



The Audience in **Centre**Stage

Audience Segmentation System in European Theatres

The Audience in Centre Stage

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Audience Segmentation System in European Theatres

ASSET – European Cooperation Project, 2018–2021



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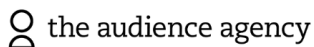


MINISTRY OF CULTURE
CZECH REPUBLIC

The ASSET project partners



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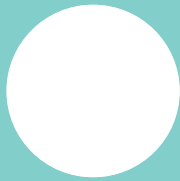
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1 ASSET Genesis and Aims

ASSET, which stands for Audience Segmentation System in European Theatres, is an international collaboration and research project of seven partners from across Europe supported by the Creative Europe programme in the period 2018 to 2021.

The main goal of ASSET was to develop, test and provide theatres and performing arts and cultural organisations in Europe with the tools and skills to learn about their audiences, using this knowledge to diversify and deepen the relationship with their audiences and develop their artistic programmes.

Team and Outreach

The ASSET project was initiated in the Czech Republic by the Department of Arts Management at the Theatre Faculty of the Academy of Performing Arts in Prague, working with the Arts and Theatre Institute, a research, documentation and promotion organisation for Czech performing arts, music and other artistic disciplines and the organiser of Theatre Night in the Czech Republic.

The ASSET partners had previous experience of mutual collaboration within different European platforms in the past. The Academy of Performing Arts in Prague, Metropolia University of Applied Sciences in Finland and The Audience Agency in the United Kingdom, as the main authors of the project methodology, are members of ENCATC, the European network on cultural management and policy, while the

rest of the partners collaborate on international activities and audience development projects such as European Theatre Night.

ASSET was centred on European Theatre Night, a celebration of the arts involving a range of cultural organisations and taking place in several countries. Although the form, conditions, contents and communication of Theatre Night vary in the countries where it is organised, it is an international project and the European idea is integral to its concept. A large part of its vision is based on concepts of audience development and in taking innovative approaches to theatre presentation.

Thus, the ASSET project became a pilot project both to understand European theatre audiences, in order to improve the quality of engagement, and to enable dialogue between those organising these initiatives.

Four national coordinators of Theatre Night in the Czech Republic, Austria, Croatia and Bulgaria were among the ASSET project partners. Dubrava Cultural Centre, as a part of the People's University Dubrava, was involved in the project as the founder of European Theatre Night (see Chapter 8), first organised in Croatia in 2008 by this theatre, which is primarily focused on young audiences. The Arts and Theatre Institute, which was the coordinator of Theatre Night in the Czech Republic, was another partner at the heart of the ASSET project. Others were primarily chosen in regard to the continuity of Theatre Night in the given country but also to reflect geographic diversity and the wide range of entities that take part in this event in different European countries. IG Kultur, a non-profit NGO that coordinates Theatre Night in Austria, and Art Projects Foundation, a marketing and communication strategy organisation that coordinates Theatre Night in Bulgaria, were invited to join the project for these reasons.

The ASSET project also directly involved coordinators of Theatre Nights or similar projects, such as Finland's Night of Arts, as an annual event with a large number of activities that embrace the entire city, bringing different kinds of art closer to people or Poland's Day of Public Theatres. These projects then had the opportunity to exchange experience and know-how.

In order to bring together this extended partnership, a symposium, "Theatre Night in Europe and Audience Development Activities in Performing Arts", was held

in the frame of the ASSET project 2019¹, gathering delegates from Poland, Hungary, Slovakia, Czech Republic, Austria, Finland, Bulgaria, Croatia and Bosnia and Herzegovina. The symposium's main aims were information exchange, networking and the sharing of innovative approaches to working with theatre audiences. It also provided an opportunity to introduce the main ideas and planning for the ASSET project. Delegates also sought opportunities for synergy and closer cooperation in the upcoming annual European Theatre Night in order to have a greater impact on European audiences.

Twenty theatres from five European capitals – Helsinki, Prague, Sofia, Vienna and Zagreb – were essential ASSET project partners and collaborators: the Czech National Theatre, Studio DVA, Švanda Theatre and Jatka78; the Austrian Werk X-Petersplatz, Dschungel, Schubert Theater and brut Wien; the Finnish National Theatre, Zodiak, Circo and Alexander Theatre; the Croatian Children's Theatre Dubrava, Studio Smijeha, Gavella Drama Theatre and Zagreb Dance Centre; the Bulgarian Ivan Vazov National Theatre, Sofia Opera and Ballet, Aleko Konstantinov State Satirical Theatre and Azaryan Theatre, were all chosen as venues that wanted to strengthen, enrich and elaborate their audience knowledge and marketing or audience development plans.

Many of these participants regularly take part in Theatre Night and were chosen as a group of theatres representing a diversity of performing arts disciplines, such as text-based theatre, music theatre, dance, contemporary circus and multidisciplinary or experimental theatre. These included a variety of operational models, ranging from public (state or city) multi-ensemble theatres to independent non-profit organisations and commercial venues.

Audience research was implemented in these theatres, while further performing arts organisations from the five cities mentioned were invited to take part in ASSET workshops and training in the theory and practice of audience research and segmentation. Their selection took place in cooperation with project partners in the country and observed the rule of diversity of selected theatres in each city and of genre and organisational diversity.

¹ The symposium took place on 5–6 February 2019 in Zagreb, Croatia

The ASSET project concludes not only with this publication but also with an international conference, ‘Theatre Audiences: The Crucial ASSET’, which took place online in May 2021, and at which the project results were presented and discussed with a range of cultural and educational organisations directly involved in the project, as well as with other cultural operators and professionals, audience researchers, cultural policy experts and representatives of public administration.

The main project target group will be reached through the implementation of the delivered ASSET project results in the individual theatres that have been implementing new practices as a result of the research findings. In this way, the wider beneficiaries of the project are being reached, namely, the audiences of theatre and performing arts programmes.

Goals and Trajectory

The participating theatres had a range of experience of audience research. For some it was an opportunity to execute their first audience surveys, while for others it was an ‘eye-opener’ that confirmed their previous feelings or particular knowledge about their audiences and provided them with time and guidance to evaluate and deepen their understanding. Regardless of whether the participating theatres fell into the first or second category of experience mentioned above, most of the teams that took part in the ASSET project agreed that the time spent with their audiences during the research and the opportunity to view their work from the perspective of the public were meaningful parts of their project activities.

During this first phase, The Audience Agency undertook an audit of the theatres’ previous and ongoing research practices. This ensured that the research did not replicate what had already been done and formed the basis for some of the segmentation methodologies to come.

As part of this preparatory phase, there was training for theatres and cultural organisations in Prague, Vienna, Sofia, Helsinki and Zagreb in audience segmentation methodology and data collection. Following this, a research methodology was developed in conjunction with the project partners, with data collection taking place in the five European theatres.

The main methodology (see Chapter 2) developed was based on questionnaires of theatre attenders in the period of February–May 2019, during Theatre Night in November 2019 and also under difficult conditions during the COVID-19 pandemic in 2020.

The ASSET project succeeded in producing useful findings about theatre audiences in Europe and also in creating a bespoke audience segmentation system, which is described in this publication. The project activities also provided international opportunities for networking, and the initial symposium and final conference became platforms for the dissemination of the outputs from the project. This publication also continues this work, aiming to provide guidance on methods and approaches not only for theatres and cultural organisations but also for university curricula and public cultural policies.

As with many other cultural and international projects in 2020–2021, ASSET was impacted by unexpected incidents: not just the COVID-19 pandemic but also an earthquake in Croatia, which completely destroyed one of the participating theatres. Nevertheless, planned activities were fulfilled with great effort and enthusiasm by all project partners. The particular phases are described in the chapters of this book, so the list below is just a brief overview to provide a general picture of the project trajectory.

Mapping existing data, ASSET methodology development

Before the main research began, a preparatory phase sought to understand what audience research was done regularly by the participating theatres. This audit of existing practices and of available data was needed to support the ASSET theatre audience segmentation methodology and to inform the creation of a segmentation model for the next stage of the project.

Workshops and training

In this stage there were workshops in each of the five countries, involving the lead partners as well as representatives from the theatres that were to take part in the project. In addition, there was also attendance from other theatres in the cities, ensuring that the learning was widely shared. These workshops had the dual purpose of training participants in the theory and practice of audience research and of consulting them on the factors that need to be considered for audience segmentation.

Data collection

Data collection took the form of a questionnaire for audiences during theatre operation in twenty theatres in five European cities (Prague, Vienna, Sofia, Zagreb, Helsinki) in two stages. During the first three months (spring 2019), the questionnaires were delivered using a face-to-face interview technique during the regular theatre programmes. This was repeated as far as possible in the spring of 2020, though research was curtailed by the COVID-19 pandemic. In between, a shorter piece of research was undertaken during European Theatre Night (November 2019). Some supplementary research was undertaken in the autumn of 2020, but the number of participating theatres was limited. Nevertheless, a total of 11 155 valid responses were collected during the ASSET project.

Data evaluation

The data analysis had two stages. Stage one took place immediately after the end of the first data collection and focused on the analysis of theatre audiences in the examined theatres. The analysis of data and initial modelling was followed by the dissemination of results and recommendations for individual organisations based on their results. The second stage of analysis focused on the data collected during special events such as Theatre Night and before the onset of the COVID-19 pandemic and at various points afterwards whenever the situation allowed.

Implementation of data results

The implementation of the recommendations based on the results started shortly after the first stage of results had been completed and continued for the duration of the project. This involved online consultations with senior management staff of the participating theatres, project leader consultants and The Audience Agency.

Evaluation of data results implementation impact

The research results led to two main types of interpretation and consequent impact. First, all theatres were able to consider the implications for their own individual organisation. Second, a wider range of analysis and segmentation, existing at a city level as well as within a wider project frame, was made possible. The final segmentation framework is one that is common to all the project participants, providing the possibility for some benchmarking and comparison of findings.

In conclusion, we sincerely hope that this book stimulates the need and inspiration to use research to understand theatre audiences and to spark imagination and creativity based on evidence. At a more ambitious level, it can also start to point towards an appreciation of why theatre is important for society. All the ASSET project organisers and partners wish that the project outputs will become a crucial asset to the further revelation of the potential of theatre and of live arts in general. This is especially relevant as we emerge from our shared difficulties during the COVID-19 pandemic.





2 Research and Segmentation Methodology and Results

Audience Research and Segmentation Approach

Context

ASSET is based on the need to understand theatre audiences. This central aim meant that the project was not just devised as a piece of ‘interesting’ research but as something very practical that the theatres individually and collectively could use to improve the way they engage with their audiences. Coming originally out of the European Theatre Nights initiative, it was also designed to understand and build on the success of those audience development initiatives.

Concept

A variety of methods were considered to achieve these aims. In the UK, where The Audience Agency is based, audience research can encapsulate a range of approaches, including ticketing, questionnaires, digital analytics and qualitative approaches. In addition, background secondary data, often based on the geographic location of the public, can be used to compare the different sets of data. It is especially useful for segmentation, with geo-demographic profiling playing an important role in systems such as Audience Spectrum.

Although many of the participating theatres had some existing research that could support this work, the types and forms of the data involved were too patchy and variable to be used in this project. Some theatres use ticketing data in their analysis of audiences, but this was by no means consistent across the group, and in many cases the information that could be derived from this data was minimal.

A further consideration was the quality and availability of secondary data, specifically that which is collected at the population level. Whereas in the UK, location data using the postcode system is precise and has many public and commercial studies that are linked to the types of people who live in certain places, in other European countries this is not usually the case.

The project was also motivated by a desire to investigate the views and opinions of theatre attenders alongside outlining their profiles and behaviour. These factors therefore pointed towards a methodology based on audience questionnaires.

It is also important to note that although it was originally an ambition to look at whole, even pan-European populations, given the practical and resource parameters of the project, ASSET had to concentrate on attenders of the participating theatres themselves. While the theatres were chosen to be diverse in size, type and programming, they are nevertheless only a small number of theatres in each of five cities. The research results and the segmentation models presented therefore must be understood with this in mind.

As described below and in further chapters, the research and segmentation systems created are centred on the participating theatres and their audiences. This methodology can be usefully applied in a range of scenarios, probably adapting the central segmentation dichotomies according to identified need. In addition, many of the research results, including the segmentation, provide useful insights into theatre audiences and have wide-ranging interest and application. However, it is not claimed that the actual segmentation groups themselves should necessarily be applied universally to every theatre. Rather, the project and this publication argue for an approach and process that understands audiences in this way, rather than providing a ready-made prescription.

Segmentation

Segmentation as a concept has several roots. In the first place, many of the social sciences, such as sociology and economics, necessarily divide up populations into different categories, most classically by income/wealth and class. These groups not only have different characteristics but also demonstrate different behaviours, beliefs and values. During the 20th century, as businesses needed to develop more sophisticated systems to target their customers, segmentation was developed as a key component of marketing strategies.

In recent years, the ideas behind this have informed practice in the cultural sphere. Being able to understand audiences in terms of their meaningful groupings helps both to be efficient in operation and to give those different segments better experiences of theatre. It does not mean that people are forever locked into these groups but rather that they are useful ways of understanding the audience, being a useful compromise between mass and individualised approaches.

This process doesn't have to be very complicated. It just involves deciding on relevant, meaningful ways of splitting up our audiences or the public more widely. For example, this may be about frequency of attendance, interest in particular types of theatre or the nature of engagement.

In this project, the segmentation process focused on attitudinal elements as a primary factor, supported by secondary characteristics such as preferences, demography and behaviour.

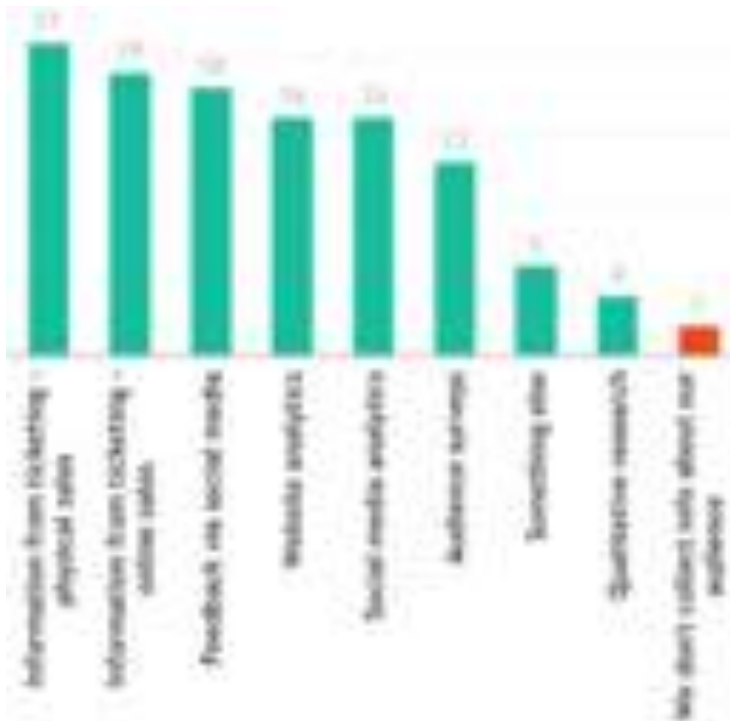
The ASSET theatres

Each of the participating theatres were invited to be involved, based on the need to have a representative selection in each of the cities. These included public and private institutions, with different levels of subsidy or governance. The selection was also influenced by the need for positive commitment to involvement in the process, with commitment to the project a necessary condition. The artforms constituting 'theatre' in this project were relatively broad, taking in the performing arts of drama, dance, circus and comedy.

Although ASSET centred on the 20 theatres that took part in the main research, other theatres were involved at the beginning of the process, in the training workshops and as part of the European Theatre Night research.

At the beginning of the project, a range of theatres in each country was asked about the audience research that they normally do. This 'audit' questionnaire was returned by 23 theatres: 11 from the Czech Republic, 4 from Austria, 3 from Finland, 3 from Bulgaria and 2 from Croatia.

Q. How do you normally learn about your audiences?

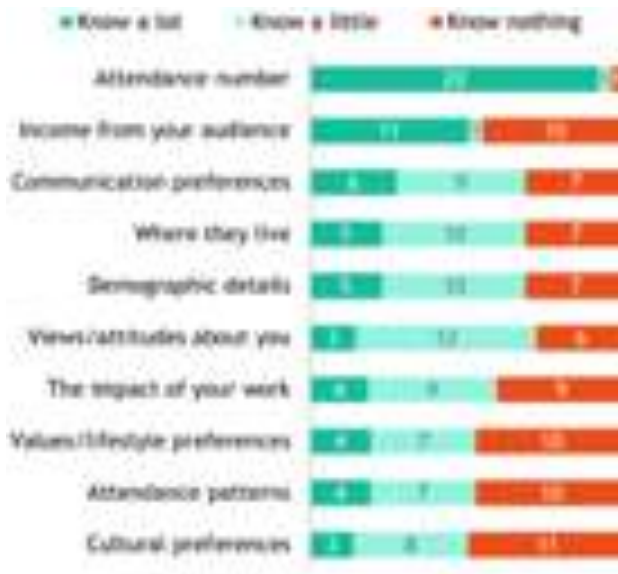


Base = 23

Asked about how they learned about their audience, three-quarters said they used some ticketing information, two-thirds said digital metrics, just under half undertook audience surveys and few utilised qualitative research. It was interesting, perhaps surprising, that audience questionnaires were not a regular part of theatre research, and in the development of ASSET it became clear that for some theatres it was a novelty; none objected to the principle; it just wasn't part of their normal modus operandi. Of the 23 theatres responding, only three used audience surveys regularly (at least every two years).

Qualitative research was even less widely used, although two theatres had used internally facilitated focus groups and one had used a 'mystery shopper' initiative. None reported externally facilitated focus groups, creative evaluation, audience panels or other types of qualitative research.

Q. What do you know about your audiences?



Base = 23

In terms of the sort of insight theatres had about their audiences, theatres were well informed about attendance numbers and income generated, with communication, location and demographics somewhat understood, attitudes or impacts less well known and wider cultural preferences or lifestyles rarely researched.

While most theatres thought audience insight could be useful, it was generally not regarded as a priority for their work, as some of the comments demonstrated:

I am sorry, I am too busy these days.

We collect information about our audience mainly for accountancy.

I wish I could use all the information about our audience.

I suspect there is a tendency to answer favourably and not critically. This might have to do with a possible desire to please, but mostly I think because the survey runs the risk of confirmation bias: The people answering the question represent a 'hard-core' of our audience and this answer tells us nothing about wider perceptions.

These early consultations were developed through a workshop programme in which Jonathan Goodacre and Daniel Cowley from The Audience Agency held workshops in each of the five cities in January and February 2019. As part of these workshops, participants from the theatres described their situations and identified the key issues that were important for them and their audiences. This formed the basis of the survey questions and set up the segmentation model.

Devising the Survey methodology

Following on from the early development and consultations, it became clear that the methodology needed to centre on the use of survey questionnaires given to random samples of the audiences in each of the theatres. These were to be undertaken by staff after performances, either in person or by e-survey.

The questions themselves were developed according to the original aims of the project, the needs of the theatres, their capacity to undertake the survey and the practicalities of sharing questions across a large number of organisations (and cities). This led to a central template for the majority of questions, with slight adaptations by city according to language and cultural context, and according to the needs and wishes of the theatres.

In each survey, there was a central question included for the development of the segmentation. This came from identification of views that seemed to be important in grouping the theatre audiences. It asked the respondent to place themselves on a scale from 1 to 10 for each of three characteristics.

When it comes to [Artform] in general, where would you put yourself on the following scales? (Please place an X where you would put yourself)

I like to see something new	1	2	3	4	5	6	7	8	9	10	I like to see something classic
I like a lot of information beforehand	1	2	3	4	5	6	7	8	9	10	I prefer to take a chance
I'm excited to see well-known performers	1	2	3	4	5	6	7	8	9	10	I like to see new talent

As well as this, the other areas of investigation were:

Recency and frequency of attendance

This was in order for the theatres to gain a sense of what proportions of their audiences were regular or occasional attenders and also to inform the segmentation. During the second phase (2020), this question was extended to include a broader idea of attendance of cultural activity more generally.

Marketing and communications

This was a particular need and interest of the theatres, with most of those directly involved in ASSET coming from the marketing teams, who wanted to gain a sense of the success of different mechanisms and channels. In order to do this, a two-part questioning format was used, asking which of all the methods they had encountered and then, of these, the most significant.

Motivation and decision-making

This had two sets of questions – one that looked at the reasons for attending and one that centred more specifically on the particular decision-making aspects identified through the workshops (such as the relative importance of ticket price, venue or performance theme).

Theatre type preferences

This question was also important for the development of the segmentation, both in terms of understanding attendance of certain artforms and more generally to understand the range of interests.

Audience experience

In order to provide useful feedback about their respondents' experience of the theatre at performances, this rating question asked for opinions on a range of aspects such as facilities, comfort and value for money.

European Theatre Night

Given that the project developed out of this initiative, it was also important to gain a sense of awareness whether people had attended previously and how it had influenced their theatre-going habits more generally.

Demographics

A few questions were included that asked about the home location of the respondents, as well as age and gender.

Audiences were also given the opportunity to provide answers to open questions so that they could comment and explain their answers.

Questionnaire delivery and implementation

The questionnaires were delivered during two main phases, although this was upset by the onset of the COVID-19 pandemic, which meant that the second phase was interrupted and extended.

Phase 1: March–May 2019

Phase 2: February–March 2020, with some also taking place during the autumn of 2020.

There was also a separate set of research undertaken in four of the cities during European Theatre Night in November 2019. This was a short survey undertaken on the night itself and helped to inform the overall research.

The delivery of this research is described in more detail below. Essentially, each theatre had been briefed during the workshops on how the surveys should be done, with each using the questionnaire to speak to audience members in person after performances, using interviews or supervised self-completion techniques. In the case of Finland, data was collected through an e-survey sent to people when they booked tickets.

Each theatre was asked to aim for at least 380 questionnaire responses during each phase, a sample size that would give a 5% confidence interval at the 95% confidence level (meaning that, broadly speaking, the results observed at each theatre would be within 5% of the ‘true’ value had all audience members taken part in the survey). In practice, there was a variance of response levels, but in the analysis it was possible to account for this, and for the varying sizes of the theatres’ audiences, by weighting the data to be representative of each city’s combined audience.

Audience Segmentation Model

The process

The segmentation model was devised as a process in which the different stages gradually built towards an end model. This included consultation with the theatres, analysis of results and discussion between the partners of the project. A first working prototype was created, tested using data collected through the first phase of data collection and then refined for the second phase, leading to a finished model and agreed segmentation framework produced by the end of the project.

The questions that did not directly segment respondents into one group or another had three purposes: first, they helped to create useful research outcomes for all the theatres involved; second, they were used as ‘secondary characteristics’ to give greater depth and meaning to each of the groups; and, third, they were used to help refine the segmentation process to show as much difference and distinctiveness between the groups as possible.

First stages

The initial training sessions in the five countries enabled consultations with the theatre managers about the meaningful ways of thinking about audiences in their theatres. This informed the development of the methodology and themes of enquiry for the questionnaires themselves.

As a result, in the initial approach the segments were based on three sets of opposing positioning statements:

1. ‘I like to see something new’ vs. ‘I like to see something classic’
2. ‘I like a lot of information beforehand’ vs. ‘I prefer to take a chance’
3. ‘I’m excited to see well-known performers’ vs. ‘I like to see new talent’

Respondents were asked to place themselves on a scale from 1 to 10 between each statement.

The first model

The first segmentation model was created on completion of the first phase of data collection. In this model, this data was segmented using a cascade approach, wherein:

1. All respondents who answered ‘I like to see something classic’ were assigned to segment one.
2. All the remainder who answered ‘I like a lot of information beforehand’ were placed into segment two.
3. All the remainder who answered ‘I like to see new talent’ were placed into segment three.
4. All the remainder who answered ‘I prefer to take a chance’ were placed into segment four.

5. All the remainder who answered 'I'm excited to see well-known performers' were placed into segment five.
6. All the remainder who answered 'I like to see something new' were placed into segment six.
7. The remainder, who did not express a strong sentiment at either end of the three scales, were placed into segment seven.

The priority order of this cascade (i.e. in which order respondents are placed into segments) was determined by the numbers of respondents answering in each way, with the least common answer determining the membership of segment 1, and the most common determining membership of segment 6 (and segment 7 always being those with no strong sentiment).

This ensured that those with less common preferences, in this case 'I like to see something classic', were not assigned a group due to also having a more common – but not contradictory – preference (for example, 'I'm excited to see well-known performers').



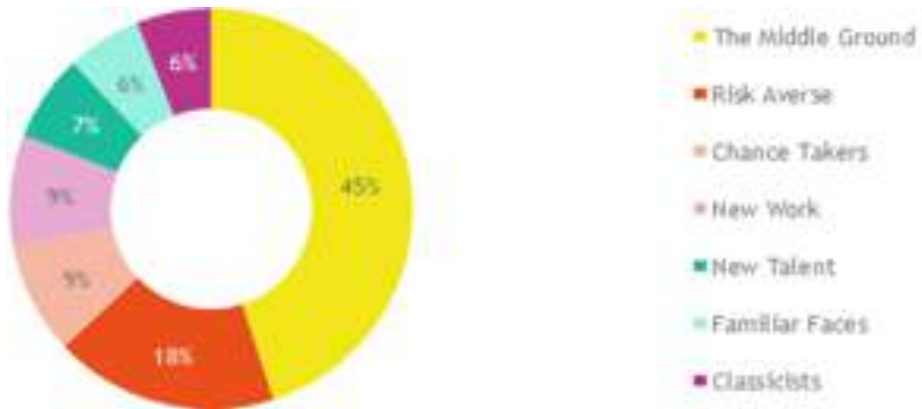
Original segmentation cascade

The seven segments resulting from this process were only somewhat distinct in their defining characteristics, since someone with a preference for classic work could have an equally strong preference for established performers, but only the former would be used to determine their segment. This meant that the secondary characteristics of each segment were also somewhat indistinct, with the age profile, for example, of most segments being similar.

The other shortcoming of this model was the large size of segment 7, 'the middle ground' who did not express a strong preference on any of the three scales. 45% of all respondents from Phase 1 of the primary research fell into this category.

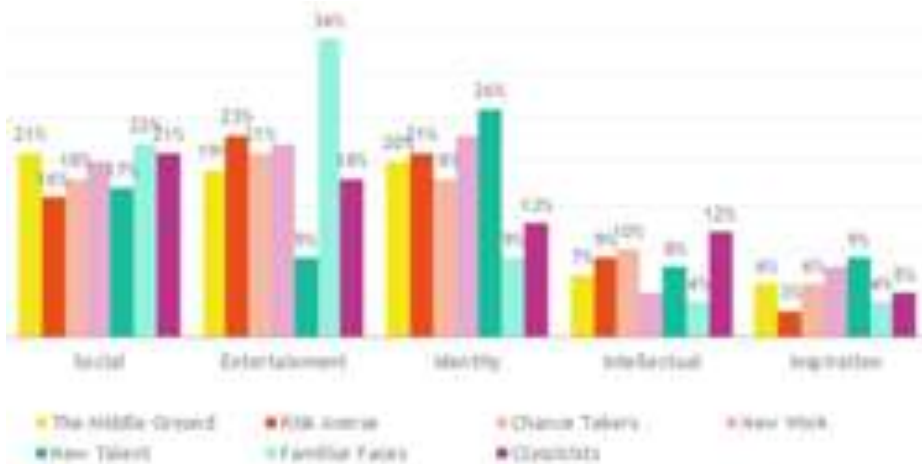
Segment name (working)	Priority	Question	Score	Size
Classicists	1	A. Contemporary vs. Classic	9 or 10	6%
Risk Averse	2	B. Information vs. Chance	1 or 2	18%
New Talent	3	C. Established performers vs. New talent	9 or 10	7%
Chance Takers	4	B. Information vs. Chance	9 or 10	9%
Familiar Faces	5	C. Established performers vs. New talent	1 or 2	6%
New Work	6	A. Contemporary-Classic	1 or 2	9%
The Middle Ground	7	All (A, B and C)	3 to 8	45%

Segmentation model 1 results



Segment sizes from segmentation model 1

Despite the shortcomings of this model, some statistically significant differences were found between the secondary characteristics of the segments. For example, segment 5 (Familiar Faces) were much more likely than segment 3 (New Talent) to be motivated to visit the theatre for entertainment (see below).



Main motivation for visit by segment, using segmentation model 1

Revised model

The model was revised prior to Phase 2 of the primary research, which took place in the spring of 2020 (with some in autumn 2020).

The objectives for refining the segmentation were:

1. Split or reduce the size of the nonspecific ‘middle ground’ segment
2. Reflect the difference between content preferences (new work, classic work, new talent, well-known performers) and communication preferences (lots of information/taking a chance) – the former being the focus of this segmentation
3. Account for diversity of preferences – segment based on dominant preferences rather than a binary prioritising of preferences

Objective 1 was achieved through asking an additional question about genre preferences. This meant that respondents who didn’t have strong preferences about new/classic work or new/familiar performers could be segmented based on the genres of performance they tended to favour – based on specific genres, the number of genres or the popularity of their favoured genres.

The threshold for determining a preference was also reduced slightly; in model 1 a score of ½ or 9/10 indicated a preference, so anyone answering 3-8 on all three scales was placed in segment 7. In model 2, scores of 1-3 or 8-10 are taken as showing a preference – reducing the size of the neutral middle ground.

Objective 2 was achieved through only using the ‘lots of information–take a chance’ scale to split larger segments, and to *describe* other segments rather than determine them.

Objective 3 was achieved through removing prioritisation from the model, and instead segmenting those who indicated one preference more strongly than the others – or, put another way, using respondents’ dominant preference.

In this new method a large proportion of respondents showed a dominant preference for ‘I like to see something new’. The ‘lots of information/take a chance’ scale was used to split these respondents.

Those without a single dominant preference (either because they showed equally strong preferences on two scales, or because they scored 4–7 on each scale) were split based on the types of theatre performance they had recently seen, via the new

question ‘Have you seen any of the following types of theatre performance in the last 12 months?’ (see below). Two variables were derived from this question: breadth of performance types and how popular or niche these types are.

- Breadth of performance types: the number of different types the respondent had seen in the last 12 months. The average (median) number of genres was used as a starting point for determining whether respondents were coded as attending a narrow or wide range of artforms, per country.
- Popular/niche interests: each genre was categorised as either ‘niche’ or ‘mainstream’, dependent on what proportion of respondents had seen that artform in the past 12 months. This was calculated for each country, on the basis that artforms that are more common in one country (e.g. community/amateur theatre in the Czech Republic) are not in another (Bulgaria).

A side benefit of looking at breadth and depth of artform attendance for each country is that the model adapts to the country in which it is applied, while maintaining comparability between countries. All other measures have the same input into the model regardless of country, meaning national profiles will reflect the distinct characteristics of audiences in each nation.

When it comes to [theatre] in general, where would you put yourself in the following context? (Please place an X where you would put yourself)

<input type="checkbox"/> I prefer to see well-known performances	<input type="checkbox"/> I like to see what's hot
<input type="checkbox"/> I like to see something new	<input type="checkbox"/> I like to see what's niche
<input type="checkbox"/> I like a lot of information beforehand	<input type="checkbox"/> I prefer to take a chance

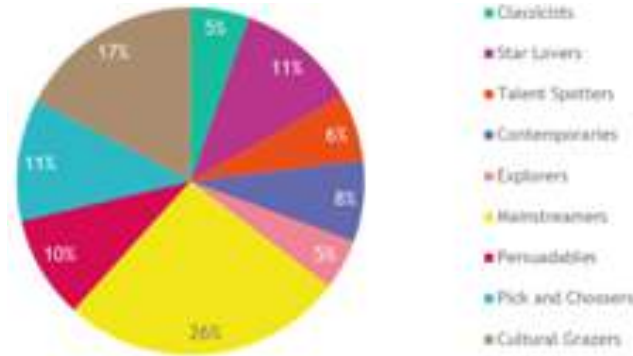
Have you seen any of the following types of theatre performance in the last 12 months? (tick all that apply)

<input type="checkbox"/> Children's Family Shows	<input type="checkbox"/> Contemporary Circus
<input type="checkbox"/> Classical Plays/Shows	<input type="checkbox"/> Classical Dance or Ballet
<input type="checkbox"/> Contemporary Plays/Shows	<input type="checkbox"/> Contemporary Dance/Contemporary Theatre
<input type="checkbox"/> Experimental Theatre (e.g. Physical Theatre)	<input type="checkbox"/> Musical
<input type="checkbox"/> Interactive Immersive Theatre	<input type="checkbox"/> Opera and Operetta
<input type="checkbox"/> Community Amateur Theatre	<input type="checkbox"/> Comedy, cabaret, stand up, talk and revue
<input type="checkbox"/> Puppetry/Marionette Theatre	<input type="checkbox"/> No, I haven't seen any of these
<input type="checkbox"/> Music Theatre	

Segmentation model 2

Results

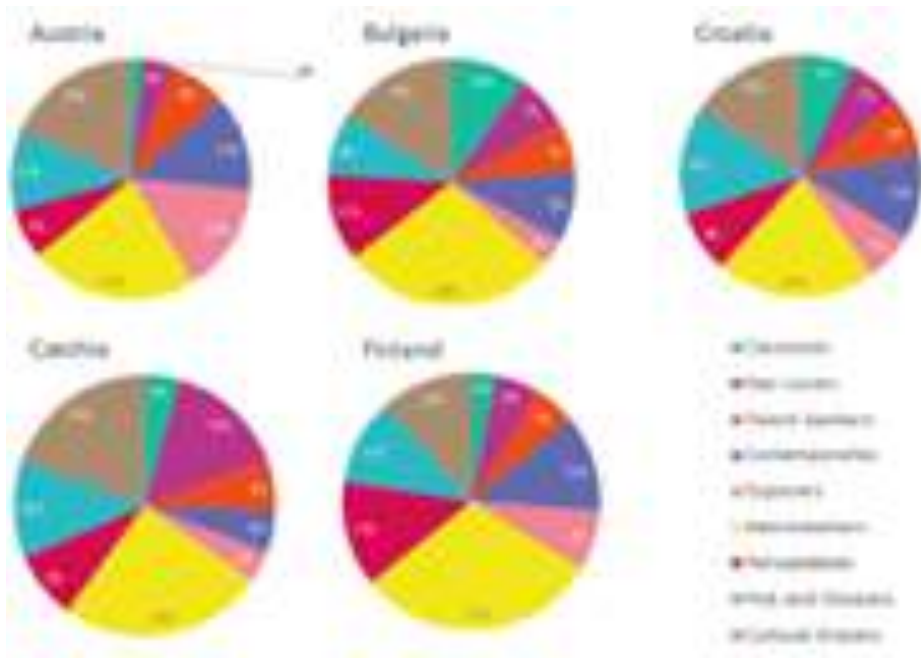
The revised segmentation model was applied to all data collected up to that point, where all the relevant questions had been answered. The resulting segments ranged in size from 5% to 25% of combined audience across all the partner venues, with some variation by country.



Final segment sizes



Final segment definitions, model 2

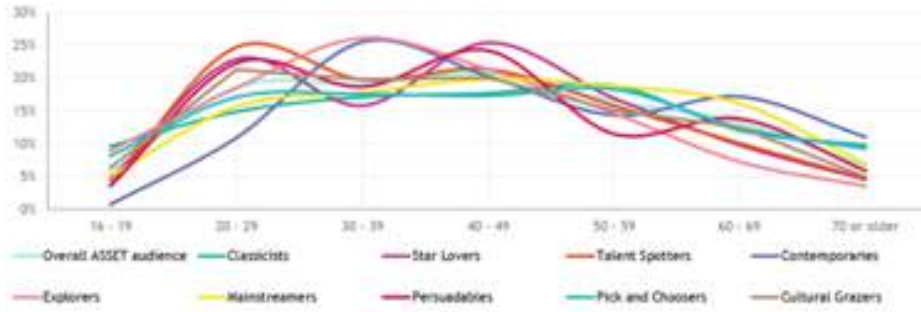


Final segment sizes by country

Refining

To this overall model a range of 'secondary' characteristics could be applied, as the particular individual responses enabled cross-referencing of the data so that it was possible to identify other tendencies in those segments, providing a deeper sense of who they were likely to be.

For example, the graph on the next page shows the different age profiles of the segments. It shows how age is part of the equation but not a defining primary characteristic. This move away from 'demographic'-only segmentation was a central and useful principle of the ASSET segmentation.



The process of refinement took place over several months and was refined in partnership with the country leads. It included discussion over the veracity of the segments, looking at whether they ‘rang true’ in their opinion.

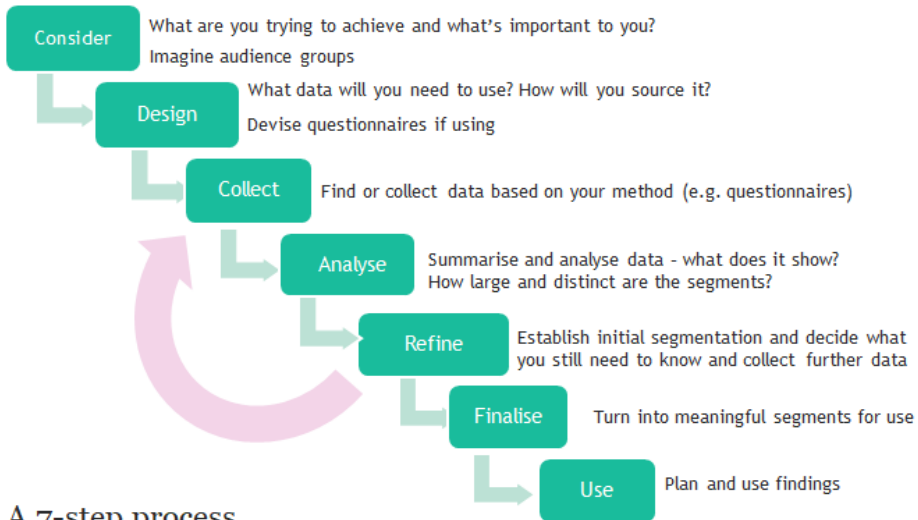
One important change that also took place was the refining of the names themselves. All the segment names were converted into collective nouns for consistency and to allow for easier translation into other languages. Thus,

The Classics	became	Classicists
Star Power		Star Lovers
New Talent		Talent Spotters
Contemporary Knowledge		Contemporaries
Discovery		Explorers
Mainstream Tastes		Mainstreamers
Beyond the Usual		Persuadables
Narrow Interests		Pick and Choosers
Open to Anything		Cultural Grazers

The consideration of names, which accurately reflected the essence of the segment, was one of the most difficult parts of the process. However, it is important to point out that in the end they are labels applied to groupings, and the segments need to be understood in that way, that is, by looking at the descriptions used for them.

Segmentation process overview

During the final conference, a workshop on segmentation took place in which an outline of a recommended process was shared. This is summarised in the diagram below, followed by an overview of the ASSET segmentation process.



A 7-step process

We used an iterative approach to the segmentation process.

1. Consider

Establish a common language

- a. What do partners already know about their audience?
- b. What do partners already know about their population?
- c. Can we bridge the gap between audience data and population data?
 - i. Is population data freely available?

- d. Are there commonalities in how partners and national agencies/governments collect and share audience/population information? (which is a long way of saying, ‘Can we use postcodes as a link between individual bookers and population statistics?’)

2. Design

Choose relevant characteristics – i.e. how are we choosing to segment the audience?

- a. Preferences, loyalty, location, demographics, quality of experience?
- b. Based on this visit (acknowledges people visit in different modes depending on type of occasion, i.e. with children, entertainment vs. study)
- c. Based on visits in general (people tend to fall into similar patterns and have overarching principles/aesthetic preferences, etc.)

Which approach will give us a meaningful, useful, conceptually clear segmentation?

3. Collect

- a. Draft meaningful questions – to gather information in the most unambiguous way possible, across multiple types of venue/countries/cultures
- b. Collect data – target sample sizes per partner so we can collect enough data to see differences between segments

4. Analyse

- a. Group respondents into different segments, aim to create useful number of segments (6–10), with each a large enough size to be viable but not so large as to be an indistinct blob
- b. Compare segments’ secondary characteristics
- c. Adjust the grouping variables/tolerances to achieve balanced and distinctive groups
- d. Identify weaknesses in segmentation (size, distinctiveness of secondary characteristics, reflecting on usefulness/application)

5. Refine

- a. Can we adjust existing questions to produce clearer answers?
- b. What else would help us define segments?

c. What else would help us understand secondary differences?

Repeat steps 4 and 5 until satisfied

6. Finalise

Create segment names and pen portraits

- a. Names reflect defining characteristics
- b. Pen portraits affirm defining characteristics and highlight distinctive secondary/descriptive characteristics
- c. Names consider translation, but each nation creates its own versions based on same principles

7. Use

Implementation

- a. Consultation with venues
- b. Venues adapt and implement activities based on results





3 Audiences in the Czech Republic

Performing Arts in the Czech Republic

The performing arts in the Czech Republic have undergone a significant transformation since the momentous political shift of the Velvet Revolution in 1989.

All types of organisations – public, non-profit and private – play an important role in the sector. The public cultural and arts organisations are established and funded most usually by municipalities and less often by regional and national governments. In most cases they are provided with yearly financial contributions by the funding body. The second segment is often labelled as ‘independent’ in the Czech context and consists of NGOs with different legal forms. A significant part of their turnover also comes from public sources, typically through open granting schemes. However, their own revenue is their most important source of income, unlike both individual and corporate contributions, which do not have a strong tradition in the country.

The private component of the performing arts sector (predominantly concentrated in Prague) is the smallest in terms of number of organisations and audience members, though not in terms of revenues, which represent a substantial financial resource for these commercially oriented businesses.¹

The most extensive and complex data on the performing arts are collected by the National Information and Consulting Centre for Culture (NIPOS), a subsidiary

¹ Nekolný, B. *Divadlo a kreativní sektor*. Praha: NAMU, 2013, p 15

organisation of the Ministry of Culture of the Czech Republic, with roots in the Culture Enlightenment Union, founded in 1905. They collect the information that cultural organisations are legally obliged to provide on a yearly basis. The selected data are published retrospectively and are accessible to the public in the 'Statistics on Culture' publication.² A tool called 'Account of the Culture of the CR'³ has also been developed and is maintained by NIPOS in cooperation with the Czech Statistical Office. The 'Account of the Culture' (first published in 2011, with figures referring to 2009) aims to gather and provide information on the economy of the Czech cultural sector yearly, e.g. by mapping its total economic input and output, measuring the effectiveness of operations in specific sub-sectors and calculating the share of culture in the state's economy. The 'Account of the Culture' has become a unique instrument, especially in comparison with other countries in Central and Eastern Europe where the use of such a statistical tool has not been a part of common practice.⁴

The NIPOS methodology of theatre data collection is mainly focused on gathering data about performances, preferred genres, attendance, employment, ticket costs and various economic activities of the organisations.

In terms of data on audiences, NIPOS statistics have their limitations, especially from the perspective of the cultural organisations. There is a lack of overview data that is collected on a regular basis, which would reveal demographic, behavioural and motivational aspects of the Czech performing arts audience. Many studies and researches examining these variables exist, but they do not create a representative or continuous outcome on the national level (or they are conducted by private marketing and sociological agencies, which usually focus only on fragments of this complex issue).

² NIPOS. Základní statistické údaje o kultuře v České republice 2018: II. díl UMĚNÍ. Praha: NIPOS, 2019. Available at: https://www.statistikakultury.cz/wp-content/uploads/2020/08/Statistika_kultury_2018_II.UMENI_web.pdf

³ ČSÚ, NIPOS. Výsledky účtu kultury ČR za rok 2018. Praha: NIPOS, 2020. Available at: https://www.statistikakultury.cz/wp-content/uploads/2020/09/Vysledek_uctu_kultury_CR_za_rok_2018.pdf

⁴ Pecková Černá, M. Scénické umění (hudba, divadlo, tanec) a kulturní politika v zemích střední Evropy. Disertační práce. Praha: HAMU, 2018

The lack of sophisticated interpretation⁵ is also generally perceived as a drawback of the national statistics. Nevertheless, audience data can at least be used to follow multi-annual trends and the development of attendance in general. For example, it can be seen that attendance increased between 2008 and 2018. It is also possible to note that drama theatre was the most visited genre throughout the period 2014–2018, followed by either musical or puppet theatre, which was more popular from 2014 to 2016.

Professional performing arts in the Czech Republic (theatre, dance and contemporary circus) in 2018 ⁶	
Performing arts companies	207
Venues (both with or w/o permanent companies)	249
Performances	40 465
Tickets sold	8.1 million
New productions	766
Productions presented	3 251
Guest performances abroad	669
Permanent working positions in the theatre sector	7 100
Population of the country	10.7 million

⁵ Louženský, L., Prokop, P. Závěrečná studie: Výzkum systému statistického sledování a vyhodnocování divadel v České republice. Praha: DAMU, 2018. Available at: <https://www.culturenet.cz/coKmv4d994Swax/uploads/2019/10/CDDS-zaverecna-studie-projektu.pdf>

⁶ NIPOS. Základní statistické údaje o kultuře v České republice 2018: II. díl UMĚNÍ. Praha: NIPOS, 2019. Available at: https://www.statistikakultury.cz/wp-content/uploads/2020/08/Statistika_kultury_2018_II.UMENI_web.pdf

Performing Arts in Prague

The capital plays a cardinal role in the Czech performing arts sector. Especially in recent years there have been enormous efforts not only to emphasise Prague's qualities in the field of cultural heritage but also to draw attention to the performing arts and improve public space and the quality of life of residents. Prague is the focal point of the Czech cultural and arts map, with the greatest number of cultural organisations and most of the leading educational institutions in the arts field.

Around 70% of Czech theatres are located in Prague and there are more than one hundred theatre venues situated in the capital. Therefore, it is not surprising that three-quarters of theatre audiences attend performances in Prague.⁷ The city directly funds ten theatres and supports many other venues, companies and projects through a sophisticated granting scheme. Prague is also home to one of the most important and visited cultural institutions in the country, the National Theatre (although it is established and funded by the Ministry of Culture). The National Theatre, which took part in the ASSET project research, welcomed nearly half a million attenders in 2018 (excluding guest performances).⁸

The statistics also reflect the structural, legislative and operating schemes of the Czech performing arts sector, which is divided into three sectors (public, non-profit and private), as mentioned above in the case of the country as a whole. The data about the capital's culture can be found in the overall annual report on arts and culture in Prague.⁹ It includes detailed economic figures on funded institutions (including

⁷ Opatrná, K., Svobodová Grossová, L. *Kultura a umění v Praze*. Praha: Hlavní město Praha – Odbor kultury a cestovního ruchu Magistrátu hl. m. Prahy, 2019. Available at: https://kultura.praha.eu/public/7c/1e/66/3096072_1056235_K_UvP_2019_web.pdf

⁸ Opatrná, K., Svobodová Grossová, L. *Kultura a umění v Praze*. Praha: Hlavní město Praha – Odbor kultury a cestovního ruchu Magistrátu hl. m. Prahy, 2019. Available at: https://kultura.praha.eu/public/7c/1e/66/3096072_1056235_K_UvP_2019_web.pdf

⁹ Magistrát hl. m. Prahy. *VÝROČNÍ ZPRÁVA 2018 – KULTURA*. Praha: Magistrát hlavního města Prahy, 2019. Available at https://kultura.praha.eu/public/a6/ed/ea/3005005_1011504_Vyrocn_i_zprava_2018.pdf

theatres) and provides general data about the capital's funding programmes and other kinds of support. Detailed information can also be found in the annual reports of the theatres that are funded by the City of Prague and in the annual reports of the non-profit organisations

Overall statistics on Prague's performing arts sector are collected and processed by NIPOS as in any other city or region. However, the figures are not published separately by territorial unit and are not directly accessible to the public. The figures in the table on the performing arts in Prague are based on NIPOS data and compiled by the City of Prague and the researchers of the project called 'Mapping the effects of a pandemic on culture'.¹⁰

Other types of data on culture in Prague are collected by the Prague Institute of Planning and Development (IPR), a subsidiary of the City of Prague, and by the non-profit organisation Creative Prague (KREP), also established by the municipality, which focuses on supporting the sustainable development of cultural and creative industries in Prague. In the last few years KREP has conducted and commissioned a number of research projects, including the Survey on Cultural Interests and Needs of Prague's Residents, Mapping of Cultural Facilities in Prague, Analysis of Theatre Attendance and Mapping of Cultural Behaviour of the City of Prague's Residents.¹¹

¹⁰ Louženský, L., Prokop, P., Prokůpek, M. Závěrečná zpráva: Dopady koronaviru na kulturní sektor – divadlo a tanec. Praha: IDU, 2020. Available at: <https://www.idu.cz/covid>

¹¹ Available at: <http://kreativnipraha.eu/>

Professional performing arts in Prague (theatre, dance and contemporary circus) in 2018	
Performing arts companies	99
Venues (both with or w/o permanent companies)	115
Performances	18 072
Performances by municipal theatres	2 795
Tickets sold	4.3 million
Tickets sold by municipal theatres	0.8 million
New productions	324
New productions in municipal theatres	43
Productions presented	2 064
Permanent working positions in the theatre sector	2 621
Permanent working positions in municipal theatres	775
Population of the city	1.3 million

Data Collection Process

Data collection took place during both spring 2019 and spring 2020, though in 2020 the collection was curtailed to some degree by the COVID-19 pandemic.

The collection of data at the Švanda Theatre took place in the form of face-to-face questionnaires at performances, mostly at two designated places – the entrance to the theatre near the cloakroom and the entrance to the hall at the lobby bar. The collection of ASSET questionnaires was signalled by a large display board (a trailer roll-up). The theatre obtained most of the completed questionnaires by active request, with some attenders also asking to take part, being pleased at the opportunity to express their opinions.

Older attenders often welcomed the assistance of staff in completing the questionnaire. Sometimes a fruitful conversation followed, after finishing the survey, about the relationship of the respondent to the theatre, their preferences in terms of repertoire and more.

At Jatka78, questionnaires were also collected on the spot in the theatre café, which also serves as the venue's foyer. The audience was mostly approached after the performances, as most tend to use the opportunity to stay and have a drink and a conversation. Many of them were more than willing to take a moment to fill in a questionnaire. The questionnaire was distributed by performers and production staff.

At Studio DVA, data was collected in the form of both face-to-face and online questionnaires. The theatre management appointed four members of the front-of-house staff, who addressed the visitors and helped them fill in the questionnaires. The theatre also received a large part of its reflections in the form of an electronic questionnaire sent to its regular audience. The number of attenders who were willing to participate in the survey was a positive surprise for the theatre.

The National Theatre decided to use tablets for data collection. In retrospect, providing personnel with thorough training and hands-on practice in handling the technology and filling in the survey was reflected as a key success factor by the team. In this way, the staff identified problematic areas where the audience was likely to require assistance.

Data was collected at all three National Theatre venues, as each has a different profile (classical, modern and experimental). The goal was to get the most representative audience sample possible. Staff approached attenders during the intermission, primarily in the foyer and lounge spaces. After the performance, audiences were approached in the entrance halls. This delayed the audience's departure from the theatre buildings and required timely notification and cooperation from the auditorium staff. Respondents received a complimentary drink as a thank-you for their time and willingness to participate. No major problems were encountered over the course of the data collection. The staff reported that the respondents turned out to be very helpful, and most of them cooperated willingly and completed the questionnaire carefully.

Data collection in Prague theatres					
Venue	Phase 1 cases for segmentation	Phase 2 cases for segmentation	Total cases for segmentation per venue	Total cases for segmentation per country	Theatre Night 2019
Švanda Theatre	344	148	492	3 153	107
Studio DVA	1 442	26	1 468		61
Jatka78	446	143	589		0
National Theatre	375	229	604		55

Unlike some other countries, the Czech Republic does not have a long history of customer research and direct marketing, and it is even more recent among arts organisations. Theatres are often quite restrained about approaching their audience in the apprehension of breaking their privacy comfort limits. However, during the ASSET data collection it was evident that audience members were more than willing to present their views through the survey. This might be a part of a nationwide trend of customers' feeling generally more confident in relationships with goods retailers, service providers, etc. This also opens up an opportunity for theatres to intensify communication with their audiences.

Partner Theatres and Research Outcomes

The process of selection of the theatres

The main criterion for the selection of theatres was to achieve diverse representation of the various artistic, production and business models that make up Prague's rich theatre network. Public theatres were represented in the project by the National Theatre, which is the one and only theatre in the Czech Republic established by the state, and the Švanda Theatre as one of ten theatres established by the City of Prague. Jatka78 was chosen as a representative of the so-called independent theatres, i.e. theatres established most usually by individuals and operated in one of the non-profit legal forms. Studio DVA was picked to represent entrepreneurial theatres. Running their own venue and producing at least part of the repertoire on their own were both necessary prerequisites for selection.

Prague partner theatres, key indicators in 2018		
Theatre	Performances	Tickets sold
National Theatre	914	483 716
Jatka78	249	53 219
Studio DVA	555	274 016
Švanda Theatre	231	36 957

The National Theatre

The National Theatre is the most prestigious theatre in the Czech Republic. It is one of the symbols of national identity and part of the European cultural space. It

is a significant part of national cultural heritage and at the same time a space for free artistic creation. It is a living artistic organism that combines tradition with experiment in a never-ending search for the highest artistic quality. The National Theatre includes ensembles of opera, drama, ballet and Laterna magika (multimedia), which perform at four venues: the National Theatre, the Estates Theatre, the State Opera and the New Stage. The National Theatre is a contributory organisation of the Ministry of Culture of the Czech Republic.

With a 6% share of the total number of theatre attenders in the Czech Republic in 2018 received by a single institution, the National Theatre is a titan among Czech theatres. Bound by the legacy of its founders, it is still expected to offer programmes to a full spectrum of audiences.

Each of the ensembles of the National Theatre has its own team of so-called lecturers who have been developing audience development programmes since 2015. Recently, they have been organised in an internal audience development platform named ND+. The programme includes interactive activities for families with children, primary and secondary school pupils, adults and senior citizens. Their aim is to create various opportunities for audiences to get closer to the theatre. The programme brings the audience to the theatre's backstage (both virtually and physically), presents the complexity of artistic, technical and all other processes of theatre operation, and reveals hidden elements and unexpected historical and social contexts of the largest Czech theatre institution.

The coordinator of the ND+ platform and accompanying programmes lecturer, Lenka Hubáčková, has been the main liaison between the National Theatre and the ASSET project team. Based on mutual communication, the following conclusions of the collaboration were formulated:

The ND+ platform connects the audience development programmes of various ensembles and departments. Their aim is to build bridges between theatre staff and the public, to establish and nourish relevant relationships, and to dispel mistrust, prejudice and fears that theatre-makers may have about more intense and open contact with the public. They contribute to the theatre's image through direct work with audiences who appreciate the genuine interest of theatre representatives in two-way communication. Together with the audience, the lecturers discover and

share the value of the theatre, reflect on its personalities and history, get to know the theatre's buildings and technologies, and uncover the themes of individual productions, without lecturing and with respect for the complexity of the process of discovery. They gain new and active audiences by allowing the public to find and cultivate their personal motivation, so that they know why they go to the theatre, what it can offer them personally and how it enriches them.

In the medium term, the plan is to build a central department of accompanying programmes at the National Theatre, thus formally integrating these into institutional structures. The creation of a separate department is supposed to position the accompanying programmes among the theatre's integral components.

The ND+ theatre lecturers look for and exploit the potential in the theatre's buildings, facilities, backstage, professions and creation processes. They help to anchor theatre within a community/place. Thanks to their personal contact with the public during workshops, discussions, etc., they have personal experience with audiences' diverse motivations and expectations, which is why they wanted to be involved in the ASSET project.

The audience development team wanted more detailed and sophisticated information about the audience and to gain experience with a research methodology, which would allow it to understand more about the motivations and expectations of different audience segments.

The team also expected that the findings could be used by the marketing and sales department. It anticipated that the project outcomes would help to substantiate the need for diverse approaches to working with audiences and to improve how they develop and prepare accompanying programmes for different target groups.

The National Theatre team found the segmentation system to be useful, as they were able to understand the motivations and communication channels used by different groups, as well as the kinds of information they prefer and need before they decide to visit the theatre. The ASSET research has shown that a large part of the audience needs information about the cast, but the theme of the play turns out to be by far the most important factor in making them decide to attend a performance.

The data obtained enables the theatre to evaluate the effectiveness of existing methods of audience communication. The ND+ team was not surprised by the

audience's interest in performances for children, as they regularly encounter this demand in their practice. The relatively low average age of spectators at dramatic theatre performances was also reflected as interesting, and is most probably related to the ensemble's progressive artistic programme in recent years.

The reasonable numbers of the audience from other regions of the Czech Republic, and the strong representation of Prague and Central Bohemian audiences, is also an important input for the development of future strategies in the area of audience development. There was also a low number of international visitors indicated, possibly due in part to the data collection methodology, but this might be an area for future investigation.

The theatre's audience development team indicated that the results of the research confirmed their conviction that, in building relationships with the audience, it is necessary to take more account of the 'user' experience without pandering to the audience at the level of content. As a direct result of the findings of the ASSET project, the ND+ team is going to invite the public to become directly involved in the creative process and development of two specific accompanying programmes. This experiment will be evaluated and further steps chosen that will help to develop similar forms of engagement.

The audience development team, in cooperation with the sales department, have made modifications and changes to the web presentation of ND+ programmes and the process for booking and reservations. The adjustments concern both the organisation of information and the degree of detail. For example, it now distinguishes between the expectations of a family with children who are looking for different information on the website and those of a teacher who is planning a class trip to the theatre and needs more details. By using smart-emailing, the theatre plans to address target groups better and modify the content and language of the information provided. Thanks to the knowledge gained through the ASSET project, the National Theatre has optimised internal systems (automation, statistics, etc.), which will provide it with other important audience data in the future and also significantly reduce the volume of administrative work for the audience development lecturers.

The results of the ASSET research have been introduced not only to the PR and marketing departments but also to the new management of the National Theatre's sales department, which, in 2020, focused intensively on the segmentation of data-

bases of existing contacts. The ASSET collaborators in the National Theatre reported that the outputs have been taken into account by individual departments and their employees in the context of their agendas and strategies. The sales department sees great potential and is looking for ways to link outputs from traditional business segmentation (socio-demography) with the outputs from the ASSET project to help the National Theatre meet its goals.

As the National Theatre is a multi-ensemble theatre, conducting comparable research also with ballet and opera audiences would be a logical future step, which would most likely help to refine the offer of the portfolio of accompanying programmes as a whole. In the next step, targeted research would be useful to reveal how audiences perceive the theatre, and whether and for what reason they attend. In this context, the sales department could assess whether and to what extent the audience is influenced by the option to choose a performance with an accompanying programme when purchasing tickets.

Jatka78

The multifunctional theatre hall Jatka78 was opened in Prague in 2014 in one of the buildings of a former slaughterhouse ('jatka' in Czech) built at the end of the 19th century and converted into a market area in the 20th century. Today, the space consists of a small stage, training hall, rehearsal room, gallery, bar and bistro. It offers ideal conditions for new circus, dance, non-verbal, alternative and puppet theatre. Jatka78 is the home stage of the founding ensemble Cirk La Putyka, the dance ensemble Dekkadancers and the Heaven's Gate theatre company, as well as hosting a number of well-known independent ensembles. Jatka78 is open to Czech and foreign ensembles for residential projects and performances, workshops, conferences, discussions, lectures, exhibitions and happenings. The team sees Jatka78 as an independent non-profit organisation that has arisen from the needs of the people, our times and the cultural scene.

As well as the artistic programme, Jatka78 organises Velká Holešovická – a night run through the Prague Market for individuals, and relays composed of theatre ensembles. It has special importance for the venue, as spectators, sports enthusiasts and

theatre professionals meet at this event. Furthermore, the theatre organises public work-in-progress presentations of its residents several times a year, and participates in the programme of events such as Open House with guided tours and more.

Jatka78 proved its relevance to the public from the beginning, as its establishment was only possible thanks to an extremely successful crowdfunding campaign. This not only brought in the necessary funds but also set a strong foundation for a wide and loyal audience core that was involved with the theatre from the very beginning.

In the spring of 2021, Patron78, a club for Jatka78's patrons, was established as a follow-up to these activities. Membership is open to anyone who makes a regular or one-time contribution on a donor platform. Loyal fans will be rewarded with various benefits. Currently, they receive invitations to online events via direct emailing and receiving priority information. Future plans include inviting patrons to backstage tours and dress rehearsals and offering them priority booking. The plan is to promote the club with an emphasis on a loyal well-chosen target group consisting of regular visitors who know and love Jatka78.

Jatka78 aims to be a theatre for all. A few years ago, it began promoting itself with the campaign *#patrimnajatka* (*#ibelongtojatka*), and bringing people together is a core value shared throughout the organisation. The majority of the programme has no language barrier, and the theatre also seeks ways to tear down other types of barriers. To allow those who cannot afford a ticket to visit the theatre, they adopted the concept of 'suspended coffee' (where a café patron buys a coffee for a future guest who can't afford one), and they plan to offer spectators a chance to buy a ticket for someone else. Of course, the patron will be rewarded with an original gift from the theatre as well. The launch of this project is scheduled for September 2021, in collaboration with non-profit organisations and individuals from disadvantaged groups, such as single parents.

In the short term, the goals were much influenced by the coronavirus pandemic. Jatka78 plans to concentrate on developing the ability to react flexibly to the situation, to improve its digital content and online communication, and to ensure the safety of the team and audiences when reopening the theatre.

The main motivation was to get to know their audiences better, including the reasons why they come, what they appreciate about the theatre and what would be

worth improving, and to find out what promotional tools are effective. They also wanted to discover shortcomings, and how marketing, programming and theatre operations could be improved.

As Jatka78 is a relatively new theatre, it hasn't done such research before, and the team were curious as to what information could be gained from the project. They also wanted to find out about the audience's perceptions given that it is a theatre with a diverse programme without its own ensemble but with strong ties to contemporary circus company Cirk La Putyka and other Czech ensembles of various genres, and, unlike many other venues in Prague, regularly hosts foreign companies and organises special projects.

Based on experience, they suspected that the audience was relatively young, that people usually enjoy themselves attending as a group, and that many return regularly. These assumptions have been mainly confirmed by the research, and by the fact that people give the most weight to personal recommendations.

On the other hand, they did not expect that such a large number of attenders were coming for the first time. This is therefore a challenge: to capture such people and try to entice them along to another performance. Interestingly, they also note that many people 'visit' the theatre in the form of a gift voucher. It therefore makes sense for Jatka78 to develop and strengthen campaigns to promote these vouchers (especially before Christmas).

Jatka78 have also established that the diversity of the programme corresponds to a diversity of audience segments. The results show that the theatre has built a relatively strong fan base and that each new project brings its own new audience.

Unfortunately, given the situation with the coronavirus pandemic and the need for advance planning, there has not been much opportunity to work with the research findings. However, they want to work with the results and develop the programme in light of the new information. The team has also now expanded to include a new member in the marketing section, who is in charge of social networking and online advertising. This new colleague will be able to work with concrete data obtained from the research.

Encouragingly, there was also a shift in ratings on the comfort of the auditorium, which some respondents complained about in the first phase. New seating was

purchased between the first and second phases, and the research showed a slight improvement in this area of evaluation.

The management of Jatka78 aims to focus on the ‘next’ generation, from which their future audiences will be drawn. They therefore consider increasing their activity on social media, along with newer platforms with greater organic reach (TikTok, Clubhouse, etc.), and actively engaging with this generation’s influencers. They will also involve them in the performance *White Rabbit, Red Rabbit*, which each time features a different participant, who performs without prior preparation and follows a script that they receive while the audience is watching. By involving an influencer, and by sharing the event through their social media accounts, the spectators are given a chance to see them in a different role.

Given the relative lack of senior attenders, a number of new practices have been developed and adopted, such as thinking about events with built-in discounts. These could include events (inspired by the Coffee with Grandma initiative) where children or grandchildren take their parents or grandparents to the theatre and receive discounted tickets, or an event similar to the ‘suspended coffee’ concept where the free tickets would be used by seniors from a particular district. They will also cooperate with organisations devoted to ageing well, such as Elpida and Život 90.

The new insights gained from the ASSET research have also influenced involvement in another initiative – the theatre tent Azyl78 (Asylum78). The tent was planned to be in operation in Prague from May 2021 to October 2021 and to offer a kind of ‘asylum’ to various Prague companies and theatres. A diverse programme was designed to attract new audiences for the next season and also to acquaint the audiences of the other Prague theatres with Jatka78, perhaps attracting new viewers, even in those ASSET segments where the research revealed gaps (e.g. the classics). The brand acts as a guarantee of quality, and this can be used in a different context by introducing indoor theatre and other activities to audiences in the attractive environment of the summer stage. This will refresh the audience, not just with a programme of theatrical events but also with a pleasant environment and atmosphere and accompanying events that encourage them to spend time with friends and family, which is something that a major part of audiences looks for, as the research indicated.

Another very clear result of the research was an audience assessment of the overall atmosphere of the theatre, which was positive but pointed to some ways in which it could be improved further, for example by making the foyer, gallery environment and outdoor summer seating even more hospitable. These steps should contribute to the spread of helpful 'gossip' and word-of-mouth marketing, which was proven to be substantial.

There are several areas of investigation on which research could now focus. This might include how people follow the online activities of various cultural institutions, what they have missed most during quarantine, etc. And then, of course, to monitor the development of individual segments and data as people return to attending events at cultural institutions. They also want to analyse and evaluate online data more.

Jatka78 is also interested in better understanding the target audience of the Patron78 club. This group is important to them and they want to pamper these loyal attenders and gradually grow their number.

Studio DVA

Studio DVA started its activities in 2000. It mainly produces its own theatre projects, presenting them throughout the country and in Slovakia. In addition to the main theatre venue on Wenceslas Square in the Fénix Palace, it also runs the Small Stage in Na Perštýně Street, where they receive space for chamber productions. In summer, the theatre performs at the Vyšehrad Summer Stage and in the courtyard of Dvice Castle. Since 2004, Studio DVA has been organising the popular theatre show Metropolitan Summer of Actors.

The theatre's audience development activities take place mainly in online form via social networks (Facebook, Instagram, YouTube). Audiences are loyal and return to the theatre repeatedly. They are regularly informed about events in the theatre through newsletters. Every year, the theatre also participates in the Theatre Night project and organises guided tours. Other activities include the Summer of Amateur Theatres, which is a festival of amateur theatre companies taking place at Studio DVA's main stage.

Studio DVA is a private, entrepreneurial theatre. Entirely reliant on earned income, it does not receive public support through grants or subsidies. This is why

audience satisfaction is a priority, according to front-of-house manager Gabriela Poledníková. The Studio DVA team has long sought to better understand its audiences and their behaviour in order to build a strong base of loyal and returning visitors. Short-term goals include the effective planning of marketing campaigns, the selection of appropriate channels of communication and a clearly defined target group.

Participation in the ASSET international research project was therefore a chance to obtain new information about the audience. Studio DVA valued the opportunity to compare this data with the other European theatres taking part in the project. The chance to compare and evaluate the appropriateness of the theatre's current marketing and business practices was another motivation to take part. The chosen methodology of audience segmentation promised a deeper understanding of audience behaviour that could support more effective planning and help to identify ways of reaching new audiences.

The ASSET research confirmed Studio DVA's assumption that the theatre maintains a high level of audience satisfaction due to the level of service it offers. It also confirmed that the theatre has many loyal and returning spectators. While this was a very positive result, it also means that there has been limited success in reaching new audiences. In comparison with other theatres taking part in the research in Prague, Studio DVA has the oldest audience, with 85% of respondents saying they were over the age of 40. Thus, the theatre must decide whether or not to focus more of its programming and communications on young people, among whom there is greater potential to build new audiences.

The discovery that the theatre's website and newsletter are by far the most dominant communication channels is important in terms of the targeting and format of promotional campaigns. Unlike other theatres in the study, outdoor and print advertising is more significant for Studio DVA, while social networks are of limited value in reaching the existing audience. However, social media would seem to represent a good opportunity when it comes to attracting a possible new, younger audience.

The results of the research reveal a healthy theatre, with a strong base of loyal and faithful spectators. The research highlights two strategies for potential expansion: focusing on new audiences who have yet to visit the theatre, and targeting audiences under the age of 35. These are long-term projects and will take time to implement.

Švanda Theatre

The Švanda Theatre is the third-oldest theatre stage in Prague. Since its inception it has belonged to the progressive theatres of the capital. Even today, this free cultural space on the left bank of the Vltava River invites its audience to participate in a theatrical experience and dialogue that is realised through new dramaturgy and the formulation of clear attitudes in opinion and artistically distinct productions. Švanda Theatre's search for topics that are relevant for our time aims to help the audience identify, reflect and understand these in the broader context of our present and everyday life. The theatre builds on a strong acting ensemble of prominent personalities who, in addition to generational closeness, also combine the capacity for team thinking and authorial input.

Activities aimed at audience development include a diverse offering of theatre workshops (acting, voice, improvisation, scenography, dramaturgy, creative writing, etc.). It also offers dramaturgical introductions to performances, discussions after performances and open days, and participates in Theatre Night.

Alongside the repertoire of Švanda Theatre's own dramatic ensemble, the theatre regularly hosts performances by guest ensembles, as well as concerts, debates, dance courses and workshops that are important for contact with the public. These have two main aims: to provide the public with insight into the theatre and to build a permanent, loyal audience. Participants can try out the fundamentals of the full range of theatre practice. The workshops try to offer content thematically linked to Švanda Theatre's repertoire and are open to all age categories.

The theatre's medium-term goal is to build a community audience, an audience that does not just passively consume but can be regarded as a partner. Also, it aims to define and nurture a segment of 'multi-genre' spectators, who visit the theatre for different events over the course of a month, i.e. not only for performances by the drama ensemble, or concerts, or performances for children.

This focus was developed with respect to the tradition of the place where the theatre is based, as well as from the point of view of the accessibility of public cultural services in the given locality – a relatively large catchment area, with a diverse public having different preferences, priorities and demands for cultural offerings.

Another of Švanda Theatre's specialities is its focus on an international audience, the size of which has gradually increased in Prague up to 2020. The theatre was the first in the Czech Republic to regularly stage productions with English subtitles. In the last three years, it has occasionally offered performances in English, which are either projects co-produced with international partners or prepared for international tours. Foreigners residing in Prague are currently not accustomed to regularly attending dramatic theatre performances in English. In the long term, the theatre aims to become foreign residents' favourite theatre venue.

Švanda Theatre joined the ASSET project with the prospect of getting to know their audience better and to analyse their needs and desires so that the theatre's relationship to a given audience member can develop further. The project was particularly interesting for the theatre because it involved international collaboration, and thus it was possible to gain insights on work with the public from different European countries.

The theatre reported that many of the findings were not very surprising, as they regularly communicate with the audience in different ways. An important realisation was that they have some loyal attenders who attend selected performances repeatedly but rarely try other events. This affirmed theatre management in their aim to cultivate multi-genre audiences.

Research indicated that building loyalty to the venue itself, beyond attracting people to the performances, is a key area to look at. Building and raising the attractiveness of the brand itself, developing special events and creating and promoting friends or membership schemes are potential tools to raise re-attendance, which turned out to be lower than in the ASSET research average.

Based on the research outcomes, the theatre would like to try to communicate better with the audience that has already entered the theatre, and to convince them, over the course of the evening, to visit again. Key segments of the Švanda Theatre audience (Star Lovers, Mainstreamers, Cultural Grazers or Pick and Choosers) commonly expect plenty of information in advance about particular things such as the cast or topic of the performance, in order to make sure it is likely to be of interest to them. As part of this they also appreciate the best possible physical experience, including food and drink service.

As the theatre's team suggested, the audience's decision to come to the theatre can be taken as evidence that the external communication has worked successfully. The theatre's marketing department now plans to concentrate on the complete care of the audience members in such a way that they choose to engage with the variety of the programming on future visits.

Prague Audience Motivations

From 2 713 respondents interviewed during the first round of data collection in Prague theatres, 1 508 people answered the open question, 'Is there on a general level something that would make you visit theatre more often?' These answers were analysed and sorted into ten main categories.¹²

Factor	Number of answers
Finance	409
Time	249
Nothing	165
Visit enough	241
Availability of tickets	206
Dramaturgy	190
Babysitting	35
Company/Recommendation of friends	33
More information	28
Physical accessibility	51

¹² The text is an abstract of a longer study which is about to be published in the *ArteActa* journal in 2022.

The factors mentioned most often were lack of time (for 249 respondents) and lack of money (for 409), although not all of the respondents who mentioned money wanted cheaper tickets or discounts. Forty respondents said they would need to earn more money, while some even wrote statements such as ‘I would need a bit more money, but definitely not cheaper tickets.’ These types of responses seem to demonstrate that many people value theatre highly and feel the urge to state this view directly. On the other hand, 270 asked for cheaper tickets and 73 for special discounts – mainly seniors or students. Some respondents also mentioned that they were missing the opportunity to use employer reward programmes to buy theatre tickets.

The second most frequent barrier was a lack of time. Some 249 respondents mentioned that they would need to have more leisure time to visit a theatre more often. Two other more specific barriers were related to time – a need for babysitting and a need to travel to visit a theatre. Almost all of the 51 people who said they would visit a theatre more often if it was closer to home were from cities other than Prague. Some of the respondents mentioned that they would welcome more weekend and afternoon performances, as they would like to have the option to explore the capital as part of their trip and not return home too late. These people also often find it annoying if they have to pick up tickets in person at the box office.

Many respondents also had an issue with the availability of tickets. Some just wish to see popular productions and struggle to get tickets; others organise theatre visits for a group of friends and need a lot of seats. There is also a segment of people who would wish to be more spontaneous when visiting theatres and who value last-minute tickets.

Twenty-eight respondents mentioned that they would appreciate more information on what is going on. One respondent wrote he would like to have ‘Theatre Spotify’ to recommend performances based on what he had liked before. Some people were also interested in some type of offering providing them with the opportunity to visit more theatres and recommending particular performances. In terms of dramaturgy, the interests varied. Many mentioned they would like to see something new and they often used the adjectives ‘interesting’, ‘unusual’, ‘surprising’, ‘strong experience’ and ‘atmosphere’.

One of the important findings of ASSET is that one of the strongest motivations for visiting a theatre in the Czech Republic is a desire to spend time with friends and family, and the qualitative responses support this. Some people wrote that they miss having company, and others that they would appreciate a special offer of a family theatre experience. A theatre visit is also often a gift in the Czech Republic, as respondents mentioned in the question regarding their motivation to visit a theatre that particular day.

On the question 'Is there on a general level something that would make you visit theatre more often?', 165 respondents answered with 'no'. What is more surprising is that 241 people wrote that they visited the theatre enough, maybe even too much. One respondent wrote, 'Even now I spend more time in theatre than could be healthy.' Another respondent wrote that he or she had visited the theatre 40 times during the last year, while another said, 'I visit theatre 3 or 4 times a year and it is enough for me.' Here we can see that people have different needs in their cultural and social life, and a lot of them do not have the capacity or interest to visit the theatre more than they currently do. This is one of the main reasons why segmentation based on audience preferences is extremely valuable.

Conclusions for Prague

The cooperation with and between theatres involved in the ASSET project proceeded without major problems until the outbreak of the COVID-19 pandemic and the introduction of emergency government anti-epidemic measures, including the closure of theatres from March 2020 to the end of 2020, thus significantly reducing data collection in Phase 2. Nevertheless, during the first data collection phase, it was possible to collect an adequate number of responses to make the resulting segmentation model valid for the city of Prague. Data collection also took place during Theatre Night 2019 in three Prague theatres involved in the project (Švanda Theatre, National Theatre, Studio DVA).

Consultations on the results of the first and second phases of data collection also took place without problems, the only negative being personnel changes in the positions of data collection coordinator in two of the participating theatres. However, the theatres managed to ensure the continuity of the project by implementing its results into the activities of both theatres.

The ASSET team hoped for more implementation steps to be taken in theatres before the end of the project, based on the research. But without having actual audiences in the theatres, some of the actions could not be taken. Nevertheless, many useful findings were delivered by the research, as described above in the reflections of the theatres, or can be used in favour of other performing arts organisations.

In terms of a plain demography, the local team was surprised that visitors are distributed in all age groups pretty equally, which is not the case in all countries. This is good news, particularly in the case of young-generation audiences attending the theatres in decent numbers, although children under 16 years were not included in the research.

It also turned out that audience members travel from other cities and regions to Prague to visit the theatre (26% of respondents) much more often compared to other cities in the ASSET project. This corresponds with the importance of Prague as the cultural centre of the Czech Republic. But it is not only the case for the National Theatre, where the visit could be understood as a kind of local cultural pilgrimage, but also for other theatres, significantly Studio DVA.

In the research we also examined the behaviour of audiences in terms of searching and consuming information about theatres and shows, which is very important for evaluating the cost-effectiveness of marketing activities. These habits obviously vary in each country and theatre, but the numbers showed that maybe in the Czech case, 18% of the local audience members just 'take a chance', compared to between 1% and 5% of respondents in other cities. It will be interesting to consider what this means in practice for marketing.

It also turned out to be specific to Prague theatregoers that their main motivation to visit theatres is to spend time with friends and family. The extreme importance of the social aspect of performing arts consumption is definitely a significant input to be taken into account by management in all theatres when planning audience

development activities. At the same time, in the Czech case, compared to other countries, ticket price turned out to be the least important decision-making factor, which might help theatres to raise their revenue goals and increase their self-sufficiency.





4 Audiences in Finland

Performing Arts in Finland

4

Like the overall Finnish political and administrative system, the Finnish cultural policy system is simultaneously highly decentralised and highly centralised. This is due to the fact that the local government system is strong and autonomous. On the other hand, with the advent of the social welfare state, the main burden of maintaining modern public services, including cultural services, was shouldered by municipalities, while the state set the legislative frameworks and was legislatively committed to compensate for a statutory share of expenditure. In the late 1980s and in the 1990s, this system, which had earlier covered public libraries and adult education, was expanded to include theatres (see Compendium of Cultural Policies & Trends: Finland¹).

The most recent arts policy of the Finnish Ministry of Culture has three key areas. First, the policy underlines that the arts must be brought to the heart of society so that their status meets with the larger societal meaning of art, which should be seen as part of the expanding service sector and business activities. Second, the policy states that arts funding must be developed strategically in accordance with ecosystem thinking, where new structures are needed with more flexibility to enable artistic work across the different fields of the arts. Third, artistic work should be treated as

¹ Compendium of Cultural Policies & Trends. Country Profile: Finland. Available at: <https://www.culturalpolicies.net/database/search-by-country/country-profile/?id=12>

equal to work in other sectors, and the opportunities for artists to earn their income from artistic work should be improved (Indicative Guidelines for Arts 2019²).

The Finnish theatre and performing arts industry is made up of state-subsidised theatres, companies and national arts institutions, publicly funded and non-profit city theatres, and a wide range of independent theatres, dance and circus companies, and production houses. In addition, there is a vibrant amateur scene, as well as commercial theatres.³

The vast majority of the large theatres in Finland are repertory theatres with a permanent ensemble. However, the large theatre institutions are offering a decreasing number of permanent contracts for artists. Open-ended employment contracts are giving way to fixed-term contracts, as the theatres rely increasingly on self-employed artists and designers. Aside from regularly employing freelancers, the state-subsidised theatres will also occasionally collaborate with independent groups and companies, which have traditionally only had intermittently employed personnel. Across the board, among all theatre professions, there is a growing number of self-employed professionals.⁴

The structure of Finnish theatre repertoires has remained somewhat stable. City theatres function as repertory theatres that offer a variety of productions. New writing continues to be at the heart of Finnish theatre. Newly written Finnish plays and adaptations make up more than half of all theatre productions annually.⁵

The repertory profiles of the city theatres and those of independent theatre and performing arts companies differ from each other. Devised performances and other non-mainstream forms and genres (including puppetry, avant-garde productions and site-specific and socially engaged practices) dominate the repertoires of

² Indicative Guidelines for Arts and Artist Policy. Proposal by working group on the key objectives for arts and artist policy (2019). Ministry of Education and Culture Publications 2019/5. Available at: <https://julkaisut.valtioneuvosto.fi/bitstream/handle/10024/161370/okm05.pdf>

³ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot. Teatterin, tanssin ja sirkuksen vuosi 2019 (2020). Helsinki: Tinfo. Available at: https://www.tinfo.fi/documents/esittavan-taiteen-tilastot_2019_web_.pdf [Accessed 15 January 2021]

⁴ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot

⁵ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot

independent groups and companies, whereas musicals have an important role in city theatre repertoires.⁶

Collaborations between theatres are increasing. There are models for both ‘in-house’ theatre production and collaborative resource-sharing.⁷

Theatre statistics have been collected in Finland for over 50 years and include all the regularly operating professional theatres. The first statistics were published in the annual report of the Central Association of Finnish Theatre Organisations in 1944. A book on theatre statistics has been published every year since 1985. Since 1995 the book has been published by Theatre Info Finland (TINFO).⁸

Professional performing arts in Finland (theatre, dance and new circus) in 2019 ⁹	
Performing arts companies	254
Venues (both with or w/o permanent companies)	not available
Performances	21 639
Tickets sold	4.0 million
New productions	341
Productions presented	536
Guest performances abroad	76
Visiting performances from abroad	101
Permanent working positions in the theatre sector	1 947
Population of the country	5.5 million

⁶ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot

⁷ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot

⁸ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot

⁹ Helavuori, H. et al. (eds.). Esittävän taiteen tilastot

Performing Arts in Helsinki

Helsinki has a vibrant performing arts scene with a great number of companies. Helsinki is the capital of Finland, with a population of 630 000. About 6% speak Swedish as their native language and almost 10% are nationals of another country. Helsinki is more international than a typical Finnish town. More than 41% of the population has at least a bachelor's-degree level of education. The municipality of Helsinki invests 3.1% of its tax-based income in culture.¹⁰

Helsinki is an active city with much artistic activity. There is everything from small contemporary circus groups to the biggest theatres in Finland, with many different performing art forms to choose from. The styles vary from comedy and musicals to new writing, new dance and new interpretations of the classics. The Finnish National Opera and Ballet is also located in Helsinki.

Performing arts in Helsinki (theatre, dance and contemporary circus) in 2018 ¹¹	
Performing arts companies in total	86
Theatre companies	60
Circus companies	7
Dance companies	19
Performances in total	7 597
Theatre performances	6 640
Circus performances	378
Dance performances	569
Tickets sold in total	1.2 million

¹⁰ Statistical Yearbook of Helsinki 2020. Available at: https://hri.fi/data/en_GB/dataset/helsingin-tilastollinen-vuosikirja

¹¹ Helsingin tilastollinen vuosikirja 2019, 177–179

Performing arts in Helsinki (theatre, dance and contemporary circus) in 2018 ¹¹	
Tickets sold for theatre performances	1 100 845
Tickets sold for circus performances	69 210
Tickets sold for dance performances	54 484
Population of the city ¹²	648 042

Many professional theatres, like professional cultural sectors overall, depend on municipal and/or state subsidies to be able to operate in the way they do. The parties behind the subsidies require cultural organisations to do audience development – different events and activities that allow people to experience culture in different ways. The aim of the government’s Strategy for Cultural Policy 2025¹³ is to promote inclusion and participation in arts and culture. The strategy should be increased and differences between population groups in terms of participation must be reduced.

The target group of audience development actions is everyone interested in theatre, from children to senior citizens. The activities can include lectures, tours, workshops and interview sessions. When people go to the theatre they do not usually form any kind of relationship with the performers and very few people understand the whole process of theatre-making. One aim of audience development, therefore, is to increase people’s knowledge and to make the arts more approachable. Another is to engage the existing audience, as well as attracting new potential viewers, which binds audience work to marketing.¹⁴ The ASSET project touches Finnish profes-

¹² Statistical Yearbook of Helsinki 2018. Available at: https://hri.fi/data/en_GB/dataset/helsingin-tilastollinen-vuosikirja

¹³ Strategy for Cultural Policy 2025 (2017). Ministry of Education and Culture 2017:22. Available at: <https://julkaisut.valtioneuvosto.fi/bitstream/handle/10024/80577/okm22.pdf> [Accessed 1 September 2020]

¹⁴ Ala-Kaila, Veera (2019). Consumer value created by audience development in theatre organisations. Master’s thesis, International Design Business Management. Aalto University. Available at: <https://helda.helsinki.fi/bitstream/handle/10138/234909/nbnfife20071793.pdf?sequence=1> [Accessed 1 September 2020]; Sorjonen, Hilppa & Sivonen, Outi (2015). Taide- ja kulttuurilaitosten yleisötyön

sional theatres through the intersection of audience development and marketing occupations, and in most theatres both occupations have their own full-time experts belonging to the theatre staff.

Data Collection Process

4

At the beginning of the ASSET project, national audience research was gathered from different academic and non-academic sources. This included the collection of national statistics and audience-related case studies in order to form a grounding for the first phase of the data collection.

The planning process of the data collection started with four different professional performing arts organisations in Helsinki in autumn 2018. The following organisations participated in the project: the Finnish National Theatre, Alexander Theatre, Zodiak – Center for New Dance, and Cirko – Center for New Circus. Detailed information on these theatres and their audiences follows later on in this chapter.

The national coordinators discussed the individual needs of each theatre and agreed their planned methods of audience research. The representatives of each of the theatres were enthusiastic about the many possibilities of audience development and audience research but made it clear that they did not have the resources to go forward with face-to-face data collection during the spring of 2019. The arctic weather and darkness during the winter were among the obstacles.

Jonathan Goodacre and Daniel Cowley from The Audience Agency visited Helsinki in February 2019 to give a professional workshop on data collection and audience segmentation to Finnish performing arts professionals. All the theatres participating in the ASSET project were present, with key members of staff joining

muodot, laajuus ja tuloksellisuus. Cuporen verkkojulkaisuja 27. Kulttuuripoliittisen tutkimuksen edistämissäätiö. Available at: <https://www.cupore.fi/images/tiedostot/taide-jakulttuurilaitostenyleisotyonmuodot17.4..pdf> [Accessed 1 September 2020]

the training. After broad and deep discussions, it was decided that e-surveys were the best way to implement the data collection in Helsinki.

The questionnaires were developed by the national coordinators, together with the theatres and The Audience Agency. There were several co-working rounds and everyone had an opportunity to influence the outcome. The questionnaires were translated into Finnish and distributed via email, with all theatres having their own individualised questionnaires.

Although the data collection for the second phase began in spring 2020, it had to stop not long afterwards due to the impact of the COVID-19 pandemic.

The participating ASSET theatres have good audience databases and were able to administer the questionnaires well. The first phase of data collection took place during March, April and May of 2019, lasting altogether about three months. The second round of data collection took place during February and March 2020. Data could not be collected during the Night of the Arts in Helsinki 2020, which was cancelled due to the COVID-19 pandemic.

Data collection in Helsinki theatres					
Venue	Phase 1 cases for segmentation	Phase 2 cases for segmentation	Total cases for segmentation per venue	Total cases for segmentation per country	Night of the Arts
Finnish National Theatre	128	-	128	2 179	-
Alexander Theatre	541	-	541		-
Cirko	113	64	177		-
Zodiak	40	141	181		-

During the data collection the ASSET Finnish national coordination staff were actively in contact with theatres via mail, phone and face-to-face meetings. The aim was to help with the data collection and also to find different ways of collecting

as much data as possible. Some organisations lacked staff at the beginning, but when they found a person to take responsibility for data collection, the collection was successful. Some of the organisations are small, with limited numbers of staff. Although they were committed, their resources for collecting data were very limited. The ASSET Finnish national coordinators offered help, such as the possibility for face-to-face questionnaires delivered by Metropolia University staff.

The larger organisations were successful with their data collection, as they had more resources to draw on. They used all the visitor contact channels, working hard to reach as many previous visitors as possible. All the ASSET organisations in Helsinki were clearly very committed to the project and interested in developing their practice as a result of knowing their audience better. The Metropolia University Master of Arts and Culture programme was strongly involved in the ASSET project, for example in helping with the translation of open answers in the questionnaires.

Partner Theatres and Research Outcomes

The criteria and process of selection of the theatres

Helsinki is a great city, full of a variety of performing arts organisations. With many theatres to choose from, it was possible to find organisations that represented different types of performing arts and ways of producing performances, as well as organisations of different sizes.

The selected organisations also reflected the performing arts in the best possible ways, with four being chosen as best suited for the ASSET project. The selected organisations were also eager to participate in international projects and were happy to try new things in the field of audience research.

Helsinki partner theatres, key indicators in 2018		
Theatre	Sold tickets in own productions	Number of performances
Alexander Theatre*	n/a	70
Cirko	7 800	78
Finnish National Theatre	160 520	964
Zodiak	8 948	140

The Finnish National Theatre¹⁵

The Finnish National Theatre, founded in 1872, is the oldest Finnish-language professional theatre in the country. For the first thirty years of its existence, the theatre functioned primarily as a touring company, not acquiring a permanent home until 1902, when a purpose-built theatre was established in the heart of Helsinki. The theatre still operates on these premises today, and over the years the building has expanded from its original size to encompass a further three permanent stages.¹⁶

In recent years, the theatre has also expanded its outreach activities in the realm of theatre in education and community work. Touring Stage, which has no fixed stage, aims to take small-scale touring performances to locations throughout the country that have little or no access to theatre, such as homes for the elderly, hospitals, welfare reception centres, prisons, and so on.¹⁷

¹⁵ Helstelä, Kirsi. Communications Producer. The Finnish National Theatre. Personal Communication. 15 February 2021; Briefly in English. The Finnish National Theatre. n.d. Available at: <https://kansallisteatteri.fi/briefly-in-english/> [Accessed 1 September 2020]; Goodacre, Jonathan. Senior consultant, The Audience Agency. Personal communication, 26 October 2020

¹⁶ Briefly in English. The Finnish National Theatre. n.d. Available at <https://kansallisteatteri.fi/briefly-in-english/> [Accessed 1 September 2020]

¹⁷ Briefly in English. The Finnish National Theatre

The audience development programme includes discussion groups, drama courses, literary study, backstage tours and more. The unit also provides educational background material relating to the theatre's productions for the benefit of teachers.¹⁸

The Finnish National Theatre would like to attract new audiences to their productions. They have a large variety of different performances and they would like to find new ways of marketing and searching for more potential customers. The Finnish National Theatre is committed to getting to know their audiences even better than they do at the moment. Deepening the relationship with their audiences is one of their main goals. They are also eager to target their marketing better to different audience segments.

The Finnish National Theatre was and still is very interested in audience research. They wanted to develop their audience segmentation and to gain new knowledge about their audiences as well as being interested in participating in an international research project. Through ASSET they wanted to gain new tools and skills to learn about their audiences.

The Finnish National Theatre wanted to evaluate what they already knew about their audiences. They were enthusiastic to develop an overview of those who engage and those who don't and to have a segmentation profile of their organisation's audiences.

According to the ASSET survey, the Finnish National Theatre has a high number of regular attenders. A high proportion of these are older people. The audience is relatively concentrated in Helsinki itself, but compared to other performing arts organisations in the ASSET project there is a significant nationwide element. This probably also relates to the National Theatre's being the national theatre in practice.

These older regular attenders are well informed about the Finnish National Theatre's programming, also indicating that they read and are informed by reviews in the media. In the comments and responses there seems to be more desire for some diversification of the performances. This might include families and children. If it is true that there are only a small number of younger people in the audience, this would also appear to be a priority to tackle.

¹⁸ Briefly in English. The Finnish National Theatre

A high proportion of attenders get their information from email newsletters, and loyal regular attenders evidently can find information from sources they know and are familiar with, such as the press. The theatre has well-informed and knowledgeable attenders, with socialising and entertainment being key motivators.

The Finnish National Theatre had overall good ratings in the ASSET survey, with audiences expressing high satisfaction with their experience in many ways, especially with the quality of the performances. About 90% of the attenders stated that the whole experience was good or very good.

The theatre staff discovered that the motivation for coming to their theatre was somewhat different from what they originally thought. They learned some new and interesting things about their audience and its motivation. The team feels that they know their audience well and that their current communications and marketing reach that audience very well. They are trying to target each performance to a particular audience and are also aiming to use their customer database much more efficiently.

The Finnish National Theatre thinks that the segmentation model helps them to market different performances to different audiences. The new information has inspired them to consider new ideas for audience development projects. They are also going to build a new audience development plan. Specific marketing channels are used for each target audience. The theatre aims to be more democratic and inclusive and therefore to reach new audiences.

The organisation is experimenting with new ways of marketing and developing a coherent plan for long-term marketing actions, including using new marketing channels to find audiences through online marketing and social media platforms. The theatre's marketing team finds it important to create new content for communication purposes.

There are many things that the Finnish National Theatre wants to learn in the future. They would like to know how to build new audience segments when they collect new data, how they could engage these audiences in their marketing planning and how to build customer loyalty for each audience segment.

They are also interested in using audience segmentation in online marketing and finding out how to distinguish audience segments in their customer database. The next step for the Finnish National Theatre is research into non-attenders.

Zodiak – Center for New Dance¹⁹

Zodiak is an experimental, pioneering centre of contemporary dance that focuses especially on artists, the community and audience engagement work. Zodiak's facilities are located at the Cable Factory in Helsinki, and it is a key producer of and venue for contemporary choreography and performances in Finland. Zodiak also actively engages in diverse audience development work stemming from its productions and the community of artists and participants around it. The programme is artistically curated and primarily based on open applications.

Zodiak wants to gain new audiences for new dance and is interested in finding new ways of marketing its performances and the venue. This means understanding its audience even better and deepening the relationship between the audience and the dance community. Zodiak also wants to target its marketing even better for different audience segments.

The Zodiak team saw the ASSET project as a way to understand its audience better. They were also interested in how the segmentation might work in practice. With a strong vision of gaining knowledge on how to reach new audiences and developing an overview of those audiences who already engage, Zodiak needed a segmentation profile in order to build a clear picture of the arts and cultural interests of their audience.

The main benefit of the ASSET project for Zodiak was the alternative way of segmenting their audience given that they already know their audience well and that there were no surprises in the ASSET survey. As a result of the research, Zodiak found new segments to target their audience development work in the future.

For Zodiak there is an opportunity to attract new attenders by making sure the 'barriers' to attendance are lowered. This could be tied into other elements such as varying the times and nature of performances. It could be interesting to look

¹⁹ Ahonen, Piia. Communications manager, Zodiak – Center for New Dance. Personal communication, 16 February 2021; Zodiak – Center for New Dance. n.d. Available at: <https://www.zodiak.fi/en> [Accessed 1 September 2020]; Goodacre, Jonathan. Senior consultant, The Audience Agency. Personal communication, 26 October 2020

beyond contemporary European dance and at communicating the further benefits the company can offer to audiences.

According to the ASSET research, compared to other theatres in Helsinki, Zodiak has a relatively young audience, with many in the 25–34 age group. The audience is mostly local, so currently it makes the most sense to concentrate on Helsinki and look for new audiences there.

The research showed that the audience respects and appreciates the high quality of work, with Zodiak having high ratings overall. The members of the audience felt that the quality of performance, value for money and the whole experience are exceptionally good, with the quality of the work being highly appreciated. The consultations following the research suggested that in looking for new attenders, there is an opportunity to emphasise that the current programme is entertaining as well as inspiring.

The Zodiak staff feel that the segmentation model will help them to market different performances to different audiences. They also see that the information they have gained will motivate them to do more outreach projects, which the team is going to build into a new audience development plan for the future.

The Zodiak centre is going to experiment with new ways of marketing, including trying more online marketing, new social media marketing platforms, guerrilla marketing and creating new content for marketing in various mediums. The team would like to learn how they could develop greater audience engagement, building customer loyalty for each audience segment. Zodiak is interested in how to use the audience segmentation model in online marketing. Research on non-attenders and how to reach them would be the next step in future research for Zodiak.

Cirko – Center for New Circus²⁰

Cirko is working to promote and develop contemporary Finnish circus. The Cirko building, located in Helsinki's Suvilahdi, is 1 400 square metres of office and performance space, custom-made for contemporary circus.²¹

Cirko is a venue, production house and artistic development centre that offers the public high-quality contemporary circus. The performances attract more than 10 000 visitors each year. The centre provides circus professionals with a first-class working environment, with around 20 professional groups using its rehearsal spaces each year and a year-round residency programme that encourages and helps emerging and young circus artists to develop new contemporary circus performances. Cirko is internationally active in the field of contemporary circus through various networks.²²

There were several reasons why this institution wanted to participate in the ASSET project. They were interested in audience research and wanted to develop their audience segmentation, gain new knowledge about their audience and participate in an international research project.

The main findings of the ASSET project for Cirko were the new ways in which they could reach audiences. For example, in the future they will offer deeper content about artistic programmes for audiences. The centre discovered that their current marketing tools work well, though they will try to use segmentation in order to attract particular audience segments.

The research showed that there are good numbers of first-time visitors and that Cirko is obviously good at attracting new audiences for some performances. This could be developed and these audiences be consolidated to become regular attenders.

²⁰ Mentula, Katja. Head of Marketing and Communications, Cirko – Center for New Circus. Personal communication, 2 March 2021; Cirko – Center for New Circus. n.d. Available at: <https://cirko.fi/en/> [Accessed 1 September 2020]; Goodacre, Jonathan. Senior consultant, The Audience Agency. Personal communication, 26 October 2020

²¹ Cirko – Center for New Circus. n.d. Available at: <https://cirko.fi/en/> [Accessed 1 September 2020]; Mentula, Katja. Head of Marketing and Communications. Personal communication, 3 March 2021

²² Cirko – Center for New Circus. n.d. Available at: <https://cirko.fi/en/> [Accessed 1 September 2020]; Mentula, Katja. Head of Marketing and Communications. Personal communication, 3 March 2021

There is also a strong segment of regular attenders. Compared to other performing arts organisations in Helsinki, this is a relatively young audience, with a high proportion coming from the 25–44 age group. The audience is mainly local, though significant numbers of visitors come from outside Helsinki and seem to be attracted by the specificity of the programme. There is an opportunity to reach out to other areas and audiences.

According to the ASSET research, the social media channels used by Cirko's audiences are mainly Facebook and Instagram, seemingly tying in with the younger audience and providing a strong basis for the reputation of the venue.

The importance given by respondents to the cast and performers probably links to the particular artform (new circus) in which people want quality. Respondents gave Cirko high ratings overall, especially for the quality of performances, value for money and the whole experience. There is perhaps an opportunity to increase the importance of the venue generally, and there are areas such as facilities and the auditorium itself that are worthy of consideration. This could be linked to the idea of building greater loyalty to the venue overall.

The information gained through the ASSET project gave Cirko new ideas for audience development projects and motivated them to do more outreach projects. The centre's plan is to give people better access to the organisation. They also feel that it is important to be more democratic and inclusive generally and therefore to reach new audiences.

Cirko would like to know how each audience segment is built and how they could better engage the audience. They would also like to know how to build customer loyalty for each audience segment.

The next step in the research should be about the centre's participatory activities. The team is interested in developing community activities for their organisation and Cirko has plans to develop online marketing, new social media marketing platforms and new content for marketing.

Alexander Theatre²³

The Alexander Theatre is a long-established centre of Helsinki's cultural life. The main hall seats about 500 in a true historic atmosphere. In the early decades of the 1800s, theatre troupes from Sweden, Estonia and Russia, and also from Italy and Germany, visited Helsinki. This changed when Count Nikolai Adlerberg became the Governor General of Finland and established a Russian Theatre with a grant he organised from the Tsar's funds, building a new theatre and opera house to unite Swedish-, Finnish- and Russian-speaking audiences.

Construction was completed in 1879. In the beginning the Alexander Theatre was the stage for opera and ballet, but later on it was mostly new European and Russian plays that were seen on the stage. Finnish opera companies moved into the building in 1918 and the National Opera remained on the premises until 1993, when they moved to the new Opera House. For this reason, the Alexander Theatre, the Old Opera House, is an important part of Finnish cultural history. Since 1993, the Alexander Theatre has been used for visiting performances of various styles. The theatre building also houses offices, rehearsal facilities, dance studios and spaces for different companies.

The main audience development goals for the Alexander Theatre are to gain new audiences and search for more potential customers. They are also interested in targeting their marketing better to different audience segments. At the beginning of the ASSET project, the Alexander Theatre was interested in audience research and wanted to gain new knowledge about their audience. They also wanted to evaluate what they already know about their audience and to develop their understanding further. It was important to develop an overview of which audience segments engage and which do not. The aim of the theatre was to build a coherent picture of their audience's arts and cultural interests in general and to understand what makes their audience feel satisfied.

²³ Nisula, Saija. Producer, Alexander Theatre. Personal communication, 3 March 2021; Aleksanterin teatteri. n.d. Available at: <https://www.aleksanterinteatteri.fi/page-en> [Accessed 1 September 2020]; Goodacre, Jonathan. Senior consultant, The Audience Agency. Personal communication, 26 October 2020

One of the main findings for the Alexander Theatre was that the motivation for coming to their theatre was very different from what they had previously assumed. Their marketing seems to work well, but their audience development work targets their existing audience. As a result of the ASSET project, the theatre's team uses their customer database much more efficiently and have found new segments for their audience development work.

The research showed that the Alexander Theatre has an older audience, many of whom are loyal, in touch with the theatre and looking out for what they particularly like. A relatively high proportion of the Alexander Theatre's audience are regular attenders.

The theatre might need to consider how it could attract new attenders and look at developing work for children and families. The audience is relatively concentrated in Helsinki itself, with a fair number living locally, though a large proportion also come from nearby towns. This demonstrates good communication strategies and that the programme is drawing people.

The Alexander Theatre feels that the audience segmentation model helps them to market different performances to different audiences. They also think that the information gained from the ASSET project has given them new ideas for audience development projects, which they will build into a new audience development plan.

Marketing professionals in the Alexander Theatre are going to use specific marketing channels for each target audience and divide their customer database into audience segments. They will experiment with new ways of marketing and developing coherent plans for long-term marketing actions. One important step for the future is not to use untested assumptions about their audience when planning marketing campaigns.

The motivation for visiting the Alexander Theatre is mostly social and related to entertainment. Attenders are looking for something engaging, as well as regarding the theatre as a place where they like to hang out with friends and family. The audience is also interested in the cast and performers, and this would link with the desire for entertainment. They want to be engaged with good performances and maybe see people on stage that they know about. Attenders are also interested in the historic building itself.

Respondents demonstrate a strong desire for engaging, entertaining work that they can understand and that does not involve something too experimental. In looking for new, younger attenders, perhaps some parts of this, or a new programme related to the world around us today, might be appealing.

The Alexander Theatre claims to be really interested in how each audience segmentation was built and how to build audience segments when they collect new data. They would also like to know how to build customer loyalty for each audience segment and how to know who belongs to which segment in their customer database. The Alexander Theatre also intends to do more online marketing in the future. They will try new social media marketing platforms and create new content for marketing. This might include online campaigns, competitions and other innovative methods in order to reach new audiences.

Conclusions for Helsinki

The ASSET process worked really well in Helsinki. It was a pleasant experience to work with the four performing arts organisations, and collecting e-questionnaires worked well as a way of gathering information from the audience.

The workshop with The Audience Agency and representatives from Finnish theatres was relaxed, and participants felt that they learned something new. The workshop was also a forum for professional networking.

The consultations enabled the theatres to consider their own audience segments and how they could improve their marketing in the future. The theatres are now interested in how they might integrate the audience segments into their customer databases and direct marketing campaigns.

The theatres have been extremely busy with all the COVID-19-related tasks since March 2020. The marketing staff have been in touch with members of the audience most days, and it has been difficult to collect data or do anything extra in such an exceptional situation. Nevertheless, the theatres have done everything they can to take the ASSET project forward.

The key actors in audience segmentation in performing arts organisations are the cultural management, marketing and audience development professionals. They are interested in creating new marketing strategies for non-profit organisations, in getting to know their existing audiences better and in finding potential audiences.

There is a need to develop different ways of data collection. There is also a great need to learn how to analyse the collected data in such a way that it is useful for everyday marketing in theatres, for example by integrating the data collection of ticket sales into the overall research process.

Online data analysis is not effectively used in many organisations at the moment. In Finland the internet has a big role in marketing and it is important to take advantage of the information that could be gained through analytics. Key performance indicators could also very well be built on the basis of the ASSET segmentation, which includes motivation indicators as a basis.

There is also a need to develop a variety of methods for data collection and analysis. In Finnish culture, people tend to keep their distance and face-to-face data collection can sometimes feel like not respecting one's personal space. The atmosphere of the place for data collection is also important. For example, face-to-face data was collected at Cirko – Center for New Circus, which has a café with a relaxed atmosphere. The data collectors were young adults representing the same age group as the informants.

Finns are technology-driven consumers who spend a lot of time online. They answer questionnaires, search for information and actively share their experiences via social media, and this must be considered when planning future data collection.

At the moment, theatres lack the skills to analyse data in general. Many theatres gather data every year but do not engage in deeper analysis. Theatres would benefit from the skills of building their own audience segmentation and attaching the segments to the customer database.

Knowing your audience is a key part of accessibility. The democratisation of culture is an important element of Finnish cultural policy. The performing arts should be available for all citizens, not only the ones who have the financial and social assets to be active members of the audience.

The ASSET project offers information for performing arts organisations about their audiences. Finnish performing arts organisations are very good at engaging new audience groups through participatory audience development activities. From the results of the ASSET project, arts organisations can make decisions about the audience groups they would like to work with in the future.

The methods and knowledge of audience segmentation will be included in the curriculum of Cultural Management at Metropolia University of Applied Sciences. In this way, the effects of the ASSET project will continue after the end of the project through the empowerment of future cultural producers.





5 Audiences in Austria

Performing Arts in Austria

Austria is famous for its great cultural offerings. The capital, Vienna, and seven of the eight federal provinces have big theatres, financed by the state or the regional governments. During the theatre season 2018–2019 these organisations (including the theatre projects of the youngest federal province, Burgenland, which doesn't have continuously playing theatres) offered 7 769 performances and were visited by 3.7 million people. Nearly 50 other private Austrian theatres had 1.8 million visitors during the same period.¹

However, these are the only numbers you can find in official statistics. You can't find data on performances of and visitors to other professional theatre work. For example, IG Kultur Österreich, a nationwide umbrella organisation and interest group of autonomous cultural organisations, counts 850 members, many of which have venues with stages and offer cultural events including theatre,² and these are not generally included in national statistical overviews.

¹ Kulturstatistik 2019. Available at: www.statistik.at

² See www.igkultur.at

Performing arts in Austria (theatre, music theatre and dance) ³ in 2018/2019 ⁴	
Main theatres ⁵	16
Performances in main theatres	7 769
Ticket sold by main theatres	3.7 million
New productions	282
Overall productions performed in main theatres	903
Overall permanent working positions in main theatres	6 226
Other theatre and music venues ⁶	80
Presentations in other venues	7 127
Population of the country	8.9 million

Another Austrian association, IG Freie Theater,⁷ has 1 500 members, consisting of individual persons, actors, dancers, choreographers and directors, who are artistic independent professionals. Most of them are members of autonomous ‘free’ theatre groups and find their jobs in numerous theatres outside the bigger venues in Vienna and the provinces.

Apart from the professional sector, each of the nine Austrian provinces has an umbrella organisation for other types of theatre, such as amateur theatre, student theatre, theatre for seniors, schools and young people, inclusive theatre, and so on. There are around 35 000 people involved in this sector, producing 2 600 plays and reaching nearly 2 million attenders with 24 000 performances in a year. It may be seen as an important base for all professional work.⁸

³ Not including festivals

⁴ Kulturstatistik 2019. Available at: www.statistik.at

⁵ As monitored by Statistik Austria

⁶ As monitored by Statistik Austria

⁷ See www.freitheater.at

⁸ See information by Gerhard Koller, president of OEBV, Austrian organisation for theatre outside work. Available at: www.oebvtheater.at

Performing Arts in Vienna⁹

Vienna is the capital of Austria and is a continuously growing city. It has around 1.9 million inhabitants, with 10 000 new citizens every year. A third of the population (570 000 citizens) are foreigners, with approximately 250 000 citizens of states of the European Union, and another 190 000 people coming from other European states and from around the world. In 2019, Vienna had 19.7 million overnight stays by tourists (an important target group for the great theatre and opera houses). About 240 000 young people attend Viennese schools and 190 000 students are at universities or other highly specialised colleges. The ASSET questionnaires also demonstrated that Viennese visitors to theatre venues benefit from using a cheap annual ticket for the city's well-functioning public transport system. It is easy and cheap to travel within the city.

In the season 2017–2018, the seven biggest theatre venues were visited by 1.55 million people, and the two great opera houses had 908 000 visitors. Together, these nine organisations presented nearly 3 300 events. Results from Statistik Austria, the statistical office of the Republic of Austria, show that 40% of the offerings in the major Viennese theatres are classified as contemporary, which means they were written by living authors or composers.

These numbers don't include the offers of smaller theatres (*Mittelbuehne*, or middle stages), which have salaried employees and offer their programmes throughout the year. For the sector of the free groups, formed by artistic independent professionals, the following figures were collected in 2013: 85 Viennese groups produced 318 productions, with 1 970 performances reaching 347 000 visitors.¹⁰

⁹ See www.wien.gv.at/statistik

¹⁰ See 'Wir sind viele und divers – so wie unser publikum'. *gift – zeitschrift für freies theater*, March 2013. Available at: www.freietheater.at/gift-archive/

Performing arts in Vienna (theatre, music theatre and dance) in 2018/2019 ¹¹	
Main theatres ¹²	7
Performances in main theatres	3 640
Tickets sold in main theatres	2.4 million
New projects in main theatres	91
Overall productions performed in main theatres	394
Overall permanent working positions in main theatres	3 412
Population of the city	1.9 million ¹³

Data Collection Process

In February and March 2019, activities were focused on the preparation of the first audience survey. The questionnaire was translated into German and the wording was thoroughly checked in consultation with the participating theatres. When the final layout of the questionnaire was prepared by The Audience Agency in London, the copies were printed for theatres to distribute during the next phase, although some theatres used both the German and English versions by arrangement. Consultations were held with The Audience Agency to discuss the possibility and technology for online surveys to be used in specific cases in all partner theatres. Finally, the procedure for conducting the survey was communicated in detail.

¹¹ Kulturstatistik 2019. Available at: www.statistik.at

¹² As monitored by Statistik Austria

¹³ See www.wien.gv.at/statistik

In April and May 2019, the questionnaire interviews took place in the four participating Viennese theatres. In total, 1 017 responses were collected via face-to-face survey (Schubert Theater also collected 33 responses via e-survey).

In all four theatres, the survey was carried out by staff specifically available for this purpose.

The visitors were approached directly, and after a short explanation of the project they were given the questionnaire. In case of performances with fewer attenders, the questionnaires were also handed out at the box office when the tickets were purchased. Staff were available to supervise the questionnaire completion and to provide help when needed.

In the next step, the results of the questionnaires were entered into The Audience Agency's survey portal.

The next survey was planned for spring 2020. For this reason, in January 2020, the focus was on individual online consultations between The Audience Agency and the participating Viennese theatres. Based on these first results, adaptations for the second survey were discussed. The questions centred around adaptations of the questionnaire in order to better represent the frequency of visitors in other theatres and to find out the preferred group of visitors (alone, in pairs, in groups).

The theatres also wanted to make greater use of e-surveys during this phase, which was made possible, but with the aim of ensuring that respondents had actually visited the theatre during the period of the survey.

In February 2020, the questionnaires were ready to be used in the theatres for the second phase. On 10 March 2020, the COVID-19 pandemic restrictions began. Gradually, safety measures for the audience were introduced (free rows and spacing between seats), which limited the number of visitors. On 12 March 2020, all events at Brut (brut Wien) had to be cancelled, and on 16 March the theatres Dschungel Wien and Werk X-Petersplatz closed. In the same period, all other theatres across Europe were closed and the survey had to be terminated. In Viennese theatres, questionnaires were distributed to visitors at all performances until the theatres closed.

In the first weeks of April, the data that it had been possible to collect was entered into The Audience Agency portal (Brut 200 responses; Werk X 116; Schubert Theater 157; Dschungel 119), after which it was not possible to continue further.

From then on, the COVID-19 pandemic determined the progress of the project. The third survey, initially planned for November and December 2020, then postponed to February and March 2021, had to be cancelled due to the uncertain situation and the third lockdown across Europe. Adaptations of the questionnaire for this survey were discussed in October 2020: among other things, additional questions were provided on the changes in behaviour and attitudes towards theatre due to the pandemic. This certainly provides a great opportunity for new research to build on the ASSET project.

Data collection in Vienna theatres					
Venue	Phase 1 cases for segmentation	Phase 2 cases for segmentation	Total cases for segmentation per venue	Total cases for segmentation per country	Theatre Night 2019
Werk X-Petersplatz	128	97	225	1 464	0
brut Wien	311	185	496		33
Dschungel Wien	270	107	377		23
Schubert Theater Wien	221	145	366		28

Partner Theatres and Research Outcomes

The criteria and process of selection of the theatres

The Austrian project coordinator of ASSET is IG Kultur Österreich (IGKOE),¹⁴ a nationwide umbrella organisation and interest group of autonomous cultural organisations, with its office in Vienna. Since 1990, the organisation has been the network and the representative of free and independent cultural work in Austria. There are three key activities of IGKOE:

1. Influence at the cultural-political level: at the legislative level, IGKOE campaigns for necessary legal improvements aimed at the structural protection of cultural initiatives and the social protection of cultural workers.
2. Advice and training for cultural workers: As an expert organisation in legal and administrative issues, IGKOE passes on its knowledge to cultural associations and cultural workers.
3. Production, appropriation and distribution of knowledge: IGKOE sets and deals with cultural policy issues in order to lay the foundations for cultural development.

IGKOE is also well anchored in national and international cultural policy, as a member of (among others) the Austrian Culture Council, European Network of Cultural Centres (ENCC), On the Move – Cultural Mobility Information Network, Culture Action Europe and Amateo, the European Network for Active Participation in Cultural Activities.

ASSET and the cooperation with The Audience Agency opened a window onto a level of audience research that autonomous cultural groups normally cannot afford. For this reason, IGKOE decided to invite four Viennese theatres that don't belong to

¹⁴ See www.igkultur.at

the ‘touristic flagships’ of the Viennese theatre scene. The focus was set on realising contemporary theatre work of different genres, concentrating on audiences living in Vienna, open to experimenting with new developments in the theatre scene, socio-political commitment, a special focus on a young audience and the will to be able to enter into better communication with the audience.

An initial selection of four theatres was made. However, two participants had to be exchanged in January 2019. The first, Kosmos Theatre, which sees itself as a feminist house promoting female voices and gender balance in theatre, felt that they did not have the capacity for all phases of the study. The second, Aktions-theater Ensemble, an independent ‘free’ theatre founded in 1989, which performs alternately in Vienna and the region of Vorarlberg, in the far west of Austria, were not performing in the capital during the period planned for the survey. As all theatres had to be in the same city, Aktionstheater Ensemble couldn’t take part in the project.

After numerous discussions, the following four theatres were invited to participate:

Vienna partner theatres, key indicators in 2018		
Theatre	Performances	Tickets sold
Schubert Theater	157	5 800*
Dschungel Wien	500*	43 000*
brut Wien	300*	5 000*
Werk X-Petersplatz	200*	13 000*

* Approximate figures

Schubert Theater¹⁵

Schubert Theater is a puppet theatre for adults, with a wide range of themes and artistic expression. It is situated in the 9th district, where other small and mid-scale theatres perform for Viennese audiences. It presents classical and contemporary theatrical material on stage, extending from *Faust* or *Jedermann* to biographical stories such as *Hedy Lamarr* or *F. Zawrel* (based on the true story of Friedrich Zawrel). Although it is a small theatre, with only 80 seats, Schubert Theater received the Nestroy Prize, the greatest Austrian award for theatre, for *F. Zawrel* (2012).

Schubert Theater also tours within and outside Austria, cooperating with larger Austrian theatre institutions as well as with young groups of puppet theatres. Every year at Halloween, they organise an international festival named 'Puppen sterben besser' (Puppets die better).

Schubert Theater has about 6 000 visitors a year.

Through the collected data and its results, Schubert Theater aims to be able to adapt, adjust and customise its communications not only to a core audience but also to a new and broader public. The theatre also has a long-term goal of developing better relationships with its audience, as well as making itself more visible in the public eye.

As a small puppet theatre for adults, with a small team for administration and management, it is not normally possible to collect and analyse audience data in detail. Most insights about the audience are gained through direct dialogue, but the audience is quite diverse and the Schubert team find it hard to make connections or to find the 'red thread'. For this reason, they were enthusiastic about taking part in the project and finding out more about their audience.

Puppet theatre for adults is not a well-known theatre form in Austria, and puppets are primarily associated with theatre for children. However, this neglected artform offers numerous possibilities for raising awareness about life and its problems, and for fantasy stories suited for grown-ups.

¹⁵ See www.schuberttheater.at

The first phase of research showed the deep interest in and awareness of the theatre, and also the willingness of the audience to advertise the plays on their own initiative as ‘word of mouth’. As a result, Schubert Theater decided to offer more information and content on its website and social media channels, and to upgrade the direct dialogue of talks and public discussions with the audience. A surprising 21% of respondents were from outside Vienna, which provides a good selling point in negotiations with tourist agencies and other visitor stakeholders.

The second set of research data confirmed a loyal audience of puppet and Schubert Theater lovers, with 11% in the Pick and Choosers segment and 10% each in Explorers (preference for new work and talent), and Cultural Grazers (love for various artforms). In addition, it also solidified the wide gap between audience groups: 43% had visited Schubert Theater in the previous 12 months, and 41% were first-time visitors. The theatre therefore plans to integrate this information into future pricing policies and special offers, for example through special arrangements with other leisure and cultural facilities, better communication and, if necessary, adaptation of existing offers.

A few of these intentions have already been realised: the talk series ‘Wir müssen reden’ (We need to talk) was held four times and featured intriguing themes and prominent guests from scientific and artistic fields. The project on the life of Hollywood diva Hedy Lamarr led to a first collaboration with the Jewish Museum in Vienna. The puppets for the production of *War with the Neutts* will also be loaned as exhibits for a show at Vienna’s Literaturmuseum about the play’s author, Karel Čapek. The theatre has also started a blog, to which they will regularly add new content – as soon as the pandemic allows the theatre to open its doors again. During the pandemic, it was possible to spread awareness about Schubert Theater’s booster club and the opportunity to sponsor the theatre by becoming godparents to a puppet.

With a better understanding of who its audience groups are, where they come from and what they are looking for, Schubert Theater knows what and where to provide, not only before but also during and maybe after their visit. Some audiences are also motivated by the overall experience and are therefore willing to take a chance on the content of a play. A visit to the theatre should be some kind of social event, something special but not too out of the ordinary. In contrast to this

group, the Contemporaries group (8%) prefers more detailed information and has a higher frequency of attendance. With a personal touch in the announcements, further linked information and the uniqueness of the venue, Schubert Theater will try to speak to all groups in the way that is most appropriate to them.

A few questions are still unanswered, and it would be interesting to dig even deeper for more targeted communications, as well as specific measures for particular segments and their preferred media platforms and content. Also, a follow-up survey could examine the execution and reception of plans and operations based on the research and its effects on the audience and the theatre. But for now the theatre says that they are more than happy with the results and are excited to improve and learn more about the audience using the measurements and tools that have been installed or are being experimented with.

Dschungel Wien¹⁶

Dschungel Wien is a theatre for children and young adults. Situated in the 7th district, in the Museumsquartier, it is in a neighborhood famous for museums (Kunsthalle, Leopold Museum, Mumok) and theatre venues, and for great festivals such as Wiener Festwochen or ImpulsTanz. It sees its social responsibility as dealing with the people and topics of the city, and with actual social developments in a time of social change. Dschungel Wien wants to create an authentic and courageous platform for the sights and interests of its young visitors and a place where young people are motivated to reflect on the society, to speak about wishes, fears and visions, and to create their own utopias.

The productions of Dschungel Wien are made for ages beginning in early childhood, for kindergartens and elementary school, for youngsters from 10 to 14 years and up to young adults over the age of 15. They put on all types of theatre: spoken, puppet and music, with a special focus on dance and art performance. Within a single season, Dschungel will put on 60 productions, half of which are premieres, with 500 performances taking place. There is strong collaboration with Austrian and

¹⁶ See www.dschungelwien.at

foreign free theatre groups. Artists from more than 20 nations, who live and work in Vienna, engage with a young audience, opening up spaces with their visions and thoughts. In some plays, professionals work together with young actors on stage.

Within the ASSET project, the target group were young-adult visitors. Dschungel Wien has about 43 000 spectators a year, 8 000 of whom visit the young-adult productions (age 15+).

Dschungel Wien is a theatre for young audiences and it has a good understanding of how to get in touch with the parents of children. However, they would like to engage more with their teenage audience. Hence, a key demographic in this study is young adults, from ages 16 to 25, with whom they would like to develop a closer bond and also learn how to cater to their specific needs.

Their main motivation is to gain better knowledge about the audience, especially young adults. An ongoing mission for Dschungel Wien is to make theatre accessible for every child and young adult, no matter their social, cultural or financial background. They already know how to get the parents of younger children to engage with the theatre but are less sure about how to bind these young people to the theatre in the long run (e.g. during their teenage years and while growing up into adulthood).

To some extent, the findings confirmed what was already known. The outcome states that it is tough to make theatre appealing to a young audience. In other ways, however, it was possible to see what type of theatre most appeals to them and that the best chance of getting them to engage is via their main forms of communication (e.g. internet, social media). Something already felt to be the case was that the main way of gaining a new audience is through word of mouth. Nevertheless, it was still nice to find this confirmed within the segmentation model.

It wasn't really possible to implement new ideas since the theatre was closed for most of 2020 and remains closed for the time being. This means that the Dschungel Wien team have not been able to get more feedback and could feel a difference in audience interests. However, they aim to use some of the findings from the project in future seasons.

Apart from the problem of closed theatres, one of their productions, *Medeas Töchter*, which focused on increasing the visibility of young women in society, was

an extraordinary success during the lockdown in 2020. The team managed to transition the production almost completely from a stage version to an online format. Every woman who identified herself with the topic of the production could send in a video and become part of *Medeas Töchter*.¹⁷ The number of participants greatly increased through word of mouth.

The main goal of Dschungel for the season 2021/2022 is to focus on community building and strengthening the ties between different communities. They have also developed a special concept for the teenage audience. Four small festivals throughout the theatre year will be dedicated to a particular topic that is currently on the minds of young adults. What will make these festivals special is the expanded supporting programme, which will feature poetry slams, open floors and formats for initiating discourse between artists and the audience. The marketing team is engaging much more with young people via the Dschungel Wien Instagram account and is constantly seeking to improve it. They have also created a 'Junge Kunst' Instagram account especially for young adults. This account helps to spread the word about all theatre mediation formats for people 15 to 25 years of age. In addition to this improved social media presence, new formats have been created whereby teenagers and young adults, accompanied by Dschungel Wien theatre mediators, are encouraged to see plays and then discuss them. They are actively encouraging an exchange of ideas between young people and acknowledging their role as a creator of spaces and platforms for it. They are already offering resources to youth organisations, such as 'Fridays for Future'.

The Dschungel Wien team are finding it difficult to transform the findings of the segmentation model into marketing strategies because the audience has such a huge variation in age and is still in the middle of growing up and forming interests. Segmentation based on their interests and focuses is therefore quite short-lived. However, the findings show that it is of utmost importance to Dschungel Wien to build audience loyalty to the centre from the earliest moment possible. Children who have had great theatre experiences tend to come back in their teenage years and beyond.

¹⁷ More information at www.medeastoechter.at

For future research, Dschungel Wien would like to be able to compare their audience with those of other centres. Since the third and last evaluation period was cancelled due to COVID-19, it was also not possible to assess whether their changes and adaptations were fruitful. Dschungel would also like to be able to evaluate what has changed and is going to change over the next year. They would also be interested in participating in any follow-up research to ASSET.

brut Wien¹⁸

Brut is a production and performance venue for the performing arts in Vienna. Since its inception in 2007, it has been among the most influential venues for independent performance, dance and theatre. The Brut programme stands for experimentation and interdisciplinarity, as it showcases the free scene's diverse and differential character. In addition to productions for theatre spaces, Brut realises site-specific projects and places an emphasis on process-oriented working, dialogues with the city, temporary performance sites, cooperation with institutions from related disciplines and theory.

A number of independent artists from Vienna and Austria have been supported by Brut as a co-production partner for many years. A good share of Brut's productions are international co-productions touring prestigious festivals and venues across the continent. On the other hand, Brut enriches and stimulates the Vienna scene by inviting international guest performances, realising co-productions with artists from across Europe and committing itself to continuous engagement in EU-wide networks.

After Brut was forced to leave the Künstlerhaus am Karlsplatz in the 1st district, where the theatre was located, it has used nearly 90 venues over the last five years for its performances. In 2024, Brut will move into a new home in St Marx, an urban development area – not in the centre of the city as before but 700 square metres larger than its old venue. From 2021 to 2023, Brut's temporary headquarters – 'brut nordwest' – will be in an industrial hall. Brut Wien receives about 9 000 visitors a year.

¹⁸ See www.brut-wien.at

Since Brut has not had a fixed venue for the past three years, playing various stages and venues throughout Vienna (90 temporary venues in 19 districts), they were happy to announce their temporary venue for the next three years. The constant venue changes have presented a particular challenge for audience development.

In the medium term, however, their goal is to build audience loyalty. A visit to Brut should be part of a social gathering, a social event, and they would like to create that experience, helped by the upcoming move to a new permanent venue (with an associated bar and a small outdoor area).

In the long term, Brut will move into a completely renovated theatre building in a new environment with new neighbours (universities, media quarter, etc.). Starting in 2024, it is their intention to pick up a large number of potential first-time visitors through outreach programmes and to establish the Brut brand.

Theatre companies often feel that they know their audiences well, and yet it is something completely different to get empirically based data about visitors. Furthermore, it is a great opportunity for smaller theatre companies with limited budgets to be part of an international and professionally organised project on audience development and to analyse the data generated with professionals. In subsequent discussions about the data, the Brut team have discussed various ideas for the implementation of new ideas resulting from the research, to be developed in the upcoming years of change, and, above all, to look at the focus of communication and outreach work as they move into the new venue.

Brut believes that the ASSET surveys have been helpful for them not only to learn something new about the visitors but also to know that their assumptions are empirically confirmed, so that these can be incorporated into future project submissions, applications, etc. This means that marketing and communication strategies can be developed more confidently.

Furthermore, it is extremely valuable for Brut, in the current 'mobile' period, to maintain contact with the audience, to 'lose' as few people as possible and, ideally, to collect feedback and impressions of the audience. All these points would not have been possible to this extent without ASSET.

Other aspects that Brut has found interesting and useful have been the positive feedback on its online activities, the low priority given to ticket prices and the large

role played by word of mouth in communications. They find it encouraging that the audience feels comfortable on the Brut premises (despite the constant changes and adaptations imposed by mobile operations). Linked to this, it has become evident that there is a need to increase the social factor during a theatre evening at Brut (food and beverage services, party formats, etc.).

There is great enthusiasm for implementing some of these approaches further in the coming months at the new venue. However, implementing new approaches and establishing the new venue are difficult at this time due to the COVID-19 pandemic.

In concrete terms, Brut sees great potential in cooperating with institutions from other branches of the arts, for example with theatres that reach other audiences and with larger, established institutions. It will also be exciting to accompany the change from a quasi-mobile theatre to a theatre with a fixed venue with further audience research.

Following on from this, it will be interesting to see if the behaviour of the visitors changes, and to what extent the fixed location will make it possible to retain visitors for a longer period of time and attract new audiences through outreach work in the immediate vicinity. The team is also keen to know whether having a fixed location will contribute to greater loyalty to a theatre institution or whether the mobile situation helps to raise the profile of the organisation, reaching audiences from completely different corners of the city and then encouraging them to become regular attenders at the new venue.

In an international context, Brut would be interested to compare itself to theatres with a similar structure and production programme.

Werk X-Petersplatz¹⁹

Werk X is a contemporary venue for collaboration, producing innovative theatre projects and events with a strong focus on socio-political relevance. Situated in the 1st district, in the centre of Vienna, near the famous Stephansdom, it is well known for its progressive spoken theatre performed by both young and established

¹⁹ See www.werk-x.at

theatre groups. The most important topic is to open the doors to create a future space for artists and audiences, to encourage variety and diversity within the various communities.

Werk X sees itself as a negotiation room of actual social questions for progressive and politically engaged artists, and as a platform for new positions of directing in theatre. At the heart of the programme, there are all contemporary forms of spoken theatre without any limits. Werk X also collaborates with larger state or provincial theatres such as Thalia Theater in Hamburg or Residenztheater in Munich, as well as with internationally renowned artists.

Werk X-Petersplatz receives about 13 000 visitors each year, with about 5 000 of them attending theatre events.

Like other theatres, Werk X-Petersplatz wants, on the one hand, to retain its core audience and, on the other, to gain new audience segments. New audiences should be tied more closely to the theatre through a high level of attractiveness, which should be achieved through a mix of cultural marketing, public relations and cultural mediation. In this context, it is particularly important to promote diversity and break down social barriers. Through intercultural interactions on all levels, new aesthetic impulses should also be integrated into the theatre's artistic work.

The opportunity to take part in the ASSET project was made possible by the withdrawal of one of the other theatres. For Werk X-Petersplatz, it was the perfect opportunity to understand its audience for the first time on an absolute professional level, evaluated by a highly qualified team using established methods. Although the venue was invigorated by the arrival of a new artistic director in 2018, to some degree it was starting from zero in terms of knowing its audience. The ASSET project was the ideal instrument, at the right place and the right time, to help Werk X get to know and learn about their target groups, as well as to examine if they really could reach the people they were expecting to approach.

As described above, many of these things were new, as there was no past audience evaluation that could serve as a basis for comparison, although it was not surprising to discover that more women than men attended and that the audience was mainly young (67% under the age of 34). Also, as one of the main focuses of the theatre is

to support emerging artists in the field, it was satisfying to find that they did attract a young audience along with that aim.

It was also not a surprise to discover that 77% of attenders live in Vienna, as Werk X-Petersplatz is a contemporary venue for collaborative projects within the local and national off-theatre scene, with a focus on realising new approaches and aesthetics in German-language stage plays.

On the other hand, it was helpful to see the results about how the audience found out about events. The figure for 'word of mouth' was lower than the Austrian average (below vs. above 50%), as was that for the venue's website (15% vs. 20%). Some 14% of respondents named the venue on social media and 10% cited 'someone else on social media', which is high compared to other venues.

In that context, it was interesting to see disproved the common assumption that visitors do not read, as 9% named 'newspaper' as a source of information and only 2% mentioned TV and radio.

What the Werk X team had hoped to see, but did not expect to work out so well, was the factors influencing the 'decision-making' of the audience to attend: 78% named the theme or subject matter as important or very important, while ticket price was the factor of least importance. With an emphasis on socio-political relevance in the programme, theatre should be available no matter what the social background, and Werk X-Petersplatz have found this to be one of the best outcomes, confirming their resolve to continue on the same strategic path.

In general, the theatre found the research to be a great acknowledgement of their efforts and hard work, summarised by the audience's opinion of the 'experience', which showed very good ratings overall, especially concerning the 'quality of the performance' (89% good or very good), 'the whole experience' (86%) and 'value for money' (81%).

However, as regards information about cast and crew, under 60% of respondents rated the experience as good or very good. As an immediate consequence, Werk X have improved their website, which now has biographies, portraits and additional links for all cast members of ongoing productions. The fact that social media seems to have an important role for the audience has been taken into account through measures such as organising 'Insta Walks' with and for the audience, although this was affected by the COVID-19 pandemic.

As the venue itself was not often cited as so important in decision-making, and 50% of respondents were first-time visitors, the Werk X team plans to build a stronger relationship with the audience by, for example, offering two tickets for two different events for the price of one.

As mentioned above, they also want to expand their activities on social media, not only in terms of communication or advertising but also in terms of participation. The fact that the audience is mainly drawn from Vienna could be taken into account through greater engagement in local partnerships of various forms – educational, social, commercial, etc.

Looking ahead, the main interests for Werk X-Petersplatz would be to find out how to be more attractive for intercultural activities, perspectives and audience development, and to improve their level of diversity in terms of arts, staff and audience. The team also see it as important to develop audience relationships that go beyond online offers such as streaming events as an artform in a time of pandemic.

Conclusions for Vienna

In the theatre scene, there is a great demand for projects that allow you to better understand your audience. Larger theatres had and have the means to set up their own audience development departments for this purpose. For smaller institutions, it is much more difficult – for personnel and financial reasons – to make appropriate provisions.

For this reason, it was not surprising that about 50 organisations showed interest in the workshop with The Audience Agency held in Vienna in January 2019. It had to be split into two dates, and an additional follow-up meeting for interested Austrian colleagues was held in November 2019. Due to this high level of interest, it was already clear that with ASSET, we have set in motion a process that would extend far beyond the results of the four participating theatres, and that it would be possible to motivate other theatres throughout Austria to engage with the topic.

As an interest group of smaller cultural organisations, we saw the project from a different perspective. In the meantime, it is no longer a problem for larger cultural institutions to participate in international study programmes within the framework of EU projects. Greater effort should be made to make such programmes more accessible to smaller organisations by reducing administrative hurdles.

The collection of visitor data through ticket sales via the internet or ticket offices can certainly be expanded. Smaller organisations are limited here by the number of tickets sold. In addition, they are often concerned that such analyses could violate the privacy of visitors and breach data protection guidelines. This was one of the big discussion points when considering using existing databases for an online survey.

Due to the COVID-19 pandemic, international communication in 2020 was limited to online tools. This experience has shown that it would certainly be worthwhile to use these means in a targeted manner in the future. However, it has also shown that there is no substitute for international meetings, direct communication over longer periods of time and direct perception of structures in other countries. The impossibility of holding project meetings and the final conference in person was a great loss. The opportunity to discuss the data in a personal meeting, to draw conclusions from it and to develop new measures and projects cannot be fully replaced by an online event.

For the four Viennese theatres, the project will prevail long after its official ending. The incorporation of the results into marketing and PR planning had to be postponed to the next seasons due to the pandemic and the theatre closures that were imposed several times. So the effects of the results will only be seen in the next few years.

For IG Kultur Österreich, the Austrian coordinator of the project, the work did not end with the official conclusion of the ASSET project. Meetings in the capitals of the Austrian provinces were planned for autumn 2021, to which theatre and culture professionals would be invited and in which the results and working methods would be reported. IG Kultur has also considered making the ASSET questionnaires available to other interested institutions for their own research and helping them with the evaluation.

In cultural action, it is not important to present ready-made solutions but rather to ask the right questions. The ASSET project has succeeded in putting one of the most important questions, namely, how users and audiences perceive the institutions, at the centre of interest for many cultural institutions throughout the country.





6 Audiences in Croatia

Performing Arts in Croatia

The Republic of Croatia has a rich and varied performing arts scene. Institutional culture, especially theatre, dates back several centuries, and it has remained stable and enduring through all the transitions the state has gone through. The independent performing scene in Croatia began to develop its momentum with the independence of the Republic of Croatia, with rapid growth in the first decade of the 21st century.

The oldest public theatre in Croatia, and the third oldest in Europe, is the Hvar Theatre, built in 1612. The Croatian National Theatre in Zagreb officially began its work in 1860. National theatres, as centres of cultural life, are located in Zagreb, Split, Rijeka, Osijek and Varaždin.¹ Theatres that also use the prefix 'national', but are founded by local communities, also exist in Zadar, Šibenik and Pula, and many other cities also have public city theatres. Independent theatre groups have been established with headquarters throughout the country, and their numerous guest appearances within Croatia and abroad are significant. Visits of foreign theatres in Croatia are more oriented to festivals, which are also numerous and significant both in the development of the sector itself and in the development of the audience.

The statistical data on the performing arts scene in Croatia shown below are taken from the Croatian Bureau of Statistics, a national body responsible for official

¹ Theatres Act, NN 71/06, 121/13, 26/14, 98/19. Available at: <https://www.zakon.hr/z/301/Zakon-o-kazali%C5%A1tima>

statistical data-gathering. The Croatian Bureau of Statistics is the main holder, disseminator and coordinator of the official statistics system of the Republic of Croatia and the main representative of the national statistical system to the European and international bodies responsible for statistics. As part of its regular annual statistics, the bureau publishes statistical reports on the arts and culture sector.

Professional performing arts in Croatia (theatre, dance and contemporary circus) in 2018–2019 ²	
Performing arts companies	132
Performances	11 294
Tickets sold	2.1 million
Productions presented	1 930
Guest performances abroad	507
Visiting performances from abroad	173
Permanent working positions in the theatre sector	2 571 ³
Population of the country	4.1 million

² The data show figures for the 2018–2019 theatre season, which ran from 1 September 2018 to 1 September 2019. State Bureau of Statistics, Culture and Arts, 2018. Available at: <https://www.dzs.hr/>

³ Professional theatre and professional theatre for children

Performing Arts in Zagreb

The city of Zagreb is the capital of the Republic of Croatia and its largest cultural centre. In 2018, the population was 802 762 and continues to grow. Zagreb is a ‘green city with a pleasant climate’, because more than three-quarters of its administrative area consists of green spaces – forest fields, meadows and parks. The average age of the population is 40.4 years for men and 44.3 years for women. The language spoken is Croatian, and with rare exceptions, cultural and theatrical productions in Zagreb are performed in the Croatian language.

Zagreb has the country’s largest and most important theatre, the Croatian National Theatre, which has drama, opera and ballet ensembles and repertoire. Zagreb has seven public city theatres, of which four are for adults and three are for children. Apart from public city theatres, theatrical activity takes place in the theatre halls of Zagreb’s cultural centres. The Zagreb performance scene also has many independent theatres, mostly in the drama field, with some having their own spaces and a large number performing their plays in various available spaces and on numerous tours across the country. The theatre season is most dynamic from September to June, but theatres are also active during the summer months on open stages and as part of festivals, events and activities for a wider audience.

In addition to the numerous drama theatres, Zagreb also has many venues for non-verbal theatre and contemporary dance companies. Unlike drama, contemporary dance is almost exclusively produced and performed by independent non-profit organisations. The Zagreb Dance Center, a unit of the Zagreb Youth Theatre, is the sole public institution dedicated to this artform. Zagreb also generates new forms and trends in performing arts, with a lively contemporary circus scene and progressive forms of multimedia theatre.

Professional performing arts in Zagreb (theatre, dance and contemporary circus) in 2018–2019 ⁴	
Performing arts companies	86
Venues (both with or w/o permanent companies)	23
Number of performances	6 560
Tickets sold	1.25 million
Productions presented	822
Permanent working positions in the theatre sector	1 337
Population of the city	802 762 ⁵

Data Collection Process

6

Immediately after the workshop with theatres in Zagreb, led by experts from The Audience Agency, talks began with representatives of partner theatres for the implementation of ASSET project activities. Theatre representatives mainly consisted of staff responsible for marketing and public relations. The knowledge that theatres have about their audience, the challenges that theatres face in preparing their performances and the hypotheses about the structure of the existing theatre audience in the city, as well as the specific needs and expectations of theatres that are participating in the ASSET project, were extensively discussed.

⁴ The data show figures for the 2018–2019 theatre season, which ran from 1 September 2018 to 1 September 2019. State Bureau of Statistics, Culture and Arts, 2018. Available at: <https://www.dzs.hr/>

⁵ Zagreb in Numbers, City Office for Strategic Planning and Development, 2018

Theatres actively participated in reviewing the proposed survey questionnaires conducted in their theatres. Given that ticket sales in Zagreb theatres are still mostly carried out by direct purchase at theatre box offices, and in the case of online sales being mediated by third-party services, most theatres do not have a complete contact database of their audience. Therefore, it was decided that conducting face-to-face research was the most appropriate method.

The questionnaires were delivered in a variety of ways, with several having special checkpoints set up to conduct surveys with on-duty staff. Larger theatres (such as Gavella) had the capacity to conduct surveys through the engagement of theatre employees. Others hired external experts or students. The need to hire more staff to conduct face-to-face surveys arose during the first days of implementation. Everyone involved noted that the audience, not accustomed to extensive, if any, surveys in theatre spaces, had a lot of additional questions and needs for clarification, given the scope and complexity of the questions, and that the process could not be carried out by setting up questionnaires and relying on self-completion. On the other hand, the described methodology provided theatres with a direct insight into the attitudes and opinions of the audience and strengthened direct communication between the theatre and the audience.

The described methodology was not applied in the case of Studio Smijeha. This performance venue, because of the specifics of its programmes and organisational orientation, developed communication with part of its audience through social networks and had the capacity and technical capability to use e-surveys.

The first phase of the research began on 16 March 2019 and ended on 30 May 2019. A total of 866 questionnaires were completed, of which 163 were collected online and 713 face to face.

During Theatre Night in November 2019, with the aim of gaining a more complete insight into the structure of the Zagreb theatre audience and the impact of the Theatre Night event, the research was extended to other Zagreb theatres, including the Zagreb Youth Theatre, Histrion Acting Company, Exit Theatre, Ivan Goran Kovačić Student Theatre and City Theatre Komedija – all major public and independent theatres. The short duration and high number of attenders of Theatre

Night presented some challenges. Nevertheless, the response of the audience and the number of completed questionnaires was good.

During January 2020, online consultations and meetings were held with representatives of Zagreb theatres where the project was being implemented. The results of the audience research from the first phase (in 2019) were presented, as well as the trends in theatre audiences in all countries involved, with a special emphasis on Zagreb. At this stage, Comedy Club Studio Smijeha had to leave the project due to a series of organisational difficulties. Following discussions with other theatres, agreement was reached with the private theatre Luda kuća to take part in the second phase. When selecting the new participant, attention was paid to the need for it to be similar, both organisationally and in terms of genre, to the previous participant, so that the final results of the research would enable a clearer presentation of trends and habits of the theatre audience in the city.

During January 2020, through online correspondence with representatives of all partners, new questionnaires were agreed for the next phase of the research. The new phase of the research began on 1 February 2020 with preparatory activities, such as the translation of the questionnaire into Croatian and the harmonisation of the survey schedule by theatres, including the organisation of interviewers. The survey in Zagreb began on 22 February 2020 at the Zagreb Dance Center and the Children's Theatre Dubrava. At the Gavella City Drama Theatre and the Luda kuća Theatre, the survey was scheduled to begin on 13 March 2020. However, due to the declaration of the COVID-19 pandemic and accompanying epidemiological measures, activity was suspended on 11 March 2020.

Data collection in Zagreb theatres					
Venue	Phase 1 cases for segmentation	Phase 2 cases for segmentation	Total cases for segmentation per venue	Total cases for segmentation per country	Theatre Night 2019
Children's Theatre Dubrava	278	112	390	1 038	77
Gavella	192	-	192		79
Luda kuća	-	-	-		-
Comedy Club Studio Smijeha	158	-	158		-
Zagreb Dance Center	151	147	298		61
Zagreb Youth Theatre	-	-	-	-	105
Kazalište Komedija	-	-	-		43
Teatar Exit	-	-	-		36
GD Histrion	-	-	-		32
Teatar ITD	-	-	-		-
Teatar IGK	-	-	-		16
Mala scena					-

During the period of suspension of theatre activities and performance, significantly changed by the COVID-19 pandemic, the partners discussed the future course of the project and changes in the timing of activities. Given the significantly changed conditions for theatre attendance, as well as changes in audience habits, the sudden and unexpected situation caused by the pandemic required refinement of the questionnaire.

The last phase of the survey collection, with new questions included, began in Zagreb on 24 October 2020, and ended with Theatre Night on 21 November 2020. During this phase, research was conducted at the Zagreb Youth Theatre-Zagreb Dance Center, Children's Theatre Dubrava and the Luda kuća Theatre. For epidemiological reasons and the need to maintain social distance, the questionnaires were collected by a combination of filling out paper questionnaires and interviewing the audience and entering data into the application on mobile phones. The necessity for health protection conditioned the involvement of a larger number of external associates in order to collect a relevant number of surveys and prevent the grouping of audiences at survey sites. This involved the provision of more stands to communicate with the audience in a safe way. The number of questionnaires collected was optimal given the significantly reduced number of visitors who could attend theatre performances.

Partner Theatres and Research Outcomes

6

Criteria and process of selection of the theatres

Considering the varied and rich performing arts scene in Zagreb, choosing the participating theatres was guided by the need for representation of different performing genres, which significantly contribute to the development of the scene, and for representation of different organisational forms of theatre and their production models, according to official and unofficial data and research available. In the preparatory phase, preliminary talks were held with several Zagreb theatres from the public and private sectors of the dramatic arts and other performing arts disciplines. During these discussions, an important consideration was their interest not only in participating in the project but also in the motivation to implement project results. Also important was the regular participation of theatres in Croatian Theatre Night. The following four Zagreb theatres were originally selected to participate in the project:

Key figures of the partner theatres (in 2018) ⁶		
Theatre	Sold tickets in own productions	Number of performances
Children's Theatre Dubrava	11 499	101
Gavella City Drama Theatre	60 118	201
Zagreb Dance Center (ZPC)	4 197	38

Children's Theatre Dubrava

The Children's Theatre Dubrava was established in 1955. Since its beginning, the theatre has been led by the enthusiasm of its founders and their successors. Many famous names in Croatian children's theatre have contributed to the theatre's activities. The Children's Theatre Dubrava became part of Narodno sveučilište Dubrava in 1976, a public institution for culture founded by the City of Zagreb and one of the biggest cultural centres in Croatia. Theatre performances are seen by around 30 000 children a year, mainly of school and pre-school age and their parents/carers. The theatre takes part in numerous festivals across Croatia and abroad. It employs professional and supporting staff while all artists involved in production and reruns of performances are freelance artists. Narodno sveučilište Dubrava is located in the Zagreb suburbs.

The main goal of Children's Theatre Dubrava is to become an institution that is not simply visited once by spectators to see a performance but that attracts audiences to a complete package of its additional activities. It aims to deepen young spectators' interest and create regular theatre-going habits that will persist into adulthood. Most

⁶ Croatian Bureau of Statistics. (2020). (rep.). Culture and Arts, 2018 (Ser. Statistical reports). Zagreb, Croatia. Available at: <https://www.dzs.hr/>

audiences come as a result of cooperation with educational institutions. There is an aim to ‘keep’ them and motivate them to return to the theatre and follow the theatre programmes beyond the curricular obligations. Significant medium-term goals of audience development are to strengthen the internal capacity of the organisation to work with different audiences, to develop recognisable marketing packages that will stand out from the many children’s theatres operating in the local community and to develop intersectoral collaborations and partnerships for audience development.

Children’s Theatre Dubrava was motivated to participate in the ASSET project because they had gained some knowledge of the basic structure of their audience over many years of direct work with audiences. Marketing actions and announcements in the public space were planned intuitively. Some of them would yield significant results, some weaker ones. As there is a lack of comprehensive and systematic monitoring of the structure and movements of the public at a local and national level, participation in the project answered their desire to gain a deeper insight into the structure of the Zagreb audiences and the audience structure of their theatre. This insight would enable them to direct actions more clearly and purposefully in working with existing audiences and attracting new ones.

The insights gained by participating in the ASSET project partly confirmed the previous assumptions of the theatre. It is especially important now that this knowledge about the audience moves from intuitive guessing and opinions to research that can be published or used as a professional foundation for future projects. In addition, related theatres in the local community can benefit from the above.

The results of the research have also opened up new areas of interest, for example placing the website and social media profiles at the forefront of future marketing plans, and using these more actively to communicate with audiences. It has also made the theatre aware of the need for a different approach to their primary audiences: children, who are increasingly using digital tools and new technologies; and their parents, guardians and grandparents, who actually decide to bring children to the theatre but who are more inclined to traditional forms of marketing.

Considering the unfavourable epidemiological situation and the accompanying epidemiological measures, Children’s Theatre Dubrava have so far been limited in their use of the knowledge gained from the ASSET project. As the number of people

who could attend performances was mostly an average of 16% of the full theatre hall capacity, it was instead an opportunity to review the way in which the theatre carried out its direct communication. Its activities on the website and on Facebook intensified in order to display more repertoire titles online, paying special attention to the analytics and monitoring of audience actions in responding to digital activities.

The most significant advantage appears to be the fact that with new, in-depth knowledge of the Zagreb audiences, it will be easier and more efficient to organise new, more effective programmes and marketing strategies after the COVID-19 pandemic. The Children's Theatre Dubrava team feel more competent about preparing an effective strategy to recover from and mitigate the negative consequences of significantly reduced capacity during the pandemic.

Zagreb Dance Center

Zagreb Dance Center (ZPC) is the central place for contemporary dance in Croatia, supporting Croatian and foreign dance artists, and encouraging a dynamic dance scene. It supports a range of innovative initiatives, advocates a diversity and plurality of artistic visions, and encourages artists, audiences and the community to explore and analyse choreographic and other concepts together. Zagreb Dance Center opened its doors in 2009, as the first city-owned building in Croatia designed specifically as a centre for dance and choreography. Until 2016, it was run by the Croatian Institute for Movement and Dance. Since 2016, Zagreb Dance Center has been part of the Zagreb Youth Theatre (ZKM), and it remains the highly regarded central space for contemporary dance in Croatia. The centre's staff create and present performances in collaboration with independent artists and art organisations chosen in an open annual competition. Aside from the performances, there is a multimedia space designed for other programmes, such as thematic talks, presentations of new projects, symposiums and press conferences.

The centre aims to bring contemporary dance art closer to people and encourage them to attend dance performances. They believe that starting education in childhood is crucial. To accomplish this goal, a couple of years ago the centre launched a dance audience development programme in collaboration with schools.

The centre wanted to participate in the ASSET project in order to know its audience better and to learn the tools by which this can be done. There was an expectation of a more detailed and different audience segmentation than that provided by the usual classical surveys of demographic data.

Much of the insight about the audience gained through the ASSET project is in line with what ZPC had previously thought about their audience, but it had never conducted such detailed and extensive research. The team were especially impressed by the model of audience segmentation offered by the ASSET project. In terms of the results, they were surprised that ticket prices were not especially a problem for most of the audience members, and that they even considered the prices low. In addition, the team realised that a large part of the audience were going to ZPC for the first time, and that there is potential to build a more loyal audience by encouraging return visits.

The insights gained through the ASSET project have helped in the development of new potential marketing and public relations strategies and in programming dance performances (building the theatre repertoire itself). One immediate task was to find ways and tools for advertising and communication that would bring back people who have only visited ZPC once.

Next, ZPC would like to investigate how they could develop the primary methods and tools that can be used to support this model of audience segmentation. The next research steps could include measuring the effects of the programme activities, designed and implemented marketing campaigns and PR communication.

Other theatres in Zagreb

As mentioned earlier in this chapter, Gavella City Drama Theatre, Comedy Club Studio Smijeha and Luda kuća were also partners of the ASSET project and participated in the data collection. However due to extreme complications caused by COVID-19 pandemic, the earthquake in Zagreb in March 2020, which damaged the building of Gavella Theatre, and other circumstances, it was not possible for their teams to participate in the whole course of the project and to provide the ASSET project team with their feedback.

However, it was possible to conduct research with Luda kuća, and although this could not be integrated into the overall segmentation model, the ASSET team managed to outline useful research results for the theatre itself.

Conclusions for Zagreb

Conducting extensive research on audiences is not a common practice for Zagreb theatres. Therefore, it took time to select the most effective methodology for conducting the research, one that would contribute to the overall atmosphere of the audience in theatres and where the audience would not feel that filling out the questionnaire would in any way interfere with their experience. Conducting face-to-face surveys, whether by filling out questionnaires on paper in the theatre space or by conducting interviews, was the beginning of a process of raising awareness of the need for and the benefits of direct communication with the audience.

Whilst the chosen methodology worked well, even during the time of the pandemic, digital databases of the audience are probably the way to facilitate this communication in the future. The first results partly matched the existing state statistics and partly gave a deeper insight into the segments of the Zagreb audience. They point to the need to continue conducting similar research to specify and verify some of the findings.

The application of the research results was hampered by the aggravating circumstances of organising cultural programmes during the COVID-19 pandemic. Planning was difficult due to uncertainty about the possibilities and conditions of performing activities. Uncertainty, which also has its financial dimension, affected both theatre planning and audiences, but the results of research can certainly contribute to a smoother recovery for the theatres involved, after the partial or complete recovery from the impact of the pandemic.





7 Audiences in Bulgaria

Performing Arts in Bulgaria

Statistical information on the performing arts in Bulgaria has been collected since 2009 by the National Statistical Institute. The data covers all state, municipal and private theatres, and shows a relatively stable number of visitors and performances, and levels of revenue, from year to year. Bulgaria has 74 state theatres, with 14 concentrated in Sofia, the capital. There was a slight increase of 4% in the size of audiences in 2018 compared to previous years.

Professional performing arts in Bulgaria (theatre) in 2018 ¹	
Theatres in total	75
Venues (both with or w/o permanent companies)	122
Capacity of theatres in total	29 907
Capacity of state theatres	24 601
Capacity of municipal theatres	1 878
Capacity of private theatres	3 428

¹ Bulgarian National Statistical Institute, 2018. Available at: <https://www.nsi.bg/en/content/4654/75-capacity-performances-attendances-and-revenue-theatres-form-ownership>

Professional performing arts in Bulgaria (theatre) in 2018 ¹	
Performances	15 155
Performances in state theatres	12 803
Performances in municipal theatres	1 612
Performances in private theatres	740
Tickets sold in total	2 388 823
Tickets sold by state theatres	1 977 499
Tickets sold by municipal theatres	186 774
Tickets sold by private theatres	224 550
New productions	330
Guest performances abroad	606
Permanent working positions in the culture, sport and entertainment sectors	37 557 ²
Population of the country	7 million

Performing Arts in Sofia

7

Sofia, one of the oldest cities in Europe, is the capital and the largest city of Bulgaria. With its cultural significance in southeastern Europe, Sofia is home to the National Opera and Ballet of Bulgaria, the National Palace of Culture, National Theatre and 12 other theatre institutions having broad and intensive cultural programmes. Cultural life in Sofia is also enriched by different festivals.

² Including total working positions in the culture (theatres, museums, libraries), sport and entertainment spheres in the state and private sectors

Performing arts in Sofia (theatre) in 2018 ³	
Theatres	39
Venues (both with or w/o permanent companies)	57
Performances	approx. 7 000
Tickets sold	1 283 769
Overall permanent working positions in the theatre sector	16 636 ⁴
Population of the city	1.7 million

Data Collection Process

During the first phase of gathering existing secondary data, the local team in Sofia found that statistics or research reports on theatre audiences are lacking in Bulgaria. No relevant data was gathered by theatres or any other academic or non-academic sources except the basic statistics published by the National Statistical Institute.

The planning process for the collection of audience data for the purposes of the ASSET project started basically from scratch when the local ASSET coordinators approached four professional theatres in Sofia in the autumn of 2018. Four different theatres were selected: Ivan Vazov National Theatre, Sofia Opera and Ballet, Aleko Konstantinov State Satirical Theatre and Azaryan Theatre.

³ Data as per public information of the National Statistical Institute (NSI): Culture and Arts. The data for the city of Sofia is approximate, and is estimated by calculation based on the number of theatres in the South West region (as per the definition of the NSI used in the surveys). Available at: <https://www.nsi.bg/en/content/4526/culture>

⁴ Including total working positions in the culture (theatres, museums, libraries), sport and entertainment spheres in the state and private sectors

The national coordinators and representatives of the theatres discussed the aims of the audience research, how it could support the needs of the theatres and the purpose and methodology of the ASSET project. For the theatres to understand the benefits of participation in the process, a workshop was organised in February 2019 for representatives of the ASSET partner theatres, facilitated by experts from The Audience Agency. Staff from the cultural department of the Sofia municipality and other theatres also participated in the workshop. The workshop provided much food for thought, and participants were enthusiastic about the potential of audience research and development. At the same time, they expressed their concerns about the resources needed for data collection.

In discussions held later on, all parties agreed that both e-surveys and printed questionnaires were required for data collection in Sofia. The questionnaire was developed by The Audience Agency and refined in collaboration with the theatres. During several rounds of feedback, everyone had an opportunity to influence the final outcome. The questionnaires were finally translated into Bulgarian, and each theatre received their own personalised questionnaires.

The first phase of data collection took place from 21 March to 31 May 2019. There was also further research undertaken during Theatre Night in November 2019. Art Projects Foundation, as the local ASSET coordinator, supported the data collection process and overall organisation in the four theatres. It used its own resources, hired staff and a professional agency to collect the desired number of survey responses from the theatre audiences.

Among the issues faced early on were the numbers of attenders in some theatres due to the limited number of shows presented. Also, many visitors would arrive at the theatre just before the beginning of the show and leave soon after the end, making it difficult for the interviewers to approach them. Nevertheless, the team managed to collect a representative set of data.

After the data collection was completed, the ASSET Sofia team translated all open answers into English for further analysis.

The ASSET project was communicated through different media in order to emphasise the importance of the project, provide information to the general public and help to attract different audience groups. The communication also stressed that

the audience development approach presented is applicable more widely, including cultural institutions throughout Bulgaria.

The results of the first phase of the data collection were presented by The Audience Agency to the ASSET team in June 2019 in Sofia. The presentation revealed interesting things about audiences in the different theatres, and in the other European cities involved in the project, as described in other chapters of this publication.

The second phase of the data collection process was conducted in January and February 2020 and was prematurely terminated by the beginning of the COVID-19 pandemic. One of the participating organisations – Azaryan Theatre – was not able to carry on in this phase and was replaced by the Sofia Theatre. Due to the low number of respondents and short period of participation in the project, the Sofia Theatre is not included in the ASSET research results.

Data collection in Sofia theatres					
Venue	Phase 1 cases for segmentation	Phase 2 cases for segmentation	Total cases for segmentation per venue	Total cases for segmentation per country	Theatre Night 2019
Ivan Vazov National Theatre	302	87	389	1 825	59
Sofia Opera and Ballet	336	205	541		58
Sofia Theatre	-	169	169		-
Azaryan Theatre	204	-	204		40
Satirical Theatre	312	210	522		48

Partner Theatres and Research Outcomes

The process of selection of partner theatres was driven by the intention of attracting a diverse group of institutions that would represent the diverse theatre scene in Sofia and provide not only classical theatre performances but also new artistic content. On this basis, two of the main pillars in the cultural life of Sofia were invited: Ivan Vazov National Theatre and Sofia Opera and Ballet. Aleko Konstantinov State Satirical Theatre was included in the selection to represent the comedy genre. Progressive theatre was represented by Azaryan Theatre, a fresh venue offering both alternative classical performances by private theatre companies and theatres from outside Sofia. All of the partner theatres also participated in Theatre Night in Sofia, and Art Projects Foundation, as the local coordinator, was familiar with their activities.

Sofia partner theatres, key indicators in 2018 ⁵			
Theatre	Performances	Seats	Tickets sold
Sofia Opera and Ballet	approx. 470	1 068 (2 stages)	100 000
Ivan Vazov National Theatre	approx. 600	1003 (3 stages)	160 000
Aleko Konstantinov State Satirical Theatre	approx. 300	600 (2 stages)	50 000
Azaryan Theatre	approx. 48	403	10 000

⁵ Based on information provided by the theatres

Ivan Vazov National Theatre

Ivan Vazov National Theatre is the most dominant of Bulgarian stages, having a rich history, firmly anchored in its traditions, and a commanding and protean presence in the performing arts scene. The theatre offers a broad repertoire of both contemporary and classical plays appealing to the widest possible range of audiences. Special attention is devoted to the development of national playwriting, and, at the same time, the three stages of the National Theatre are open to all innovative and noteworthy creative endeavours.

An important consideration for the National Theatre was the absence of research in Bulgaria that could provide the staff with some notion of the structure of their audience. The segmentation approach was the most appreciated part of the ASSET project for the National Theatre.

Being open to new audiences is a strong value for the management of the National Theatre, and their team is therefore motivated to increase their knowledge on how to attract new attenders. At the same time, they are determined to give their existing audience a new experience while also keeping traditional performances within the repertoire.

In line with this goal, the National Theatre has tried over the last few years to enrich its rather traditional programme with a fresh approach to the classics. Unfortunately, insufficient knowledge of their audience and the strong tradition of popular comedy shows, which easily attract a mass audience, led to lack of coherence in the repertoire of the theatre. This seemed to confuse loyal attenders and not to attract new ones, something that was later confirmed by the ASSET research.

The National Theatre now knows it can count on their extensive group of regular attenders, as 77% of the respondents declared that they had visited the theatre within the previous 12 months, which is significantly above the average of 50% for the other theatres. At the same time, only 4% of the respondents had visited the National Theatre for the first time, while newcomers represented 14% of the audience for the rest of Sofia's theatres. This demonstrates that the National Theatre's strategy has so far failed to draw the attention of new potential audiences. With 82% of attenders declaring classical drama to be their most favoured genre, the theatre's

management team can also clearly see the ambitiousness of their determination to introduce their existing audience to the progressive artistic approach.

According to the theatre's representatives, many of the results of the survey were not very surprising, but it gave a clear view of where they need to focus. As the audience turned out to be very diverse, the information from the ASSET project made the team think about how they might better communicate with relevant audiences and which performances from their wide portfolio are more likely to be appreciated by the various audience segments.

Ivan Vazov National Theatre's management also realised that detailed knowledge of the audience will help them to find new ways of reaching potential spectators through effective marketing. It now seeks to better understand the needs and behaviour of audiences, and to deepen the relationship with various audience segments. To reach their complex and sometimes divergent goals, the National Theatre decided to revise their programme and communication plans on the basis of the ASSET project outcomes.

In the future, the National Theatre plans to place more emphasis on digital communication tools, streamed shows and the use of teaser campaigns and their famous actors to promote the programme in order to create new marketing content for various media. It has already built an online ticketing system and is determined to analyse the database to find ways to reach their audience better. They also see potential in using their online marketing activities to build customer loyalty within different audience segments.

Aleko Konstantinov State Satirical Theatre

The Aleko Konstantinov State Satirical Theatre (hereafter Satirical Theatre) bears the name of one of Bulgaria's greatest writers, the author of the series of satirical novels featuring the protagonist Bay Ganyo, a depiction of a Bulgarian commoner from the author's time. The Satirical Theatre is the home of comedy on the Bulgarian theatrical scene. It is also known as Sofia Broadway. Since its establishment in 1957 the Satirical Theatre has kick-started the careers of many of the best Bulgarian performers.

The Satirical Theatre's aim is to grow its audience and programme. New management and communication teams have recently applied an innovative approach to audience development and introduced some progressive methods, such as appointing consultants operating at the box office and helping visitors to choose the best performance based on their profile and preferences.

Like many other theatres, the Satirical Theatre also longs for new audiences and closer ties with existing ones. An opportunity to be introduced to audience research methods, which would provide them with useful information on their audience, was therefore a logical reason to participate in the ASSET project. Even though they were one of the first Bulgarian theatres to actively process the data from their ticketing system and to interview attendees during the purchase of tickets, segmentation seemed to be a promising way to further develop their knowledge of the audience.

The Satirical Theatre management declared that only the testing and understanding of the audience segmentation process was a major benefit of the project. But it also resolved some questions for which they had no answers (or just suspicions) but didn't have the tools to resolve. A very practical outcome for the theatre was how the audience feedback helped them to adjust the refurbishment of the present venue, as well as the appearance of a new one.

The Satirical Theatre can now build their artistic strategy on the firm knowledge that their existing audience has a fairly narrow taste for content, as they usually attend drama theatre (69% attended both classical and contemporary drama and 55% attended comedy performances in the past three years) and do not tend to look for other artforms. Of all partner theatres in Sofia, though, the Satirical Theatre has the largest segment of Explorers (9%, compared to the 3% average), who prefer new pieces and do not hesitate to take a risk. By contrast, there were not many Persuadables (8%, or more than double the average), who look for more intellectually stimulating performances.

Sofia Opera and Ballet

Sofia Opera and Ballet, also known as the National Opera and Ballet of Bulgaria, is the nation's most prestigious institution of its kind, and was founded in 1922. The roots of the opera ensemble go back further, as the Bulgarian Opera Society was established in 1908. The ballet troupe started the history of the genre in Bulgaria, giving the first performance in 1928. In addition to contemporary repertoire, the theatre maintains a respectful portfolio of nearly 30 classic titles.

During the last few years, the theatre worked hard to build the loyalty of its existing audience and to develop ways of reaching new ones. Among other activities, it created special content for toddlers and children (up to 12 years old), offering a variety of performances for families alongside the classics. They were one of the first theatres to use digital media to reach their audience, for example by sharing video recordings of performances on Facebook. The ASSET project provided them with another opportunity to help find new ways of attracting potential attenders.

As an innovative organisation, Sofia Opera and Ballet was interested in audience research to support the process of sustainable development. They understood the audience segmentation methodology as an opportunity to gain new kinds of knowledge about their audience. They were also keen to find out if the data they already had would tie in with the findings of the ASSET project.

Sofia Opera and Ballet found that they have managed to build a loyal audience, which seemed to confirm the success of their online loyalty development activities and a recent campaign inviting visitors from nearby cities. The ASSET project also stimulated the marketing department to revise their current communication strategy to reach new audiences, and to make more efficient use of the customer database to target specific content to appropriate audiences.

The segmentation revealed that Sofia Opera and Ballet has the largest share of Classicists in the audience (14%, compared to the average of 6.3% in the rest of the theatres in Sofia and 5% of all ASSET partner theatres around Europe), which might not seem surprising. The theatre needs to consider, though, that this specific and conservative segment has some significant distinctions in terms of artistic content expectations and communication habits than non-content-preference segments, which

represent 71% of the existing theatre audience. At the other end of the audience spectrum, the ASSET research found that only 4% of audience members are in the Contemporaries segment, in contrast to 8% for European audiences and more than 10% for the other theatres participating in the research in Sofia. Sofia Opera and Ballet must make a choice between accepting the status quo or making greater efforts to attract these demanding but influential (and usually frequently attending) spectators.

Through the ASSET project, Sofia Opera and Ballet saw the need not only to have the data but also to understand what is behind the numbers and information. They now realise how important it is to use the data to understand the audience, to group them into segments, to engage them through effective communication and to build strong relationships. As a next step, the Sofia Opera and Ballet team is planning to find effective methods to link specific audience members in their customer database to the relevant audience segment.

Azaryan Theatre

The Azaryan Theatre is a new theatrical space in Sofia, part of the huge cultural venue of the National Palace of Culture. Well-known names on both the Bulgarian and the European scenes associate their work with this curatorial project. The theatre offers a platform for young artists who follow or even create new trends in the performing arts. The Azaryan Theatre has the ambition to unite a large group of artists around a common social, cultural and aesthetic idea, and to produce a creative micro-environment of exchange with its audience. The theatre is unique in encouraging artists to elaborate progressive practices and challenge the audience's established social, intellectual and emotional patterns.

As a new theatre venue with an unusual, demanding dramaturgy and emerging artists on stage, the Azaryan Theatre initially had the attention of professionals and the general public. But in due course, mainly as a result of non-functional communication, it encountered difficulties in attracting an audience. Performances were often cancelled due to the low number of attenders, disappointing even the few curious audience members keen to see a progressive cultural programme. The theatre was struggling and in serious trouble.

For these reasons, the Azaryan Theatre was not able to participate in the second phase of the ASSET project, as it could not sustain the execution of the programme and collect the necessary data. Still, a few conclusions for the theatre can be drawn from the Phase 1 survey that could help, along with other measures, to overcome the difficulties.

Interestingly, the sample showed that the theatre's audience was pretty consistent in terms of demography: most of its members were middle-aged and lived close to the theatre. This gives a fairly clear idea about an adequate communication strategy for the existing audience and indicates great potential for attracting audiences from other parts of the city.

In terms of audience segments, the Azaryan Theatre is considerably different from the rest of the participating theatres in Sofia. It has the smallest share of Mainstreamers (11%) and the greatest share of Persuadables (24%) and, most significantly, Cultural Grazers (31%). Since the last-mentioned segment is made up of spectators who are strongly tied to a specific place, and who tend to visit the venue regularly, it makes them a vital core audience, on which it is possible to wrap other layers.

Conclusions for Sofia

In Sofia, the chief difficulty for the ASSET project was in engagement with theatre staff. The main reason seems to be the undersized workforce of the organisations involved, caused by funding issues. Theatres hesitated to carry out project tasks, which they regarded as an extra burden, although they acknowledged that they would benefit from them. The same effect was seen during Theatre Night.

Enormous efforts have been made to keep all of the representatives of the theatres involved in the project. At first, most of them were keen to participate in the project, but later on, when the data collection had to be organised, they were not able to support the process and even found it difficult to participate in the consultations organised for them. Understanding the need to conduct the research, Art Project

Foundation took the initiative in the overall organisation and communication agenda, and the project was completed successfully.

The ASSET research revealed or confirmed some similarities and differences between the audiences of participating organisations in Sofia. The research showed similarities between attenders of the theatres mainly in terms of age, communication patterns and motivation, and differences above all in the artforms they attend and the locality from which they travel to the theatres. Demography and segmentation between theatres therefore have some similarities but also individual differences, as described above.

Compared to other countries, it turned out that Bulgaria is just average in terms of the age of attenders. What makes theatre-goers in Sofia different from the average of the European audience included in the research is, for example, the communication channels they use to get information about theatres. Only 1% of the Bulgarian audience declared that they read something about the performance in the email newsletters sent out by theatres, compared to the European average of 18%. Similarly, virtually no spectators in Sofia gained any information from the theatre's newspaper or magazine, in comparison to the 8% average of the whole international sample. The reasons and conclusions must be resolved by the Bulgarian marketing staff, as they lie both on the side of the audience (lack of interest) and on the theatres themselves (lack of relevant communication tool or its inappropriate form).

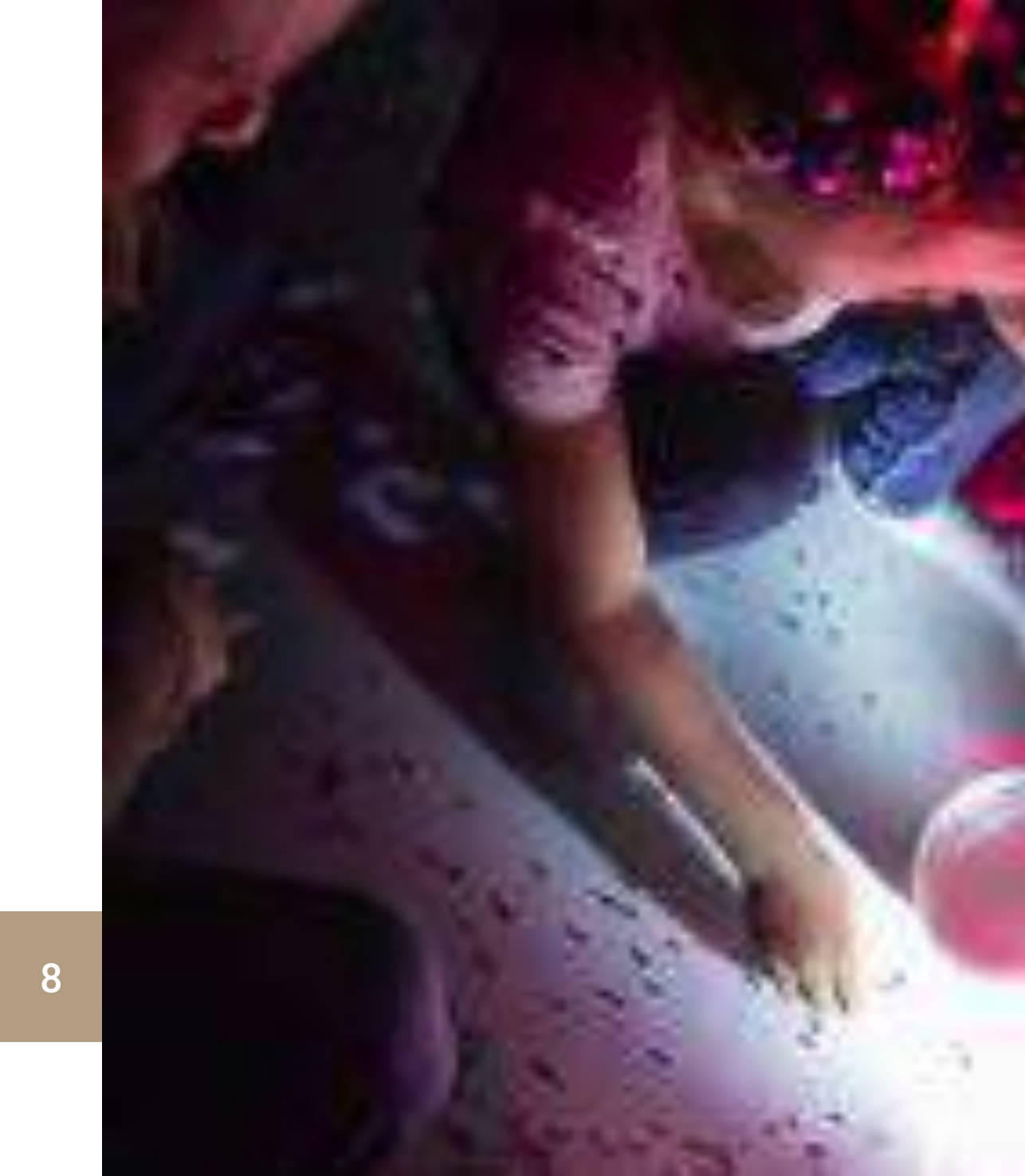
In terms of their strategies, the partner theatres definitely need to take into account the motivations of Bulgarian audiences, which are significantly different from the overall average of the audiences around Europe included in the ASSET project research. While 34% of the audiences in Sofia responded that intellectual stimulation was one of the reasons for visiting the theatre, the overall average was only 22%. For 25% of the Bulgarian attenders, being intellectually stimulated was even the main motivation, though the European average was only 9%. A distinctly higher number was also motivated by the desire to be inspired (30% vs. 19%).

On the contrary, fewer audience members were driven by the prospect of being entertained (26% vs. 43%), of spending time with friends and family (21% vs. 44%), of identity reasons (13% vs. 30%) or of the pleasure of the atmosphere (10% vs. 26%). These research results suggest that Bulgarian audiences are generally more

focused on the performance itself rather than on the context and complements of the theatre visit.

For the programming and marketing departments, it is of particular importance to note that the cast and creative team are vital factors in the decision to attend the theatre: 71% answered 'very important' and 23% answered 'important' in the case of cast members; 71% answered 'very important' and 22% answered 'important' in the case of creative team. This is more important than the theme of the performance (60% 'very important, 35% 'important') and far more than the ticket price (19% 'very important, 41% 'important'), which turned out to be, like in other countries, the least important factor in making the decision to visit the theatre. But it is also worth noting that according to the ASSET research results in Sofia, spectators do not usually make up their minds at short notice without knowing much about the performance.

In terms of segmentation for Sofia, Mainstreamers (28%) appear to be the most numerous segment, just like in other countries. What makes Bulgaria different is the large number of Classicists (10%) in the audience.





8 Theatre Nights Around Europe

Theatre Night is an annual one-day event dedicated to theatre and the performing arts. Theatre becomes the focus of meetings, dialogue, socialising and new insights of artists, theatre professionals and their audiences. It is organised in many European countries, including Croatia, Slovakia, Bosnia and Herzegovina, Montenegro, Slovenia, Serbia, Austria, Hungary, Czech Republic, Bulgaria, Spain and Germany. In some countries the event is held under the umbrella title 'European Theatre Night'. It was initiated by the Croatian Children's Theatre Dubrava in 2008, and is held simultaneously every third Saturday in November. On that day, theatres and theatre companies offer special programmes and productions with free or low-price tickets, in order to deepen the bond that already exists between them and their audiences.

Theatre Night is a time of extraordinary experiences, because visitors have a chance to see and witness things that theatres do not normally offer, and thus it becomes an ideal platform for complementary theatre audience research as part of the ASSET project.

The Origins of European Theatre Night

The idea of Theatre Night was born in the minds of several individuals in several European countries during the early 2000s. The first person to propose a structured form of organisation of this event, and thus the initiator of Theatre Night, was

the French designer of intercultural projects, director, actress and drama teacher Eléonora Rossi. In 2007, in the document entitled 'La nuitée – The Intercultural Night of European Theatre', Rossi outlined a concept proposing a special event to celebrate European theatres from Saturday 8 pm to Sunday 8 am in late October or early November.

The initiative was taken up by Croatian theatres, where Theatre Night first took place on 25 October 2008. Two theatres participated on this occasion – the Children's Theatre Dubrava as initiator of the event and the Šibenik Theatre (later the Croatian National Theatre in Šibenik) – presenting a programme more local than national in character. In April 2009, with the support of the Ministry of Culture of the Republic of Croatia, all theatres in the country were invited to take part in the event, and from that year Theatre Night became a regular substantial event in Croatia.

Children's Theatre Dubrava, a theatre dedicated to children and young people in the suburbs of Zagreb, the capital of Croatia, is a public institution operating within the Narodno sveučilište Dubrava (Cultural Centre Dubrava). Although the theatre has only a handful of employees in the management and organisation of its entire activity, it became the national coordinator of Theatre Night in Croatia. Over the years, almost all public theatres in Croatia, numerous independent theatres and other institutions have participated in Theatre Night, making it one of the most recognisable cultural manifestations in the country.

This has now expanded to several other European countries. After more than a decade of implementation, with occasional national variations, the event is now held every third Saturday in November. Theatre programmes are very different and heterogeneous, with some closer to the original idea of a literal overnight stay in the theatre, while others strive to provide the audience with the uniqueness of the experience of that special night, offering different additional programmes. In some countries, European Theatre Night has even turned into a multiday event.

Despite fluctuations in funding, both nationally and/or locally, the number of attenders has been increasing year on year. Programmes have responded to the needs of the audience, based on a central principle of the recognition of the real needs of communities from which it originated.

Key figures, European Theatre Night in Croatia (2018) ¹	
National coordinator: Children's Theatre Dubrava	
Number of theatres involved	144
Number of events	170
Number of cities and towns involved	55
Number of visitors	40 000

Theatre Night in Austria

In 2011, Austria became part of the European Theatre Night network, and since 2017 this has taken place under the auspices of the Austrian federal president. Theatre Night in Austria has grown steadily over several years. In 2011 it was held in six Austrian cities, with 32 theatres participating and 47 performances and programmes being offered. In 2018 the event expanded to 26 cities in all nine provinces of Austria, with 108 theatres and organisations participating and nearly 100 events being offered.

The programme included a wide range of performing artforms and genres: action theatre, backstage tours, Butoh dance, chanson evenings, playwrights' workshops, narrative theatre, feminist theatre, puppet theatre, flash mobs, forum theatre, radio plays, improvisation theatre, inclusion theatre, youth theatre, children's theatre, comedies, crime theatre, multilingual performances, open rehearsals, opera, poetry slams, director's theatre, school and student theatre, senior theatre, dance theatre, workshops, contemporary circus, etc.

Since its inception, European Theatre Night has been supported by the independent theatre scene, and in recent years larger regional and state theatres have

¹ Organisers' official website: www.noc-kazalista.com

also participated. For some years now, the media partnership with the Austrian Broadcasting Corporation (ORF) has made it possible to advertise European Theatre Night throughout Austria on television.

Key figures, European Theatre Night in Austria (2018) ²	
National coordinator: IG Kultur Österreich	
Number of organisations involved	108
Number of venues	68
Number of performances	90
Number of cities involved	26
Number of visitors	6 800

The uncertainties caused by the COVID-19 pandemic made 2020 a turbulent year for European Theatre Night, and only half of the participants were able to confirm their participation. Three weeks before the date of Theatre Night, all theatres were still closed. As a substitute, theatres offered live broadcasts, short films produced for this event, radio plays or Zoom conferences, such as on the ‘Theatre of the Oppressed’. One of the Zoom sessions gave the European organisers the opportunity to report on the situation in their countries. The meeting was attended by representatives from Austria, Bulgaria, Germany, Italy, Croatia, England, the Czech Republic and Slovakia, and it was live-streamed on YouTube and Facebook channels.

² Source: IG Kultur Österreich and information from participating theatres, November 2018

Theatre Night in Bulgaria

Theatre Night in Bulgaria unites theatre fans in a large-scale forum with captivating art events. It shows the quality of theatre art without borders or language, religious or ethnic barriers, and, along with traditional theatre forms, it experiments with the new ones, attracting new audiences. Since 2013, when Bulgaria joined European Theatre Night, the initiative has managed to win the hearts of audiences of all ages, media, actors and directors, becoming a sought-after and anticipated event with an innovative programme. The event was so well accepted by the audience that after the first year it expanded from the country's capital, Sofia, to other cities, by attracting theatres from 18 cities all over Bulgaria. According to studies by Alpha Research, the attenders in Sofia give the event a very high rating.

Theatre Night in Bulgaria provides an opportunity for over 30 000 people to become attenders and participants in a programme that offers open doors, exhibitions, theatre workshops, meetings and talks with artists, discussions and performances in theatres and alternative locations. By participating in Theatre Night, theatres receive extensive promotion among a mass audience. They attract young attenders, as well as an audience that doesn't often engage. Young and emerging artists also become known by the audience, which is extremely valuable for their further development. The initiative has a targeted communication that makes it visible and accessible to the public.

Key figures, European Theatre Night in Bulgaria (2018)³

National coordinator: Art Projects Foundation	
Number of theatres involved	51 (state and private)
Number of events	206
Number of cities and towns involved	18
Number of visitors	71 824

³ Source: Art Projects Foundation and information from participating theatres, November 2018

Theatre Night in the Czech Republic

The Czech Republic joined the European Theatre Night initiative in 2013, and since the very first edition of Theatre Night in Czechia it has become the biggest and most visible theatre celebration in the country, with a truly national impact. The national initiator and coordinator of the event is the Arts and Theatre Institute, a state organisation focused on documentation, research and international promotion of Czech theatre and arts.

The main aims of Theatre Night are to increase the social value and prestige of the theatre and performing arts scene in the Czech Republic, to inspire and stimulate innovations in the field of audience development in participating organisations and to support international cooperation with partners from the European Theatre Night network.

The first edition of Theatre Night in the Czech Republic attracted over 80 theatres and cultural organisations, and since 2014 the number of cultural organisations involved in the event has increased to more than 100. With visitors numbering between 40 000 and 45 000 each year, the Czech Theatre Night has become one of the biggest events within European Theatre Night. It offers educational programmes for young and family audiences, as well as special events for various adult segments such as guided tours of theatres' backstages, discussions and meetings with theatre-makers, workshops, open rehearsals, interactive formats and concerts. A special feature of the Czech Theatre Nights are the citywide events organised by several theatres operating in the same city that connect their programmes, for example through theatre bike tours or scavenger hunts.

The Arts and Theatre Institute, as the national coordinator, has been designing Theatre Night since its first edition as an event in support of work with the audience and its development. Participation in Theatre Night is not necessarily a free offer, although free admission or reduced admission prevails at most events. However, it is an obligation to offer the audience an 'exceptional experience' during Theatre Night, i.e. programmes beyond normal performances at a normal price. Therefore, the main work of the coordinator is to develop discussions or seminars about audience

development and debates on the particular topics of each year, which are usually related to social or historical themes of importance in Czech society.

Key figures, Theatre Night in the Czech Republic (2018) ⁴	
National coordinator: Arts and Theatre Institute	
Number of theatres involved	109
Number of events	approx. 500
Number of cities and towns involved	30
Number of visitors	approx. 40 000

The organisers of Theatre Night in the Czech Republic include a range of public and private entities that run theatre activities on a professional or amateur basis. A high percentage of organisations participating in Theatre Night are located in Prague, but the number coming from all regions of the Czech Republic has increased since the event's inception. The Arts and Theatre Institute undertook several research projects in the period 2013–2016 to help to verify the main aim of the event: to establish and strengthen relationships with the audience. The surveys started with 450 responses from 20 organisers across the Czech Republic in 2013 and ended up with over 1 000 responses from 24 theatres, with a balanced representation of Prague and out-of-Prague entities. The last survey was designed to compare Theatre Night audiences with audiences for conventional theatre programming.⁵

In 2013, Theatre Night met the expectations of 75% of visitors, and only 4% left dissatisfied, while in 2015–2016 some 90% of spectators stated that they liked the event. In 2015 and 2016, 16% of visitors attended Theatre Night with children.

⁴ Source: The Arts and Theatre Institute and information from participating theatres, November 2018

⁵ This research was designed in cooperation with the NMS Market Research agency

This is more than double the number for regular performances, which attendees are more likely to go to with friends. The event was attended by those who had more 'mainstream' interests compared with regular performances.

Accompanying programmes were an important factor in motivating visits, while the popularity of a given theatre and the low cost or free admission did not significantly influence participants. These surveys also showed that Theatre Night is good at attracting new visitors who are willing to come to the theatre again afterwards. Another interesting finding has been the discovery that Theatre Night visitors show a greater sense of connection to local events compared to regular theatre audiences.

The Night of the Arts in Helsinki

The Night of the Arts is an annual one-day festival that has taken place in Helsinki since 1989. Cultural events take place in various locations around the city on one day/night in August each year. The events typically begin at around 6 pm and last until at least midnight, sometimes even to early morning. The Night of the Arts is open to everyone to participate, whether as a member of the audience or as a professional or amateur artist. In addition to traditional cultural-event organisers such as museums, galleries, libraries, bookshops, theatres, concert halls and cultural centres, the Night of the Arts encourages every citizen to create his or her own artistic or community event around the city. Similar festivals also take place in other cities and towns in Finland in August.

The Night of the Arts resembles Theatre Night but also has a number of community activities that embrace all artistic disciplines – not only the performing arts. It brings different artforms closer to audiences and offers possibilities for new experiments. The festival aims to attract a wide range of different audiences, including first-time visitors, to enjoy the arts.

Key figures, theatre, dance and circus at Helsinki Night of the Arts event (Finland) ⁶	
Number of theatres involved	18
Number of performing arts events (out of approx. 415 events)	39
Number of visitors to performing arts events	not available ⁷

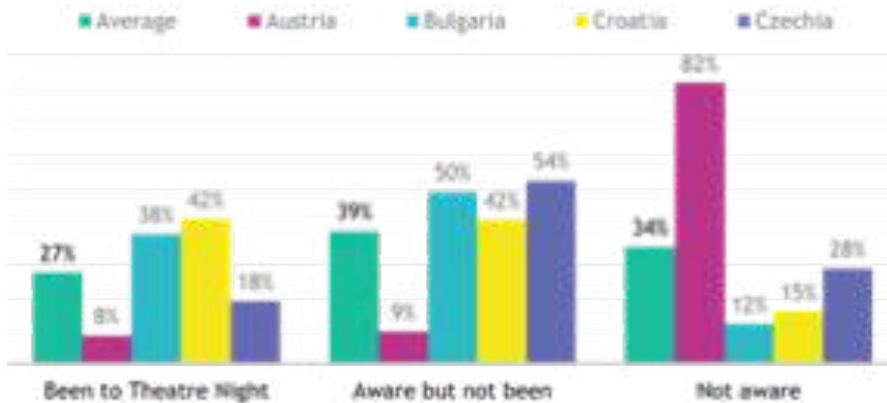
European Theatre Night Audience Research

It was decided early on in the project that it would be beneficial to look at the impact of European Theatre Night itself.

Therefore, in the first phase of research, in the spring of 2019, there were questions included in the four countries regularly participating in European Theatre Night: Austria, Bulgaria, Croatia and the Czech Republic. Attenders were asked about their awareness of, and participation in, European Theatre Night. It can be seen from the results below that in Bulgaria, Croatia and the Czech Republic, many of that season's attenders were aware of European Theatre Night, and in the cases of Bulgaria and Croatia a relatively large proportion had been to Theatre Night as well.

⁶ Taiteiden yö 2018 ohjelma <https://2018.helsinginjuhlaviikot.fi/taiteidenyo/ohjelma/index.html>

⁷ Altogether 415 events, in many cases taking place in city open space. Annually, more than 100 000 visitors attend the whole arts event, but no reliable data is available for the 39 performing arts events



As noted above, Theatre Night takes different forms in each of the countries. Generally speaking, the aim is audience development. The responses of those who attended, when asked about their reasons for taking part, reflect this aspect. Many, for example, said that it encouraged them to return to theatres they had visited as part of the initiative.



Audience research, November 2019

European Theatre Night took place between the two main phases of research in November 2019, providing an opportunity to understand the effect of the initiative more directly. As it takes place mostly on one day/night, the opportunities for obtaining data were relatively limited, so the questionnaire was kept short so that a good range of responses could be obtained.

Most of the theatres involved in the ASSET project (where European Theatre Night was taking place) took part. In Croatia, more theatres took part than were in the original core ASSET research, providing a basis for future research partnerships in that country.

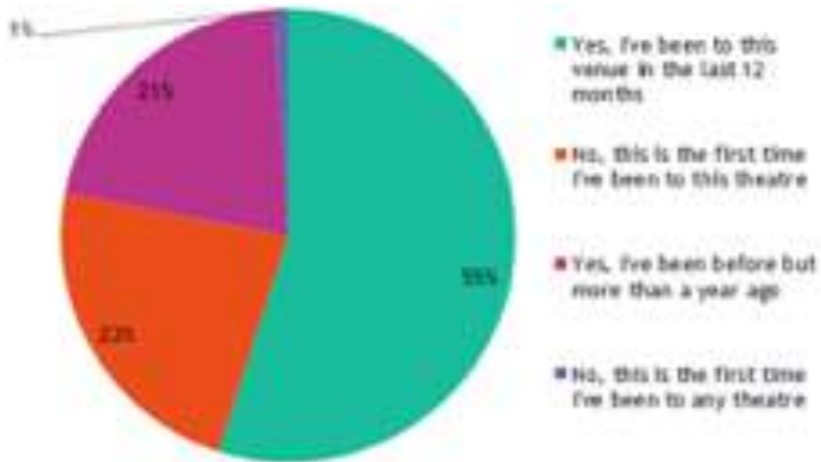
Despite the short available data-collection period, it was still possible to obtain 961 responses across the four countries, which enabled a useful snapshot to be produced.

Findings

The findings were relatively consistent across all countries and theatres. Theatre Night was not generally found to be a way of persuading people to attend the theatre for the first time, but in general it was good at encouraging people to try out new places and activities.

Q. Have you been to this venue before, for Theatre Night or anything else?
(Tick one only)

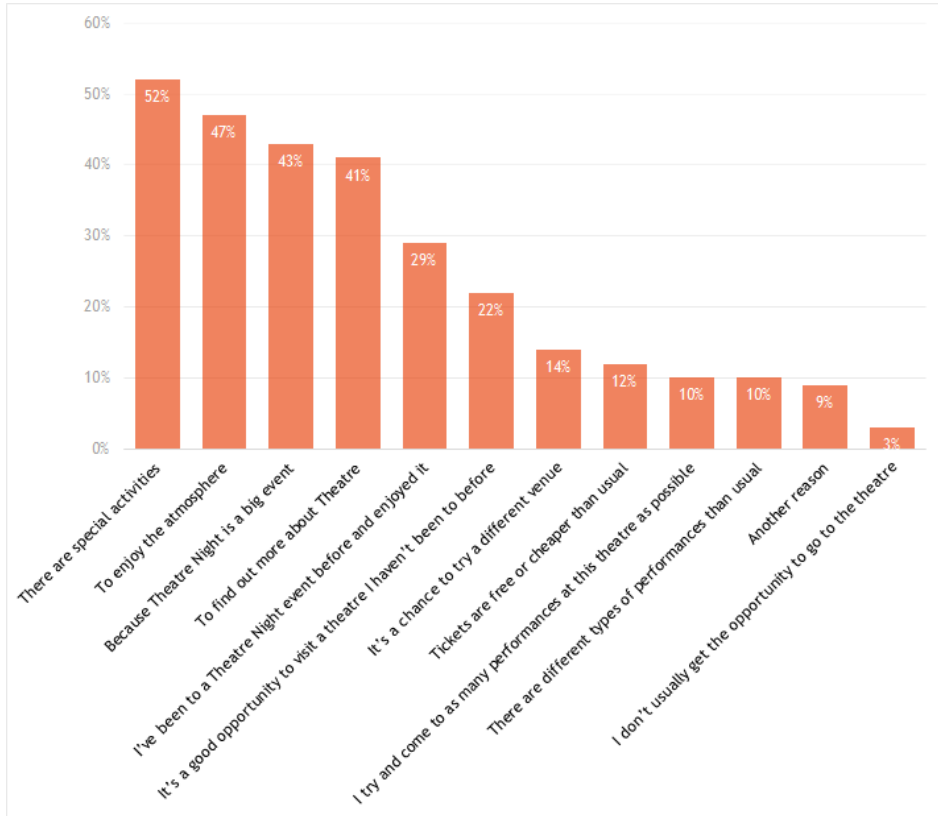
Base = 961



There were a wide variety of reasons for attending/participating. In the question below, attenders were asked why they were visiting, with the option of being able to choose any reason that applied (i.e. not just giving one reason).

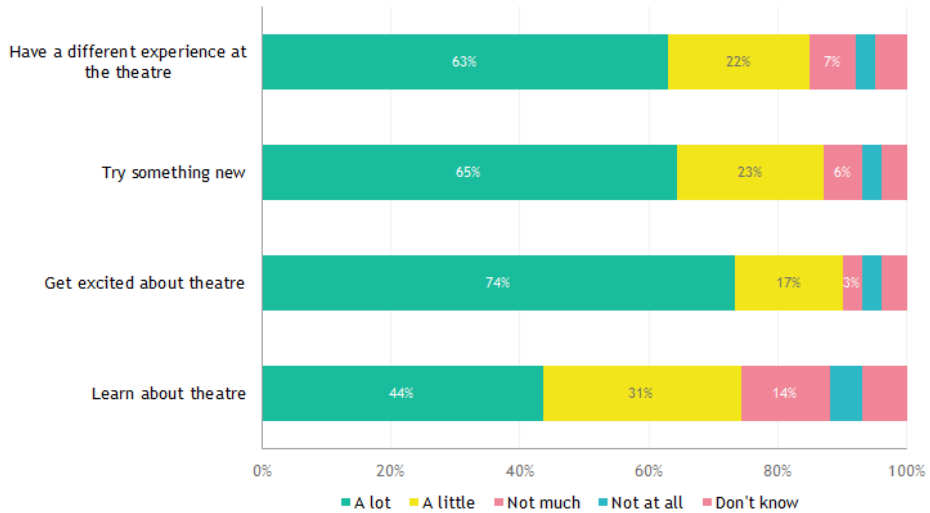
Q. Why are you visiting tonight? (Choose all that apply)

Base = 961



The way that Theatre Night inspires and encourages people to try out different elements of theatre is also reflected in the following question.

Q. To what extent does Theatre Night help you to...



There were further results relating to, for example, segmentation. These are described in more detail in the final chapter of this publication.





9 Conclusions and Recommendations

Ambition

ASSET is the acronym for the rather grandly titled ‘Audience Segmentation System in European Theatres’ but, ultimately, this doesn’t accurately describe the project.

While it did indeed produce a workable, meaningful way of segmenting theatre audiences, it should be stated that this is not, and nor was it intended to be, some kind of overarching segmentation of the theatre-going public of Europe. Rather, it aimed to work with the theatres and partners in the participating cities to help those institutions use segmentation to understand their actual and potential audiences. It is a process that exists and takes account of the contexts in which theatre takes place.

This publication and the project as a whole have therefore always sought to be open and transparent about the methodology and process. Segmentation is not a magic formula. It is a tool by which we can understand a particular ‘population’. It recognises that people tend to have clustered characteristics by which they can be grouped together. However, these groupings – segments – are ones that we create. We choose which characteristics are important and then develop a methodology accordingly, as described earlier in this book.

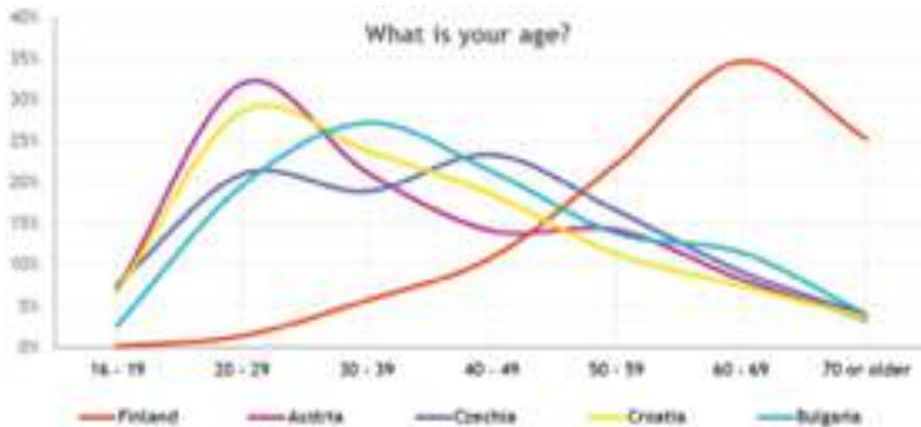
The results therefore need to be understood with this background, developed as a result of the early consultations at the beginning of 2019, in which those working in the theatres identified some of the key influences on reasons for attending the performing arts, with wider research questions adding further insight.

It therefore provided a range of results of great potential use to the theatres involved and made it possible to look at the similarities and differences between theatres and cities. However, it is important to note the following:

- This research does not aim to show definitive segments for Europe or describe whole country populations
- It represents the views of current audiences at the participating theatres, although the results have commonalities that inform understanding
- The research is one ingredient in our understanding of what we are doing and how it should be continued, changed or developed at policy, sectoral and individual theatre level

Beyond the Average

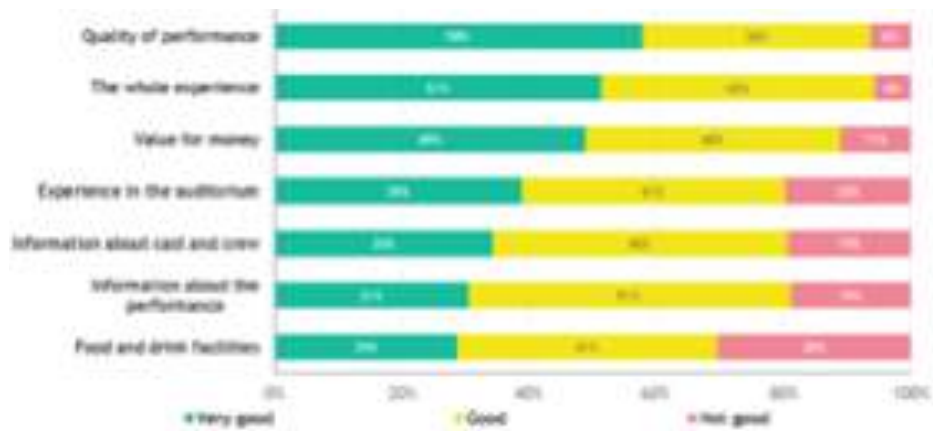
While it is important to be clear about what exactly the ASSET research represents, it nevertheless suggests interesting comparisons between the five cities involved. A graph showing the age breakdown of the respondents from the first phase is indicative of underlying differences between the theatre-goers of the different countries.



Each audience has its own characteristics, but the Finnish audience is clearly different from the other four. We had much debate about the reasons, including the consideration that the research in Finland was mainly conducted via e-survey rather than face to face. In addition, both the Austrian and Croatian surveys included theatres that had a high proportion of work dedicated to young people. However, other research in Finland appears to indicate that the age pattern in this project was reflective of the audience.

On the topic of relevance, during phases 1 and 2 it was possible to conduct individual consultations with each of the theatres. During these consultations, each theatre's results were discussed and possible actions delineated. Some of the survey questions were relatively simple, based for example on audience reaction to their experiences at the theatres. Although simple, for many theatres – perhaps most – this was the first time they had benefited from this sort of feedback. The graph below outlines the overall results of one question from phases 1 and 2, and indeed this was often supplemented by qualitative ('literal') answers from audience members.

How would you rate... (ratings consolidated into 3 categories)?



While it was encouraging to see the performances rated highly, there was great interest that the ratings were often so low for other aspects of the theatre experience, such as food and drink facilities or comfort in the auditorium. In addition, it was interesting that the information provided about the performance was often rated fairly low, given that this had been one of the main elements of the segmentation methodology (how much information people wanted before making a decision). These were results that could be taken and directly acted upon, and there were some theatres that especially addressed the food and drink and comfort issues immediately after Phase 1, using the results to make cases within organisations about what was lacking.

Also noticeable within the results were the similarities between certain types of institution, for example between theatres presenting dance or between ‘national’ theatres. This comes through in distinct patterns of segmentation, with dance venues, for example, having a large proportion of the ‘Pick and Choosers’, seemingly representing audiences who follow dance as an artform.

The types of theatre and artform presented also tended to influence the spread and dominance of their segmentations. For example, the larger, established theatres had a tendency for a smaller number of more dominant segments, whereas smaller, more recently set up venues had a wider variety of segments of more equal size. The reasons for this are for speculation, but the implications could be various. To have a good spread of equally sized segments implies a varied audience but also the difficulty of providing a range of types of offer to keep those audiences ‘happy’.

The results of the research more generally also demonstrate the need to go beyond ‘averages’ to a more sophisticated understanding of audiences – one of the main arguments for segmentation. The average (mean) age of an audience might be 45, but this could well be made up (say) of one large group of 20- to 30-year-olds and one of 60- to 70-year-olds. So the figure of 45 is statistically correct but doesn’t reveal the ‘true’ nature of that audience.

It also demonstrates the power of having enough research results to make cross-tabulation possible, and, for that matter, demonstrates the value of ‘regression analysis’. In the following table (representing Phase 2 only), the question of who/how many people an audience member is accompanied by can be broken up by segment.

While the deviations may not be massive, nevertheless there are some patterns that can be deduced from the figures, which may warrant further investigation.

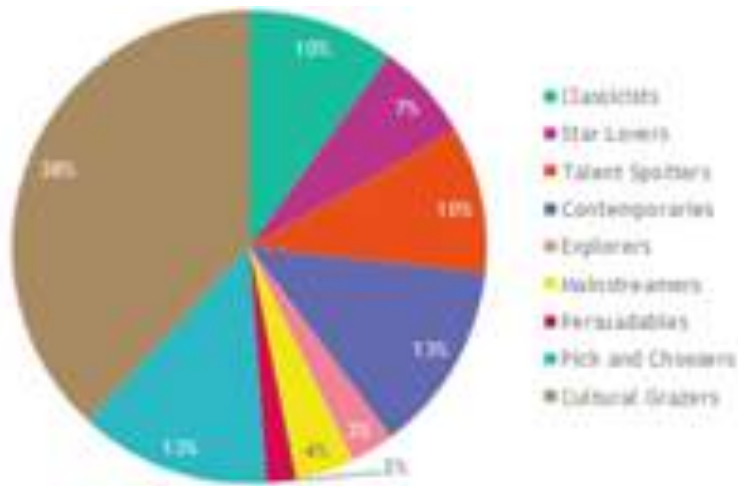
When attending these types of theatre performances, who do you most often attend with?	Overall	Classicists	Star Lovers	Talent Spotters	Contemporaries	Explorers	Mainstreamers	Persuadables	Pick and Choosers	Cultural Grazers
Alone	6%	3%	1%	3%	7%	4%	6%	9%	10%	7%
One other adult	29%	27%	40%	24%	23%	31%	25%	36%	26%	29%
Friends or family, including children	24%	26%	32%	26%	20%	33%	20%	17%	31%	25%
Friends or family, not including children	38%	42%	24%	44%	46%	29%	45%	38%	25%	35%
An organised tour / group / club	2%	2%	1%	2%	5%	3%	2%	0%	3%	1%
A school / university group	2%	0%	1%	0%	0%	1%	2%	0%	6%	3%

As stated, it is important to recognise that this or any segmentation system is not based on a ‘magic formula’ but is developed around informed decisions about key characteristics. However, internal cross-referencing demonstrates that the segments seem to be well constructed because there are characteristics that are consistent with what we would expect.

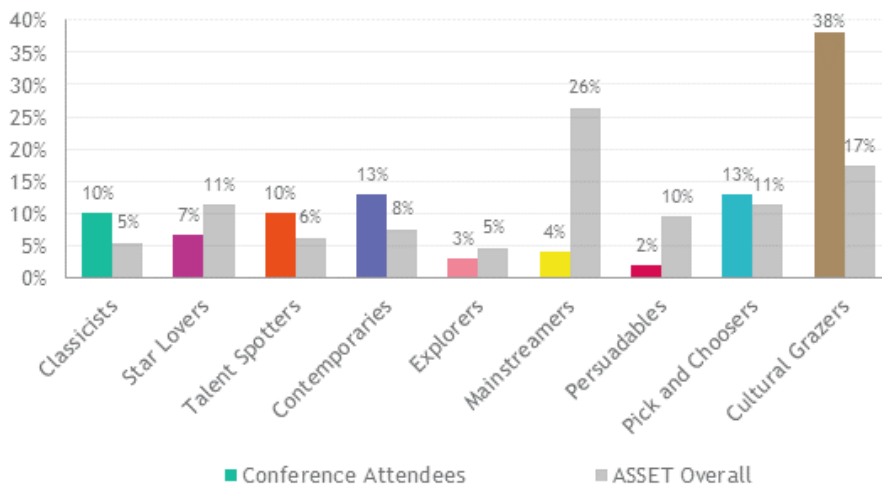
The ‘Explorers’ segment, for instance, has members who are most likely to live locally, have an ‘inner’ motivation for attending and see a relatively wider range of artforms than other segments.

For those who might doubt the distinctions vs. similarities between segments, it is worth showing the ‘on-the-spot’ segmentation that was done for the ASSET conference.¹ For the conference attenders, being largely cultural professionals of one type or another, answering the segmentation questions provided this illuminating result:

¹ The international online conference ‘Theatre Audiences: The Crucial ASSET’ took place on 26–27 May 2021 and was streamed from Prague. Its recording is available on this link: <https://www.youtube.com/watch?v=3tzhZ3zIzLo&t=5s>



In comparing this to the overall ASSET result, we can see how different this set is from the ASSET audiences – a good reminder that cultural professionals are not the same as, and are often quite different from, the public they serve.



Future ASSET

While many theatres, including some in the ASSET project, disappointingly still regard audience research as an ‘added extra’ or ‘nice to have’, there are many who have come to see it for the value and centrality to theatre work it should have. Rather than the description of particular research result findings, it is arguably this that has been the project’s major achievement.

Most of the theatres are now integrating audience research into their ongoing work, and in some places, such as in Austria, the project is expanding to encompass theatres across the country. In some of the larger theatres, where it was possible only to research one part of the audience, there are now plans for exploration of other areas and for extending the research to investigate elements in more depth.

The ASSET project also provided an opportunity to scan the theatre sector within Europe, albeit only in five cities so far. In some places, this was the most extensive piece of audience research ever undertaken and also pointed to the often missing pieces of data about audiences in these cities and countries, which surely has implications for cultural policy. Without proper evidence of the scale and type of public engagement, cultural policy is being formulated without a vital part of the equation.

A further important and perhaps surprising result of the ASSET project was the recognition that the research has implications for elements beyond marketing towards wider organisational issues, including artistic policy. Interestingly, given that some might lead to something reductive, the evidence is quite the opposite, leading to more expansive and creative ideas, made with the knowledge that this is likely to resonate with certain audiences.

There are many possible steps leading on from ASSET, which are being considered by the partnership. These include:

- Expansion within countries to bring in a wider collaboration between theatres
- Development and connection with other artforms within and beyond the performing arts
- Integration and development of new research to understand better the impact of the COVID-19 pandemic and its effect on theatre audiences

- Development of European Theatre Night to become a much more transnational experience in line with the work done by the museum sector
- Follow-up research projects in other countries, beyond the five original participants, to gain a greater understanding of theatre audiences at a European level
- Working with other networks to share and extend the learning of ASSET

As one of the first international projects of its type, ASSET – Audience Segmentation System in European Theatres – has demonstrated how fundamental and important theatre is in our society and how much it is appreciated. It also shows how theatre audiences reflect the societies from which they come, with many differences of interest and approach. There are many different types of engagement and many voices to be heard. The ASSET project goes beyond assumptions and guesses to offer a better understanding of the nature of current and potential audiences for the theatre.

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