Marketing Professional Ballet: A *Pas De Six* – Three Cases and Their Audiences, Box Office Receipts, and Patrons

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***Carla Stalling Huntington**'s research centers on marketing and managing the performing arts. In addition, she is interested in influencing public policy to create increased demand for them. Her experience includes extensive and highly responsible positions in the for-profit business world, and she previously founded and led a successful professional ballet company.*

Abstract
This paper presents summary findings of a larger study. Here the interpretation of the effects of marketing expenditures on three variables in three professional ballet companies is given for the years 1990 – 2000. The variables were box office receipts, patronage, and audience growth. The Stuttgart Ballet in Stuttgart, Germany; The Kansas City Ballet in Missouri, United States of America, and Les Grands Ballets Canadiens de Montreal in Montreal, Canada are the three representative cases. While the marketing efforts evaluated in the North American cases were substantial and undertaken to increase box office receipts and audiences, audiences were not growing at an appreciable rate and box office revenue did not increase as a percentage of overall earned income. However, there was significant increase in donations from private patrons. Different results were found in the German case.

Keywords
Strategic Marketing; Performing Arts; Professional Ballet; Audience Growth; Marketing Expenditures.

Introduction

It is my hope that my research will eventually contribute to a much needed and long overdue industry-level stimulation, a positive shift, of consumer demand for performing arts in general and professional ballet specifically. I believe that the shift I envision can be achieved through strategic marketing efforts. With these ends in mind, I conducted research into the marketing methods of three professional ballet companies in three western countries. All three companies were non-profit (the North American companies had varying degrees of deficits over the period), complete with earned and unearned income distinctions, received government funding in varying degrees (declining in North America), and had company leadership comprised of artistic and executive staff. Of course I would have liked to have researched more companies; however time and monetary constraints prevented that.

Nevertheless, with performing arts companies' longevity in mind, this article has three aims. *One* is to present the effects that marketing has had on audiences, private patronage, and box office receipts, revealed in the case studies over a ten-year period of time, from 1990 through 2000. Data is presented that indicate relationships between marketing expenditures and the aforementioned variables. *Another* aim is to inquire as to the reasons for the outcomes. *Finally* then, recommended approaches to marketing are given. There are two. The first is that performing arts organizations become more strategic in their approach to marketing and include a social marketing component. Second, that government underwriting of consumer research and behavior studies for the professional ballet industry be engaged to change behaviors and

increase real audience growth. After presenting data and prescriptives I then suggest future research possibilities.

Methodology and Theoretical Considerations

One aspect of marketing theory purports that an increase in strategic marketing expenditures in lock-step with a firm's marketing orientation or concept could be undertaken to change or increase audiences and revenues. Moreover, marketing strategy emphasizes the measurability of desired changes between the independent and dependent variables. As such, the question was: Does marketing expenditure in professional ballet positively affect box office receipts, audience size, and patron donations? The hypothesis was that marketing would affect these variables in live case examples.

Therefore, three firms were selected to participate in this study based on a set of criteria. They had to have been in existence since the 1950s but not be top of mind in brand awareness; had to have revenues of over $4 million United States dollars; needed to be in a mixed macro-economy; and have its main facility in the West. Importantly, the firms' directors had to agree to participate in the study.

The research methodology used an ethnographic approach to gather data. Three weeks of on-site observation of each of the companies was undertaken. During the site visits, interviews with executive staff and key board members were conducted to determine their points of view relative to the importance of marketing for professional ballet companies. In conjunction with the interviews and ethnographic approach, financial statements, strategic plans, and marketing plans were gathered for the period under investigation. The data was synthesized and analyzed to determine if there were relationships between marketing (the independent variable), earned and unearned income, and audience sizes (the dependent variables).

Findings

While informants agreed that the marketing efforts conducted in the North American cases were substantial and undertaken to increase box office receipts and audiences, audiences were not growing at an appreciable rate and box office revenue did not increase as a percentage of overall earned income. However, there was a significant increase in donations from private patrons with increases in marketing expenditures. Different results were found in the German case.

In attempting to explain why these results were found, it became clear that the marketing efforts in the two North American cases were not strategically derived. In other words, if the company leaders wanted to increase their audience sizes and sustain them for example, they would benefit from improved target market strategies with measurable goals and objectives. The main challenge of such marketing would be a behavior change for consumers. The German ballet company however did appear to have a strategic approach, supported by both a social marketing component and systematic marketing tactics.

If marketing expenditure is classified as an independent variable, it is generally assumed that increases in it will have an impact on other previously identified dependent variables. Items such as audience size, patron demand, and box office receipts are dependent, or quantities that may change with a change in the independent variable. For our immediate purposes, marketing

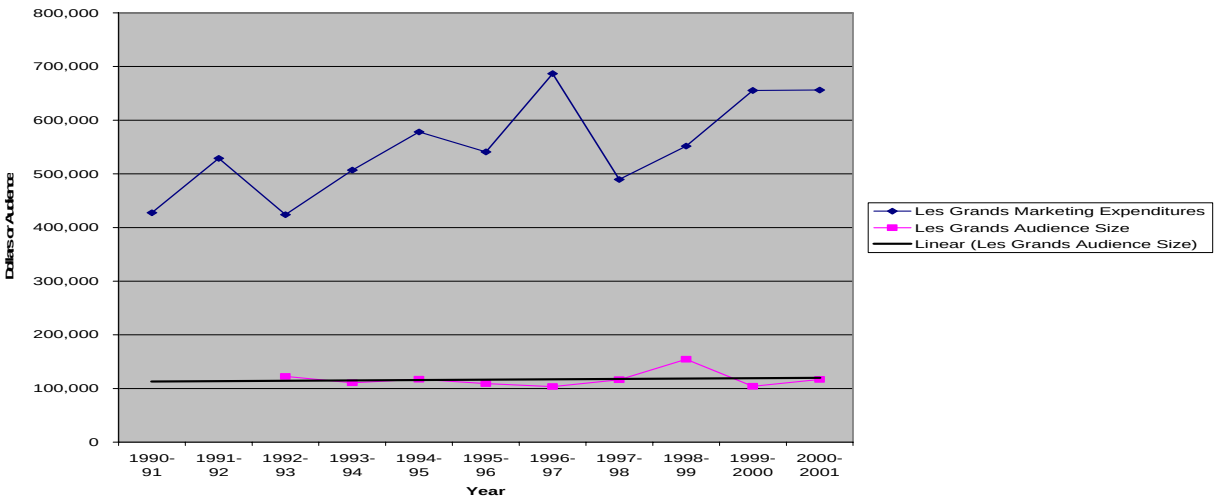
expenditures include not only direct disbursements for print and media advertising and promotional efforts, but also include salaries for marketing personnel, travel, and miscellaneous expenses. The next subsection examines, by inspection and comparison, relationships between these variables. After that, a discussion of the ways in which such connections may be strengthened ensues.

a) Audiences

It is useful at this point to review some comparative effects of marketing expenditures found in the cases. The question begging to be answered is "Did increased marketing expenditure by these three companies increase audience sizes, patron demand, or box office receipts for ballet products?" Data on these measures have been compared to expenditures for marketing over the time series for each of the three cases.[1]

Graph 1 Marketing Expenditure and Audience Growth, Les Grands 1990 – 2000, depicts the company's relationship between marketing expenditures and audience growth. The data indicates that there was no steady and consistent relationship between the two for Les Grands. For example, in 1993/94, marketing expenditures increased over those of 1992/93, while audience growth dipped. In 1994/95, marketing expenditures were increased again, and audience growth increased only slightly. The 1995/96 year shows a decrease in marketing expenses with a decrease in audience size. However, 1996/97 and 1997/98 data demonstrate the two variables moving in opposition. By 1998/99 they moved in concert again. One important point to note though is that there was neither a sustained nor significant positive trend in audience growth during this period of time.

Graph 1:
Marketing Expenditure and Audience Growth, Les Grands 1990 – 2000



For Kansas City, Graph 2 Marketing Expenditures and Audience Growth, Kansas City 1990 – 2000 shows that at the beginning of the time series, there was a direct yet miniscule relationship between the two variables. When marketing expenditure was increased, audiences grew in each year until 1992/93. In 1993/94 a drop in audiences occurred with a decline in marketing. The positive relationship between increased marketing and audiences returned in 1994/95, but

disappeared in the next two years. By 1997/98 there did not appear to be a positive effect on audiences with increases in marketing expenditures.

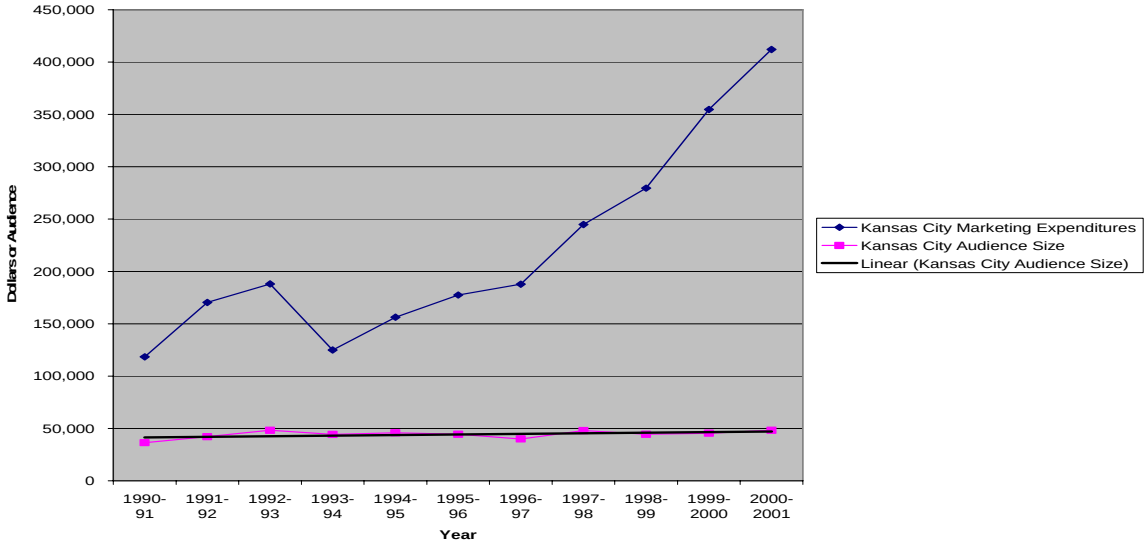
Constant increasing expenditures on marketing efforts in Stuttgart were related to an increasing audience at the trend level of analysis. However, individual data points for marketing expenditures and audience growth had no relation. More often than not, the individual data points indicate an inverse relationship in audience size and increased marketing expenditures. Graph 3 Marketing Expenditure and Audience Growth, Stuttgart 1990 – 2000 presents this data.

b) Patrons

What was the effect of marketing expenditures on patron demand? For this analysis Stuttgart has been excluded due the fact that such demand is not significant for that company in the manner in which it is for the North American cases. In any event, where patron demand, i.e., contributed income, is the dependent variable, the individual data points for Les Grands indicate a sharply increasing trend in patron demand was consistent with increased dollars spent on marketing. For Kansas City there was a steadily increasing trend in marketing expenditures and contributed income. What do the micro-level data show?

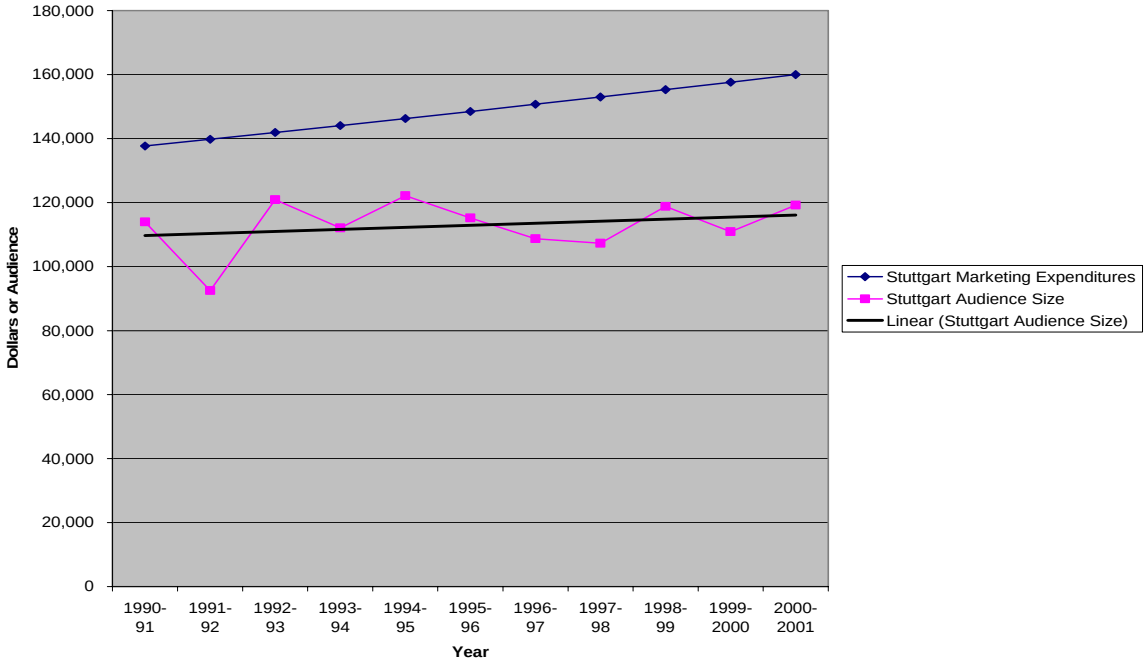
Graph 4 Les Grands Marketing Expenditures and Contributed Income (nongovernment) 1990 – 2000 depicts the trends and data sets. Looking at the individual data points, the connections between the two variables are non-static. Evident was wide fluctuations in both variables in terms of expenditures and contributions from year to year; however for two years of the study the relationship between the two variables was positive. In the years 1993/94 and 1996/97 when marketing expenditures increased over the previous year, there was an increase in contributed income in the same year. The 1995/96 year shows that a decrease in contributed income was associated with a decrease in marketing. In the other years the variables moved without consistency. Be that the case in the point variables, it is clear that the trend in increasing marketing is associated with a trend in increasing patron demand.

Graph 2:
Marketing Expenditure and Audience Growth, Kansas City 1990 – 2000

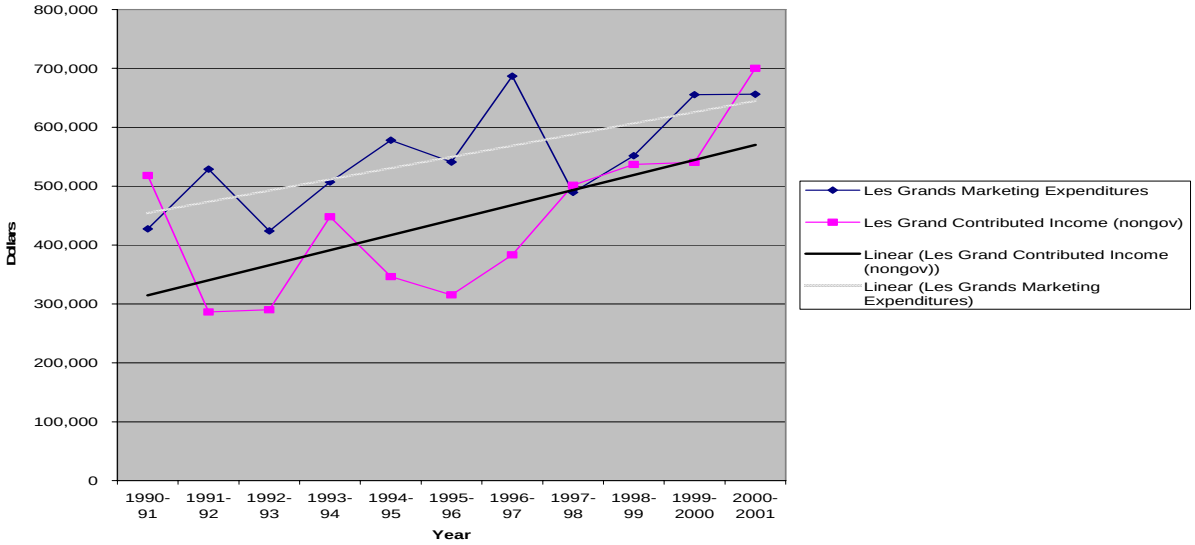


While not as sporadic, the trends in Kansas City are clearly upward. Refer to Graph 5 Kansas City Marketing Expenditures and Contributed Income (nongovernment) 1990 – 2000 for the representations. The data for Kansas City reveals an inverse relationship between marketing expenditure and contributed income in 1993/94 and 1999/00 where increases in marketing are matched with decreases in contributed income. For the remaining years, the relationship was positive or unchanged.[2]

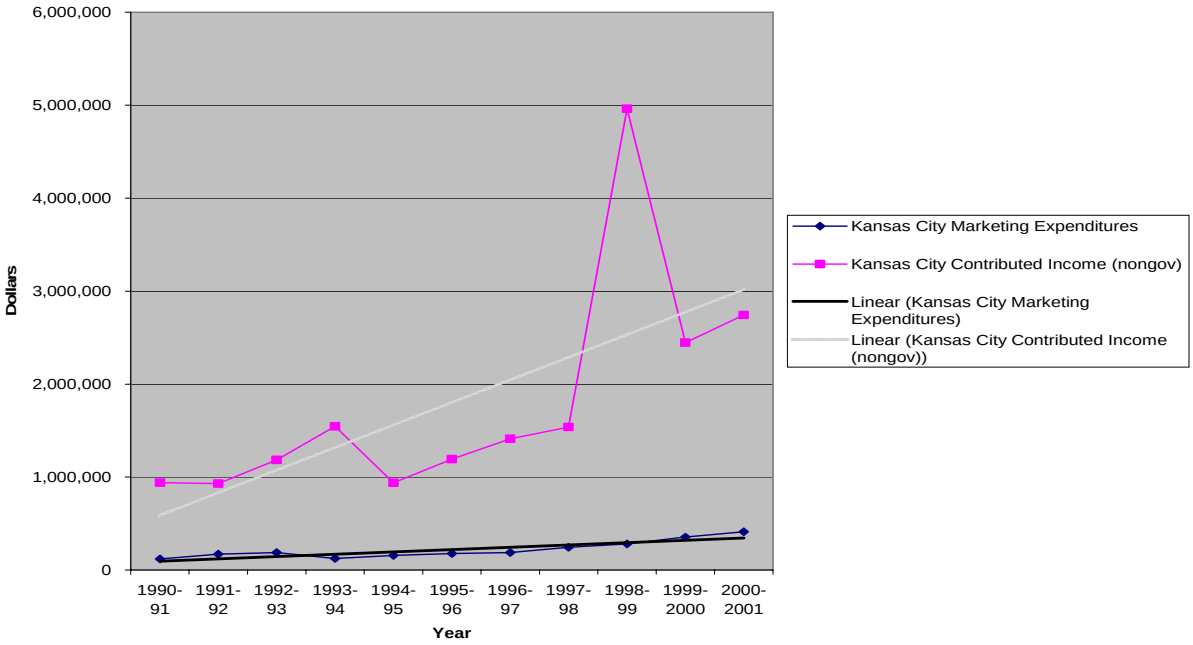
Graph 3:
Marketing Expenditure and Audience Growth, Stuttgart 1990 – 2000



Graph 4:
Les Grands Marketing Expenditures and Contributed Income (nongovernment) 1990 – 2000



Graph 5:
Kansas City Marketing Expenditures and Contributed Income (nongovernment)
1990 – 2000

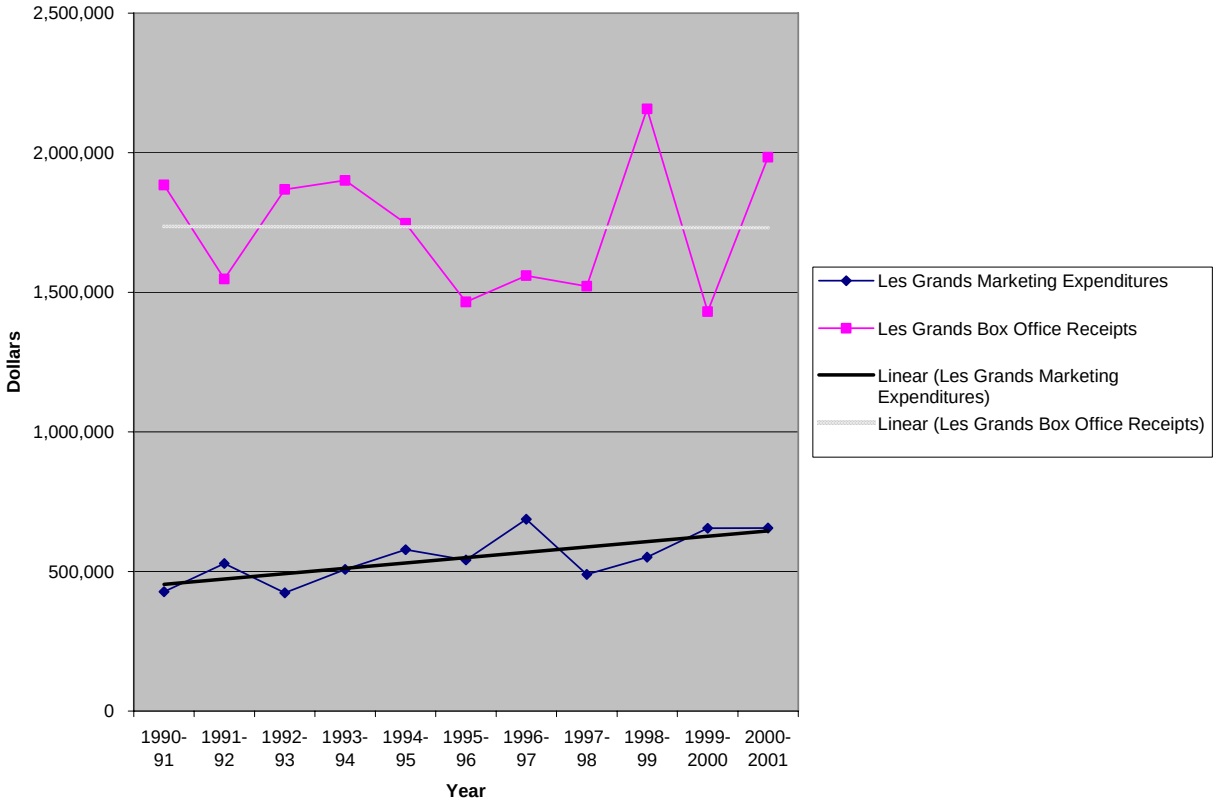


c) Box Office Receipts

When we examine box office receipts relative to marketing expenditures, the trend in all three cases was upward. The more marketing being done, the higher the level of box office receipts. It appears that the dependent variable was positively related with changes in the levels of marketing expenditures. However, Les Grands' case is a bit peculiar. There was tremendous fluctuation in the expenditure levels for marketing over the time series. The trend line therefore was best fit as a flat line that indicated no relative change in either direction over the time series. This is depicted in Graph 6 Marketing Expenditures and Box Office Receipts, Les Grands 1990 – 2000.

Graph 7 Marketing Expenditures and Box Office Receipts, Kansas City 1990 – 2000 shows data sets with the two variables. Changes in marketing expenditure change the amount of box office revenue in the positive direction for years 1990/91, 1991/92, 1993/94, 1995/96, and from 1997/98 until the end of the study. In these years, increases in box office revenue were positively related with marketing when compared with the previous year. At the same time, in those years when marketing expenditure decreased over the previous year, box office revenue declined for all other years except 1994/95 and 1996/97. Similarly, Stuttgart's data, shown in Graph 8 Marketing Expenditures and Box Office Receipts, Stuttgart 1990 – 2000, reveals that slight increases in marketing increased box office receipts in each year except 1993.

Graph 6:
Marketing Expenditures and Box Office Receipts, Les Grands 1990 – 2000



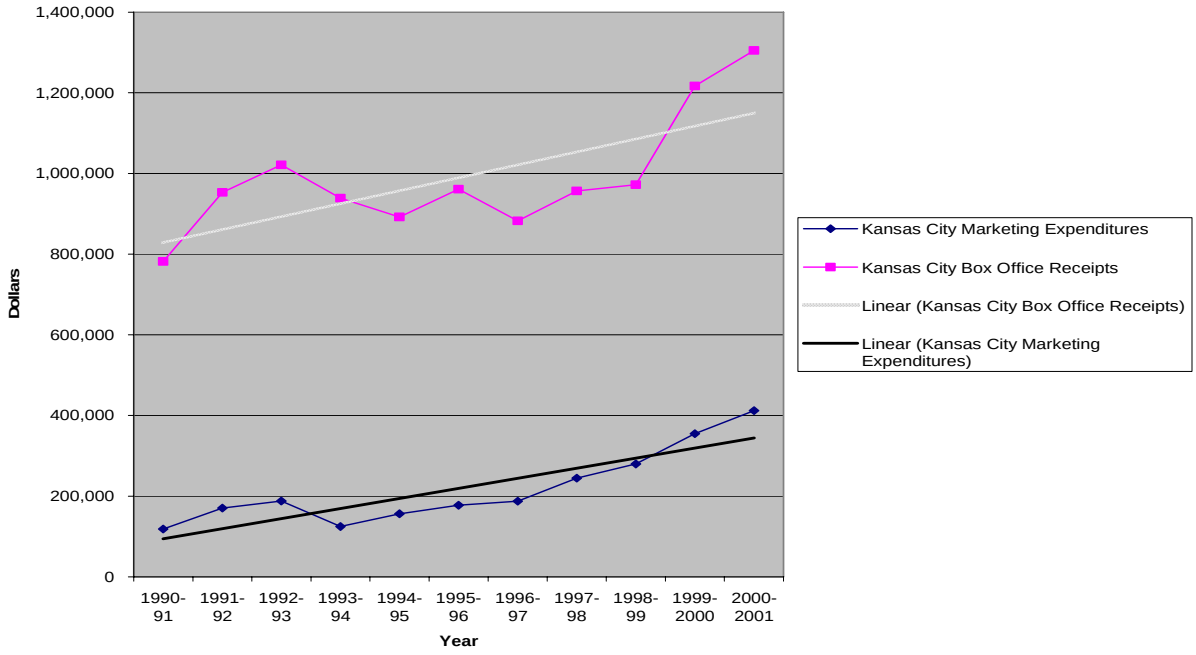
What about box office receipts as a percentage of revenue? They were on decline for both Kansas City and Les Grands. In Stuttgart they remained unchanged due to the mandate to raise 20% of their revenue from consumer demand. Of the two North American companies, Kansas City's earned income as a percentage of revenue declined faster in aggregate than that of Les Grands. However, the trend for Les Grands declined nonetheless at a significant pace. Kansas City began the series with the box office contributing over 35% to total revenue; it ended at just over 30%, with highs and lows in between. Les Grands began the 1990s with over 40% of total revenue coming from consumer demand and ended with just under 35% with marked fluctuations in the amounts over the years as well. These relationships are depicted in Graph 9 Box Office Receipts, Percentage of Revenue, 1990 – 2000.

It is necessary to keep at least two points in mind here however, in terms of other explanations of increases in revenues that could be unrelated to marketing efforts. First of all, both companies had a relative increase in non-government contributions. Of course then that would mean that the percentage of box office receipts would be declining if the relative amounts of non-government income increased. And secondly with regard to increases in box office receipts themselves, this could be attributable to increased prices where the audience was static and demand inelastic.

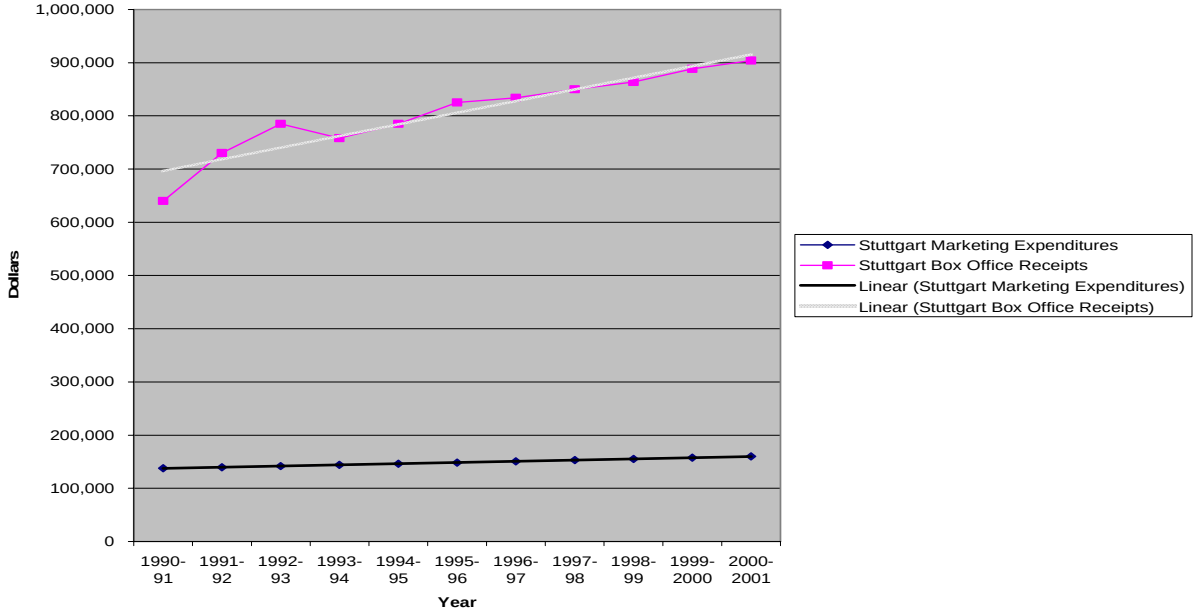
Those explanations notwithstanding, this section has presented data from the three cases showing possible relationships between marketing expenditures, box office receipts, patrons, and audiences. The next section will give a brief set of possible theoretical explanations for the

findings. Namely that the marketing efforts were non-strategic and do not address the decay in audiences for the professional ballet industry as a whole.

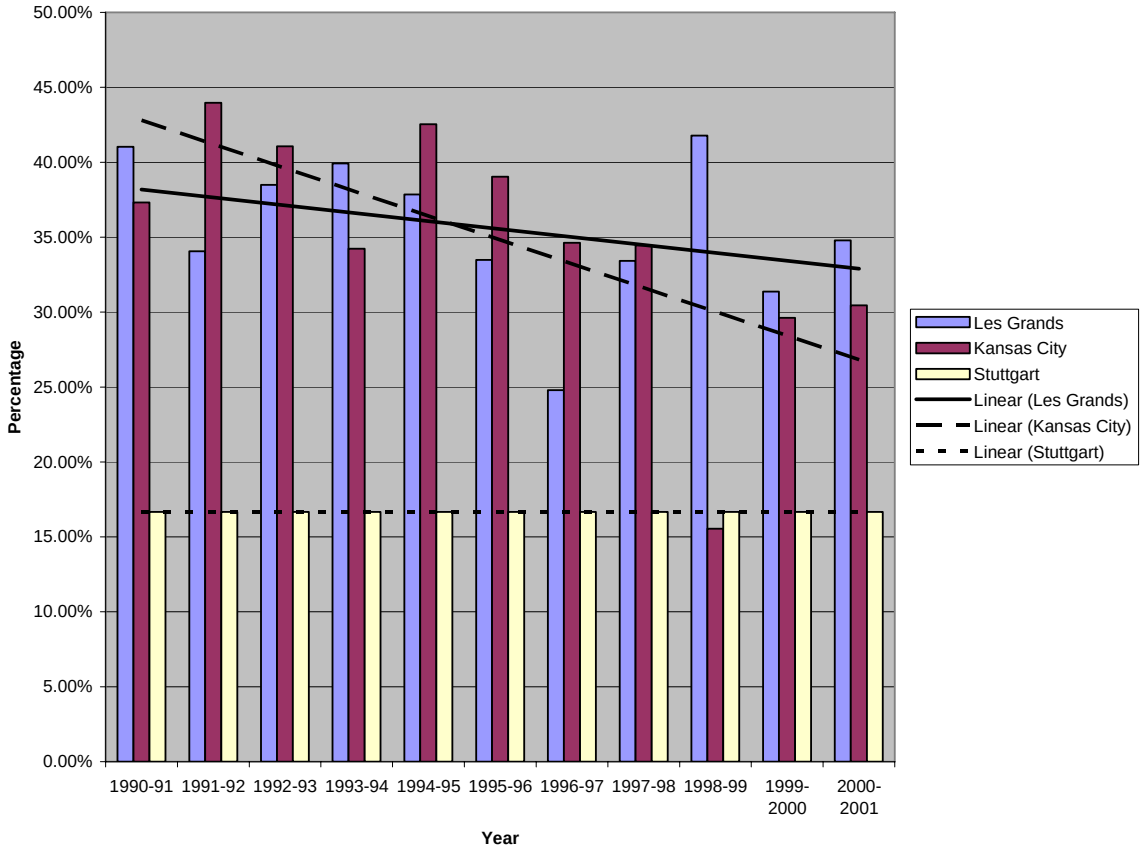
Graph 7:
Marketing Expenditures and Box Office Receipts, Kansas City 1990 – 2000



Graph 8:
Marketing Expenditures and Box Office Receipts, Stuttgart 1990 – 2000



Graph 9:
Box Office Receipts, Percentage of Revenue, 1990 – 2000



Discussion

The trouble with these analyses is that we cannot say, using only the available data, how much marketing expenditure exerted what level of quantifiable change in the dependent variables of audience growth, patron demand and box office receipts. What is known about the expenditures for marketing in the three cases is that they were made non-strategically. In none of the cases, prior to establishing a marketing department or engaging in marketing activities for example, were consumer behavior studies conducted before marketing was executed. Audiences were not segmented with ballets presented to them in lock step with the company's marketing concept or marketing orientation. Researchers did not assess audience response or motivations to attend performances.

In short, there was marketing expenditure on salaries and supplies, media advertisements, education, and outreach programs. Many professional ballet companies view education and outreach programs as the insurance for a bright and growing future audience. Indeed many marketing professionals have suggested that this kind of marketing is necessary. Education programs attempt to reach young children in the hopes that later in life they will embrace professional ballet. In addition, outreach programs—termed "public relations and promotion"—aim to generate good will towards the ballet.

All three companies under consideration in this research had such programs. They were administered in a variety of ways, from presentation of a lecture-demonstration at an elementary school to giving away discounted tickets to children and their parents. These actions though aid the performing arts with questionable returns, according to Throsby and Withers:

> … [c]omprehensive education in artistic appreciation is a difficult and expensive undertaking, far more so than ongoing support of performance companies and projects. Moreover the returns are diffuse and are a long time coming.[3]

While such approaches may have some effectiveness, social marketing attempts to educate the consumer do not precipitate behavior or attitude changes and certainly do not increase box office revenues for the company today (Peattie, Peattie and Clark 2001). Moreover educational and informative marketing expenditures exhibit utility when used on a target market that will behave favorably toward our cause without a reward of some kind (Rothschild 1999). Hence this could explain the relationship between marketing expenditures and increases in patron support. Nonetheless, the outcomes exhibited by the relationships in this research for the North American cases lead me to conclude that the marketing used did not meet the real need of the professional ballet company or industry: To develop or increase new audiences.

The problem is that effective and beneficial marketing programs—strategic and research driven—cost money. And each firm was responsible only for itself. Therefore, rather than engage in those aforementioned, the North American professional ballet companies here tended to spend marketing dollars on immeasurable public relations and educational programs, with the result that sustained increases in box office receipts as a percentage of revenue and increases in audiences alluded them. And the bottom line is that continuously increasing audiences and increases in revenues resulting from those audiences form the backbone of a growing performing arts industry.

Importantly, Stuttgart's case indicates that audiences increased with marketing expenditures. I believe that result stemmed from two tiers of efforts. First from the collective strategic marketing efforts on the part of the artistic industry aimed at a social consciousness on the one hand, and strategic marketing efforts on the part of the *Staatstheater* (i.e. public funds) on the other. Therefore, the next section explores the possibilities of increased social and strategic marketing at the levels of firm, industry, and federal government. Consumer research, promotional strategy and design, measurable development of markets and targets, and development of patron demand could be addressed under this scenario.

Implications

Three researchers have broached the subject of marketing and the performing arts supporting the ideology that government could play a role in improving demand for professional ballet. The first one comes from Kevin McCarthy's *The performing arts in a new era* (2001). His work was commissioned by The Pew Charitable Trusts through the RAND Corporation to examine the state of the performing arts, and to evaluate 21st century performing arts organizations. McCarthy recommended greater resources be spent to stimulate demand for the performing arts. I interpret the recommendation geared toward stimulation in demand to be aimed at increased marketing expenditures. Those marketing expenditures would originate from government as McCarthy believes:

> Because public and philanthropic arts policy over the past half-century has concentrated more on building and strengthening the supply of artists, organizations and productions than on stimulating the public's demand for the arts, this recommendations points to a profound policy shift. … Efforts [paid for by government to stimulate demand] to diversify and broaden arts audiences are also less likely to be subject to the criticisms that have been raised about public subsidies…[4]

A point of view I hold is that government could stimulate demand from consumers and patrons if it was to a) launch an industry-related consumer behavior research program with the goal of changing behaviors and attitudes, and b) if it were to underwrite the cost of advertising to stimulate industry demand based on the results of such a program. If the research program were designed correctly, demand for ballet could be stimulated through the understanding of consumer tastes and related presentations of ballet. After this, a strategic marketing campaign could be developed. It seems to me that this is exactly what was done in the United States for the dairy industry. The result was that commercial dairies, left alone to market its products was incapable of shifting demand, nonetheless benefited from the resultant shift when the marketing was taken from a micro to a macro level. Of course I do not mean to suggest that ballet or performing arts products are simple commodities; I do suggest that collective marketing actions supported by government can turn an entire industry from one of decline and decay to one of sustained growth.

Another scholar that considered a marriage between government and marketing for the performing arts was Jennifer Radbourne. Her article "Social Intervention or Market Intervention? A Problem for Governments in Promoting the Value of the Arts," was published in the *International Journal of Arts Management* (2002).[5] In that article she discussed performing arts company marketing strategy in Australia and hypothesized two results that governments present if they expend dollars for marketing for the performing arts at large. She defined those as "social intervention" and "market intervention" for the performing arts companies. Social intervention by the government would be a system wherein the government supplied promotional materials for the performing arts "as a means of enriching society and encouraging greater participation in and appreciation of artistic/cultural activities."[6] Under market intervention, government would provide direct investment into marketing practices such as "market development, research and marketing strategies, as a means of achieving increased consumption"[7] of professional ballet products. While Radbourne views the market intervention approach as problematic, this researcher believes that both systems if utilized correctly would prove useful in terms of stimulating demand in the professional ballet industry.

Finally, researchers Throsby and Withers suggested that government be integrated into the marketing process.

> Western society does not generally look upon [the performing arts] as an individual necessity … [and this and other attributes about current audiences for and firm structure of the performing arts] may establish an argument for [government] assistance in marketing and advertising for the arts ...[8]

Further, Throsby and Withers remind us that "the only valid argument for government aid to the arts is that it is a means of educating the public's taste"[9] suggesting government support for marketing and advertising in this sector of the economy.

Stimulation of long-term demand most likely could be afforded with a focused social and strategic marketing and resultant advertising campaigns. Even though it was not implemented in a manner that I am suggesting here, another important and successful example of such a program was that used by the United States government during the cultural export program.[10] That program was probably the first concerted, specific, and targeted government-sponsored advertising and marketing program for the performing arts. Of a five-million dollar allocation, 10% of it was spent on advertising and promotion. Money was used to publicize artists and performances. Print, radio and newsreel media were utilized as promotional vehicles, as were critical reviews of performances. Moreover, marketing included lecture demonstrations, teaching seminars, engagement of local artists in performances, as well as highly publicized gala events.[11]

The upshot of suggesting that government funds be used to cover the costs of developing demand is to give governments in North America and elsewhere as the case arises, an opportunity to exit the supply business and move into the demand business with regard to professional ballet. These initiatives will allow companies to transition into a demand mode, or what we could consider marketing concept and orientation modes. Importantly, the costs of launching significant and enduring strategic marketing processes will not rest solely with the individual ballet companies.

What will the government consumer research reveal and how will it be used to increase audiences? How will government decide which companies receive advertising dollars? There is no doubt that a pilot program is needed. However, such consumer research would reveal a number of issues, but it would primarily be used to decide what types of ballets to stage through the level of marking services solicited by attenders (Douglas and Isherwood 1996). Moreover, such marketing research would deliver increasing real audiences—generate demand—with changed attitudes and behaviors towards the ballet. The point that is important to remember is that the results of the research would be country specific, but usable and accessible to all performing arts companies. Secondly, industry-wide marketing strategies would be launched, thereby alleviating the need for individual companies to expend impossibly large dollar amounts for effective marketing results. Of course, local expenditures would be needed, and could be subsidized by the government.

Cooperative Industry- and Firm- Level Marketing Efforts

Cooperative marketing efforts are an additional avenue to increasing the return on investment to the company marketing dollar. It could mean a significant reduction of expenditures that are not yielding any return relative to the amount of tickets sold or awareness of the respective ballet brand. If used in conjunction with the above governmental approach, such savings could be used to accumulate surplus or wealth for the company's brands. Of course, this will mean that the companies in the United States and Canada comprehend their joint marketing efforts as increasing market share for all participants rather than imagining that cooperation will ultimately decrease the size of their own audiences.

Neither Canada at the federal level nor Quebec at the provincial level had entities that focused completely on marketing the performing arts as was seen for Stuttgart. Further, no national or provincial directives existed in Canada that assisted consumers in being aware of ballet as a product or developing any type of loyalty to it. I would raise the same points for Kansas City. A cooperative effort in conjunction with other performing arts organizations in their geographic

area should be undertaken to engage in strategic marketing. Such an entity does exist in Germany and it gave Stuttgart a decided lead in its ability to increase audiences.

Conclusion and Future Research

This study was qualitative in nature and the conclusions presented certainly warrant further research. A main finding of this paper though was that the North American professional ballet companies under review here utilized marketing efforts that did not increase box office receipts as a percentage of revenue or increase audience growth in a stable and consistent manner. It is clear, from the level of expenditure and the discussions I had with executives, that Les Grands and Kansas City did however want to achieve both of these ends. The marketing efforts do seem to have affected patrons and their willingness to give to the ballet, again an outcome that was important to both companies. In Stuttgart's case, they increased audiences and revenues by using an approach to marketing that consisted of industry, government, and company levels of strategic, social and tactical marketing efforts.

Future research then to increase audience sizes and increase box office receipts as a percentage of total income, particularly in an environment where government subsidy continues to decrease, is needed. Not only is future research needed; funding consumer research so that the performing arts attract new and growing audiences is also needed. While there are arguments against having the government fund this sort of research, I would like to pose three arguments in favor of it. First of all, professional performing arts budgets are often unable to absorb the expense of market research and analysis. Secondly, government funding has been in the business of aiding the supply of performing arts and in so doing has basically assisted arts organizations in their failure to embracing the marketing concept and marketing orientation strategies that help align supply and demand. Done correctly government funding of marketing and research for the performing arts would allow the government to exit the supply business all together. That means that companies would, in the long run, be self-supporting through patrons and consumers.

A pilot program is needed wherein a number of predetermined performing arts organizations in a specified region of the world participate in a government funded consumer research program. At the same time they would engage in an industry-level cooperative method of initiating marketing efforts and simultaneously actively market their own company's individual cultural products. An example of such a strategy comes to us through Stuttgart, but also with the "Got Milk?" campaign. In that industry, demand for milk had turned downward at an alarming rate. The efforts from government, the dairy industry, and individual milk producers, coupled with effective strategic marketing, not only turned the industry around but produced an overall increase in demand for milk (Schiffman and Kanuk 2000).

Finally then and possibly most importantly, without this three-pronged approach to creating new audiences and generating box office revenues we may soon face a time when we reminiscence about the consumption of performing arts products as in a distant memory.

Notes

[1] German sources: Staatstheater Stuttgart 2002; Ministerium fuer Wissenschaft, Forschung und Kunst; Baden Wuertemburg 2003; Statistisches Bundesamt, Stat. Jahrbuch 1999-2000, and Deutscher Buehnenverein, 2003. Canadian sources: The Canada Council for the Arts, The Quebec Arts Council, The Arts Council for the City of Montreal, and Les Grands Ballets Canadiens de Montreal 2001. United States' sources: National Endowment for the Arts, Special Compilation 2003, National Endowment for the Arts Annual Reports 1990 – 2000; Kansas City Ballet 2003.

[2] The large spike in the data is the result of Kansas City fulfilling its obligations with the National Arts Stabilization Project. However, the amount of marketing expenditure and the relative portion of contributed income were noteworthy, even to the exclusion of the NASP by the end of the period. For example, nearly $3 Million was contributed in 2000/01 over less than approximately $500,000 in marketing expenditures.

[3] Throsby and Withers 1979, 302

[4] McCarthy 2001, 119

[5] Radbourne, 2002, 50 – 61

[6] Radbourne 2002, 56

[7] Radbourne 2002, 56

[8] Throsby and Withers 1979, 189, 191

[9] Throsby and Withers 1979, 245

[10] See Prevots, N. *Dance for Export; Cultural Diplomacy and the Cold War*, Wesleyan University Press, 1998 for a discussion of the topic on the Cold War and United States government subsidy for dance.

[11] Prevots 1998, 40; this is an excellent model to use in the application of price, product, promotion, distribution, and positioning in marketing the performing arts.

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