



nielsen

CONCERT

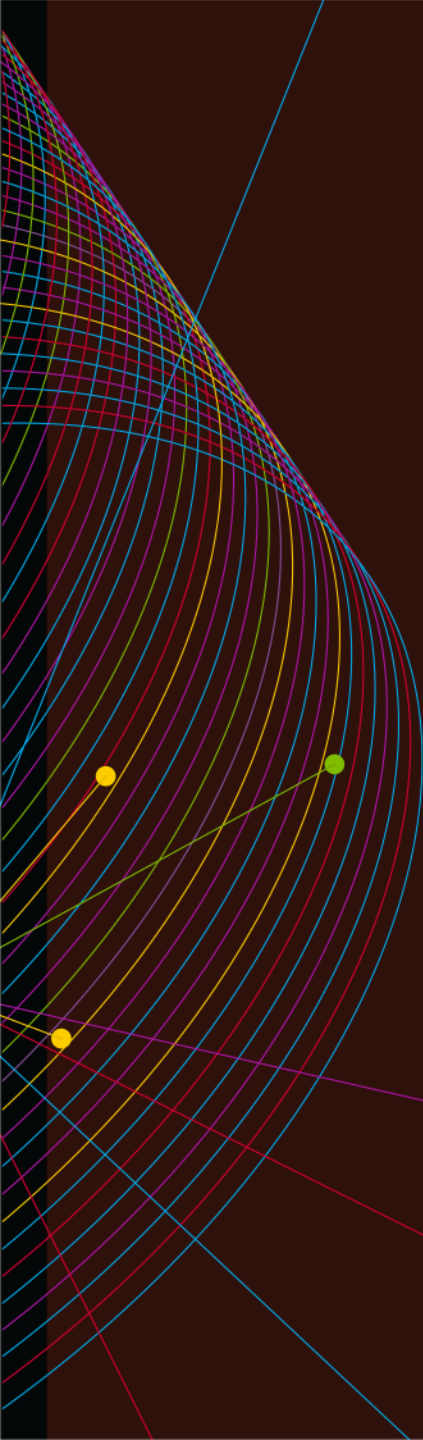
WORKSHOP OUTPUT

PREPARED FOR



s 9 (2)(a)

September 2015



BACKGROUND & INTRODUCTION

INTRODUCTION

- Radio New Zealand commissioned Nielsen to talk in-depth to both current, lapsed and prospective listeners of Radio New Zealand Concert with a view to understanding how to maximize the programme for existing and prospective listeners
- The bottom line is that across all groups – including those that currently listen frequently – listeners across the board wanted some **degree of change**
- To help figure out what the resulting change could look like, a workshop was conducted with the Concert team. Critically also listeners were invited to join the last session to express their views in person and to hear the Concert Team's plans for change
- This is a summary of the workshop session

WORKSHOP AIM

The three broad aims of the session

- To clearly define the target market for Radio New Zealand Concert
- To define the current and potential brand essence
- To work out implications for change

WORKSHOP ATTENDEES

- The workshop was facilitated by s 9 (2)(a)
- A cross section of the RNZ Concert team attended
- Three Concert listeners attended the last session to act as a 'sounding board' for the new ideas and directions for Concert - identified during the afternoon session

WORKSHOP OUTLINE

Here is an outline of the day

1. What Listeners Want

- Key themes from the research
- Painting a picture of the segments

2. Who is the audience?

- Who should Concert's audience be?
- Which of the typologies do we want to keep/attract

3. Best market positions for the audience

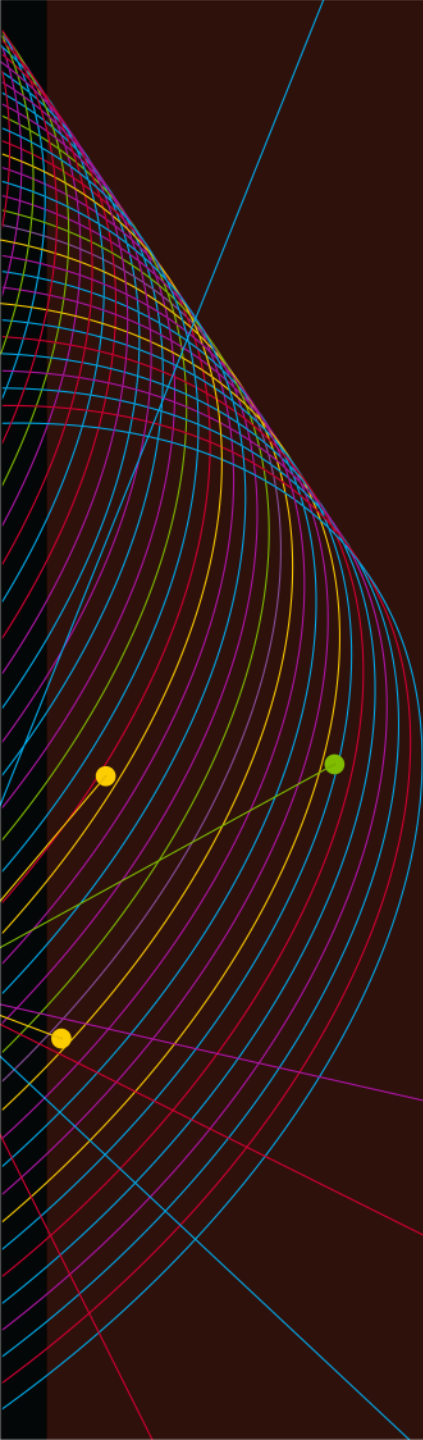
- SWOT analysis

4. Changes to Concert

- What to keep and ditch

5. Concept Generation

6. The Listener in the Room



WHAT LISTENERS WANT

KEY THEMES FROM RESEARCH
- A PICTURE OF SEGMENTS

WHAT DID THE RESEARCH TELL US?

s 9 (2)(a) provided a re-cap of the key research findings:

- Listeners like the **focus on music** and **variety** of Concert, plus the sense of **knowledge** and the New Zealand focus
- However non/lighter listeners see Concert as **highbrow** (do I need a music degree or Grade 8 to listen to it?), **heavy** (sombre music and serious opera), **stuffy** and a bit **old**
- **Loyal listeners recognise these perceptions too** – they don't want people to think they are boring for listening to Concert
- **Awareness** of the Concert offer appears to be an **issue** and there are some elements of surprise (e.g. Taiko drumming) – **telling people** what's on and how to find it is an obvious opportunity

HIGHBROW

“Groups like Sol3 Mio and the Tenors have brought opera to the people...but this radio station is missing the point because they are only playing the highbrow stuff.”

“It took a lot of concentration to listen to it.”

“I think it is a high standard of music. You have to know your stuff.”

“What I associate with it was music that you kind of had to be dedicated to listening to it.”

WHAT ARE THE MAIN ISSUES?

- Presenters on the whole seen to be **monotone**, **lacking approachability** and **accessibility** – people want to hear the **enthusiasm** for music come through
- **Disjoint** and **disruption** with the music played – pieces that don't match or suit the mood
- Too much unrelated **'talk'** on some programmes takes away from the enjoyment of the music. Concert is about music
- **News** can be intrusive and interfering and there can be too much of it – keep it but keep it short unless there is a crisis
- **Lack of sign-posting** and need for **destination** slots to provide more cues

PRESENTERS

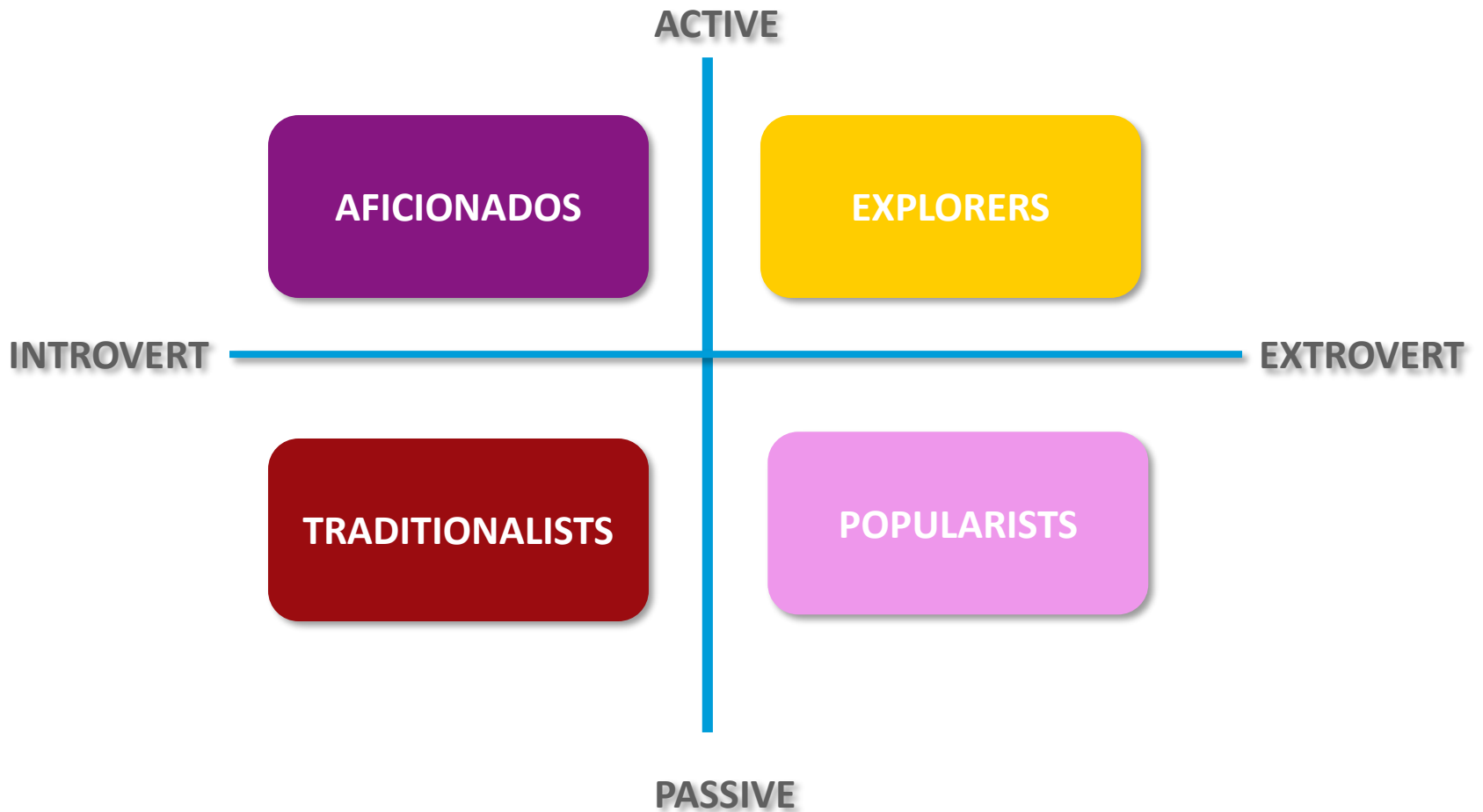
“He (the presenter) sounded like he was elderly and that sort of continuity announcer voice as if he was just reading out the programme notes from the CD booklet. Kind of stuffy really.”

“I think the announcers are a little bit stagnant maybe.”

“They are boring to a degree. They need a bit of life in them. They just need a couple of fireworks under them to get them going a little bit. Add a little spark to it. When you talk on the radio, it’s the tone of how you talk. Put a bit of emphasis into it.”

“There’s a lack of connection between the listener and the presenter. They could make it sound more interesting.”

CLASSICAL MUSIC LISTENING TYPOLOGIES



AFICIONADOS

AFICIONADOS
*Tell me something
I didn't know*

- Aficionados are looking for the breadth and depth of classical music
- So as well as the great composers they want more esoteric and contemporary composers included
- They are also keen to know the detail and minutiae and desire this at a more intellectual level to mirror their own knowledge and understanding
- Catering only to the Aficionados though would render Concert far too high-brow for the vast majority and it could be seen to be an exclusive club only for the cognoscenti
- Perhaps we cater to the Aficionados for some of the time but increasingly direct them to the digital space where they can really indulge their passion

EXPLORERS

EXPLORERS
*Take me
somewhere new*

- Explorers want to discover new things and many of them are doing this digitally and this looks to be the way forward for them
- However, Concert can offer new discoveries that may appeal to many of this typology
- The potential randomness of radio can play a part here or there may be specific programmes aimed at bringing new music to the airwaves e.g. Exploring Eastern European and Jewish Music, Discovering the Art of Asian Music etc

TRADITIONALISTS

TRADITIONALISTS
*Keep on playing
the classics*

- Traditionalists want to hear the great composers
- There is scope here to educate them a little so that they can derive even more enjoyment from the key classics that they love
- Maybe some works from the old masters that they hadn't yet considered

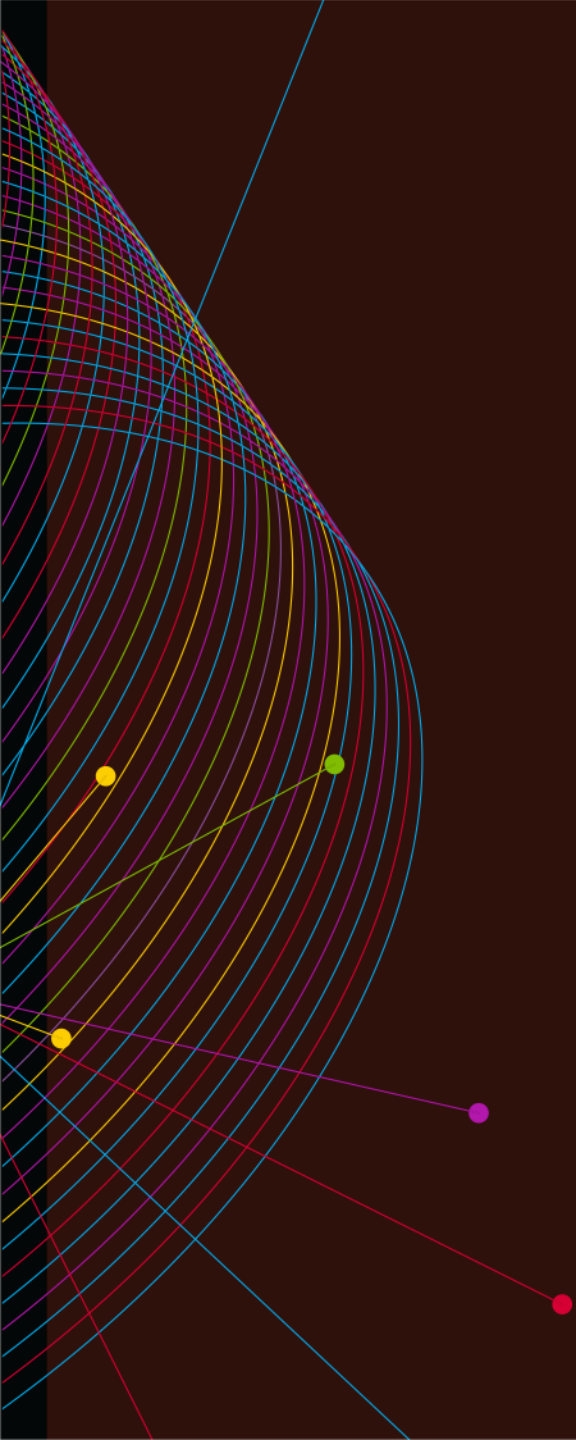
POPULARISTS

POPULARISTS
*Lighten it up for
me*

- To appeal to the Popularists there is a need to lighten up the offer
- Consider music from the musicals and movies, more popular artists such as Sol3 Mio, Freddie Mercury and Montserrat Caballé, Andrea Bocelli and even André Rieu for some of the time
- Although it is important that Concert does not become overly lightweight in the process
- If we can bring in the Popularists for some of the time then we may be able to bring them in on the beginning of a journey of classical music

WORKSHOP: WHO IS OUR AUDIENCE?

THE CONCERT TEAM
GENERATED THE FOLLOWING
CONTENT

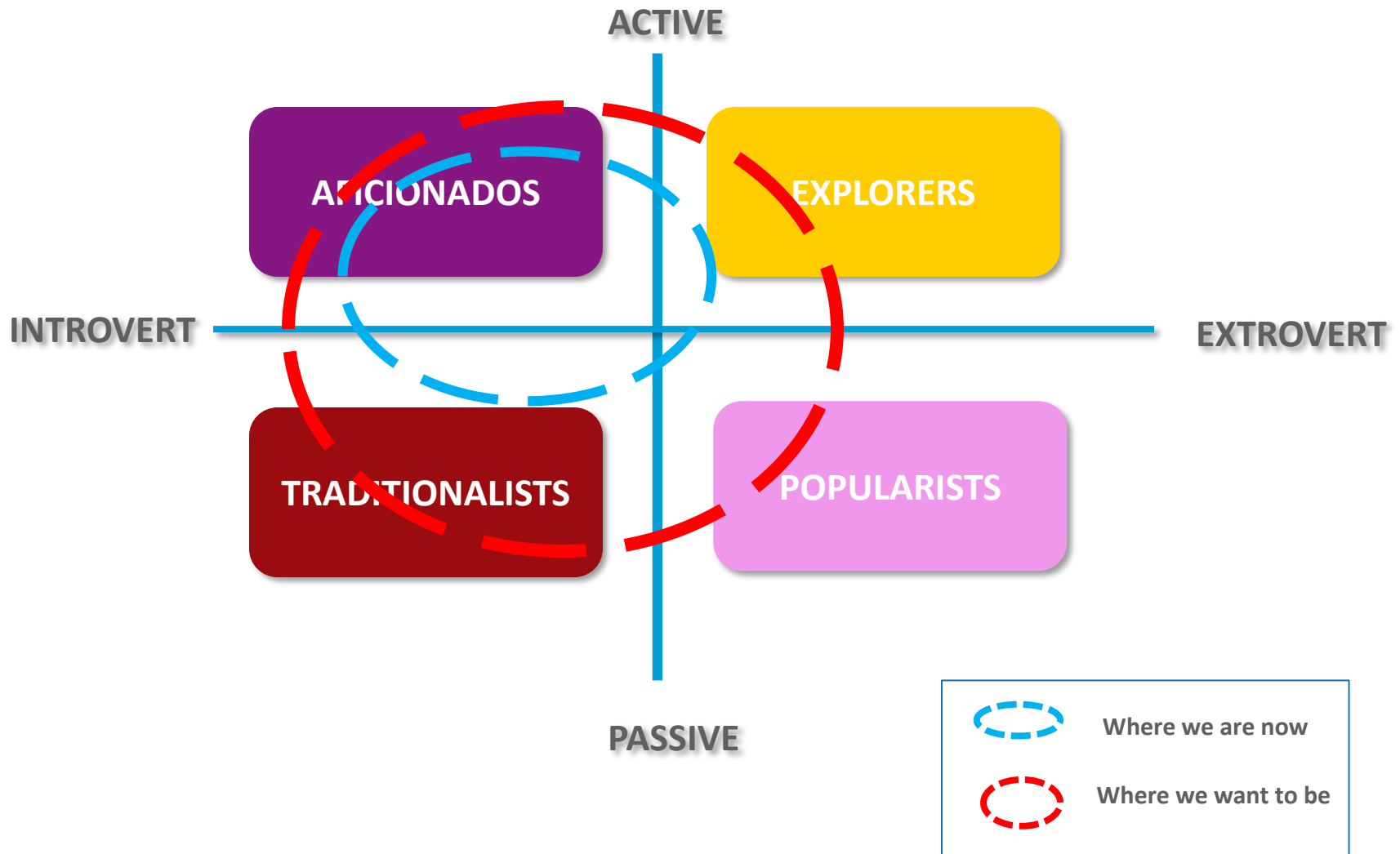


WHO IS OUR AUDIENCE?

Themes:

- Our audience is New Zealand music makers
- Young New Zealanders are important
- We should be broad
- Bring in those **passionate** about classical music

MARKET MAPPING EXERCISE. WHERE DO WE WANT TO BE? RADIO



WHERE DO WE WANT TO BE - RADIO

- The view of the Concert team was that Aficionados need to remain a key part of the Concert offering
- However the footprint needs to **broaden** to embrace the Traditionalists more fully - with a 'nod' to Popularists. The team's view was that catering more strongly to Tradionalists would also pull the Popularists through
- Some 'Explorer' tracks are played now, this will continue but it was agreed that the heart of the Explorer offer is likely to live online

WHERE DO WE WANT TO BE? - RADIO

So with a view to targeting the Traditionalists more strongly...

- Do we play the familiar stuff enough?
- With Traditionalists in mind there's a good reason to play it
- Quality and familiarity is needed
- Targeting Traditionalists will grow our listenership and is the easiest way to serve our goal and grow our numbers.

WHERE DO WE WANT TO BE? - RADIO

And what else should we do?

- Provide something for everyone across the mix of programming to make it more dynamic. Including more traditional works and the Classics will also work for the Popularists but including some Sol3 Mio style tracks across the mix will also 'lighten' the perception
- Remember charter obligations on air and compliance = a balance and a point of difference
- Our artists/people/NZ angle or interpretation to be included across the day
- Curation is key to doing this – but this means time and staff.

WHERE DO WE WANT TO BE? - ONLINE



WHERE DO WE WANT TO BE? - ONLINE

The Concert team recognised that the online space offers a great opportunity to meet the needs of Explorers

- Portal – a destination for quality - people can do what they want there
- Can make provision for NZ content – what is traditional in our culture?
- Reporting and reviewing news in relation to NZ music activity
- Use wider Radio New Zealand resources
- Concert Hall
- Provide options
- Content driven from outside?

Also noted that It's hard to know what Explorers want

THOUGHTS ON ONLINE VS. RADIO APPROACH

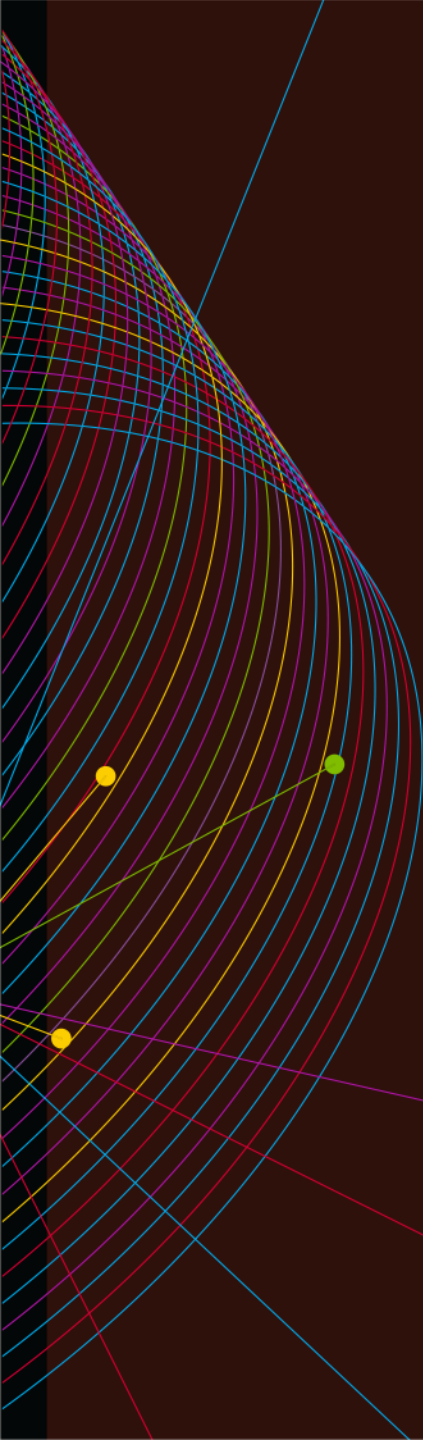
- Online – ideally get Explorers online
- Aficionados – will they find detail online?
- Popularists – get them online also ? We're not there with the Popularists
- Traditionalist = radio – expand and improve radio to easily talk to the Traditionalists
- Success for Concert will be marriage of presenter and curation – **story-telling and personal connection**
- Can we focus more on the Traditionalists?

THOUGHTS ON ONLINE VS. RADIO APPROACH (CON'T)

- Maintain quality and familiarity
- We have to be careful of the Charter – not too European and not enough New Zealand
- Shift things down a bit – but how do you play enough for the Popularists?
- Curation is key
- Concert Hall – people would do what they want there in the online space
- It has got to feel like “**our place**”

CURRENT VIEWS ON PRESENTATION & TALK

- The perception is 'stuffy and passionless'
- Fixed presentation content now
- It's a balancing act to keep everyone happy
- Need to address the amount of news
- "Talk" features we produce and buy in from overseas are an issue
- Cross-promotion and promotion needed
 - Different media
 - But how to do without increasing talk?
- Sign-posting – where and how?
- Choice of music against segments
- New gems vs. repetition vs. curated?



CURRENT & POTENTIAL PERSONALITY

WHAT IS OUR CURRENT PERSONALITY?

- Currently we are **schizophrenic**
- We are different things in different places
- There is no cohesive voice and too many voices
- But there are two sides to the coin
- While we are diverse and rich to Aficionados
- We are:

Unwieldy

Uneven

Out of control

Brave

Serious (lack of fun)

Daring

Quality

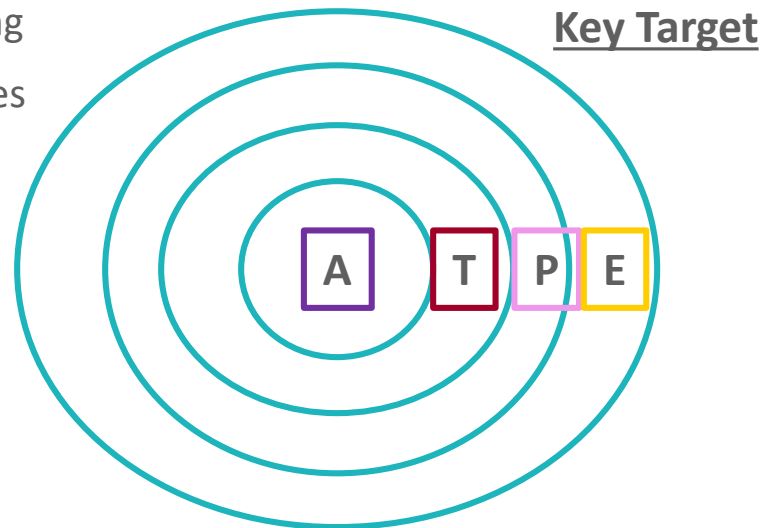
Intelligent

- A community of music makers and artists
- How do we attract new listeners without losing the existing?
- Soundscape – how do we co-ordinate?
- What is causing the jarring – curation?

NEW PERSONALITY

This is the way the team saw the new targeting and personality –

- Aficionados and Traditionalists at the heart of the model
- The question however: how to handle the Popularists?
- Will the popular classics engage them?
 - Sign-posting
 - Touchstones



A = Aficionados
T = Traditionalists
P = Popularists
E = Explorers

NEW PERSONALITY

The elements of the new personality:

Fun

Enthusiastic

Quality

Entertainment (but not shallow)

Companionable/connected

Living/current /popular

Embracing

Engaging

Passionate

Trusted/comfortable

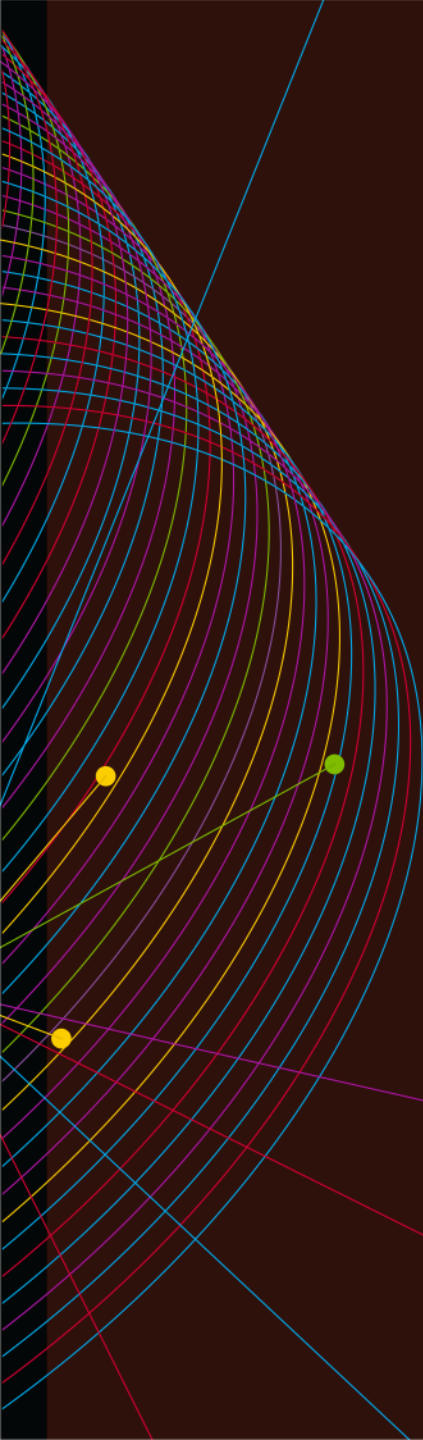
Authentic

Vital

Daring

Relevant

A whole lot warmer, engaging and passionate but retaining a dash of daring



BEST MARKET POSITION FOR THE AUDIENCE

SWOT ANALYSIS

STRENGTHS AND WEAKNESSES

STRENGTHS

- We own classical radio
- Unique content – NZ
- Advertising free
- Heritage – culture NZ
- Expertise
- Nationwide
- Audio dynamic
- Commitment – passionate, openness, willingness to try
- Wonderful wealth of music
- Excellent music library
- Live concerts
- Relationships with wider music community

WEAKNESSES

- Name – what is it? Branding
- No address
- Weak signal
- Lack of marketing/promotion
- Lack of Big Picture and value of what the station is in Radio New Zealand
- Lacks cohesiveness
- Small audience size – endangered species
- Lack of engagement from presenters
- Lack of support for presenters/schedulers
- Stuffy, boring, schizophrenic
- Poor/outdated studio equipment

THREATS AND OPPORTUNITIES

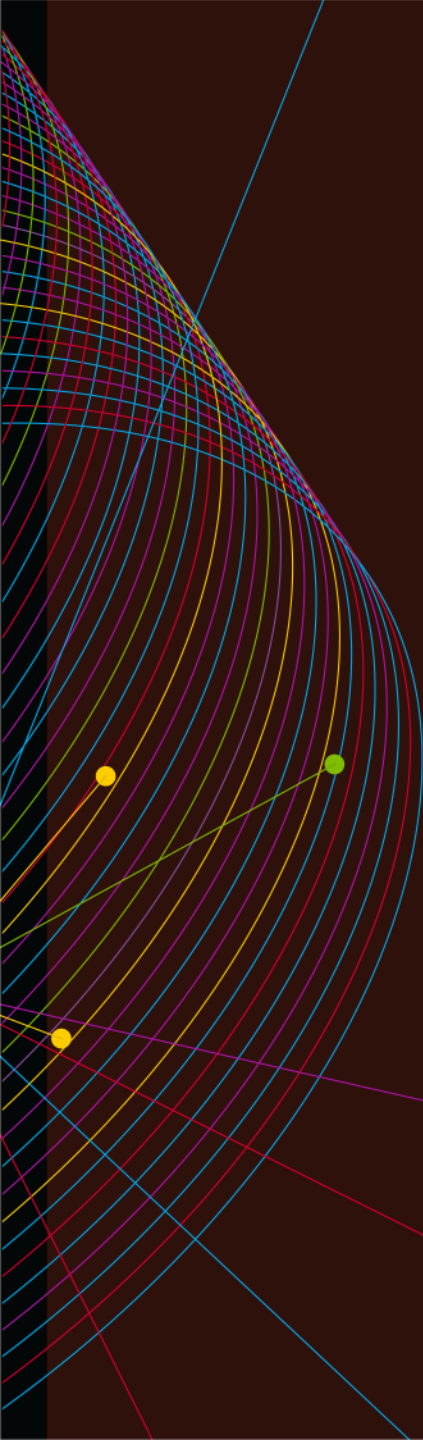
Do the small things to make a big difference

THREATS

- Audience size
- Move to digital
- Decline in radio listening
- Proliferation of online alternatives
- Convergence
- Vocal minority of stakeholders (e.g. other arts organisations, s 9 (2)(a))
- Current political environment
- Lack of resource to enact change (human and financial)
- Our attitudes to ourselves (so tied in with the process we don't step back and see the bigger picture)
- No expectations set
- Neglect
- Lack of strategy/big picture

OPPORTUNITIES

- Cross-over with other organisations
- Investing in new technology where critically needed
- An audience to be gained
- Position and market
- There is a place for radio/Concert
- Cross-promoting
- Sign-posting
- Bring Traditionalists back and reach out to Popularists
- Online digital – to get non-radio listeners/to enhance the experience of radio listeners / measuring results
- Connecting with other arts
- Ability to take risks and ability to fail
- Focus and clarity



CHANGES TO CONCERT

WHAT TO DITCH/KEEP

WHAT TO KEEP, DITCH AND ADD IN

KEEP

- Resources where needed
- Realistic expectations
- Personality
- Expertise
- Bravery/daring
- Authenticity
- 24 hours
- NZ content – coverage of NZ arts and music news
- Live performance
- Quality
- Open mind about reviewing things
- The best music

DITCH

- Selector
- BBC WWI style talk programmes
- Philosophy talk
- Under-resourced, lost opportunities – we need to move on
- Victim complex
- Unrealistic expectations
- Stuffiness/highbrow
- Amount of news content
- Old rule and outdated rules

ADD-IN

Flexibility

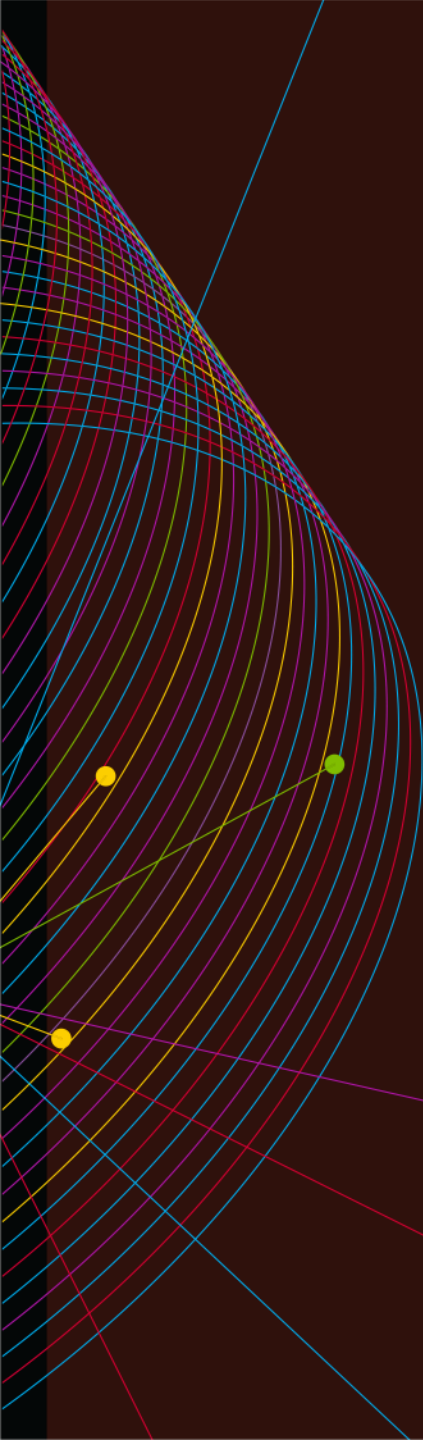
Communications

Engagement

Ability to talk to audiences we don't have

Strategy/overall co-ordination

Mid-level supervisors – help drive the whole picture.



CONCEPT GENERATION: TWO VERSIONS OF THE NEW IDEAL

CONCEPT DEVELOPMENT – TEAM 1

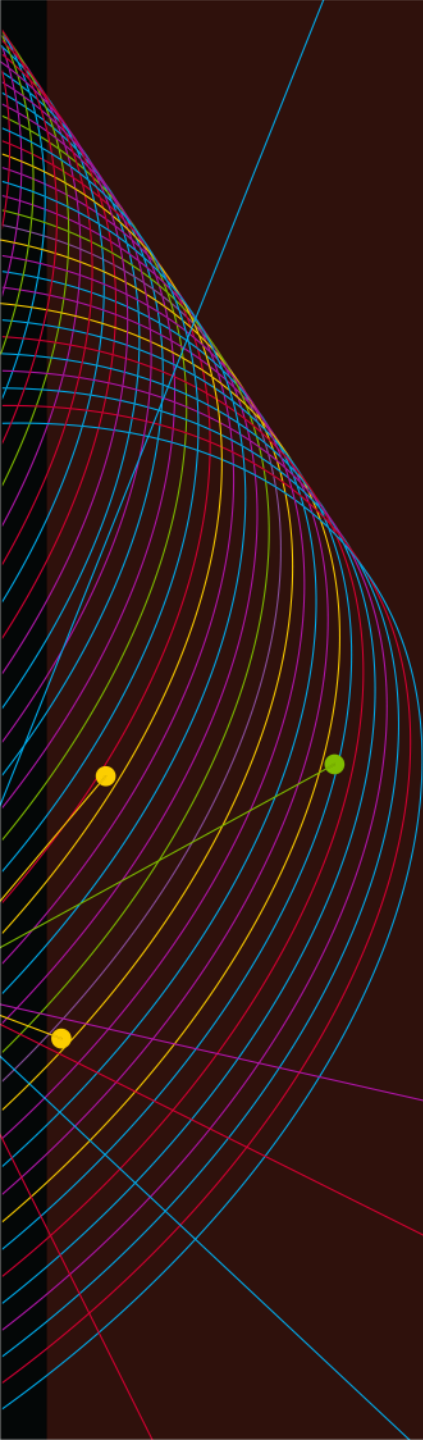
- Programming – more familiar works, more often while maintaining quality
- For Popularists – increased frequency, destination, feature programmes, advertise certain slots
- Observing moods at times of day and ‘up’ the mood
- Quizzes, competitions and fun
- Broadcasting from outside the building – events/concerts
- No musical style off limits – our take on it – context or illustration – curation
- Awareness of good broadcasting techniques
- Speed/tempo – tone = enthusiastic and warm while sounding natural
- Information that hits home – title and composer is crucial
- Discretion – do you need all of the information all of the time:? Supported by website

CONCEPT DEVELOPMENT – TEAM 1 (CONTD)

- What is the most interesting take on the work at that time of day? Will it enhance the listening?
- Excitement and personality – presenter interaction but not awkward
- No parrots – ethnic variety, just continuity or also contractors/casuals/contributors
- Sign-posting – things to look out for (positive/negative) and courtesy

CONCEPT DEVELOPMENT – TEAM 2

- Entry programme is short, approachable, familiar, well-paced, shaped, broad appeal (Traditionalists)
- Hosted multi-genre programme e.g. classical, jazz, folk, world etc.
- Community arts news content
- Concerts – live, recorded, New Zealand and overseas
- Music features e.g. brass, composers, topics
- Whole works in schedule
- News and weather
- Promotions
- Presenters – engaging, embracing, knowledgeable but not stuffy, good company
- Music/style – classical high %, carefully rethink content and rotate, rules, clocks, time of day appropriate, conducive to staying with us
- New Zealand and new music with context – also on digital

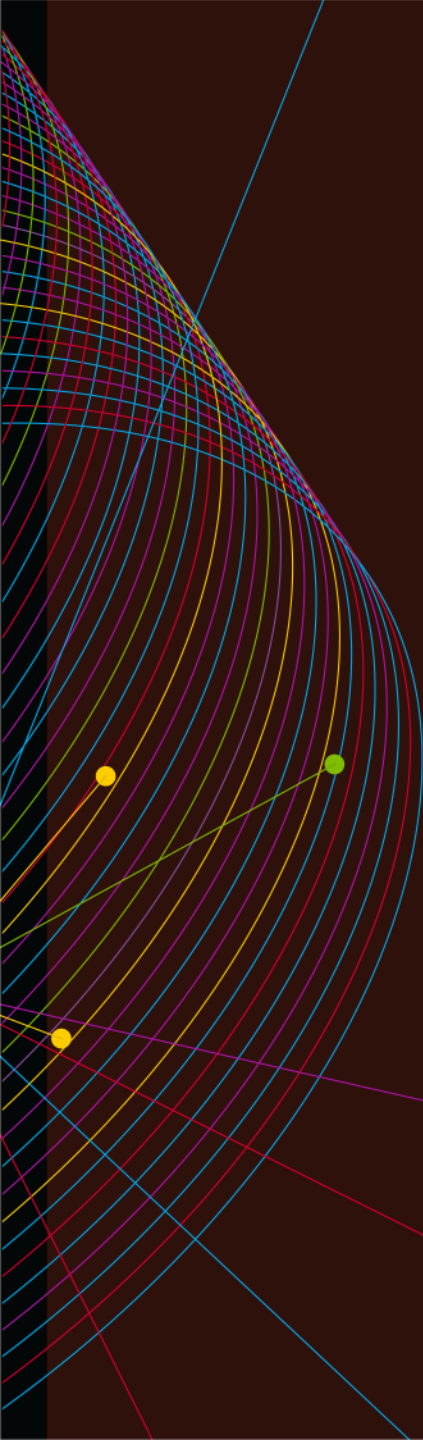


BRINGING THE LISTENER INTO THE ROOM

THE LISTENERS IN THE ROOM

Three Concert listeners (all three took part in the Concert research) joined the team – two Popularists and an Explorer. The main things they relayed to the team:

- Think about listening to relax
- Consider the role of digital and how people find ‘their’ music
- Mix it up – genres but within the mood
- More focus on Pacific Island and Māori music
- Increase appeal of things like Sol3 Mio and Andrea Bocelli
- Presenters – less monotone please
- Competitions are good
- A bit of information about the pieces – but not intellectual



WORKSHOP WRAP- UP

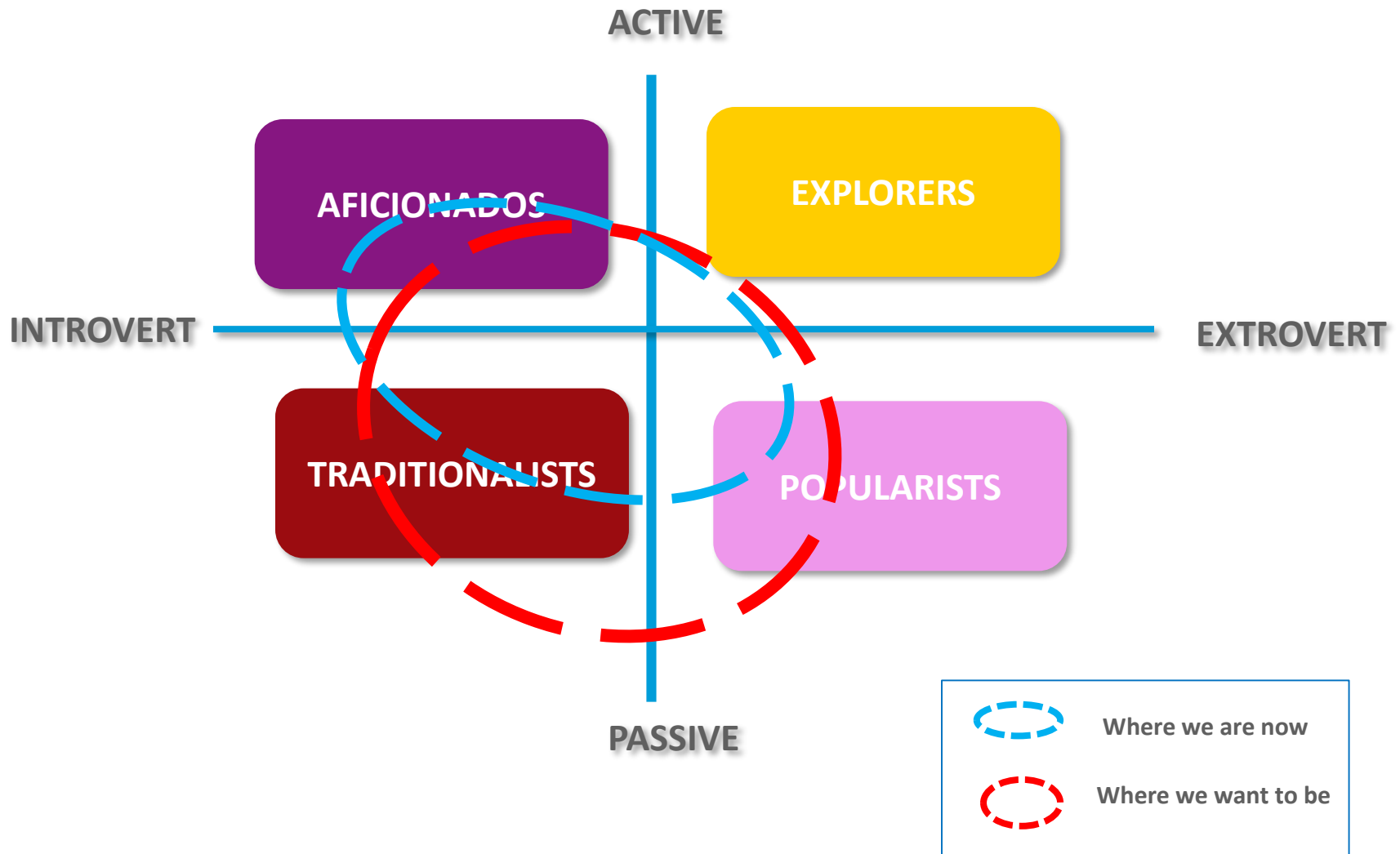
CONCLUDING POINTS

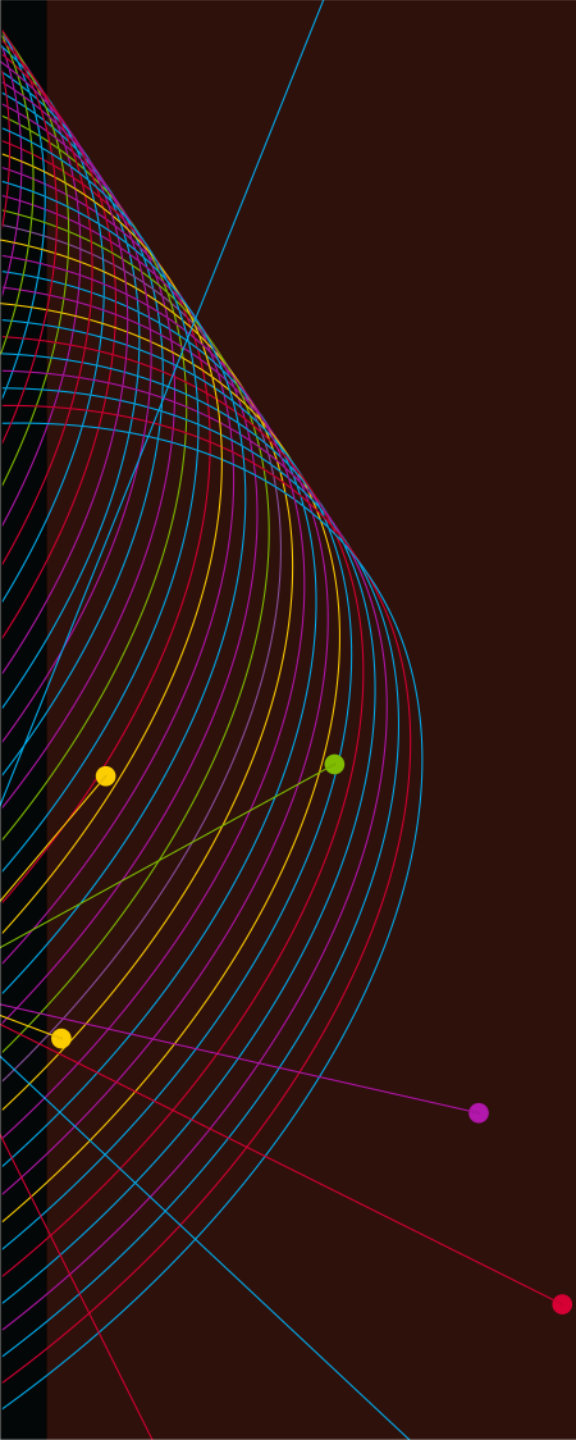
- The Concert Team all agreed there is a need for change - not only to attract lighter or new listeners but also to keep the current audience engaged. In short, the major changes outlined by the team were greater dynamism of presenters, better sign-positing and promotion of Concert and changing the music mix
- The team saw the need to broaden the programme to include the Traditionalists more strongly – while keeping the heart of the offer with the Aficionados. Explorers would be handled primarily via the digital offer with Popularists a mix of both
- The personality would ‘warm-up’ considerably getting rid of the hangover of the ‘BBC’ and making the programme more engaging for New Zealanders.

CONCLUDING POINTS

- However, based on the research findings from the focus groups we conducted, (and including feedback from the listeners at the end of the Concert workshop) Nielsen's view is that the team **may not be going far enough** to broaden the audience through this plan of action
- In our view the Concert radio offer needs to go further towards drawing in the Popularists and that it isn't enough to say we will get them by appealing to the Traditionalists
- Our feeling is that if the heart of the brand sits in the Aficionados the same concerns will emerge in terms of not upsetting that group and in terms of needing to meet the needs of select arts groups
- The Popularists represent one of the best ways to increase listenership . Their needs are different in that they like and use classical music to soothe and relax, to wind down, as an alternative to the 'noise' of other radio offers.
- Our ideal market position for Concert is shown on the next page.

MARKET MAPPING EXERCISE. WHERE DO WE WANT TO BE? RADIO





APPENDIX

SUGGESTED PROGRAMMING FROM A LISTENER

DAYPART	SUGGESTIONS (painted with broad brushstrokes focusing on tone/energy)
6am-9am	Short pieces, light balanced tone, obviously a "breakfast" programme, an entry point that keeps you listening
9am-10am	Maybe one longer work per hour + shorter works (12-15 minutes)
10am-12noon	Possible place for concerts e.g. Proms, RNZ recordings or items from RNZ recordings
12noon-1pm	"In the Day" i.e. it is obviously this day in history as opposed to any other Upbeat style contribution Eva/Classical interaction Energy: news, places, people, events Music themed by events etc.
1pm-3pm	Concerts
3pm-6pm	Energy pick-up to combat afternoon fatigue
6pm-7pm	Time to slightly slow down the pace of things Is this also a time when we lose people to TV viewing? Is this an opportunity to take some calculated risks in terms of programming a variety along the popular/jazz genres, or will that simply alienate more?
7pm-10pm	Concert-style programming To accommodate live broadcasts, as live programmes with a concert focus
9.30pm-10pm-10.30pm	Post-concert talk features Consider talk features as a less jarring way of transitioning from "live" feeling to rotate/CDs
10.30pm onwards	An opportunity for exploratory programming?

