern dance, theatre, circus and museums.

### The cases

I identified more than 25 organizations of interest in different parts of Europe. I took a deeper look into 12 organizations. With the focus on readability I divided the material into 9 case studies on 7 organizations (2 of the organizations are attributed 2 case studies each). 6 of these case studies describe instances of high level audience growth:

- Swedish Östgöta Wind Symphonics started a new subscription series from scratch and reached 1.820 subscribers in 6 seasons
- British Royal Liverpool Philharmonic Orchestra<sup>1</sup> reached, among others, 14.000 new attenders and increased its ticket income by over 1.000.000€ in 3 seasons
- German Deutsche Kammerphilharmonie established a sold out concert series with 1.200 subscribers in Bremen in the mid 90's
- Deutsche Kammerphilharmonie established a second concert series in Bremen in 2004 starting out with 1.200 subscriptions and reaching 250 on the waiting list in 2005
- Estonian Vanemuine Theatre (a multi art venue) tripled audience numbers from 67.000 to 162.000 and increased ticket income 2,5 times from 450.000€ to 1.150.000€ in two seasons

In addition

- Danish Concerto Copenhagen increased its audience numbers from an average of 200 to 550 attenders per concert in two seasons

It is only a matter of definition if the CoCo case is simply good or if it is high level audience growth. The study on CoCo is, however, incorporated into the report because of the very obvious connection between their marketing approach and the results.

Two cases are not included because of their high level audience growth but because of their otherwise interesting approaches:

- The Royal Danish Theatre is in the spring of 2006 launching probably the most comprehensive web based CRM-system in our branch
- German Tonhalle Düsseldorf has developed eye catching advertisement campaigns that successfully address new segments without compromising the integrity of their artistic image

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<sup>1</sup> Divided into 2 different case studies in order to increase clarity for the reader.

## Perspectives and limitations of the research

The starting point of this research was to identify quantitative growth and I took care to ensure that this growth was substantial and that the knowledge was of use to other promoters of fine arts events. For instance, the report doesn't contain cases where a new concert hall or mass concerts were explanatory factors behind the audience growth. Some cases were left out because the number of changes in techniques was so big that it wasn't possible to isolate the most probable explanatory factors. In other cases, the growth was slow and steady over a very long period – in these cases I found that Östgöta Wind Symphonics covers the story more than well. I also left out cases where artistic planning was the key factor behind the audience success. The reason is that I wanted to isolate marketing as an independent profession from programming. My stand is that successful audience development should support the artistic integrity of our fine arts organisations – not the other way around.

Although the starting point of the research is quantitative (numeral increase in audience numbers and/ or ticket income) the majority of the facts in this report are qualitative: after having qualified the cases quantitatively I studied marketing materials and annual reports as well as interviewed the key personalities behind the campaigns. All research is – as we know – to some extent subjective. This is also true of numbers which can be used to support doubtful hypothesis. The question of subjectivity is even stronger in qualitative researches such as this. I therefore find it important to shed some light on the personality behind this research.

Since the mid 80's I have been involved in audience building as artist manager (agent), producer of freelance events and producer of 10 international, independently funded festivals in Austria, Czech Republic, Estonia and Finland. These have mainly been administrated through my company StillArt, founded in 1992. In the late 90's I was the producer at established festivals (Helsinki Festival and Musica nova Helsinki). In the 90's I led a freelance orchestra and at the beginning of the millennium I was General Manager of the Finnish Radio Symphony Orchestra as well as Head of Planning at Helsingborg Concert House and Symphony Orchestra. This means my perspective when writing this report is rather the General Manager's than the Marketing Manager's – I have been responsible for and involved in marketing the events and often carried out parts of it, but I have never held the formal position as Marketing Manager or Press Officer. Furthermore my academic degree is in philosophy and in addition I have studied the cello, orchestral conducting, history and political science. I am now studying organisational consultancy. This means my training is rather humanistic than administrative not to mention my lack of specific studies in marketing.

My lack of the inside perspective naturally has both positive and negative aspects. I don't possess the technical vocabulary and I had to study a lot of theory from scratch. On the other hand, I am not burdened with the traps of the professionals but can take a perspective "from the outside of the box". I must admit that I feel some pride in the fact that arts marketing professionals have commented that my conclusions in many cases provide a fresh and unorthodox perspective.

## Main findings and how to read this report

If you are in a hurry right now you might want to read the Hot Tips at the beginning of the report and the Concluding Words at the end. Here you will find the condensed message of this report: where to focus in order to quickly increase audience numbers.

It is probably also possible to pick and choose useful tricks and techniques from individual cases that are similar to your own organisation's structure and developmental stage. Then you might want to skim the first paragraph of each case study to quickly identify the most useful organisations.

The report has, however, been structured according to three main discoveries. (1) Useful tricks and techniques are described in the individual case studies. The first chapter on Östgöta Wind

Symphonics is the benchmarking model for how to effectively build a subscription series – from scratch or from an already established level. The Östgöta case will therefore be attributed the first main chapter and is probably worth reading for everyone. (2) I have found that a common denominator for all organisations that have gone through high level and apparently stable audience growth is that they view their audiences as consisting of valuable and mature individuals instead of an indefinable mass of difficult consumers that need to be forced to the concert hall. I have therefore devoted the following chapter to different aspects of CRM – customer relationship management, or the art of relating to your audience in a way that they will not only return but become a valuable part of your organisation. (3) In all cases I found strong leadership that was able to change the organisation's perspectives, goals and routines. I therefore devoted the third main chapter to different aspects of leadership. The theme of leadership is unfortunately burdened with unnecessary mythology and misconceptions. To deepen the understanding of this central factor in audience development I recollect two cases where leadership was clearly the main factor in the audience success. I continue by describing how research defines leadership and how to develop this character trait. And I finish by defining some marketing leadership traps that are important to avoid in our branch.

### Key insights

It has been extremely stimulating to work on this research – and stimulating for a vast number of reasons.

First of all I found that in the cases of high level audience growth neither money nor the size of the marketing department were actually the central explanatory parameters. On the contrary, in most cases the organisations were in deep financial and administrative crisis, meaning that they had extremely small resources at hand when starting the change process. Instead, these organisations started to develop the humanistic values and human resources that were and had always been available to the organisation: leadership, creativity, entrepreneurship, authenticity, enthusiasm, values, goals, relationships, networks, contacts... So first of all I find it stimulating to be able to dispel the myth that increased audience numbers is dependent on external resources such as money and more marketing staff.

I found that values were often important in these cases. In some (such as the young orchestras Concerto Copenhagen and Deutsche Kammerphilharmonie) the value foundation was very obvious, strong and founded in the artistic content. In older organisations the artistic values are dustier and derive from traditions that are sometimes centuries old – not from values that make the people in the organisations tick today. In these organisations someone started to cultivate personal values, when it came to structural matters or marketing. These people had the courage to allow themselves to become vulnerable and didn't fear criticism and failures but were able to drive a change process founded on a solid base.

As a humanist I find it very comforting that all the organisations that went through high level audience growth focused on some aspects of CRM. This as a contrast to investing heavily into diffuse and expensive marketing such as advertisement campaigns with the aim to convert anyone and everyone into attending the event. The reason I find this comforting is that we obviously do not need to participate in the accelerating race of increased commercialisation and technocratisation of our societies, but that we in promoting our activities can instead focus on satisfying one of our most basic human needs: to authentically relate to and interact with our fellow human beings.

According to an article I read recently, CRM and loyalty programmes are a strong trend among commercial marketing professionals and one of the most attended courses in Business Schools. The idea is to develop customer loyalty and frequency and the reason is that this marketing tool has proved to be by far the most resource effective. It is therefore very exciting to discover that in classical music we have actually cultivated loyalty programmes for centuries: the creation of subscription series is the administrative and financial foundation for icons such as Musikverein and the New York

Philharmonic Orchestra, as well as for tens of thousands of arts institutions around the globe. Contrary to what most people say in our branch today, I believe subscriptions and other loyalty programmes will strongly grow in importance and find new expressions and adaptations over the decades to come. I trust this report will be part of this re-awakening.

As stated above, I wanted to focus on high level audience growth that was independent of artistic planning. It is stimulating to be able to write that, in almost all cases included, the success of the marketing department has been able to support the artistic integrity of the institution. Contrary to what is often feared and accused, truly successful marketing of the arts isn't connected with commercialisation and artistic prostitution but supports the independence and integrity of the artistic endeavour.

Following from this, marketing can be a very strong starting point for a positive spiral of growth in the artistic organisation. Successful marketing campaigns will not only fill the halls and bring money. Much more importantly, successful marketing is a vehicle that independently of the current artistic status of the organisation

- sets free creativity in the organisation
- triggers value discussions within the organisations
- ensures the artistic integrity of the organisation
- deepens the relationship with active and passive audience segments
- strengthens the social, political and financial backing for the organisation
- creates administrative stability and possibilities for long term strategic planning
- diminishes long term stress and related personal and social illness
- makes it possible for the arts to take a more active and constructive role in society

With this in mind it is obvious that marketing can be a key strategic tool to a positive development of our fine arts institutions and our society. I hope this report will be helpful in gaining a stronger trust in our power to influence our future.

In Helsingborg, Easter 2006

Magnus Still  
Director / StillArt  
Project Manager / Effective Marketing by Concert Organizers

## II CUSTOMER RELATIONSHIP MANAGEMENT

### 2. Traditional CRM – Concerto Copenhagen

#### 2.1. Background

*Concerto Copenhagen*, or CoCo, celebrates its 15<sup>th</sup> anniversary in the 2005/06 season. CoCo has from the very start emphasized the quality aspect of their work: professional vs amateur, high level of musicians vs local musicians or friends, communicative attenders vs large audience. CoCo is a freelance orchestra that slowly and consistently is building a stronger basis for its existence.

CoCo's current full-time staff consists of two managers (general and sales & development). There is also a part-time booker & librarian and a volunteer, part-time secretary. As an ensemble for early music, they perform with an average of some 15-20 musicians. CoCo's annual activity level differs greatly according to subsidies, additional fund raising, touring and sales revenue. In this report we will concentrate on CoCo's own productions in Copenhagen that average 7 yearly.

*Peter Stevnhoved's* appointment as Administrator in August 2003 is part of CoCo's long-term goal to also professionalize the administration of the ensemble. In 2003 the Danish state recognized this need by granting CoCo subsidies for administration over a three year period. Peter himself has studied music and also has an administrative career in this field. In my communication with Peter I find this relatively young man dynamic, goal oriented, outgoing, quick in decision and easy to approach. He is clearly aligned with the general philosophy of the ensemble emphasizing creativity, quality, the long-term perspective and professionalism.

#### 2.2. The story

The first aspect I want to emphasize is that the ensemble has had a strong inherent – if not necessarily written down – mission statement and philosophy from its very beginning. This philosophy of what CoCo is has also given the ensemble a strong brand.

From interviews and yearly reports I have read, and from the interview with Peter, I would summarize the characteristics and values of CoCo as follows

- early music
- mainly instrumental
- orchestra
- professional
- quality
- financial and administrative stability
- long term perspective
- organic growth

The attributes of the brand “CoCo” I would then summarize in this way

- early music
- passion for quality, whatever it takes

Such a clear and concise concept of what CoCo stands for very much simplifies both the daily work with and the communication of a brand and the products.

In some 18 months CoCo increased the average number of concert attenders from 200 to 550. Let's put these numbers in a larger framework:

	2003	Spring 2004	Autumn 2004	Spring 2005	Autumn 2005	Goal 2006
Newsletter database	400				1.250	1.500
Officials in database	150				250	
E-mails	250				800	1000
Partout card		100	140	150	-	-
CoCoVIP	-				75	100
Attenders/concert	200	300	300	450	550	700

When Peter joined CoCo in August 2003 the ensemble had a database with 400 subscriber names that had actively registered themselves. On top of these, there were 150 key personalities from the music community (politicians, administrators, musicians, press...). The persons in the database had received an A4 newsletter every now and then. This promotion and other channels of marketing attracted an average of 200 attenders per concert.

Financial and administrative stability were two of the main objectives for CoCo when Peter joined. With an average of 200 attenders at their own concerts, increased audience numbers naturally was one of the main goals following from these objectives. Therefore Peter and his associates (1) actively increased the number of names in the database, (2) improved the communication with the people in the database and (3) promoted increased audience loyalty.

1. From August 2003 till December 2005 the database has tripled from 400 to 1 250 names. The number of "passive names" (politicians, top managers etc) is now 250. There are no statistics available on how the database grew in this period. However, there can be little doubt that the quantitative increase in the database correlates with the increase in attenders.

It is noteworthy that the "active names" in the database were mainly recruited among occasional concert attenders who were happy to give their details for information. There were no commercial campaigns in newspapers or any other active large-scale attempts outside the concert hall to recruit names.

2. In the autumn of 2003 CoCo shifted from A4 newsletters to printed brochures that soon became very fancy: programme notes and interviews written by professional journalists, four-colour print, pictures, often with a cd with excerpts from upcoming cd releases included... The price for creating and distributing this "newsletter" to 1.200 recipients is appr. 50.000DKK (6.500€). In 2004 there were 4 newsletters.

This relatively big cost for the newsletter/magazine is of course a heavy burden for a freelance ensemble. Therefore, the newsletter was turned into one single season brochure for 2005/06. As a complement CoCo has created an e-mail list of 800 names that is sent when something happens (concert, tour, cd release, review). On average, these mass e-mails are sent once a month. According to Peter, there are two sign-ups for every request for cancellation of e-mails each time they are sent out. The e-mail database is therefore still growing.

3. To increase loyalty of the customers and reduce administrative work, CoCo introduced a "Partout card" (For all card) in the spring of 2004. This concept, that is relatively unknown in the Nordic countries, differs from a Subscription in that it includes all concerts for a given period in a given town and that it doesn't give exclusive seating. The main philosophy is still the same: reduced price as an exchange for loyalty. A Partout card can of course be complemented with typical subscription VIP benefits such as get-togethers with artists or discounts in cd shops. Reasons why CoCo chose "Partout cards" were
  - a. the fact that CoCo had very few concerts in Copenhagen each season forced them to include all of the concerts (par tout - for all)



- b. due to financial reasons concerts were often cancelled at short notice (card holders were promised financial compensation if this happened)
- c. my guess is that the old fashioned French name also strengthened CoCo's brand and profile as an ensemble for early music in contrast to the Subscriptions of the romantic size symphony orchestras of Copenhagen

CoCo sold approximately 100 Partout cards in the first season (spring 2004) and reached 150 a year later. Although impossible to prove with the available data, the increase in loyalty (same person visits more times) most probably accounts for several 10% of the increased attenders.

For the autumn of 2005 CoCo ended the Partout card offer for two reasons: 1) The season started very late (November) and was short (opera and Christmas concert), and 2) they wanted to increase loyalty still further among the closest supporters. Therefore CoCo introduced the VIPCoCo club - Virkelig Interesseret CoCo Publikum - Very Interested Public of CoCo. The price for registering to the club is 1.500DKK (200€) for adults and 1.000DKK (130€) for students and retired people. In addition VIPCoCo:s pay a yearly membership fee of 250DKK (33€) or 150DKK (20€) for students and retired people. Many of the VIPs also help CoCo with practical matters such as selling tickets.

In exchange, the VIPs are given a Diploma of their membership to put on the wall, reduced prices (20%-100%) on concerts, access to special events and membership gifts such as cd:s and t-shirts.

The goal is 100 VIPs. In the first months, CoCo has registered 75.

As a first summary, CoCo's increase of average concert goers from 200 to 550 in some 18 months was the result of three main components

1. quantitative increase in persons receiving direct mail
2. qualitative improvement of services, including direct mail
3. development of loyalty schemes

## Future

I briefly discussed CoCo's future plans with Peter. Two things strike me: Peter is at the same time focused on both growth and the value framework of CoCo.

Growth is important to CoCo. With more official funding, sponsors, touring and audience the orchestra can stabilize its activities and increase the number of productions. With an increased number of productions and an increased number of production performances the orchestra will be able to keep up and further improve the artistic level. Perhaps it would even be possible to give more musicians longer contracts!

But Peter isn't simply interested in larger audiences. It isn't good to fill every seat of the 800 seat concert hall, "Because then everybody couldn't see the conductor and the orchestra - and visually following the energy of the ensemble is a very important factor of the CoCo experience. We want each attender to have a great experience each time".

With this trend continuing - the 550 seats that are today filled in the Copenhagen concerts and only some 800 on sale - the Copenhagen concerts will very soon be sold out. Peter is aware of the quantum leap it takes to move from a sold out series to "repeat concerts with perhaps 400-500 attenders in each".

But Peter doesn't buy my suggestion to introduce Subscriptions through a large marketing campaign. The financial risk isn't the main argument: "We don't want just any audiences. We want an audience that shares the values of CoCo".

As a person now specializing in marketing of concerts I find Peter's responses very challenging. And challenging in a positive way: the marketing strategy is an outcome of distinct values of the organisation. Marketing for marketing's or for money's own sake is of course short sighted. Marketing for a product founded in values and a philosophy is enriching in the long term not only for the musicians and the audience but also for the marketing personnel.

So the way forward for CoCo in Copenhagen is obviously to keep extending the database by recruiting names at the concerts (and perhaps through references from existing names in the database), by continuing to increase both the loyalty of occasional attenders and also the number of friends. This has thus far proved a very strong strategy for CoCo to simultaneously increase ticket income and get administrative support free of charge.

### 2.3. Conclusions

CoCo almost tripled its audience in 1,5 season. Although the starting point (an average of 200 attenders per concert) is low, the result (350 more attenders in average) is still very good for such a short period.

Since CoCo's marketing resources are extremely limited, they haven't done very much marketing other than that stated above. The connection between the CRM work and the growth in audience numbers is therefore very strong.

To summarize CoCo's marketing techniques to achieve this success:

- 3x more names in database
- develop communication with the loyal audience through
  - improved quality of newsletters
  - modernized communication (e-mail newsletters)
- develop audience loyalty by
  - introduction of Partout card
  - creation of VIPCoCo club

I also want to emphasize the following aspects that strike me in CoCo's case

- CoCo already had a strong value base from which they could communicate their brand
  - Early music
  - Passion for quality, whatever it takes
- The period of audience growth started when CoCo's administration was professionalized
- The leadership of Peter Stevnhoved is strongly hands-on (active) and goal oriented
 

Comment: This seems to be a strong common denominator in most successful audience campaigns. You need to settle a goal, you need to have a plan how to achieve the goal, you need to be flexible to change both goal and plan when reality so demands, and you need to carry through the work that you have written in the plan. If this is a weak spot in your character – don't panic! There is a lot of both literature and training in this field. Some literature is listed at the end of this report.
- Within this very short period CoCo has experimented strongly with different approaches, still grounding the experiments in their general values and philosophy and thus making the experiments recognizable as belonging to a specific CoCo framework

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#### Footnote:

This study is based on an interview in December 2005 with Peter Stevnhoved and materials provided by Concerto Copenhagen. After the interview Peter has read through the document several times.

When calling in March 2006 I become curious about what has happened because communicating with Peter is suddenly very different: he is much calmer and patient in both explaining and listening, he is not constantly interrupted and there is much more "space" in our dialogue. Peter explains the background. CoCo has recently kept its annual General Assembly which recognized that CoCo has gone through an immense period of growth in many sectors (including audiences in Copenhagen). The ensemble has now reached a new level of existence and it is time to integrate.

To make the point clear: To increase audience attendance with 150% is a quantum leap that takes hard work. But there is an end and a reward for the process.

## EFFECTIVE MARKETING BY CLASSICAL MUSIC PROMOTERS

*Effective Marketing by Classical Music Promoters – 9 Case Studies in High Level Audience Growth* is a 100 page report commissioned by 36 classical music promoters in the Nordic countries. It was finalized in April 2006 by StillArt - a consultancy company supporting arts organisations in strategic development.

THE CASE STUDIES	
Concerto Copenhagen	From 200 to 550 sold tickets / concert in 18 months
Östgöta Blåarsymfoniker	1.800 subscriptions in 6 seasons
Deutsche Kammerphilharmonie I	1.200 subscriptions (sold out) in a few season (mid 90's)
Deutsche Kammerphilharmonie II	1.200 subscriptions in first season of new series (2004)
Royal Liverpool Philharmonic Orchestra I	14.000 new visitors, 1.000.000€ increased ticket revenue in 3 seasons
Royal Liverpool Philharmonic Orchestra II	Group sales covered costs (incl. salary) within 1 year from campaign start
Vanemuine Teater	3 x audience, 3 x revenue in 2 seasons
Tonhalle Düsseldorf	Award winning advertisement campaigns
Kongelige Teater	The most modern web based CRM system in the branch

The report is written as a self help guide for arts institutions that are serious about increasing audience numbers effectively. The case studies present dozens of techniques that can be used immediately. Even more importantly, however, the research discovered two basic factors common to all these success stories: customer relationship management and development of leadership - factors that can be developed regardless of financial and professional situation.

### The report

- is action oriented and written to inspire
- has a pedagogical outlook with references for further reading
- describes dozens of practical examples for immediate action
- focuses on strategic factors behind strong audience growth
- is adaptable to arts organisations independent of organisational type and environment
- proves that the marketing philosophy is more important than money and competence

**Price:** 1.000€/500€ depending on the size of the organisation. Delivered digitally – 100€ extra for 3 print copies (100 pages, full colour). 6% VAT added for Swedish organisations.

You are welcome to contact us to discuss the findings of the research! We are also happy to help you evaluate the suitability of the report for your organisation's needs and circumstances.

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