Audiences for European Theatre

Study on the Status Quo of

Audience Development and Audience Research

in the European Theatre Convention

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Content

1 Executive Summary

Challenge

„Audiences for European Theatres“ evokes a very homogeneous notion. Yet it is common sense that theatres in Europe are as diverse as European culture. They differ in their institutional organisation and structure, their funding, capacities and resources, their size and program - with one or several performing art genres, their programming either repertory, semi-stagione or ensuite and last but not least their work with or without companies of permanent actors.

Empirical evidence about the situation and audiences of theatres in Europe so far has been rather heterogeneous. In a number of countries associations or other bodies are already collecting data, in numerous countries there are no such structures. In these cases the structure of available data depends on the individual practice of the theatres.

The resulting lack of comparable data on European theatres and their audiences is a major challenge when discussing new tools and measures for audience development for theatres. Which theatres might be comparable? Which trends and patters are similar in the different countries? Despite all their differences they all face a mutual challenge: to contribute to cohesion, tolerance and democracy in changing societies by establishing and strengthening their relationship to existing and new audiences.

The present study of the European Theatre Convention (ETC), performed by the Center for Audience Development (ZAD) at the Freie Universität Berlin, tackles this lack of a unified basis of data and information. It has colluded standardised status quo-information from 24 exemplary theatre organisations from 17 different countries into an insight of the situation and the audience of theatres in Europe. The study cannot claim to give a complete overview of Europe´s theatre landscape. It nevertheless contributes to establishing evidence-based audience development in theatres and thus to innovative and creative development in Europe. The outlined information points to trends and tendencies across national boarders and shall serve as a starting point for future work, offer guidance in developing theatre audiences and be used as benchmark.

Key Figures

Disregarding the large differences between the 24 participating theatres a few general key figures shall give an impression of the theatres represented in this study:

- In the reported season (in general 2011/12, with a few exceptions) the 24 theatre organisations from 17 countries offered 912 productions to the public, out of which 125 (14%) target children and young audiences.
- These theatres staged a total of 8.846 performances, an average of 369 performances per theatre – which amounts to nearly one performance per day throughout the year.

- Most theatres still play in the repertory system (75% of theatres) but host guest performances (a total of 550) and engage in co-productions (a total of 89) to diversify and attract specific audiences. A lot of these guest performances and co-productions are from other European countries, often developed between ETC member theatres.
- When only taking into account venues in regular use the combined number of available seats of all theatre is 29.812. They were offered to a total of 11.523.111 inhabitants in the corresponding inner cities
- Across all theatres visitors amounted to 2.450.026 in the reported season.

Specific audience development activities

Every country or city is shaped by history, leading to specific social, economic and cultural patterns. These patterns shape preferences and habits in culture and leisure activities. To adapt to these pattern and preferences is the one most relevant challenge in audience development. As diverse as the different cities might be there yet seems to have developed a set of strategies and activities that seem to establish relationship to these very diverse contexts.

- In **programming** the most important trends are those towards participative theatre practice (42% of theatres) and towards platforms for developing new playwrights and for emerging directors and actors (25%).
- In the area of **education** activities like workshops and clubs (62%) or lectures, introductions and post-show-talks (38%), outreach activities (29%) and the training of multipliers (29%) are already standard. State-of-the-art theatres are combining sets of activities into packages within strategic partnerships in order to achieve sustainable effects.
- **Marketing** activities are rarely mentioned in the context of audience development – probably in contrast to theatres in Great Britain or the United States. Among the few activities mentioned price reductions and presentations at universities are the most frequently mentioned activities, the latter sometimes combined with a special price scheme for students of that university.

Marketing

A few theatres do not have a marketing budget that they can manage by themselves but depend on decisions in the public administration that they belong to. Still a few figures can sketch the status quo of marketing activities:

- The basic **software** for flexible, targeted marketing (CMS: 67% of theatres, mailing / newsletter: 67%) is widely installed. Software for more elaborated approaches (CRM: 58%) less so.
- While classic **marketing channels** like advertisements and posters still get the largest share of marketing budget, online activities (advertising, website, social

media) are getting more emphasis. (Only one theatre reported a downward trend for the budget of any digital marketing channel.)

- In **social media** all theatres have at least installed a facebook presence. Also youtube and other video platforms are used increasingly (63% of theatres).

Evidence for audience development

- The basis for audience development on the basis of empirical evidence is established in the ETC member theatres as 20 theatres have performed audience research or took the chance of this project to do so. Three theatres have moved on to the next step and have performed or are performing non-/ new-visitor-research.
- About half of the theatres that had already performed audience research had been supplementing quantitative statistics with insight from qualitative research and analysis.
- Information is mostly used for marketing planning (48%) and for reporting to funders (38%). Yet a considerable share of the theatres also used results for programming (33%).

Orientations for Future Activities

- In the second half of 2014 ZAD will integrate the results from audience research in 7 theatres into an in-depth analysis of trends in audiences for European theatres, their structure, motives and patterns of visiting, information, ticketing and general culture and leisure activities.
- The collection of profile information should be repeated in a two-year rhythm facilitated by a user-friendly online interface, facilitated by a provider like ZAD that will also analyse and interpret the data. Thus the picture generated from the first 24 participating theatres would be enlarged to unveil trends and show reasons for development more clearly.
- Basing audience development on evidence rather than on assumptions is a learning process that has started in a number of ETC members. Confidence grows as theatres experience that they can participate in the set up of research, be involved in the analysis and thus get results that answer their specific questions. Therefore the ETC proposes to install a two-year cycle of audience related research, action, and research for assessment.

2 Introduction: Challenges for Theatres in Europe

Societies in Europe are challenged by a number of fundamental developments that will require the engagement and integration of all social groups. Globalisation and the financial/economic crisis since 2008 have led to more economic and social imbalance within societies and between states. This has augmented pressure to lower incomes especially for untrained work, instigated migration both within and from outside the European Union and stimulated the resurgence of nationalism, inherited confrontations and ethnical tensions.

It is a commonplace that in the face of these challenges – along with sound economic development, political stability and legal certainty – culture plays a crucial role in strengthening civic societies based upon responsibility, engagement and tolerance.

To do so has become even more relevant in the face of digital revolution, be it web 1.0 or 2.0. In many instances it has led to even more segmentation and orientation towards the self, the group of peers and their specific interests. Yet empirical evidence suggests that in parallel to the increasing importance of the worldwide web as a space for communication and discourse the physical encounter and direct personal communication is maintaining or regaining importance. When it comes to relevant topics, individuals seem to feel a need to meet with people they trust in a physical space where they can see something "real", get impulses for the topics that move them, talk about them in personal communication and experience integration and the impact of one's opinions and actions.

Among the Arts especially the Performing Arts and theatres see themselves in a tradition of platform for this kind of exchange and reflection, both privately and on a more general public level.

On the other hand cultural organisations all over Europe in the last two decades have been called into question: Do they really reach the general public, contributing to the development of democratic societies? Or do they rather serve a small elite only, having no relevance for the solution of the above-mentioned challenges to societies of today? In order to contribute to the development of civic and democratic societies in Europe it thus seems to be critical for Theatres to maintain and strengthen bonds with a broad cross-section of society. This is the pledge of audience development, the perhaps most widely used and debated notion of Arts Administration in the last years.

While the challenges to society and in this context to theatre are felt throughout Europe it remains uncertain whether the preconditions can be generalised all over Europe. If societies are rather characterised by specific traits that have in turn shaped theatre structures and the preferences and habits of the public towards the theatre: Can there be strategies that are apt for all these different situations? How can theatres learn from the practice and experiences other theatres in other European countries make?

In this situation the European Theatre Convention (ETC) took the initiative to investigate whether there are common patterns in the relationship between theatre and the public in Europe. How comparable are the offers to the audiences, what strategies and actions are taken in the main areas of audience development - programming, education, marketing and communications, ticketing and research? What impact do these strategies have in building relationships between the theatres and the audience in the very diverse cultural settings? How can theatres edit information in a way that makes their experience available and formatted for others, preparing the ground for comparison and adoption?

To set standards and to gain insight into these questions the ETC commissioned an integrated study by Center for Audience Development (ZAD) at the Institute for Arts and Media Management of Freie Universität Berlin. Within a broad research program the ZAD set out to collect a profound status quo of infrastructure and activities in audience development in autumn 2013 on the one hand and on the other hand performed audience research in seven member theatres between November 2013 and May 2014 to evaluate in depth the relationships between the individual theatres and their audience.

While there have been efforts to compare this kind of information in smaller groups of theatres the initiative of the ETC is the first to tackle the lack of systematic information on audience development in theatres on a European level. Including its 38 theatres in 22 European countries, it will build a common ground of information and shared practise in audience development. Combining the data and experiences from public drama theatres and theatres that offer several genres of Performing Arts, it will provide a framework for the exchange of information and an overview of the strategies and tools for European theatres to address the similar yet always specific challenges in their societies.

3 The Study

As sketched above the study performed by ZAD consisted of two parts: The first part set a structure of information on infrastructure and activities that are relevant for the assessment of audience development and then collected the status quo in the ETC member theatres. The second part introduced state-of-the-art audience research in selected member theatres. This included both theatres that due to lack of resources or to historical development were not able to perform research before and theatres that already had performed research, enabling them to compare between the new and the prior studies.

This report presents the result from the first part on infrastructure and activities (Level 1&2, as described below). The results from the second part, integrating the results from analysis and interpretation of research in partner theatres, are presented in a second report.

3.1 Level 1&2: Collecting the Status Quo

For the assessment of the conditions and activities in audience development the ZAD defined a set of information on the theatres to be collected from all ETC member theatres. The definition of relevant information combined data that other bodies like the German association of public theatres and orchestras (Deutscher Bühnenverein) collect and factors that were identified by ZAD in its studies to be relevant for the success of audience development in numerous prior studies on a smaller scale. On the basis of this set of information the ZAD designed a questionnaire with the following modules (see annex):

Level 1

Data on the supply side:

- Inhabitants of the city and region as indicators for the potential audience
- Total number of seats in regularly played venues as indicator for the volume of supply
- Type of programming (Distribution of productions and performances across genres and distribution between own productions, co-productions and presented guest performances)

Data on the audience:

- Total number
- Distribution across genres
- Distribution between own productions, co-productions and presented guest productions
- Distribution in three basic socio-demographic indicators (age, gender, education)

Level 2

Data on ticketing and pricing

- Distribution across points of sale
- Range of ticket prices
- Distribution across tickets at full price, reduced price and free of charge

Data on Marketing

- Distribution of budget across communication channels
- Use of social media channels
- Software for CMS, Mailing and CRM

Data on specific audience development activities

- Description of activities
- Frequency, key target groups, number of participants

Data on audience research

- Type of research
- Research subjects
- Research methods
- Type of analysis and use of results

The questionnaire was distributed to all 38 members of the ETC. As it was foreseen that in a number of theatres the collection and use of this kind of data was not or not completely common practise the ZAD offered to support each theatre in completing the questionnaires on demand. This offer was repeated in two reminder mailings. Support was given to 11 theatres. 24 member theatres from 17 countries have returned completed questionnaires.

Some theatres could not provide all of the information. Where this is the case, the abbreviation “n.a.” (not available) is used in the tables. Otherwise all information given by the theatres is captured in a comprehensive excel file. This file will be made available to all ETC member theatres. It can thus serve as a point of reference for members that are looking for a specific expertise or for a comparison with patterns and activities in other theatres.

The rate of participation and the difficulties in completing the questionnaires show that a substantial share of theatres is not prepared to provide this information in their present organisational practice. As the information is nevertheless essential to assess the theatres’ status quo and their options for action it is one recommendation this project that the collection of this information should be turned into in a regular, maybe biennial standard procedure. While the capturing of the data can be standardised to a certain extent the analysis should each time be done by an external expert that can identify common trends and relate them to European and global development within theatre, within the Arts and within economy and society.

This report presents an overview and analysis of the data collected from the 24 theatres that have submitted their information. For the sake of clarity not all information submitted will be presented. Especially texts on the practice of audience development will be shortened to headers that give a short impression, inviting a more profound lecture in the comprehensive table. The structure of the audience will be treated with greater depth when the data from research in level 3 and 4 is analysed.

3.2 Procedure in Level 3 & 4

In order to select the member theatres where exemplary research was to be performed the ETC made a call for participation amongst its member, inviting theatres that were interested to gain expertise, know-how and training to elaborate and implement tailor made audience development strategies. Seven ETC member theatres decided to participate in this exemplary audience research. This included quantitative audience research with standardised, mostly quantitative questionnaires and a mostly qualitative in-depth analysis on a research topic or target groups with specific relevance for the individual theatre.

Mutual Steps

The participating theatres were invited to a preparatory workshop in Berlin on the 29.05.2013. In this workshop the cornerstones of the methodological procedure and the distribution of tasks were presented to the theatres. The ZAD then collected the topics the different theatres wanted to inquire. Thus the questions for the audience survey were developed from the specific requirement of participating theatres, of course taking into account the experience of ZAD.

From these informational requirements ZAD developed at catalogue of questions (see annex). The catalogue was grouped into modules:

- Socio-Demographics
- Visiting Behaviour
- Patterns of cultural and leisure activities
- Communication and ticketing
- Expectations / Satisfaction / Suggestions
- Image

Each module contained core questions, which the ZAD suggested to be used in the same way in all of the theatres, and a set of complementary questions. From these complementary questions the individual theatres could choose additional questions. These were included in the questionnaire for this house in order to analyse an area of specific interest more thoroughly. The selected questions were then put into a layout provided by the ZAD and translated by the theatres.

A specific focus of the combined analysis of quantitative and qualitative research will be to evaluate the relevance and impact that European theatre, specifically in the form of inviting artists, hosting guest productions and co-producing performances has on audience development.

The ZAD visited each theatre for the test run of the survey and enabled the staff that distributes the questionnaires personally. To secure quality standards and representivity it attended the first distributions personally.

The research had to be oriented on the individual scheduling of seasons in the different theatres. For this reason, combined with the necessity of personal attendance to the test run the research in the theatres started over a period of two months from November to December 2013. The results are presented in a second report. As an outlook an overview of the specific research fields can be given:

Theater Dortmund, Germany

Test run: 18./19.10.2013

Survey finished: 31.01.2014

Focus for qualitative in-depth research:
What image do student and citizens with migrant background have of Theater Dortmund? How does the theatre itself perceive its positioning and activities towards these target audiences?

Method: Qualitative Interviews with visitors and non-visitors from these target groups, juxtaposed with interviews with theatre staff responsible for the strategy and activities towards these target groups.

Teatri Kombetar Tirana, Albania

Test run: 8./9.11.2013

Survey finished: End of March 2014

Focus for qualitative in-depth research:
How does the theatre contribute to society-building and the reflection of post-communist cultural development.

Method: Focus group discussions with audiences and participants of audience development activities aimed at developing new productions and emerging artists from the Performing Arts scene in Albania.

Theatre Organisation of Cyprus Nicosia, Cyprus

Test run: 15./16.11.2013

Survey finished: End of March 2014

Focus for qualitative in-depth research:
How to secure the theatre’s future audiences by developing formats for students and communication strategies for young families.

Method: Focus group discussions with students and young female persons between 25 and 40 (the “decision-makers”).

Théâtre des Osses Givisiez, Switzerland

Test run: 22./23.11.2013

Survey finished: End of January 2014

Focus for qualitative in-depth research:
How to develop new audiences within young adults and young families in order complement the very loyal but ageing existing audience?

Method: Focus group discussions with young adults and people living in families with young children.

z/k/m/ Zagreb, Croatia

Test run: 27./28.11.2013

Survey finished: End of February 2014

Focus for qualitative in-depth research:
Developing a safer ticketing basis for contemporary theatre in the face of multi-optional and short-term decision pattern.

Method: Qualitative interviews with young visitors and non-visitors combined with a job analysis of the department for marketing and sales.

Teatrul National Timisoara, Romania

Test run: 14.12.2013

Survey finished: Mid of March 2014

Focus for in-depth research:
Assessing the success of broadening the audience towards a more diverse audience – including classical theatre goers – and educating the audience to develop a deeper interest in contemporary theatre aesthetics.

Method: Combine the new research with two prior researches into a longitudinal analysis.

De Toneelmakerij Amsterdam, Netherlands

Test run: scheduled for 23.03.2014

Survey finished: to be confirmed

Focus for in-depth research:
Understand the decision-making process for theatre for younger audiences.

Method: Qualitative interviews with parents, teachers and theatre programmers.

4 The “Supply Side”: Infrastructure and Programming

4.1 Seats

The most fundamental offer that theatres make to the public are the stages where the theatres show performances and the seats for visitors to watch them. Thus the total number of seats in the venues where the theatres usually play are used as a general indicator for the level of offer to the public. The analysis of this figure also is important because it is frequently used as a central factor in economically oriented analysis of the cultural sector.

In the interpretation of these figures one has to keep in mind that some theatres play in stages like city halls on a quite irregular basis. All of these halls are nevertheless included as it was impossible to make an objective decision which to include and which not.

In addition to the number of seats the relation between the number of seats and the number of inhabitants of the cities where they are located is a central measure for the level of “supply”. Therefore the following table also includes the ratio of seats per 1.000 inhabitants in the corresponding city centres and the ratio of seats per 1.000 inhabitants within a radius of 80 km[1]. If there are considerable differences in these ratios there probably are other factors than the numerical market structure that are relevant in determining the size of venues used.

The following table divides the theatres into three classes: type A - theatres that have a more or less average ratio between 2 and 5 seats per 1.000 inner city inhabitants (5 is the average ratio across all participating theatres), type B – theatres where this ratio is well above the average and type C – theatres that are small compared to the number of inner city inhabitants. The theatres are thus ordered into type A, B and C, and within these types in declining total numbers of seats.

[1] From research on tourism pattern it is known that 80 km is a very simple and valid proxy for the distance covered at maximum for day trips. Also it is a distance that you may cover easily enough to return after visiting a theatre performance in the evening.

	Seats in regularly used stages	Inhabitants in Inner City	Ratio Seats/1000 Inhabitants Inner City	Inhabitants in 80 km distance	Ratio Seats/1000 Inhabitants in 80 km distance
Type A: Average Size relative to City					
Theatre Finland Helsinki	2.645	610.600	4,3	1.160.000	2,3
Staatstheater Karlsruhe	1.587	300.000	5,3	934.000	1,7
Serbian National Theatre Novi Sad	1.431	360.000	4,0	n.a.	n.a.
Slovak National Theatre Bratislava	1.475	462.600	3,2	1.162.000	1,3
MESS Sarajevo	1.220	500.000	2,4	n.a.	n.a.
Det Norske Teatret Oslo	1.188	630.000	1,9	1.900.000*	0,6
Teatrul National Timisoara	900	320.000	2,8	650.000	1,4
TeatroDue Parma	870	185.000	4,7	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	704	302.601	2,3	618.335	1,1
Theatre Organisation of Cyprus, Nicosia	703	238.574	3,0	890.000*	0,8
Montenegrin National Theatre Podgorica	432	187.085	2,3	408.409	1,1
National Theatre of Kosovo	321	187.000	1,7	1.200.000	0,3
Théâtre des Osses, Givisiez	210	37.300	5,6	300.000	0,7
Type B: Large Size relative to City					
Theater Dortmund	4.097	570.000	7,2	8.000.000	0,5
Staatstheater Braunschweig	3.147	251.000	12,5	2.175.731	1,4
Theater Heidelberg	2.920	148.415	19,7	2.309.815	01,3
Theatres de la Ville, Luxembourg	1.476	94.034	15,7	537.875	2,7
Slovensko Narodno Gledališče Maribor	1.450	107.801	13,5	500.000	2,9
Slovensko Narodno Gledališče Nova Gorica	478	36.000	13,3	120.000	4,0
Type C: Small Size relative to City					
Deutsches Theater, Berlin	1.025	3.500.000	0,3	5.500.000	0,2
Theater an der Parkaue Berlin	614	3.500.000	0,2	5.500.000	0,1
Teatri Kombëtar Tirana	550	895.000	0,6	1.800.000	0,3
z/k/m/ Zagreb, Croatia	369	790.017	0,5	1.099.713	0,3
De Toneelmakerij, Amsterdam	Not applicable (touring company)	810.084	Not applicable	1.100.000*	Not applicable

n.a. : Information not available   * figure based on research by ZAD

Table 1: Seats in relation to population

- The data on basic infrastructure reveals no clear pattern. The ratio of offered seats to the population differs within a broad range.
- The size and number of venues obviously is only partly a result of considerations about the market potential measured by inhabitants. Instead they seem to reflect other decisions – artistic, historical, social or political. Especially prominent is the trend to play on more and more stages of different sizes in order to accommodate different kinds of productions for specific audiences with often limited selling prospects. Some of these patterns will be pointed out while discussing the further data.
- Thus arguments in cultural policy that try to apply simple economic rules to the planning and assessment of cultural infrastructure should be resisted.

4.2 Type of programming

The next central characteristic of a theatre's offer to the public is the program: which genres does a theatre offer to the public, how many productions and performances do they show and do they show them in a repertory changing from day to day, in small series (semi-stagione) or in long blocks (ensuite).

	Type of Program	Drama		Opera		Ballet / Dance		Concerts		Operettes & Musicals		Children & Youth Th.		Other Formats	
		Prod	Perf.	Prod	Perf.	Prod	Perf.	Prod	Perf.	Prod	Perf.	Prod	Perf.	Prod	Perf.
Type A: Average Size relative to City															
Theatre Finland Helsinki	Repertory	23	608	0	0	4	36	0	0	4	125	6	110		59
Staatstheater Karlsruhe	Repertory	27	392	23	143	6	52	50	50	Incl. in Opera		17	213	0	0
Serbian National Theatre Novi Sad	Repertory	26	157	8	25	9	36	0	0	0	0	0	0	0	0
Slovak National Theatre Bratislava	Repertory	35	459	0	0	0	0	0	0	0	0	0	0	0	0
MESS Sarajevo	Festival	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Det Norske Teatret Oslo, Norway (2012)	Repertory	25 (with Musical)		0	0	0	0	0	0	Incl. in Drama		5	n.a.	0	0
Teatrul National Timisoara	Repertory/ Semi-Stagione	15	193	0	0	0	0	0	0	0	0	0	0	0	0
TeatroDue Parma	Semi-Stagione	39	372	0	0	3	9	7	7	0	0	0	0	0	0
Teatrul National "Marin Sorecu" Craiova	Stagione	24	743	0	0	0	0	0	0	0	0	0	0	0	0
Theatre Organisation of Cyprus, Nicosia	Repertory	10	198	0	0	0	0	0	0	0	0	3	218	0	0
Montenegrin National Theatre Podgorica	Repertory	5	111	0	0	0	0	n.a.	72	0	0	0	0	0	0
National Theatre of Kosovo, Prishtina	Repertory	8	234	0	0	Incl. in Drama		0	0	0	0	0	0	0	0
Théâtre des Osses, Givisiez	Ensuite	5	151	0	0	0	0	0	0	0	0	0	0	4	8
Type B: Large Size relative to City															
Theater Dortmund	Repertory/ Semi-Stagione	25	270	13	137	4	45	28	42	0	0	11	155	0	0
Theater Braunschweig	Repertory	23	125	8	64	4	46	0	0	3	17	0	0	30	30
Theater Heidelberg	Repertory	46	258	15	74	1	10	37	48	0	0	31	225	17	29
Theatres de la Ville, Luxembourg	Repertory/ Semi-Stagione	26	66	7	20	23		0	0	11	16	0	0	0	0
Slovensko Narodno Gledališče Maribor	Repertory	21	285	18	124	Included in Opera		0	0	0	0	0	0	0	0
Slovensko narodno gledališče Nova Gorica	Repertory/ Semi-Stagione	7	185	0	0	0	0	0	0	0	0	0	0	0	0
Type C: Small Size relative to City															
Deutsches Theater, Berlin	Repertory	26	790	0	0	0	0	0	0	0	0	5	Incl. in Drama	0	0
Theater an der Parkaue Berlin	Repertory	0	0	0	0	0	0	0	0	0	0	41	448	0	0
Teatri Kombëtar Tirana	Semi-Stagione	5	16	0	0	0	0	0	0	0	0	0	0	0	0
z/k/m/ Zagreb	Repertory	29	289	0	0	0	0	0	0	0	0	0	0	0	0
De Toneelmakerij, Amsterdam	Ensuite	0	0	0	0	0	0	0	0	0	0	6	251	0	0

n.a. : Information not available

Table 2: Productions and Performances per Genres

- A bit less than two third of the member theatres participating in the project were only offering drama. The remaining third offers other genres also.
- The large theatres in type B are mostly theatres offering three or more genres. Historically, these houses are meant to be centres of cultural life in their cities. Therefore the large number of stages and seats reflect the intention to provide suitable infrastructure for the different genres.
- ETC member theatres that participated in the project mostly still adhere to playing classical repertory theatre sometimes mixed with semi-stagione. The latter is often used for co-productions or guest performances. It is interesting that this programming type persists albeit the higher costs due to the need for more technical staff.

In the last decades theatres have been asked for more co-operations and exchange between theatres. This is meant to diversify program and a faster exchange of ideas between different cultural spheres. Therefore we also analyse which role guest performances and co-productions play in the program of participating theatres.

		Own Productions		Co-Productions		Presenting		Touring	
		Prod.	Perf.	Prod.	Perf.	Prod.	Perf.	Prod.	Perf.
Type A: Average Size relative to City									
Theatre Finland Helsinki	Producer / Presenter	37	938	3	8	37	938	5	31
Staatstheater Karlsruhe	Producer	35	850	1	12	40	50	11	19
Serbian National Theatre Novi Sad	Presenter / Producer	43	218	3	16	85	260	17	17
Slovak National Theatre Bratislava	Producer / Presenter	35	459	0	0	23	23	16	19
MESS Sarajevo	n.a.	n.a.	n.a.	2	n.a.	n.a.	n.a.	n.a.	n.a.
Det Norske Teatret Oslo	Producer	28	1033	5	65	6	15	4	110
Teatrul National Timisoara	Producer	14	184	1	9	0	0	11	n.a.
TeatroDue Parma	Producer	18	274	2	64	0	0	9	108
Teatrul National “Marin Sorecu” Craiova	Producer	9	184	0	0	0	0	n.a.	15
Theatre Organisation of Cyprus, Nicosia	Producer	12	412	0	0	2	9	11	156
Montenegrin National Theatre Podgorica	Presenter / Producer	5	111	2	n.a.	167	111	n.a.	12
National Theatre of Kosovo Prishtina, Kosovo	Producer	8	234	0	0	0	0	n.a.	15
Théâtre des Osses, Givisiez	Presenter / Producer	3	90	0	0	2	35	2	26
Type B: Large Size relative to City									
Theater Dortmund	Producer	81	649	1	n.a.	7	n.a.	n.a.	n.a.
Theater Braunschweig	Producer (partly Presenter)	63	615	4	21	33	46	13	20
Theatres de la Ville, Luxembourg	Producer (partly Presenter)	127	637	0	0	14	26	7	7
Theatres De La Ville Luxembourg	Presenter / Co-Producer	11	42	25	54	37	62	7	24
Slovensko Narodno Gledališče Maribor	Producer / Presenter	27	409	3	13	30	30	18	70
Slovensko narodno gledališče Nova Gorica	Producer / Presenter	6	114	1	71	10	12	6	88
Type C: Small Size relative to City									
Deutsches Theater, Berlin	Producer	23	790	3	Incl. in own prod	0	0	n.a.	44
Theater an der Parkaue Berlin	Producer	29	n.a.	20	n.a.	0	0	n.a.	59
Teatri Kombëtar Tirana	Presenter	5	16	0	0	28	28	2	2
z/k/m/ Zagreb	Presenter / Producer	14	192	15	97	29	289	17	37
De Toneelmakerij, Amsterdam	Producer	6	251	0	0	0	0	6	251

n.a. : Information not available

Table 3: Productions and Performances per Type of Production

- In most ETC member theatres the own productions still make the largest contribution to the program.
- Even in theatres that show a lot of guest performances these often contribute fewer performances to the program than the own productions. This is especially true for the large theatres. (Here, guest performances contribute between 5 and 10% of productions.)
- Most probably this is due to the fact that usually guest performances can only be shown in limited series of a few days in a row.
- Co-productions are adding more substance (as per performances) to the program than guest performances.
- Even in big houses like Théâtres de la Ville, Luxembourg, or the Slovene National Theatre Nova Gorica that invite relatively numerous guest performances, the majority of performances still are own productions.
- In the theatres of type A the share of guest performances is higher, but they rarely outweigh the own productions.
- Only among the theatres of type C (small houses in comparison to population) one finds two houses – Teatri Kombetar Tirana and z/k/m/ Zagreb – that provide the largest part of their performances with guest performances.
- The questionnaire did not distinguish whether the guest performances or co-productions were done with partners from the own country or from another country. From close contact with theatres in the levels 3 &4 it is obvious though that many of these activities are undertaken with partners from other European countries. Quite frequently these partners are also part of ETC. Thus the personal contact in this European network provided the opportunities and impulses to form project-based collaboration that answer the desire of audiences to be presented with state-of-the-art impulses from other theatres and countries.
- There will be a specific focus on the relevance of these transnational activities in the overall analysis of the results from levels 3 & 4.

4.3 Preliminary Conclusions on Infrastructure and Programming

The analysis of infrastructure and programming reveals that it is difficult to establish general patterns. There is a wide range and diverse mixtures of types of infrastructure and programming. These mixtures can only partly be explained from market structures but rather from political, cultural and social traditions. The diversity in programming and the growing number of venues reflect the effort of theatres to provide diverse performances to the different audience segments that the performing arts are encountering. The next section will give an insight into how the types of infrastructure and programming are reflected in the human and financial resources of theatres.

5 Resources

After having analysed the infrastructure and the program of the theatres participating in the survey we shall shortly regard the level and distribution of resources. Sufficient staff and financial resources obviously are the precondition of addressing audience development strategically. The first focus is on staff.

	Overall		Artistic		Technical		Marketing & Fundraising		Education		Administration	
	fixed	free-lance	fixed	free-lance	fixed	free-lance	fixed	free-lance	fixed	free-lance	fixed	free-lance
Type A: Average Size relative to City												
Theatre Finland Helsinki	241	162	197	n.a.	161	n.a.	0	0	1	1	45	n.a.
Staatstheater Karlsruhe	649	223	250		263	0	Incl. in admin.		4	4	86	0
Serbian National Theatre Novi Sad	579	0	283	0	225	0	40	0	0	0	51	0
Slovak National Theatre Bratislava	179	196	70	190	74	0	27	6	2	0	6	0
MESS Sarajevo	7	250	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Det Norske Teatret Oslo	552	0	187	0	184	0	9	0	1	0	171	0
Teatrul National Timisoara	82	87	21	n.a.	42	n.a.	0	n.a.	0	0	11	n.a.
TeatroDue Parma	15	126	76	n.a.	51	n.a.						14
Teatrul National “Marin Sorecu” Craiova	121	0	40	0	41	0	0	0	0	0	40	0
Theatre Organisation of Cyprus, Nicosia	85	18	26	17	31	0	2	0	0	0	26	1
Montenegrin National Theatre, Podgorica	136	0	32	0	64	0	2	0	0	0	38	0
National Theatre Of Kosovo	65	0	23	0	21	0	3	0	0	0	18	0
Théâtre des Osses, Givisiez	11	45	1	28	2	16	0	0	2	0	6	2
Type B: Large Size relative to City												
Theater Dortmund	512	349	293	n.a.	191	n.a.	6	n.a.	5	n.a.	22	n.a.
Staatstheater Braunschweig	514	421	262	421	103	0	6	0	3	0	15	0
Theater Heidelberg	291	110	158	110	90	0	6	0	5	0	32	0
Theatres de la Ville, Luxembourg	70	2	0	0	52	2	0	0	0	0	18	0
Slovensko Narodno Gledališče Maribor	320	156	189	134	108	22	6	0	0	0	17	0
Slovensko narodno gledališče Nova Gorica	78	42	30	20	39	0	2	0	0	0	7	0
Type C: Small Size relative to City												
Deutsches Theater Berlin	283	61	105	58	149	3	3	0	2	0	24	0
Theater an der Parkaue Berlin	85	120	41	n.a.	34	n.a.	2	n.a.	5	n.a.	3	n.a.
Teatri Kombëtar Tirana	64	0	32	0	23	0	1	0	0	0	9	0
z/k/m/ Zagreb	116	2	35	0	31	1	5	0	12	0	32	1
De Toneelmakerij, Amsterdam [2]	26	70	7	30	4	9	5	0	4	20	1	0

n.a. : Information not available

Table 4: Fixed and Freelance Staff – Overall and per Function

- Regarding the total number of staff there is a clear relation between size, measured in seats, and staff: The higher the number of seats, the larger the staff. The same is true for the artistic staff. Yet there are substantial differences in the distribution between fixed and freelance artistic staff, hence the decision to work with a large fixed ensemble or to have a smaller fixed ensemble and more freelance artists hired for specific productions.

[2] The number of staff has since been reduced substantially because of budget cuts by the federal government.

- Here one again encounters unexpected oscillations: Some typical German repertory theatres like Theater Heidelberg or Deutsches Theater Berlin work with a large part of freelance artists and contemporary, while a flexible theatre like z/k/m/ – apart from its guest performances – works only with fixed artists due to working law regulations.
- Theatres in Helsinki, Novi Sad and Podgorica show that the supposition that guest performances are used to reduce artistic staff does not hold as a general rule. Yet there is a tendency for theatres that primarily are producers to have larger fixed artistic staff.
- Not surprisingly theatres offering more genres tend to have a larger artistic staff.

	Total Budget / Turnover	Individual Ticket Sales	Sub-scriptions	Other Earned Income	Public Funding	Sponsoring	Other Third Income
Type A: Average Size relative to City							
Theatre Finland Helsinki	9.956.000 € (down)	8.720.000 € (down)	12.024.000 € (down)	n.a.	n.a.	n.a.	n.a.
Staatstheater Karlsruhe	44.000.000 € (Up)	5% (Up)	4% (Equal)	4% (Down)	90% (equal)	<1%	<1%
Serbian National Theatre Novi Sad	265.892 € (Up)	53% (Up)	0	20% (Down	21% (Down)	0	0
Slovak National Theatre Bratislava	2.450.000 € (Up)	51% (Down)	1% (Down)	4% (Equal)	38% (Up)	0	8% (Up)
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Det Norske Teatret Oslo	24.000.000 €	20%	0	5%	n.a.	ca. 1%	0
Teatrul National Timisoara	2.313.018 € (Down)	2% (Up)	0	1% (Up)	97% (Down)	0	0
Teatro Due Parma	3.211.940 €	20% (Equal)	10% (Up)	0	65% (Down)	6% (Equal)	
Teatrul National “Marin Sorecu” Craiova	1.484.574 € (11/12), 901.186 € (12/13) (Down)	5% (2012) (Down)	Included in Individual Ticket Sales	10% (2012) (Down)	83% (2012) (Down)	2% (2012) (down)	<1% (2012) (Down)
Theatre Organisation of Cyprus, Nicosia	20.112.235 € (Down)	1% (Up)	<1% (Up)	<1% (Up)	98% (Down)	<1% (Up)	-
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
National Theatre Of Kosovo	1.128.004 €	1%	0	2%	97%	0	0
Théâtre des Osses, Givisiez	1.890.000 € (Equal)	9% (Down)	3% (Down)	21% (Down)	50% (Up)	0	18% (Equal)
Type B: Large Size relative to City							
Theater Dortmund	39.532.437 €	8%	2%	1% (Up)	88% (Up)	1% (Down)	-
Staatstheater Braunschweig	32.354.000 € (Equal)	7% (Equal)	2% (Equal)	4% (Equal)	85% (Up)	2% (Up)	0% (Up)
Theater Heidelberg	8.063.316 € (Up)	22% (Up)		2% (Up)	72% (Up)	4% (Up)	0% (Up)
Théâtres de la Ville Luxembourg	16.000.000 €	10 %	0	2%	88%	other earned incom	0
Slovensko Narodno Gledališče Maribor (2012)	13.114.328 € (Down)	not applicable	not applicable	not applicable	89% (Down)	2% (Down)	<1% (Up)
Slovensko narodno gledališče Nova Gorica	3.100.000 € (Down)	3% (Equal)	3% (Equal)	9% (Equal)	85% (Down)	0	0
Type C: Small Size relative to City							
Deutsches Theater, Berlin	28.730.000 € (up)	9% (Up)	<1% (Equal)	4%	82%	0	3%
Teatri Kombëtar Tirana	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theater an der Parkaue Berlin	6.114.120 € (Up/Equal)	9% (Equal)	999	<1%	87%	<1%	4%

z/k/m/ Zagreb	n.a.	4%	3%	12%	n.a.	n.a.	8%
De Toneelmakerij, Amsterdam[3]	2.722.118 €	<1%	0	16%	n.a.	0	5%

n.a. : Information not available

Table 5: Budget – Total and Share per Type of Income

- Total budget figures obviously reflect differences in wealth and income rather than the size of infrastructure – to be seen in midsize theatres like the Theatre Organisation of Cyprus in Nicosia or Det Norske Teatret in Oslo whose budget is ten- or twentyfold the one of theatres of equal size in Timisoara or Craiova.
- Albeit all pressure on cultural organisations to earn more money via ticket sales there are still 11 theatres with more than 80% public funding. Another one, the Teatri Kombetar Tirana, presumably also belongs to this group as it is a direct part of public administration.
- Three of these in South-Eastern Europe are even close to 100% – often forced by large portions of tickets handed out for free because of political considerations.
- Only five theatres have a smaller percentage of public funding than 80%, out of which Heidelberg is not far down from that (72%), three 50% or less.
- It is interesting that the two theatres with the largest share of income from individual ticket sales (Bratislava and Novi Sad) are not located in very affluent regions.

5.1 Preliminary Conclusions on Resources

As in the section on infrastructure and program the figures show that the structures that can be discovered are rather a result of specific organisational strategies, legal regulations, overall monetary prosperity or political decisions. Only in some occasions the structure of staff might result from considerations about the program structure that in turn might be aimed at developing new audiences.

[3] The size of budget has since been reduced substantially because of cuts by the federal government. Thus also the budget structure has changed since.

6 Audiences

Having discussed the difficulty to identify general patterns in the relationship between the audience potential and basic characteristic of the ETC member theatres we now turn to the audiences.

6.1 Total visitors

The first step is analyse to the number of total visitors. Once again the absolute figure is put into relation with the population in the inner city and the population within a radius of 80 km. The theatres are ordered in declining total numbers of audiences.

Theatre	Total visits	Ratio visits/1000 Inhabitants Inner City	Ratio visits/1000 Inhabitants 80 km
Theatre Finland Helsinki	326.000 (Down)	530	281
Staatstheater Karlsruhe	276.616 (Up)	922	111
Det Norske Teatret Oslo	223.491 (down)	355	117
Theater Dortmund	221646 (Up)	389	28
Theater Braunschweig	165.825	661	76
Deutsches Theater, Berlin	163.866	47	30
Slovensko Narodno Gledališče Maribor	144.403	1340	289
Theater Heidelberg	117.477	793	51
Théâtres de la Ville Luxembourg	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	134700	291	116
Theater an der Parkaue Berlin	96.268 (Up)	28	18
Theatre Organisation of Cyprus, Nicosia	94.004 (Down)	394	106
Teatro Due Parma	69716 (Equal)	377	n.a.
Serbian National Theatre Novi Sad	65953	183	n.a.
Slovensko narodno gledališče Nova Gorica	56888	4218	474
De Toneelmakerij, Amsterdam	55.749	Touring company	
z/k/m/ Zagreb	47732	60	43
Montenegrin National Theatre, Podgorica	41497	222	102
Teatrul National "Marin Sorecu" Craiova	37515	124	61
Teatrul National Timisoara	35632	111	55
Teatri Kombëtar Tirana	25300	28	14
National Theatre of Kosovo	17447	93	15
Théâtre des Osses, Givisiez	17304	464	58
MESS Sarajevo	12000	24	n.a.

n.a. : Information not available

Table 6: Audience – Total and Relation to Population

- Turning from infrastructure to the number of visitors changes the ranking considerably.
- The big houses with several genres tend to draw rather large audiences. As the different genres usually are attractive for slightly different target groups these houses might be able to cover a larger part of tastes with their program.
- This view is supported by the ratio of visitors to inhabitant: The theatres with several genres tend to have a higher ratio, indicating more frequent visits from the potential audience. This is especially true for the inner city, with respect to the population in the region the picture is less clear.
- Three houses in type C – Deutsches Theater, Theater an der Parkaue and z/k/m/ – manage to profit from the large potential audience and mount up in the ranking.

6.2 Visitors per Genre

	Drama	Opera	Ballet / Dance	Concerts	Operettes & Musicals	Children & Youth Th.	Other Formats
Theatre Finland Helsinki	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Staatstheater Karlsruhe (in brackets: visitors 12/13)	41.314 (55.987)	74.458 (86.290)	47.519 (47.147)	39.999 (37.333)	74.458 (86.290)	38.147 (35.023)	4.046 (46.21)
Det Norske Teatret Oslo, Norway	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theater Dortmund	46.691 (Up)	70.766 (Equal)	27.188 (Up)	34.731 (Equal)	0	32.320 (Equal)	9.950 (n.a.)
Theater Braunschweig	25.000 (Up)	8.000 (Equal)	11.645 (Equal)	40.043 (Equal)	10.668 (Equal)	38.824 (Equal)	20.390 (Equal)
Deutsches Theater, Berlin	163.866	0	0	0	0	0	0
Slovensko Narodno Gledališče Maribor	44.285 (Up)	100.118 (Up)	0	0	0	0	0
Theater Heidelberg	31.308 (Up)	28.934 (Up)	4.959 (Up)	26.551 (Equal)	0	35.902 (Up)	7.603 (Equal)
Theatres de la Ville, Luxembourg	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theater an der Parkaue Berlin	99.265 (Up)	0	0	0	0	0	0
Slovak National Theatre Bratislava	134.700 (Down)	0	0	0	0	0	0
Theatre Organisation of Cyprus, Nicosia	35.200 (Down)	0	0	0	0	58.805 (Down)	0
TeatroDue Parma	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Serbian National Theatre Novi Sad	33.387 (Up)	13.072 (Up)	19.494 (Equal)	0	0	0	0
Slovensko narodno gledališče Nova Gorica	56.888 (Down)	0	0	0	0	0	0
De Toneelmakerij, Amsterdam	0	0	0	0	0	0	55.749
z/k/m/ Zagreb	47.732	0	0	0	0	0	0
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	37.515 (Equal)	0	0	0	0	0	0
Teatrul National Timisoara	35.632 (Up)	0	0	0	0	0	0
Teatri Kombëtar Tirana	25.300 (Down)	0	0	0	0	0	0
National Theatre of Kosovo	17.447	0	0	0	0	0	0
Théâtre des Osses, Givisiez	17.304 (Down)	0	0	0	0	0	0
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

n.a. : Information not available

Table 7: Audience per Genres

- Splitting the audience into genres shows that the assumption about the reason for the large audience figures of multi-genre theatres was right.
- Still also for Drama in itself there is a tendency for theatres in larger cities and with larger infrastructures to draw more visitors for Drama. That some large theatres have relatively small figures for Drama visitors (for instance the Staatstheater Braunschweig) can, on the other hand, be attributed to the fact that in these houses Drama is often rather shown in the smaller venues.
- The most interesting pattern yet is that all theatres that offer different genres expected an upward trend of their audiences – across all genres.

- On the other hand, the majority of medium and small predominantly drama houses expected a downward trend in their audiences. This trend might be due to the fact that almost all of these are located in South-Eastern Europe, that is still facing severe economic problems.
- With respect to audience development it is interesting enough that only four German multi-genre theatres and the Theatre Organisation of Cyprus have positioned the theatre for younger audiences into an independent genre. The potential in this is obvious: As a result of this strategic decision the genre is almost on the same level of visitors – impressive figures even though a large portion of these visits are provided by Christmas productions.

6.3 Preliminary Conclusions on Audiences

A look into the audiences reveals that especially large houses with sufficient infrastructure and several genres were pretty optimistic with regard to the development of their audiences – both in total and across their genres. The picture for houses more concentrated on Drama, often being also smaller in general, is mixed. Whether this is rather because of the program structure or because of the socio-economic context cannot be decided with the present figures. It will be interesting to analyse and interpret this aspect further in the context of the results from Levels 3&4: Does the program diversity of multi-genre theatres allow for a more precise targeting of specific audiences compared to pure Drama theatres?

From the theatres that have distinct genres for theatre for younger audiences – and from the successes of De Toneelmakerij, a touring company specialised in this genre and the Theater an der Parkaue Berlin, also purely concentrating on this – it can be seen that there is a large potential for present and future audiences that can be developed.

Whether there are general structures in the audiences of the participating theatres will be analysed in depth when the results from the audience research in seven houses of the ETC are available.

7 Marketing and Communication

Marketing and communication establish links between an offer (in this case the theatre and all of its activities) and its target groups (its audience, stakeholder, the public) – which is in turn a basic definition of audience development. Therefore the questionnaire on audience development activities also included an overview about communication channels used by the theatres. The share of the marketing budget allocated to the different channels is used as an indicator for the relevance these channels have for the communication strategy of the house.

7.1 Basic Software

Theater	Content Management Systems (CMS)	Newsletter/ Mailing System	Customer Relationship Management (CRM)
Theatre Finland Helsinki	Custom made	Cision	Eventim
Staatstheater Karlsruhe	Custom made	Kulturserver	Eventim
Det Norske Teatret Oslo	Audience View / custom made publishing system	Apsis	Visma CRM
Theater Dortmund	Typo 3	Typo 3	CTS-Eventim
Staatstheater Braunschweig	Typo 3	Mailchimp	n.a.
Deutsches Theater Berlin	Specifically customized CMS	Specifically customized Mailing System	Showsoft Eventim
Slovensko Narodno Gledališče Maribor	Bananaadmin CMS	phpList by Dragon Venue ticketing	n.a.
Theater Heidelberg	Silverstripe/Wordpress	YMLP (Your Mailing List Provider)	Eventim Cash System
Théâtres de la Ville Luxembourg	CMS-Egotehc	CMS-Egotehc	Via ticketing website
Theater an der Parkaue Berlin	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	No	Yes	Yes
Theatre Organisation of Cyprus, Nicosia	In Progress	Polymedia Business Manager	Polymedia Business Manager
Teatro Due Parma	Yes	Campaing Monitor	None
Serbian National Theatre Novi Sad	n.a.	n.a.	n.a.
Slovensko narodno gledališče Nova Gorica	ADS	ADS	ADS
De Toneelmakerij, Amsterdam	Custom made	Mailinglijst.eu	Adrez (EM-cultuur)
z/k/m/ Zagreb	No	Sending e-mails manually	Yes, direct contact, phone and e-mail
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.
Teatrul National “Marin Sorecu” Craiova	Yes	Yes	No
Teatrul National Timisoara	Yes	n.a.	n.a.
Teatri Kombëtar Tirana	No	no	Email, social media, telephone
National Theatre Of Kosovo	No	Daily Newspaper´s	No
Théâtre des Osses, Givisiez	Typo3	Information letters to followers (2.500) every three months (postmailing)	File Maker Pro (no electronic mailing)
MESS Sarajevo	n.a.	n.a.	n.a.
Share of theaters	16 (67%)	15 (63%)	14 (58%)

n.a. : Information not available

Table 8: Marketing Software

- Two thirds of the theatres are working with a software that allows them to update information into their website by themselves (CMS), almost two thirds with a specific software for sending newsletters and mailings.
- More than half of them have a software that allows to segment the visitor database and to address these target groups specifically (CRM).
- The use of professional software gets less frequent with declining size of the theatre and visitor numbers. This is especially so for CRM.

7.2 Advertising and classical PR

Theater	Newspaper Ads	Magazine Ads	Internet Banners	AdWords	TV Campaigns	Press Conferences Meetings	Radio
Theatre Finland Helsinki (12/13)	10% (Down)	10% (Down)	10% (Up)	5% (Up)	10% (Up)	Equal	5% (Up)
Staatstheater Karlsruhe	3% (down)	3% (Down)	<1% (Up)	-	-	<1% (Down)	-
Det Norske Teatret Oslo	ca. 20% (Down)	< 5% (Down)	ca.5%, (Up)	less than 5% (Up)	-	< 5% (n.a.)	-
Theater Dortmund	12% (Down)		Online adv. 1% (Up)		-	-	-
Staatstheater Braunschweig	25% (Up)	8% (Down)	2% (Up)	0	0	<1% (Down)	-
Deutsches Theater Berlin	11%	5%	3%	-	-	-	-
Slovensko Narodno Gledališče Maribor	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theater Heidelberg	8.62% (Equal)		0%	0%	0%	Included in Overhead	n.a. (Up)
Théâtres de la Ville, Luxembourg	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theater an der Parkaue Berlin	10% (Equal)	10% (Equal)	5% (Up)	0%	0%	n.a.	n.a.
Slovak National Theatre Bratislava	8% (Equal)	15% (Down)	9% (Down)	-	13% (Up)	1% (Equal)	5% (Equal)
Theatre Organisation of Cyprus Nicosia	18% (Down)	-	-	-	15% (Down)	-	25% (Equal)
Teatro Due Parma	15%	5%	10%	-	-	5%	-
Serbian National Theatre Novi Sad	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Slovensko narodno gledališče Nova Gorica	23% (Down)	8% (equal)	-	-	-	4% (Equal)	33% (Equal)
De Toneelmakerij, Amsterdam	20%	8%	-	-	-	-	-
z/k/m/ Zagreb	0% (sponsor-ships)	0% (sponsor-ships)	0% (sponsor-ships)	No	No	Yes, 0%	n.a.
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	0 (Media partnership) (Up)	0 (Media partnership) (Up)	-	-	15% (Up)	10% (up)	0 (Media partnership) (Up)
Teatrul National Timisoara	No own marketing budget						
Teatri Kombëtar Tirana	No own marketing budget						
National Theatre Of Kosovo	Yes	8000€	-	-	Yes	Yes	-
Théâtre des Osses, Givisiez	30% (Equal)		-	-	-	Not part of budget	3%
MESS Sarajevo	Yes	Yes	Yes	Yes	Yes	Yes	-
Share of theaters	18 (75%)	17 (71%)	11 (46%)	4 (17%)	6 (25%)	12 (50%)	7 (29%)

n.a. : Information not available

Table 9: Share of Marketing Budget per Channel of Advertising and PR

- Six theatres could not specify the allocation of their marketing budget to the different communication channels. Some of the national theatres are parts of the public administration and thus don't have any own marketing budget that they can distribute. This obviously is a challenge for implementing a strategic audience development-process.
- The most relevant advertising channels still are advertisements in print media (three quarters of the theatres). This channel is also often allocated with one of the largest share of the budget. Yet its importance is declining in the majority of theatres.
- Almost half of the theatres does some kind of online advertising, mostly using little monetary resources for it. Although still at a low level the importance in most cases is considered to be rising.

7.3 Own Print Media

Theater	Posters	Outdoor
Theatre Finland Helsinki	(Equal)	(Equal)
Staatstheater Karlsruhe	7% (Up)	5% (Up)
Det Norske Teatret Oslo, Norway	< 5% (Down)	< 5% (n.a.)
Theater Dortmund	15% (Equal)	2% (Up)
Staatstheater Braunschweig	10% (Equal)	5% (Equal)
Deutsches Theater Berlin	3%	-
Slovensko Narodno Gledališče Maribor	n.a.	n.a.
Theater Heidelberg	25% (Equal)	0%
Théâtres de la Ville, Luxembourg	n.a.	n.a.
Theater an der Parkaue Berlin	5% (Equal)	5% (Equal)
Slovak National Theatre Bratislava	7% (Down)	17% (Up)
Theatre Organisation of Cyprus, Nicosia	14% (Down)	13% (Up)
TeatroDue Parma	10%	10%
Serbian National Theatre Novi Sad	n.a.	n.a.
Slovensko narodno gledališče Nova Gorica	23% (Equal)	2% (Equal)
De Toneelmakerij, Amsterdam	25%	8%
z/k/m/ Zagreb	30% (Up)	60% (Up)
Montenegrin National Theatre, Podgorica	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	40% (Down)	Yes
Timisoara Teatrul National Timisoara	No own marketing budget	
Teatri Kombëtar Tirana	No own marketing budget	
National Theatre Of Kosovo	7000€	-
Théâtre des Osses, Givisiez	13% (Equal)	5% (n.a.)
MESS Sarajevo	Yes	-
Share of Theatres	18 (75%)	14 (58%)

n.a. : Information not available

Table 10: Share of Marketing Budget per Print Media

- Posters and outdoor marketing are still used by the majority of theatres, regardless of size and audience numbers. The two theatres without an own marketing budget finance them from production budgets. The trend is mixed, rather hinting to a modest decline in importance. The impact of these media is debated in other studies and will be analysed specifically in the research in Level 3&4. First trends suggest that poster and flyer campaigns that are carefully targeted to areas or locations frequented regularly by specific audiences can be highly efficient.

Some theatres added further print media, mostly related to program information. These options were not provided in the questionnaire. As it was unclear whether the other theatres also use these channels but do not consider them as marketing or do not pay them from the marketing budget they cannot be compared with the other theatres. When the date is collected again these options should be included in the questionnaire.

Theater	Program for Production	Season Program	Monthly Program	Theatre Newspaper
Staatstheater Karlsruhe	-	16%	14%	13%
Theater Dortmund	20% (Equal)	35% (Down)		
Theater Heidelberg	14% (Up)	11% (Equal)	12%	7% (Down)
Slovak National Theatre Bratislava	23% Inner building fliers, posters, yearbook, photobook, magazine (Up)			

Table 11: Share of Marketing Budget for additional Print Media

7.4 Own Digital Media

Theater	Website	Newsletter/Mailing	Social Media	Trailer
Theatre Finland Helsinki	(Equal)	(Equal)	20% (Up)	10% (Up)
Staatstheater Karlsruhe	3% (+ 24h/week)	<1%	10h/week)	-
Det Norske Teatret Oslo	10% + extra funding by sponsors (Up)	< 5%	> 5% (Up)	-
Theater Dortmund	4% (Up)	-	-	4% (Up)
Staatstheater Braunschweig	2% (Up)	<1% (Equal)	-	-
Deutsches Theater Berlin	3%	6%	-	-
Slovensko Narodno Gledališče Maribor	n.a.	n.a.	n.a.	n.a.
Theater Heidelberg	4% (Equal)	-	-	1.88% (Up)
Théâtres de la Ville, Luxembourg	n.a.	n.a.	n.a.	n.a.
Theater an der Parkaue Berlin	10% (Equal)	-	-	-
Slovak National Theatre Bratislava	<1% (equal)	1% (Equal)	1% (Up)	
Theatre Organisation of Cyprus, Nicosia	9% (Up)	18% (Up)	5% (Up)	-
TeatroDue Parma	15%	15%	15%	-
Serbian National Theatre Novi Sad	n.a.	n.a.	n.a.	n.a.
Slovensko narodno gledališče Nova Gorica	5% (Up)	5% (Up)	3% (Up)	
De Toneelmakerij, Amsterdam	8%	0%	0%	13% (incl. Photo)
z/k/m/ Zagreb	Yes, 0%	Yes, 0%	3%	7%
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	Yes	Yes	Yes, no costs	-
Timisoara Teatrul National Timisoara	No own marketing budget			
Teatri Kombëtar Tirana	No own marketing budget			

National Theatre Of Kosovo	Yes	Yes	-	-
Givisiez Théâtre des Osses, Givisiez	22% (Equal)	-	-	-
MESS Sarajevo	Yes	Yes	Yes	-
Share of theaters	18 (75%)	14 (58%)	11 (46%)	5 (21%)

n.a. : Information not available

Table 12: Share of Marketing Budget per Digital Media Channel

- The option "trailer" was not provided in the questionnaire but added by the theatres. Thus other theatre might also use these channels but do not consider them as a separate position.
- All theatres that gave an answer to this question have stated that they provide a website. For the other theatres this was checked by ZAD. So it can be ascertained that all theatres provide this basic communication channel.
- Also we know about two theatres that did not mention newsletter/mailings actually do use them (Theater Dortmund, Théâtre des Osses) – which would augment the share of theatres using this channel. The same holds for social media. As we will see in the next chapter all participating theatres are in some way active in social media. Yet the difficulty to account for money allocated in the form of working time makes it hard to assess the internal relevance compared to the other channels. In order to balance the efforts strategically theatres should at least try to estimate personnel costs.
- Not surprisingly there were no theatres that expected a downward trend for any kind of digital communication channel.

7.5 Social Media

Theater	Facebook	Youtube	Twitter	Google+	Other
Theatre Finland Helsinki	27.712 foll. 7-15 posts/week,Up	-	-	-	-
Staatstheater Karlsruhe (Jan 2014)	2.500 foll.	100.000 impressions	1.100 foll.		
Det Norske Teatret Oslo	11.000 f., Daily posts, Up	Yes, plus vimeo & other channels	weekly p., up	-	Instagram, sever. posts/week
Theater Dortmund (June 2013)	4852 f. Daily posts, Up	17963 impressions	2433 f. Daily posts	Channel set up, no activities	RSS-Feed, Blog
Staatstheater Braunschweig (Oct. 2013)	2.689 foll., Daily posts, Up	34 f., 1vid/2weeks, 15343 views, Up	464 f., Daily posts, Up	-	-
Deutsches Theater Berlin (Oct. 2013)	12.346 fl. 3-4 posts/week, Up	129 f., 1-2 vid/month, up	1221 f., 3-4 posts/week, Up	70 foll., 3-4 p./ week, Up	-
Slovensko Narodno Gledališče Maribor	3 pages 7.329 foll, posting almost daily, Up,	-	-	-	-
Theater Heidelberg	1.200 foll. 5-10 p./year, Up	61 f., 1-3 vid/month, Up	583 foll., Weekly posts, Equal	-	-
Théâtres de la Ville Luxembourg (Nov 2013)	2351 foll.	-	-	-	-
Theater an der Parkaue Berlin	1650 foll	2000 impr.	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	5 pages 14000 foll., Daily posts, Up	Yes	-	-	FourSquare
Theatre Organi-sation of Cyprus, Nicosia (July 2013)	10.160 foll. Daily posts, Up	21 foll. 2 vids/month 12.524 views, Up	-	-	-

TeatroDue Parma	fun page 925 likes personal profile 5000 foll., Up	186 foll., Up	524 foll., Up	-	-
Serbian National Theatre Novi Sad	Since Dec. 2012	144 f., monthly vid., Up	Since Sep. 2013	-	-
Slovensko narodno gledališče Nova Gorica	4168 Foll. Daily Posts, Up	10 vid/year, Yqual	-	-	-
De Toneelmakerij Amsterdam (Feb 2014)	3.393 foll. Daily posts	30 foll. 93 videos 80.159 views	968 foll. Weekly posts		
z/k/m/ Zagreb (June 2013)	8125 f. up	yes	-	-	-
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	6.183 foll.	Yes	-	-	Flickr 1500 foll., Weekly posts, Up
Teatrul National Timisoara	1388 F. Daily posts Up		-	-	-
Teatri Kombëtar Tirana (June 2013)	17000 likes, 5500 friends	-	-	-	-
National Theatre Of Kosovo	Daily posts	-	Occasional posts	-	-
Théâtre des Osses, Givisiez	301 Foll. Weekly Posts, Up	-	-	-	-
MESS Sarajevo	4184 foll.	30 foll.	135 foll.	-	-
Share of Theatres	23 (96%)	16 (67%)	11(46%)	2 (8%)	4 (17%)

n.a. : Information not available

Table 13: Subscribers and Level of Activity per Social Media Platform

- All theatres that answered this question are active on facebook, with relevance growing. The number of followers is increasing the larger the theatre is. Yet there are some remarkable exceptions from this trend:
- MESS Sarajevo or Teatri Kombëtar Tirana have large numbers of followers compared to their small audience figures. For MESS this might be attributed to being a festival, for Tirana the figure is impressive.
- On the other hand Theater Heidelberg or the Théâtres de la Ville in Luxemburg have rather small figures of followers – perhaps due to the more traditional audience of their different genres.
- Youtube channels are already quite widely used across the whole range of theatres. As with Facebook there is a tendency that the theatres with large audience numbers post more videos that are watched more often.
- Theatres with large audience numbers more often maintain a twitter account. Yet the number of followers is not closely related to the size of audience.
- Larger theatres that can allocate more personal resources to them are using additional social media platforms more often.

7.6 Preliminary Conclusions on Marketing and Communications

Since it became notorious that the development of digital media changes communication patterns drastically it has been a commonplace that state-of-the-art marketing and communication for the Arts have to become digital. In spite of this, many ETC member theatres still allocate a large share of their marketing budget to standard print advertising and the production of classical own print media like programs, theatre newspapers etc..

In parallel, the majority of theatres has installed the basic channels of digital communication and is serving social media, at least Facebook. A noticeable share maintains a Youtube channel as a means of visual communication – a precondition for visual storytelling. The preconception that larger theatres are slower than smaller ones to adapt to changes cannot be supported by the present data: it is rather the large houses that by now have allocated considerable resources to serving these new communication channels. Yet from the preparatory discussions with the theatres participating in the audience research in levels 3 & 4 it becomes clear that although the communication channels are installed there persists a fundamental uncertainty about how to reach and to activate audiences via the social media.

8 Sales

8.1 Point of Sale

	Web	Box Office	Ticket Agencies	Other
Theatre Finland Helsinki	20%	50%	30%	0%
Staatstheater Karlsruhe	16%	76%	Incl. in “Other”	8%
Det Norske Teatret Oslo	30-40%	60-70% incl. sales and group department	-	-
Theater Dortmund	9%	88%	3%	-
Staatstheater Braunschweig	7%	84%	10% (booking offices)	<1% (Online connect)
Deutsches Theater Berlin	21%	68%	1%	10%
Slovensko Narodno Gledališče Maribor	5%	90%	5%	-
Theater Heidelberg	11%	87%	3%	0%
Theatres de la Ville Luxembourg	n.a.	n.a.	n.a.	n.a.
Theater an der Parkaue Berlin	n.a.	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	15%	60%	25%	-
Theatre Organisation of Cyprus Nicosia	n.a.	n.a.	n.a.	n.a.
TeatroDue Parma	20%	80%	-	-
Serbian National Theatre Novi Sad	n.a.	n.a.	10%	n.a.
Slovensko Narodno Gledališče Nova Gorica	2%	98%	-	-
De Toneelmakerij Amsterdam	Touring company			
z/k/m/ Zagreb	n.a.	n.a.	n.a.	n.a.
Montenegrin National Theatre Podgorica	n.a.	n.a.	n.a.	n.a.
Teatrul National “Marin Sorecu” Craiova	-	5%	95%	-
Teatrul National Timisoara	n.a.	n.a.	n.a.	n.a.
Teatri Kombëtar Tirana	-	100%	-	-
National Theatre Of Kosovo	-	100%	-	-
Théâtre des Osses, Givisiez	-	100%	-	-
MESS Sarajevo	-	100%	-	-

n.a. : Information not available

Table 14: Shares of Points Ticket Sales

- While the small theatres with small visitor figures are selling their tickets entirely or almost entirely at their box office the share of tickets sold via online channels rises with a increasing audience sizes – in most cases coinciding with larger infrastructures and more resources.

8.2 Range of Ticket Prices

Theatre	Drama		Opera		Ballet / Dance		Concerts		Operettes & Musicals		Children & Youth Th.	
	Highest	Lowest	Highest	Lowest	Highest	Lowest	Highest	Lowest	Highest	Lowest	Highest	Lowest
Theatre Finland Helsinki	Average: 38 €		-	-	-	-	-	-	Average: 60 €		-	-
Staatstheater Karlsruhe	25,7 €	8,5 €	38,2 €	9 €	38,2 €	9€	38,2 €	9 €	38,2 €	9 €	11	11 €
Det Norske Teatret Oslo	44 €	10 €	-	-	-	-	12 €	12 €	61 €	10 €	30 €	10 €
Theater Dortmund	33,2 €	9,05 €	49,3 €	12,5 €	55,05 €	12,5 €	41,25 €	18,25 €	49,3 €	12,5 €	7 €	4
Staatstheater Braunschweig	31 €	9 €	4 €2	13 €	-	-	34 €	14 €	42 €	13 €	22 €	6.5 €
Deutsches Theater Berlin	48 €	4 €	-	-	-	-	-	-	-	-	n.a.	n.a.
Slovensko Narodno Gledališče Maribor	24 €	5 €	35 €	7 €	35 €	7 €	-	-	-	-	-	-
Theater Heidelberg	34 €	11 €	36 €	8 €	34 €	7 €	36 €	7 €	-	-	13 €	11 €
Théâtres de la Ville Luxembourg	20 €		65 €	40 €	25 €	25 €	-	-	-	-	-	-
Theater an der Parkaue Berlin	-	-	-	-	-	-	-	-	13 €	3 €	-	-
Slovak National Theatre Bratislava	20 €	4 €	-	-	-	-	-	-	-	-	-	-
Theatre Organisation of Cyprus, Nicosia	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
TeatroDue Parma	21 €	9 €	-	-	18 €	9 €	18 €	9 €	-	-	-	-
Serbian National Theatre Novi Sad	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Slovensko narodno gledališče Nova Gorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
De Toneelmakerij Amsterdam	Touring company											
z/k/m/ Zagreb	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National “Marin Sorecu” Craiova	8,88 €	2,22 €	-	-	-	-	-	-	-	-	-	-
Timisoara Teatrul National Timisoara	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Teatri Kombëtar Tirana	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
National Theatre Of Kosovo	3 €		-	-	-	-	-	-	-	-	-	-
Théâtre des Osses, Givisiez	29 €	20 €	-	-	-	-	-	-	-	-	-	-
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

n.a. : Information not available

Table 15: Range of Ticket Prices per Genres

- The differences in price structure are considerable. They are obviously mirroring complex factors such as the purchasing power in general and within specific target groups or political considerations about the desired price levels – to name just a few.

8.3 Preliminary Conclusions on Sales

The distribution of ticket sales directly mirrors the size and resources of the theatres. The price range on the other hand reflects the difficulty of collecting and reporting central data as a basis for strategic audience development. A lot of theatres did or could not provide this information for this research. Also the calculation of an average ticket price was not common to all theatres. Where prices are given they again reflect the large differences of national or regional income levels and the willingness to pay because of specific preferences.

9 Audience Development

It was a core aim of this study to determine the status quo of strategies and activities of audience development in the ETC member theatres. Aside from asking for preformatted areas that are considered to belong to audience development (programming, marketing, ticketing, audience research) the questionnaire developed by ZAD asked the theatre to state their main activities that they considered to belong to audience development. The activities were grouped into four general categories: program, marketing, education and service. Within these categories the activities were grouped into subcategories that could be described by a general characteristic or approach. In this section we describe the main directions followed by the participating theatres by assessing how many theatres adopt activities within these subcategories.

9.1 Program

	Participative Productions	Platform for Emerging Artists and productions	Program for single target groups	Matinées	Crossover with Popular Culture
Theatre Finland Helsinki	Theatre production with seniors Participative dance performance Playwriting project with young people		Storytelling performance for primary schools	Yes	
Staatstheater Karlsruhe	Volkstheater	“The new piece” – Collaboration with scenic design class in University			
Det Norske Teatret Oslo					
Theater Dortmund (2011/12)	Crashtest Nordstadt Sprech-/ Bürgerchor Seniorentanztheater Schoolmotions (Ballett)	NRW Juniorballett Opernstudio	Drama and Opera for younger audiences (with participation)	yes	yes
Staatstheater Braunschweig	Theatre for All and "Stadt-Theater"				
Deutsches Theater Berlin		“Young German Theatre“ productions, educational offers, workshops	Students festival DT Campus		Cooperation w. Basketball Team ALBA Berlin and Football Club Union Berlin
Slovensko Narodno Gledališče Maribor					
Theater Heidelberg					
Théâtres de la Ville Luxembourg					
Theater an der Parkaue Berlin	“Winter Academy” Art projects & presentation “Jump & Run” Art project with schools				
Slovak National Theatre Bratislava					
Theatre Organisation of Cyprus Nicosia	Pan Cyprien International Amateur Theatre Festival	Playwriting development program International Youth Theatre Forum			
TeatroDue Parma		“Documentary”			

		production of Con Nuore Puro “Corpo A Corpo”– project for actors musicians and dancers Artists in Residence			
Serbian National Theatre Novi Sad					
Slovensko narodno gledališče Nova Gorica	Theatre with young amateurs				
De Toneelmakerij Amsterdam	TM Jong: Pupils make theatre plays				
z/k/m/ Zagreb	n.a.	n.a.	n.a.	n.a.	n.a.
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National “Marin Sorecu” Craiova	5 productions per year				
Timisoara Teatrul National Timisoara					
Teatri Kombëtar Tirana		Competition and festival of young directors			
National Theatre Of Kosovo	Productions supported by professional resident actors				
Théâtre des Osses, Givisiez				Matinee for Primary & Secondary Schools	
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.
Share of Theatres	10 (42%)	6 (25%)	3 (12%)	3 (12%)	2 (8%)

Table 16: Audience Development Activities in Programming

- The program is the second most frequent area of action – topped only by education. This fact shows that audience development is already embedded into the core of theatre activities. This is an encouraging perspective on the sustainability of efforts in operational practice.
- It is equally positive that the activities can rather be grouped around general strategies like participative theatre and development of new pieces and artists than around addressing specific target groups with specific productions.
- Strategies of participative theatre and formats that serve to develop new content and new artists were the most frequent activities within the category of programming.
- ETC members thus rather try to win audiences strategically by developing art and artists that are relevant to the public. The outstanding approach to do so is to integrate members of the public into the development and presentation of the pieces in participative productions.

9.2 Education

	Talks and Lectures	Guided Tours/ Open Days	Outreach	Training of Multipliers	Clubs and Work-shops (inhouse)
Theatre Finland Helsinki	Talks before and after the shows Lectures on the topic of the play	Backstage tours Open work-shop days for families Open rehearsals	Workshops in schools, kindergardens, old peoples homes	Teacher workshops Theatercamps for cildren	Workshops for schools, kindergardens and various adult groups
Staatstheater Karlsruhe					
Det Norske Teatret Oslo					“Multi Norske” Theatre school for non-ethnic Norwegians
Theater Dortmund	Multiple programs in all branches	Open tours 1x per month Free tour with groups combined with ticket	Artists visit schools Students own stage productions (Schoolmotion, Oper erleben)	Scouting-Programms	Opernscouts, Bürgerchor, Theatre Clubs for Youths and "Oldies”
Staatstheater Braunschweig	Theatre.Fever Theatre in the School				
Deutsches Theater Berlin					“Young German Theatre“ productions, education, workshops
Slovensko Narodno Gledališče Maribor	Discussions with school children before and after performances	Doors Open Day		Briefings of schoolteachers	
Theater Heidelberg	Preparations & follow-ups for performances		Artists visit schools & kindergarten Specific program for 35 partner schools	Advanced Education for Pedagogues	Theatre Clubs Expert workshops
Théâtres de la Ville Luxembourg	Introductions to opera and dance	Guided tours			Workshops (in dance and theatre)
Theater an der Parkaue Berlin	“Tusch” Workshops with schools, visits and production talks “TuKi” Workshops with day care, visits and production talks			Salon on Theatre pedagogy Education of pedagogues	Theatre Clubs
Slovak National Theatre Bratislava	“Let’s talk about theatre” Artists talks before and after shows.				“From text to performance” Lectures about performance making. Creative writing
Theatre Organisation of Cyprus Nicosia			PanCyprien School Theatre Games		Program for people w. eye sight impairement
TeatroDue Parma	Specific in-depth analysis projects of our productions		“Blitz” The story of drama and theatre performed in a classroom.		“Fare Teatro”. A theatre school for the audience
Serbian National Theatre Novi Sad			n.a.	n.a.	n.a.
Slovensko narodno gledališče Nova Gorica					
De Toneelmakerij Amsterdam			Binden & Boeien, Cooperation with schools: Visits of performances, workshops for students and teachers		
z/k/m/ Zagreb	n.a.	n.a.	n.a.	n.a.	n.a.

Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova					Audience workshops; for young people
Teatrul National Timisoara					"Time for theatre" Theatre classes with amateurs
Teatri Kombëtar Tirana					
National Theatre Of Kosovo					
Théâtre des Osses, Givisiez		Theatre visits for Enterprises			Discover the world of theatre
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.
Share of Theatres	9 (38%)	6 (25%)	7 (29%)	7 (29%)	15 (62%)

Table 17: Audience Development Activities in Education

- Education was the most frequent field of audience development activities. Most common were classical formats like workshops and clubs, followed by introductions, talks and lectures.
- At the third rank already were outreach activities that don't stay in the theatre buildings but go to other places to meet the target groups in their own context.
- There is an emerging trend to combine different formats of educational activities into packages (workshops, lectures, visits to performances, artist talks) for specific target groups or partners such as schools or universities. Hence a closer relationship is fostered, leading to lasting effects both in the audience segment and the partner organisation.

9.3 Marketing

	Ticketing	Distribution	Ambassadors	Communications	Events
Theatre Finland Helsinki	Special ticket offers for school classes				
Staatstheater Karlsruhe					
Det Norske Teatret Oslo					
Theater Dortmund	Reduced "social tickets" Theatre-Flatrate for Students, Reduced tickets for school classes Reduced tickets corporate citizenship	opening shows at the universities of the city cooperation with the local industry (e.g. DSW21, BVB)	Theater-/ Opernscouts Bürgerchor	Several media cooperations	Special open day for subscribers
Staatstheater Braunschweig					
Deutsches Theater Berlin	Reduced "Social Tickets" Once per month "Blue day" all Tickets reduced Reduced Tickets for school classes Reduced tickets for citizens who work honorarily	Presentation/ Promotion at the universities at the openings of the semester	Theaterscouts	Media Cooperations	

	Kooperation with Kulturloge Berlin				
Slovensko Narodno Gledališče Maribor					
Theater Heidelberg					
Théâtres de la Ville Luxembourg					Meets & Greets
Theater an der Parkaue Berlin					
Slovak National Theatre Bratislava					
Theatre Organisation of Cyprus Nicosia					
Teatro Due Parma					
Serbian National Theatre Novi Sad					
Slovensko narodno gledališče Nova Gorica					
De Toneelmakerij Amsterdam					
z/k/m/ Zagreb	n.a.	n.a.	n.a.	n.a.	n.a.
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova					
Teatrul National Timisoara					
Teatri Kombëtar Tirana					
National Theatre Of Kosovo					
Théâtre des Osses, Givisiez					
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.
Share of Theatres	2 (12%)	2 (8%)	2 (8%)	2 (8%)	2 (8%)

Table 18: Audience Development Activities in Marketing

- Compared to activities in programming and education straightforward marketing activities were rarely mentioned in the context of audience development.
- This does not mean that other theatres do not perform similar activities. They might just not consider to belong to audience development, hence not as a strategic attempt to win new audiences.

9.4 Service

	Hospitality	Transport	Surtitles
Theatre Finland Helsinki	n.a.	n.a.	n.a.
Staatstheater Karlsruhe	Free WiFi for students in Foyer		
Det Norske Teatret Oslo			
Theater Dortmund	Special fare for parking Free wardobe		
Staatstheater Braunschweig			
Deutsches Theater Berlin			Surtitles in English and Russian for selected productions

Slovensko Narodno Gledališče Maribor			
Theater Heidelberg		Theatre Bus	
Théâtres de la Ville Luxembourg			
Theater an der Parkaue Berlin			
Slovak National Theatre Bratislava			
Theatre Organisation of Cyprus, Nicosia			
Teatro Duoe Parma			
Serbian National Theatre Novi Sad			
Slovensko Narodno Gledališče Nova Gorica			
De Toneelmakerij Amsterdam			
z/k/m/ Zagreb			
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.
Teatrul National “Marin Sorecu” Craiova			
Timisoara Teatrul National Timisoara			
Teatri Kombëtar Tirana			
National Theatre Of Kosovo			
Théâtre des Osses, Givisiez	Cafeteria		
MESS Sarajevo	n.a.	n.a.	n.a.
Share of Theatres	2 (8%)	1 (4%)	1 (4%)

Table 19: Audience Development Activities in Services

- Service is the least mentioned field of activity, only four theatres (17%) described an activity in this field.
- Perhaps theatres underestimate the supporting effect of hospitality within audience development, prolonging visiting time, enabling contact with media of the house, getting to talk to artists and integrating into the world of the theatre.

9.5 Preliminary Conclusions on Audience Development

Trends towards strategies that seem to work well in a number of social and cultural are clearly emerging, especially in programming and education.

These strategies are rather general schemes to identify and integrate contemporary topics, artists and active audiences into the activities of the theatre (e.g. participative theatre, platform for developing new content and artists, intensified programs of workshops and clubs, outreach).

Whether the theatres have formulated a clear mission statement that integrates these activities cannot be seen from this research as there was no question for the guiding principles. In discussions with some theatres participating in levels 3 & 4 aspects like openness, curiosity, incorporating the society into theatre and vice versa, contributing to the civic development of the city were cited. A question asking for the existence and the exact formulation of a mission statement or claim for audience development should thus be included in a revised version of the questionnaire.

10 Audience Research

Audience research is a decisive cornerstone of any audience development strategy. As we have seen the situation of any theatre is shaped by a number of factors that are as diverse as the societies in which they are located. Given these differences each theatre has to become aware about the basis of their relationship to their audience and to the potential visitors in the public of their cities. Therefore we will describe the status quo of audience research in the ETC member theatres – their informational basis for evidence-based audience development.

10.1 Research Already Performed

	Visitor Research	Non-Visitor- / Audience Research
Theatre Finland Helsinki	Once (1.552)	Never
Staatstheater Karlsruhe	2010/11 (1.351) 2011/12 (1.204)	2011/12
Det Norske Teatret Oslo	Several Times	Several Times
Theater Dortmund	07/08 (3073) 12/13 (200)	Never
Staatstheater Braunschweig	Once (1.072)	Planned
Deutsches Theater Berlin	Since 2011, 4000 Visitors	Never
Slovensko Narodno Gledališče Maribor	Never	Never
Theater Heidelberg	Twice (09/10: 1.127)	Never
Théâtres de la Ville Luxembourg	Never	Never
Theater an der Parkaue Berlin	n.a.	n.a.
Slovak National Theatre Bratislava	n.a.	n.a.
Theatre Organisation of Cyprus, Nicosia	Never	Never
Teatro Due Parma	Each year at the end of season	Never
Serbian National Theatre Novi Sad	2010/11, (1.200)	Never
Slovensko narodno gledališče Nova Gorica	12/13 (750)	Never
De Toneelmakerij Amsterdam	Never	Never
z/k/m/ Zagreb	Never	Never
Montenegrin National Theatre, Podgorica	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	2011 (408)	2011 (100)
Teatrul National Timisoara	2011 (167) 2012 (468)	Never
Teatri Kombëtar Tirana	Never	Never
National Theatre Of Kosovo	Once	Never
Théâtre des Osses, Givisiez	Never	Never
MESS Sarajevo	n.a.	n.a.
Share of Theatres	13 (54%)	3 (13%)

Table 20: Visitor and Non-Visitor/Audience Research

- Only seven theatres report to not have performed any audience research. Five out of these seven theatres (another 17%) have performed research with the ZAD in Level 3&4 of this project.

- Thus most of the theatres already have undertaken an effort to know their audience – and one quarter has taken the possibility of this project to either enlarge this knowledge or to make a first attempt to do so.
- Only two of the theatres have performed more demanding non-visitor research, one will do so this year. (Two out of these three, the Staatstheater Karlsruhe and the Staatstheater Braunschweig, have been or are performing this with the ZAD.)

10.2 Research Topics

	Name	Residency	Sociodemo-graphics	Cultural/ Leisure Activities	Purchasing Behavior	Media Usage	Expectation Satisfaction
Theatre Finland Helsinki	Once	Once	Once	Never	Never	Once	Once
Staatstheater Karlsruhe	Never	Yes	Yes	Yes	Yes	Yes	Yes
Det Norske Teatret Oslo	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Theater Dortmund	Yes	Twice	Never	Once	Twice	Continuous	Twice
Staatstheater Braunschweig	Never	Once	Once	Once	Once	Once	Once
Deutsches Theater Berlin	-	continuous	continuous	continuous	continuous	continuous	continuous
Slovensko Narodno Gledališče Maribor	Never	Never	Never	Never	Never	Never	Never
Theater Heidelberg	Never	Never	Twice	Twice	Twice	Twice	Twice
Théâtres de la Ville Luxembourg	Never	Never	Never	Never	Never	Never	Never
Theater an der Parkaue Berlin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theatre Organisation of Cyprus, Nicosia	Never	Never	Never	Never	Never	Never	Never
Teatro Due Parma	Never	Never	Yes	Never	Never	Yes	Yes
Serbian National Theatre Novi Sad	Once	Once	Once	Once	Never	Never	Never
Slovensko Narodno Gledališče Nova Gorica	Once	Once	Once	Never	Never	Never	Once
De Toneelmakerij Amsterdam	Never	Never	Never	Never	Never	Never	Never
z/k/m/ Zagreb	Never	Never	Never	Never	Never	Never	Never
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	Once	Once	Once	Once	Once	Once	Once
Teatrul National Timisoara	Never	Never	Twice	Never	Never	Twice	Twice
Teatri Kombëtar Tirana	Never	Never	Never	Never	Never	Never	Never
National Theatre Of Kosovo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Théâtre des Osses, Givisiez	Never	Never	Never	Never	Never	Never	Never
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Share of Theatres	27.3%	36.4%	40.9%	40.9%	31.8%	31.8%	

Table 21: Included Research Topics

- Those who did perform research covered a rather large span of data, which should in general enable the analysis of existing bonds between the theatres and their audiences.
- Three theatres reveal an interesting gap with respect to purchasing behaviour and cultural/leisure activities. Especially the latter information is crucial to develop strategies for winning new audiences. Cultural and leisure activities are a very valid indicator for

segmenting audiences. They usually can characterise and distinguish the relevant behaviour of regular, occasional, rare, not-any-more or not-yet visitor.

10.3 Research Methods

	Ticketing/ CRM-Based	Quantitative Interviews	Qualitative Interviews	Focus Groups	Secondary Data
Theatre Finland Helsinki	Never	Once (1552)	Never	Never	Never
Staatstheater Karlsruhe	Never	2010/11 (1.351) 2011/12 (1.204)	Once	Never	Once
Det Norske Teatret Oslo	Never	Yes	Yes	Yes	Yes
Theater Dortmund	Continuously	07/08 (3073) 12/13 (200)	Never	Opernscouts (80 visitors)	Maps and Markets
Theater Braunschweig	Never	Once (1072)	Planned	Never	Never
Deutsches Theater Berlin	Never	continuous, 4000	Never	Never	Yes
Slovensko Narodno Gledališče Maribor	Never	Never	Never	Never	Never
Theater Heidelberg	Never	Twice (1127)	Never	Never	Never
Théâtres de la Ville Luxembourg	Never	Never	Never	Never	Never
Theater an der Parkaue Berlin	n.a.	n.a.	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	n.a.	n.a.	n.a.	n.a.	n.a.
Theatre Organisation of Cyprus Nicosia	Never	Never	Never	Never	Never
Teatro Due Parma	Never	Yes	Yes	Never	Never
Serbian National Theatre Novi Sad	Never	Once (1200)	Never	Never	Never
Slovensko Narodno Gledališče Nova Gorica	Never	Once (750)	Never	Once	Never
De Toneelmakerij Amsterdam	Never	Never	Never	Never	Never
z/k/m/ Zagreb	Never	Never	Never	Never	Never
Montenegrin National Theatre, Podgorica	Never	n.a.	n.a.	n.a.	n.a.
Teatrul National "Marin Sorecu" Craiova	Never	Once (408)	Once (100)	Never	Never
Teatrul National Timisoara	Never	Twice	Twice	Never	Never
Teatri Kombëtar Tirana	Never	Never	Never	Never	Never
National Theatre Of Kosovo	Never	Once	Once	Never	Never
Théâtre des Osses, Givisiez	Never	Never	Never	Never	Never
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.
Share of the Theaters	1 (4%)	13 (54%)	6 (25%)	3 (12%)	4 (17%)

Table 22: Performed Research Methods

- 13 theatres have done common visitor research with quantitative questionnaires.
- Eight of these theatres also have performed some kind of qualitative research, either with individual interviews or with focus groups. This is showing a trend also known from other theatres to deepen the figures and analysis from quantitative questionnaires with qualitative methods.

- In six of the theatres participating in Level 3&4 of this project the audience research will also include qualitative methods.

10.4 Analysis and Use of Results

	Univariate Analysis	Analysis of Segments	Analysis of (Inter-) Dependence	Qualitative Analysis	Use for Artistic Production Planning	Use for Marketing Planning	Reporting to Funders/ Sponsors
Theatre Finland Helsinki	Yes	Never	Never	Never	Never	Yes	Yes
Staatstheater Karlsruhe	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Det Norske Teatret Oslo	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Theater Dortmund	Yes	Yes	Yes	Yes	Rare/Never	yes	rare
Theater Braunschweig	Yes	Never	Never	Never	Yes	Yes	Yes
Deutsches Theater Berlin	Never	Yes	Never	Never	Never	Yes	Yes
Slovensko Narodno Gledališče Maribor	Never	Never	Never	Never	Never	Never	Never
Theater Heidelberg	Yes	Yes	Never	Never	n.a.	n.a.	n.a.
Théâtres de la Ville, Luxembourg	Never	Never	Never	Never	Never	Never	Never
Theater an der Parkaue Berlin	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Slovak National Theatre Bratislava	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Theatre Organisation of Cyprus, Nicosia	Never	Never	Never	Never	Never	Never	Never
Teatro Due Parma	Never	Never	Never	Yes	Yes	Yes	Never
Serbian National Theatre Novi Sad	Yes	Never	Never	Never	Never	Yes	Yes
Slovensko narodno gledališče Nova Gorica	Yes	Never	Never	Never	Never	Never	Never
De Toneelmakerij Amsterdam	Never	Never	Never	Never	Never	Never	Never
z/k/m/ Zagreb	Never	Never	Never	Never	Never	Never	Never
Montenegrin National Theatre, Podgorica	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Teatrul National “Marin Sorecu” Craiova	Yes	Yes	Yes	Yes	Yes	Yes	Never
Teatrul National Timisoara	n.a.	n.a.	n.a.	n.a.	Yes	Yes	Yes
Teatri Kombëtar Tirana	Never	Never	Never	Never	Never	Never	Never
National Theatre Of Kosovo	Once	Never	Never	Once	Yes	Yes	Yes
Théâtre des Osses, Givisiez	Never	Never	Never	Never	Never	Never	Never
MESS Sarajevo	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.
Share of Theatres	10 (42%)	6 (25%)	4 (17%)	6 (25%)	8 (33%)	11 (46%)	9 (38%)

Table 22: Methods of Analysis and Use of Results

- A number of theatres do not make use of the quantitative results of their research for more than univariate analysis.
- In the same manner a few theatres that have performed qualitative interviews and focus groups did not perform qualitative analysis.

- Thus the potential impact of research often is not fully exploited, perhaps due to a lack of resources or competencies in statistical or qualitative analysis. This assumption is supported by the fact that compared to 13 theatres that reported to have performed research only 11 have used the results – most often for marketing purposes.

10.5 Preliminary Conclusions on Audience Research

It is quite encouraging that audience research has begun to be more commonly performed in continental Europe. Basic visitor research has been performed by more than half of the theatres, the five theatres participating in the audience research in Level 3&4 of this project increase this share to three quarters.

Efforts towards a profound understanding of existing visitors through qualitative research and more advanced statistical analysis are less widespread. The same is true for quantitative or qualitative research on new visitors.

Statistically representative non-visitor research requires monetary resources that often surpass the possibilities in smaller theatres. Nevertheless it should be a future focus in European theatre work to develop a set of activities that can provide an understanding of relevant socio-demographic structures, milieus, groups and the topics relevant within their societies. This set of activities should not be restricted to methods from the social sciences but also include methods of artistic research.

To enhance the use of information collected through research ZAD has introduced a new form of dialogic data analysis and interpretation: Hands-on workshops with representatives of the relevant departments of the theatres, which can include both directors, dramaturgs, marketing or education. In these workshops the presentation of results by ZAD only is a starting point. Answering to questions arising from discussion, ZAD is prepared to perform data analysis on the spot so that the results are direct answers to the specific informational needs of the theatre.

11 Conclusions on the Results from Levels 1 & 2

11.1 Basic Results

The analysis of data on infrastructure, programming and resources showed that the infrastructures of theatres are at best partly based on considerations about the size and preferences of the potential audience – the population. Cultural, social, economic and political patterns of each society have combined over time to give the theatres their present shape.

The same is true for the audience: Preferences are shaped by cultural heritage as well as the media landscape. Economic wealth and its distribution in society decide about the ability to pay for leisure activities. Traumata from crisis or conflicts shape the value system and relevant themes that can lead to specific types of theatre or not.

Thus these findings suggest that it might be difficult or impossible to explain the existing theatre landscape from structural data about the public or any simple set of factors. Yet in all its complexity this conclusion leads to a central pledge: If audience development is meant to be viable strategy across different countries, societies and cultures it has to offer strategies and tools that are designed to adapt to the different contexts and at the same time are standardised and tested enough to ensure professional and experience-based artistic and managerial practice.

The analysis of audience development activities (in a broad understanding) suggests that the formation of such a methodology is under way. On the level of programming the relevant topics of society can be brought to the stage with participative theatre formats and through developing contemporary topics and emerging artists through contests, festivals and co-productions. On the level of education more and more formats get formulated to educate local audiences, especially younger ones, to become accustomed to Performing Arts. This is sided with outreach activities that move out of the theatre to get people in touch with Performing Arts in their own social contexts. On the side of marketing the relevant local media, social media and focus points of public life can be used to distribute information about the theatre and its offer via multiple platforms.

All of these activities have to rely on a profound knowledge about the public, its preferences and concerns. For this purpose a suitable mix of visitor- and non-visitor research has to be adopted. Thus the theatres can approach their existing and potential audience with a realistic picture of what is important to them. Only this way theatre will be able to be a platform for relevant discourse and exchange that contributes to social integration in European as described in the opening words to this report.

Therefore research in levels 3 & 4 will concentrate on assessing the success factors of some of these audience development approaches. At the same time standards will be set for using research as a strategic informational basis for evidence-based audience development that has real impact in their societies.

11.2 Recommended Next Steps

Notwithstanding the results from levels 3 & 4 a few recommendation can be made at this point already: A large part of the theatres has not established the standards to provide information that would be needed to evaluate its relation to existing or potential audiences. The first step was taken with this study, making theatres aware of the set of information that they can and should collect.

The task now should be to turn this into a procedure to be undertaken in a regular rhythm – frequent enough to detect relevant develops early enough to react, yet long enough not to overstrain the resources of theatres. The ZAD suggests performing the collection every two years. (Thus the next collection would be in the first half of the season 2015/16.) As the set of information has been defined in this project this could be carried out within an online interface, connected with a help desk. The procedure should be done with the support of an expert with insight into the structure and relevance of data. This expert should also provide an online help desk and supervise the coherence and plausibility of data.

On this basis an overall analysis should be provided that identifies relevant new developments and specifies the focus points for a new cycle of action, research and assessment until the next collection of standardised data.

In this cycle a changing set of theatres could engage in introducing new strategies and actions or optimising existing ones – derived from the discussion of the analysis just described. These activities would again be accompanied by research and assessment to continuously optimise the activity and to provide other theatres with best practice examples and recommendations. This research could be concentrated into a report to be presented between two standardised data collections.

The focus point for the first cycle of research can be derived directly from the results of this report: If every city and society has its own specific combination of structures, social groups and meanings, in sociology combined into the term “sense of the city” (Martina Löw), then theatres should be given a methodology to uncover this sense, providing the input for an integrated audience development strategy. Most probably this methodology would combine approaches from the arts and from social sciences. It would make theatres experts on their societies in a very unique way and at the same time enable them to become active players in their future development.

Annex 1: Questionnaire for Status Quo of Conditions and Activities in Audience Development

ETC

Check List for a Profile of Member Theatres

Freie Universität Berlin, 06.06.2013

Please complete this questionnaire with available information on your theatre of season 2011/2012. If the answer is not available please note this. The information will be included into a central document enabling comparison between theatres and document towards external Partners

In specific cases exemplary answers are given for orientation. If there are any questions left, do not hesitate to contact: Achim Müller: a.mueller@ikm.fu-berlin.de, +49.176.64054094

Legal Status (private / public)	
Established in	
Catchment area	
- Population Inner City	
- Students inscribed in Universities in Inner City	
- Population within 80 km radius around theatre	
- Students inscribed in Universities within 80 km radius	

Venues/Stages	Example:
- Name, character, seats	Main Stage, Black Box, 450 Seats
- Name, character, seats	
- Name, character, seats	
- ...	
Type of Programming (Ensuite, Semi-Stagione, Repertoire, Presenter)	
Genres presented	Example:
- Name, Number of productions, number of performances	2011/12: Drama: 23 prod., 125 perf.
- Name, Number of productions, number of performances	2011/12: Oper: 8 prod., 64 perf.
- Name, Number of productions, number of performances	
- …	
Own Productions (Number of productions, number of performances)	Example: 2011/12: 35 prod., 250 perf.
Co-Productions (Number of productions, number of performances)	
Presenting (Number of productions, number of performances)	
Touring (Number of productions, number of performances)	

Organisation (please attach organigram)	
- Staff overall (Fixed / Freelance)	Example: 2011/12: 250 fixed, 120 freelance
- Artistic Staff (Fixed / Freelance)	
- Technical Staff (Fixed / Freelance)	
- Marketing and Fundraising (Fixed / Freelance)	
- Education (Fixed / Freelance)	
- Administration (Fixed / Freelance)	
Turnover / Income structure	
- Total turnover / budget (last season, trend up/equal/down for present season)	Example: 4.000.000 € (11/12), trend up (12/13)
- Individual Ticket Sales (% of total, trend for present season)	
- Subscriptions (% of total, trend for present season)	
- Other Earned Income (Rental, publications, licenses and royalties, catering, shop, wardrobe) (% of total, trend for present season)	
- Public Funding (% of total, trend for present season)	
- Sponsoring (% of total, trend for present season)	
- Other Third Income (Donors, Foundations, EU etc.) (% of total, trend for present season)	

Audience	
Total (number last season, trend this season)	
Per Genre	For instance:
- Genre, number last season, trend this season	Drama, 25.000 (11/12), trend up (12/13)
- Genre, number last season, trend this season	Opera, 8.000 (11/12), trend equal (12/13)
- Genre, number last season, trend this season	
- …	
Own Productions (number last season, trend this season)	
Co-Productions (number last season, trend this season)	
Presenting (number last season, trend this season)	
Touring(number last season, trend this season)	
Subscribers (number last season, trend this season)	

For the following questions referring to Representation additional research might be required. Only answer them, if you have information on the topic available.	
Representation of Age Groups (% of total last season, trend this season)	For instance: 0 – 20 (3,0%, trend up) 21-30 (6,6%, trend equal) 31-40 (5,2%, trend down) 41-50 (13,9&, trend up) 51-60 (20,1%, trend equal) 61-70 (28,3%, trend down) 70+ (22,9%, trend up)
Representation of gender (% of total last season, trend this season)	For instance: Male (37,8%, trend up) Female (62,2%, trend down)
Representation of education levels (% of total last season, trend this season)	College degree (52,5%, trend up) University-entrance or vocational diploma (15,4%, trend equal) Secondary school (21,5%, trend down) Primary school (6,2%, trend up) Still student (2,3%, trend equal) Other degree (1,2%, trend down) No graduation (0,4%, trend up)

Marketing / Social Media	
CMS (system used)	
Newsletter/ Mailing (system used)	
CRM (system used)	
Marketing Channels (% of Marketing budget, trend up / down / equal)	
- Newsletter/ Mailing system	
- Website	
- News paper ads	For instance: 20% of Marketing budget, trend down
- Magazine ads	
- Internet banners	
- AdWords	
- TV campaigns	
- Posters	
- Outdoor	
- Press Conferences/ Meetings	
- Social Media	
- Other (Name)	
Social Media (Number of subscribers, activity level, trend)	
- Facebook	For instance: June 2013: 2.700, daily posting, trend up
- Twitter	
- Flickr	For instance: June 2013: 1.500,weekly posting, trend up

- Four Square	
- Google+	
- Instagram	
- YouTube	
- Other (Name)	
Ticketing	
Ticketing System (system used)	
No. of Groupsales (number of tickets last season, trend this season)	
Point of Sale (% of tickets, trend)	
- Web	
- Box Office	
- Ticket Agencies	
- Other (Name)	
Ticket sold at full price (number of tickets, trend)	
Tickets sold ad reduced price (number of tickets, trend)	
Tickets for subscribers (number of tickets, trend)	
Tickets via visitors organisations (number of tickets, trend)	
Tickets free of charge (number of tickets, trend)	
Ticket price per genre	
- Name of genre (highest, lowest, average)	
- Name of genre (highest, lowest, average)	
- Name of genre (highest, lowest, average)	
- …	

Specific Audience Development Activities (Education / Outreach / Participation, Key programs)	
Program name, description of activities	Example: Theatre with amateurs; Amateurs are recruited through advertisments and casted for specific productions. Productions are supported by theatre professional staff and become part of the repertoire.
Number and frequency of activities	Continuous project, 5 productions per year.
Participants (total number)	80 participants (11/12)
Key Target Groups (% of total participants)	Elders (60+): 25; Young adults without school degree: 14 (11/12)
Program name, description of activities	
Number and frequency of activities	
Participants (total number)	
Key Target Groups (% of total participants)	
Program name, description of activities	
Number and frequency of activities	

Participants (total number)	
Key Target Groups (% of total participants)	
Program name, description of activities	
Number and frequency of activities	
Participants (total number)	
Key Target Groups (% of total participants)	

Audience Research	Example!
Type (one time / repeated / continuous, Size of samples)	
- Visitor Research	One time in 2010/11, 1.200 visitors
- Non-Visitor- / Audience Research	Never
- Other	
Theoretical Framework (name of model/theory)	None
Research Subjects (one time / repeated / continuous)	
- Name	One time
- Residency	One time
- Sociodemography	One time
- Cultural / Leisure Activities	Never
- Purchasing Behaviour	Never
- Media Usage	One time
- Expectations / Experience / Satisfaction / Relationship	One time
Research Methods (one time / repeated / continuous, Size of samples)	
- Ticketing/CRM-Based	Never
- Quantitative Interviews	One time, 1.200 visitors
- Qualitative Interviews	Never
- Focus Groups	Never
- Secondary data	Never
- Other	
Methods of Analysis	
- Univariate distributions	Yes
- Analysis of Segmentation (Factor, Cluster or other)	Never
- Analysis of (Inter-)dependence (Regression or other)	Never
- Qualitative Analysis	Never
- Other	
Use of Results	
- Artistic Production Planning	Never
- Planning of Marketing Campaigns	Yes
- Reporting to Funders/ Sponsors	Yes
- Other	

Annex 2: Question Modules as Basis for the Design of Quantitative Questionnaires

Freie Universität Berlin

Institut für Kultur und Medienmanagement

ZENTRUM FÜR AUDIENCE DEVELOPMENT |ZAD|

Audience Research in ETC Member Theatres

Questionnaire Modules

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Module 1: Socio-Demographics

Proposed Core Questions

Your gender?
- o female
- o male

Your age?
- o Year of Birth: _________ or age in years: ______

What is the highest educational degree you have so far?
(Please only ONE answer)
- o High school
- o Secondary school level
- o University degree, technical school, vocational college
- o I have no degree/ left school
- o Other degree: _______________________________________

Are you employed? (Multiple answers possible)
- o Employed
- o Self-employed/freelance
- o Retired
- o School, apprentice, military service, civilian service
- o Student
- o Currently unemployed
- o Other:_______________________

Can you please tell us your current residence?

- o City where the theatre is located: Post/ Code: ______________
- o Region without the city where the theatre is located.
  Post/Code: ______________
- o Country without the region where the theatre is located
  Region: ___________ Post/Code: ______________
- o Abroad

(Categories to be adapted to individual theatres and regions.)

What is your citizenship?
- o <CITIZENSHIP> of the country since birth.
- o <CITIZENSHIP> by naturalization
- o Different citizenship: _____________________
- o Double Citizenship: ______________________
  and: ______________________

(Categories to be adapted to individual theatres and regions.)

Module 2: Visiting behavior

Proposed Core Questions

Is this your first visit in <NAME OF THE THEATRE>?

- Yes, this is my first visit
- No, I have already visited this theatre

How many times have you visited <NAME OF THE THEATRE> in the last 12 months - including today's visit?

- 1x in the last 12 months
- 2-3x in the last 12 months
- 4-6x in the last 12 months
- 7-12x in the last 12 months
- More than 12x in the last 12 months

How often do you visit the performances of the different genres and program strands of this theatre?

Usual graphical representation:

	Very often (at least 1x a month) 1	2	3	4	Never (Not in the last 5 years) 5
Drama	❑	❑	❑	❑	❑
Opers	❑	❑	❑	❑	❑
Ballet	❑	❑	❑	❑	❑
...	❑	❑	❑	❑	❑

Proposed complementary In-Depth-Questions

How intense do you inform yourself in advance or on the evening of the event on the content of the productions of the theatre? (eg. reviews , original texts, the website of <Name oft he Theatre>, Youtube)

Very intensive (detailed study of several sources) 1	2	3	4	Not at all 5
❑	❑	❑	❑	❑

With whom do you discuss your impressions after a visit at the theatre?

Module 3: Pattern of cultural and leisure activities

Proposed Core Questions

We are interested in what other cultural and leisure activities our visitors pursue. Which of the following activities have you attended within the last 12 months - WITHOUT today's presentation? (Multiple answers possible)

- Acting
- Opera
- Ballet
- Dance Theatre
- Musical / Revue
- Memorial / Castles / Parks
- Fine art / exhibitions
- Classical Concerts
- cinema
- rock / pop concert
- reading
- Disco / Club
- Cabaret / Variety
- Children's theatre
- None of the above

What other theatres in <NAME OF THE CITY> and the region you have visited in the last 12 months?

____

Proposed complementary In-Depth-Questions

How intensively do you follow the cultural life in <NAME OF THE CITY> and beyond in the media (eg. feature articles from newspapers , reports and television broadcasts , Internet platforms such as blogs or Facebook) ?

- 1 = very intensively (detailed study of several sources)
- 2
- 3
- 4
- 5 = not at all

Do you know these cultural organisations and have you already been there?

	Know it	Have been
Organisation	☐	☐
Organsation	☐	☐
...	☐	☐

(Organisations to be adapted to individual theatres and regions.)

Are you active artistically yourself (for example: as a member of an amateur choir, a professional photographer, a passionate amateur musician, as an artist)?

- Yes, as a : _________________
- No

Module 4: Communication and Ticketing

Proposed Core Questions

Which way did you get information about today's performance, as well as the Theatre and their offer in total? (Multiple answers possible)

	Information on the production visited today	Information about the <MANE> in general
Previous visits	❑	❑
Subscription	❑	❑
Partner/ friends/ acquaintances/ relatives	❑	❑
School/ Teacher/ Education	❑	❑
Articles in newspapers	❑	❑
Advertising in newspapers/ magazine	❑	❑
Report on the radio	❑	❑
Report on TV	❑	❑
Internet (in general)	❑	❑
Website of <NAME OF THEATRE>	❑	❑
Newsletter <NAME OF THEATRE>	❑	❑
Facebook <NAME OF THEATRE>	❑	❑
Twitter	❑	❑
Youtube	❑	❑
Yearly program brochure	❑	❑
Monthly program	❑	❑
Billboards or outdoor advertising at the house	❑	❑
Other: ______________________________	❑	❑

How satisfied are you with the media of the theatre?
(options: 1 = very satisfied, 2, 3 = neither / nor, 4, 5 = very dissatisfied; Do not know)

- Posters
- Monthly schedule
- Annual schedule
- Website

(Categories to be adapted to individual theatres and regions.)

Where and how do you purchase tickets for your visit at the theatre?
(Multiple answers possible when purchasing your tickets on different paths)

- Box office
- Subscription
- Pre-sale at <NAME OF THE THEATRE>
- Online on the website of <NAME OF THE THEATRE>
- Receive as a gift
- Coupon
- Via a booking office
- Other: __________________________

(Categories to be adapted to individual theatres and regions.)

Do you have a subscription to the theatre?

- No, because: _________________________
- Yes, a subscription, card or package, namely: _____________
- If yes: For how long have you been a subscriber?

  ____________ years

With which media (newspapers, magazines, websites , blogs , and others) do you usually inform yourself about the cultural and leisure activities in and around <CITY WHERE THE THEATRE IS LOCATED>?

____

Which of these newspapers do you read at least occasionally (at least 1x a month)?

	Print	Online
Newspaper 1	❑	❑
Newspaper 2	❑	❑
....	❑	❑

(Adjust newspapers to theatre and region.)

Proposed complementary In-Depth-Questions

How long in advance do you normally plan your visits to <NAME OF THE THEATRE>? (Multiple answers possible)

- Spontaneous decision in the evening
- A few days before
- A week before
- Several weeks before
- Several months before
- More than six months before
- After the publication of the schedule

Which of these magazines do you read at least occasionally (1x in the last six months)?

	Print	Online
Magazine 1	❑	❑
Magazine 2	❑	❑
....	❑	❑

(Adjust Magazines to theatre and region.)

Which of these radio stations you listen to at least occasionally (1x a month) ?

Station 1	❑
Station 2	❑
....	❑

(Adjust Stations to theatre and region.)

Module 5: Expectations / Satisfaction / Suggestions

Proposed Core Questions

What motivates you to visit <NAME OF THE THEATRE>? (Multiple answers possible)

- The feeling of doing something extraordinary
- New stimulus on political issues
- To be with pleasant people / to be in a scene
- Surprising impressions / artistic impulses
- Improvement of education
- Good atmosphere
- To experience something "live"
- Meet new people
- Good entertainment
- Something of which I can tell others
- To see a particular artist / a certain company
- High artistic quality
- Interest in art and culture
- Contemporary and innovative performances
- Other: ___________________________________

We want to improve our offer and our services for you. Could you tell us how satisfied you are with <NAME OF THE THEATRE> in terms of the following characteristics? (Please indicate for all aspects of a possible answer)
(Answer options each: 1 = very satisfied, 2, 3 = neither / nor, 4, 5 = very dissatisfied, do not know / no opinion)

- Artistic achievements of the director
- Artistic performances of the actors/musicians/dancers
- Diversity of the program
- Additional events such as introductions, matinees
- Ticket prices
- Atmosphere of the house
- Service and ease of ticket sale
- Availability of ticket sales
- Friendliness of staff
- Sanitary facilities

How satisfied are you in general with <NAME OF THE THEATRE>?
(Answer options each: 1 = very satisfied, 2, 3 = neither / nor, 4, 5 = very dissatisfied)

What suggestions and / or suggestions do you have for the theatre?

Proposed complementary In-Depth-Questions

How satisfied are you with <NAME OF THE THEATRE> on today's particular visit?
(Please indicate for all aspects of a possible answer)
(options each: 1 = very satisfied, 2, 3 = neither / nor, 4, 5 = very dissatisfied, do not know / no opinion)

- Staging of production
- Program booklet
- Wardrode/Entrance
- Restaurant/Bar

(Adjust topics to specific informational needs)

Module 6: Image

Proposed Core Questions

Please characterise <NAME OF THE THEATRE> with at least three properties.

____

What do you like particularly about <NAME OF THE THEATRE>?

____

Proposed complementary In-Depth-Questions

What other theatre is most closely comparable to <NAME OF THE THEATRE> from your point of view?

____

To what extent do you agree with the following statements?
[Response options: 1 = agree completely - 5 = disagree completely, 6 = no opinion]

- <NAME OF THE THEATRE> is essential for the cultural life in <NAME OF CITY>.
- <NAME OF THE THEATRE> is a public meeting place.
- <NAME OF THE THEATRE> is unnecessary.
- <NAME OF THE THEATRE> is important for the attractivity of <NAME OF CITY>.
- <NAME OF THE THEATRE> is of great importance for my relatives, friends and acquaintances.
- <NAME OF THE THEATRE> plays no role in my life.
- One can visit <NAME OF THE THEATRE> with close friends, acquaintances and relatives.
- <NAME OF THE THEATRE> is a famous cultural monument.

(Add aspects for individual informational needs.)