



Deutscher Bühnenverein market report

Population survey insights

November 2023

▶ morris
▶ hargreaves
▶ mcintyre

PROJECT AIMS & METHODOLOGY

The New Alliance Programme

Programme context and research objectives

Following a period of significant external change - the Covid-19 pandemic in 2020 and 2021, the energy crisis and rising inflation – member organisations of the Deutscher Bühnenverein are reporting that audiences are not engaging at the same level as before the pandemic.

As an Association, Deutscher Bühnenverein commissioned Julie Aldridge Consulting Ltd. and Morris Hargreaves McIntyre to deliver a programme of consultancy, research and support to explore the changing nature of audience development, supporting theatres and orchestras across the country in order to adapt and renew their audience strategies. The key aims of the programme were to:

- build understanding across the sector of how the needs and values of audiences are changing;
- implement Culture Segments (bespoke psychographic segmentation system for the cultural sector) to understand the deep-seated needs and motivations of the culture market
- explore the range of reasons why people might engage with theatres and orchestras, and what might be holding others back;
- review opportunities for audience growth for a small cohort of theatres and orchestras (Deutscher Bühnenverein members) and to support that cohort to generate ideas, experiments, and plans to reach and engage more people;
- create case studies from the cohort organisations to inform collective learning across the sector.

This report presents the findings from a market study conducted by Morris Hargreaves McIntyre in Summer/Autumn 2023 to inform ongoing training and support delivered by Julie Aldridge Consulting Ltd as part of the New Alliance Programme.



The New Alliance Programme



Introducing Morris Hargreaves McIntyre

Morris Hargreaves McIntyre (MHM) is an award-winning international consultancy working with cultural organisations of all sizes. The dedicated and experienced team members are united in their fascination with what makes audiences tick. Their strategic thinking, insight and creativity transform how clients see their world. MHM clients use their work to connect more people, more deeply, with their causes, fueling their success.

MHM are immersed in the sector and recognised for the absolute commitment they have to providing organisations with deep, accurate insight into their visitors and strategic support in analysing and acting on the findings.

They have completed thousands of interviews with cultural attendees across the world, published groundbreaking work on audience motivations, created meaningful measures of engagement and outcomes, leading to their work being widely disseminated and adopted.

MHM brings experience, insight, and understanding, from leading audience and market studies across the globe, with teams in the UK, Scandinavia, USA, Australia, New Zealand and the Gulf. Longstanding and key clients include: New York Philharmonic, London Symphony Orchestra, Sydney Opera House, The Public Theatre, West Australian Opera, Royal Opera House, Society of London Theatres, Lincoln Centre, The Smithsonian Institution, London national museums (e.g. The British Museum) and many, many others.



Methodology & context

Research objectives

The aim of this project was to provide Deutscher Bühnenverein and its member organisations with intelligence and insights on the performing arts markets across Germany. While member organisations have an understanding of their existing audiences, a nationwide population study was required to speak to and understand the wider potential audience market in the broadest sense.

Deutscher Bühnenverein sought to understand:

- Engagement with, and interest in, various artforms
- Reasons for, and barriers to attending events
- Awareness of, and engagement with, specific cultural organisations (including Deutscher Bühnenverein members)
- The Culture Segments and demographic profile of the market

Research methodology

A population survey investigating attitudes and behaviours towards the performing arts and culture was completed by respondents across Germany. A representative sample was obtained through a panel partner, using interlocking quotas for age, gender, geography and educational attainment (based on most recent census data).

This report is based on the analysis of responses from those who qualified as being in the performing arts and culture market, here defined as those who have attended an artform relevant to Deutscher Bühnenverein and its members in the past three years (variety of theatre and classical music genres). The final 'in market' sample was 1829.

Fieldwork took place between through August-September 2023. The population survey has a 95% confidence interval (margin of error) of +/- 2.29% at 50% (i.e., where the result is 50%, the actual result may fall between 47.71% and 52.29%).

The following pages present a profile of the sample to help contextualise the subsequent insights.

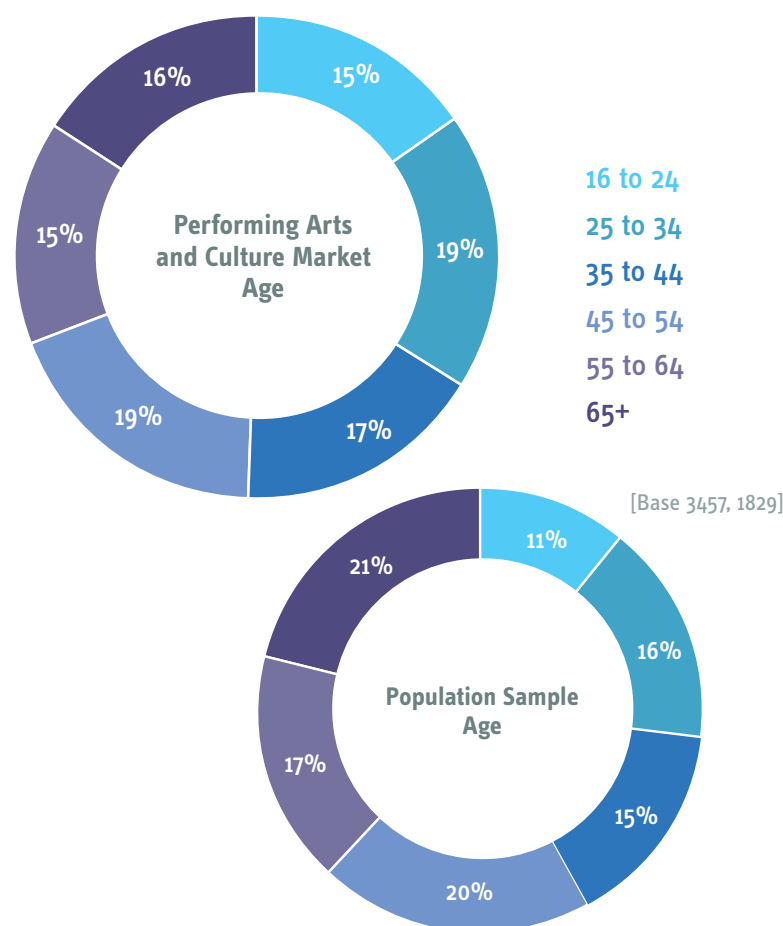


Balanced age distribution within the current Performing Arts and Culture Market

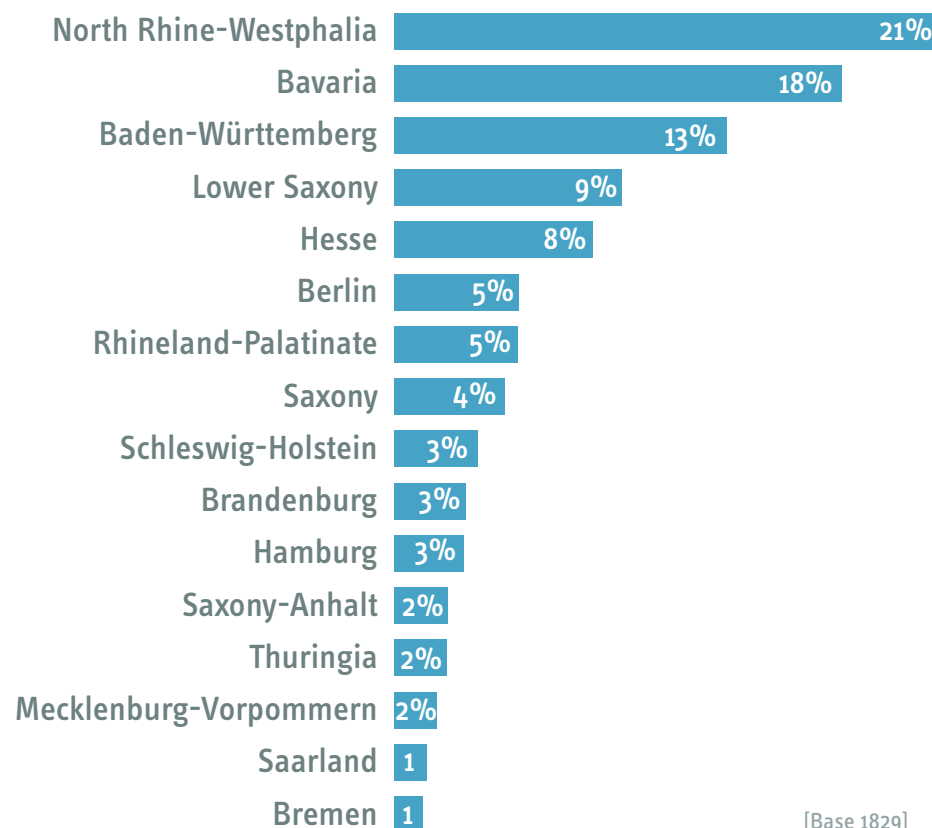
The age distribution of the Performing Arts and Culture Market is evenly balanced across all age groups, broadly reflecting the population data.

16 to 24 and 25 to 34 account for a significantly larger proportion of the Performing Arts and Culture Market than of the population sample (15% versus 11% and 19% versus 16% respectively), this is at the expense of 65+ who make up a significantly smaller proportion of the market than the population sample (16% compared to 21%).

To qualify for the Performing Arts and Culture market, respondents must have attended a relevant event within the last three years. As the age group most at risk from Covid-19, 65+ are most likely to have lingering concerns about returning to theatres and concert halls, which may account for the smaller proportion of this group in the market.



Geographical distribution of the market reflects population



The geographical distribution of performing arts and culture market is very similar to that of the population sample. There are no significant differences between the proportions of respondents from each state in the market (shown left) compared to the population sample.

Due to having relatively small populations, city states Bremen and Hamburg are grouped with their neighbouring area states, Lower Saxony and Schleswig-Holstein respectively, for the remainder of this report.



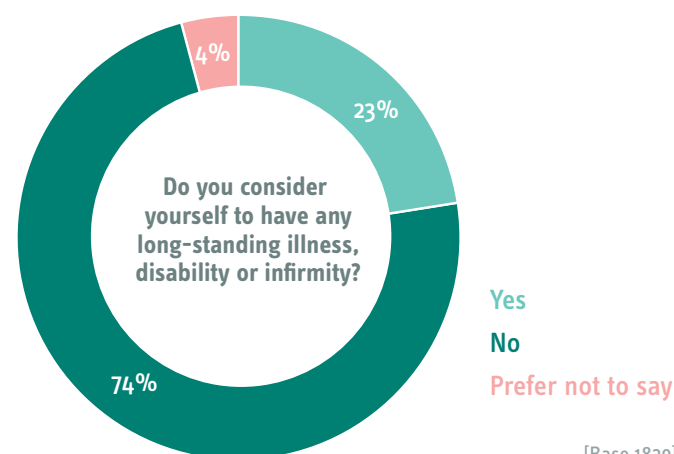
Half of the market are in full-time employment

Working status	%
Working full-time (40+ hours per week)	50%
Working part-time (8-39 hours per week)	17%
Not working - retired	17%
Student - in full-time education	4%
Looking after home/family	4%
Working part-time (Less than 8 hours per week)	2%
Not working - long term sick or disabled	2%
Student - in part-time education	1%
Unemployed - less than 12 months	1%
Unemployed (long term) - more than 12 months	1%
Other	1%
Prefer not to say	1%
[Base]	1829

Those working full-time make up the largest proportion of the market, this is consistent with the age distribution. It is also likely reflective of the often-high costs associated with attending performing arts and cultural events.

The next largest proportions are working part-time or retired (both 17%), the latter also consistent with the age distribution.

1 in 4 (23%) report having a disability or long-standing illness.



[Base 1829]



CULTURE SEGMENTS

Introducing Culture Segments

This research uses **Culture Segments**, an international, sector-specific **segmentation system** for arts and culture organisations. This **whole-market, psychographic system** draws upon a **decade of leading practice** - helping organizations to truly understand and meet the needs of audiences for arts and culture.

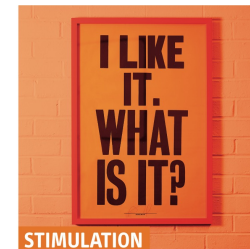
Culture Segments provides the sector with a **shared language** for understanding the audience, with a view to **targeting** them more accurately, **engaging** them more deeply and **building** lasting relationships.

The segments are distinguished from one another by deeply held beliefs about the role that art and culture plays in their lives, enabling you to get to the heart of what motivates them and develop strategies to engage them more deeply.



AUSDRUCK

Gemeinschaft
Pflegen
Großzügigkeit
Hingabe



STIMULATION

Aktiv
Experimentierfreudig
Ideen
Sozial



BESTÄTIGUNG

Eigene Identität
Achtsam
Fleißig
Sinnvolle Zeitnutzung



ESSENZ

Anspruchsvoll
Selbstbewusst
Unabhängig
Kunstbezogen



UNTERHALTUNG

Mainstream
Populäre Beliebtheit
Freizeit
Spaß



PERSPEKTIVEN

Ausgeglichen
Selbstgenügsam
Fokussiert
Glücklich



BEREICHERUNG

Tradition
Geschichte und Herkunft
Nostalgie
Lernen



BEFREIUNG

Beschäftigt
Prioritäten setzen
Ambitioniert
Entfliehen

The following pages include pen portraits of each of the eight segments, populated with insights from this study, as well as drawing on findings from previous Culture Segment studies over the past 10 years.



Introducing Essenz



**Anspruchsvoll
Selbstbewusst
Unabhängig
Kunstbezogen**

Essenz consider the arts and culture essential to their very being. Culture is a way of exploring the world and reflecting on meaning, as well as providing deeply emotional connection.

High-quality culture is their primary concern. They're therefore confident and knowledgeable, and don't see popularity as a signifier of quality, so can be dismissive of things they believe to be too mainstream or unsophisticated.

Attitudes and life priorities:

Exploring

Arts and culture

Lifelong learners

Important experience

I'll be the judge of that

Most likely to say...

Least likely to say...

What would you recommend?

"The waffle about how glamorous the show will be puts me off. I'm not interested in the wrapping paper, only the contents"

Introducing Essenz

Capturing their attention

Essenz view marketing as for other people who need it more than they do. They are far less likely than the other segments to read marketing copy, so extended prose for their benefit could be wasted effort. They're so fiercely independent, they almost make a virtue out of not being influenced.

Building relationships

Essenz are not acquiescent or natural joiners. If they do join a scheme it will often be because membership is a pay gate between them and what they need - tickets or early seat selection. Essenz have a singular personal agenda.

That's not to say they can't develop a deep affinity and connection. They are also believers in the important societal role arts organisations play. They think it's important to allow access to many different kind of artistic expressions to all citizens, and this will include involving the community in creative endeavours.

Top Tip: Essenz have a low tolerance for amateur arts for their own consumption, favouring quality of process and substantial content and rigor. The principal way they would bond with an organisation is through access to the artist, or artistic staff, or privileged access to information and booking.

Messaging should focus on...

Quality and sophistication

Appreciation of their discerning knowledge and tastes

Opportunity to develop their tastes

"The thing about Shakespeare is that he gets right to the heart of the human condition."

Introducing Ausdruck



**Gemeinschaft
Pflegen
Großzügigkeit
Hingabe**

Ausdruck are 'yes' people. They're full of enthusiasm with varied and eclectic cultural tastes. They're in tune with their creative side, are fun-loving, and see culture as a way of broadening horizons.

They enjoy activities that help them connect with and share experiences with others. They are community-minded and, as such, put a high price on inclusivity. They like to be sure that everyone is welcome to enjoy the benefits of engaging.

Attitudes and life priorities:
**Living life to the full
Community and family
Arts, crafts, culture,
creativity, nature**

Use it or lose it

Most likely to say...

Least likely to say...

But what's in it for me?

"The magic you get when music is live! Every concert I go to, I know that in one part of it I'm going to go (gasps!). Because whatever it is will just take me somewhere else magic. Right out of myself. Breathtakingly beautiful."

Introducing Ausdruck

Capturing their attention

Ausdruck don't like being 'marketed to' because they want to be inside, and part of the conversation. They don't want to be advertised to, it feels impersonal. They want an emotional, personal connection with organisations – more like a friend. Marketing needs to actively demonstrate a desire to welcome the widest possible audience.

Building relationships

Ausdruck have a very strong sense of civic responsibility with a natural in-built predisposition to support non-profit organisations. Organisations who are doing something that promotes egalitarianism, access and democracy command more of their support.

Ausdruck is the segment most likely to say nice things about you, to join, to donate, to volunteer. There may be a personal motivation, but it's also their duty: they're people who put their hands up for things. They're network people, and want to be part of something bigger.

Top Tip: Ausdruck are often visually driven. Organisations must make sure marketing has beautiful, natural images. Being people people, they also like to see close-up faces of artists, and are sensitive to (and put off by) pictures of pale, stale and male audiences.

Messaging should focus on...

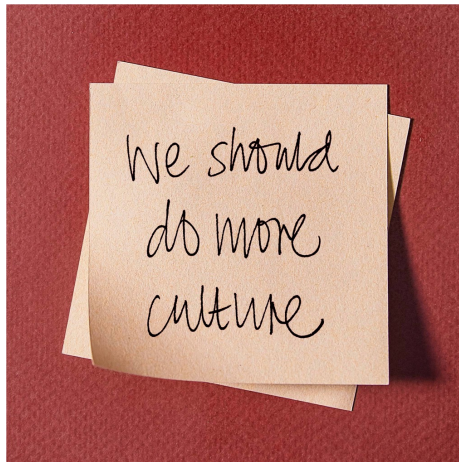
Debates and discussion

Building networks that appeal to their community spirit

Highlighting the opportunities for participation

“Some people aren't familiar with the play... it feels exclusive not to describe what the play is about.”

Introducing Bestätigung



Eigene Identität
Achtsam
Fleißig
Sinnvolle Zeitnutzung

Bestätigung are perhaps the most conscientious of the segments. They're likely to have made a deliberate decision to embrace more culture. Culture is an important and worthwhile activity. Engaging with arts and culture is a commitment to personal well-being that should be prioritised. They feel that culture is a commendable pastime and are keen that they do the right thing.

Attitudes and life priorities:
Personal development
Doing the right thing
Quality experiences

It's on my bucket list

Most likely to say...

Least likely to say...

C'mon, let's just take a risk!

"It is a constant learning process for me and that is part of the reason why I like going to the theatre. it creates a conversation within yourself."

Introducing Bestätigung

Capturing their attention

Bestätigung need plenty of endorsement and supporting evidence. Word of mouth from a trusted friend would be the ultimate validation. But TripAdvisor, press reviews, and star ratings, will all assure Bestätigung that there's no risk something's going to be a dud. Once they have decided, they want to be sure to have the best experience. The devil is in the detail.

Building relationships

Like most of us, Bestätigung want to feel confident and dignified. Information and interpretation, for example, should make them feel smarter, not reveal their ignorance. Signage, cloakroom facilities, clear seat reservations and great customer service should guarantee the trip is a success, not make them feel like a fish out of water. Bestätigung will return to organisations they trust to deliver, so a little thought about making people feel comfortable goes a long way.

Souvenirs, programmes and other take-aways provide a reminder of positive experiences and a feeling of having done a good thing, but do need to be worth the money.

Top tip: Membership may provide Bestätigung a way of getting even more value. They will initially join to gain personal benefits but as a segment looking for ways to feel good about themselves, a membership card fosters a sense of affiliation.

Messaging should focus on...

Letting them know about events early

Promoting benefits as being entertaining and educational

Offering loyalty schemes, discount cards and clubs

“It's important to get information as far in advance as possible. Planning is the first word.”

Introducing Bereicherung



Tradition
Geschichte und
Herkunft
Nostalgie
Lernen

Bereicherung tend to be lovers of history with a respect for the past. They are strongly independently minded and exert their right to be cautious. They tend to have established tastes and habits and know what they will enjoy. Bereicherung will look for the thread that links them to what went before.

When it comes to art and culture Bereicherung veer towards things they believe to have stood the test of time.

Attitudes and life priorities:
Understanding the past
Arts and crafts
Home life
Nature, gardening

It's stood the test of time

Most likely to say...

Least likely to say...

It's better than the original

“If you start to go too much along the story line it is going to lose its connectivity to where you actually are... it goes more into Disneyland.”

Introducing Bereicherung

Capturing their attention

Bereicherung don't like the idea that marketing will trick them or manipulate them into buying something. They look for plain English information that supports the quality of the product.

Due to their cautious nature, try before you buy, clips, excerpts and thorough information will reassure them. They are also price sensitive and often assess value for their money and want to know exactly what they're investing in.

Building relationships

Bereicherung are not looking to broaden their horizons and will remain loyal to the organisations that feel most relevant to them.

Membership too is a route to closer engagement by providing increased value – either monetary or through additional benefits, rewarding expert opinion and information.

Top tip: For those in invested loyal relationships, the opportunity to volunteer could provide a way of doing something sociable that is aligned with their preferred pastime.

Messaging should focus on...

Nostalgia

Highlighting the traditional
and the established

Providing good value
for money

“If it shares the insights and they are accurate, then I know I am on a good path.”

Introducing Stimulation



Aktiv
Experimentierfreudig
Ideen
Sozial

Stimulation are an active group who love adventure. They are all about big ideas and are looking for something 'out of the ordinary'. But they also attend cultural events for the social experience.

Stimulation are independently minded. They are happy to stand out from the crowd if it shows them to be ahead of the curve. They aren't drawn to the very mainstream as they like to be the one making the discoveries.

Attitudes and life priorities:
Enjoying life, going out
Taking risks
Contemporary culture

What's the big idea?

Most likely to say...

Least likely to say...

Are you sure it's safe?

"I like to go and see musicals but I also like to go and see edgy things as well. I like to go and see things that I just wasn't expecting."

Introducing Stimulation

Capturing their attention

Stimulation enjoy marketing as an art form in its own right. If it's clever, or beautiful, or visual, they'll send it to everyone. But if it's lame, they'll also send it to everyone. Marketing needs to highlight the thing that makes it incredible and different. But no spoilers please – don't give too much away. Intrigue them and spark their interest but the “reveal” should happen during the visit.

Building relationships

This segment typically has a slightly lower attention threshold and can be distracted by something newer, or shinier on the horizon. However brands they identify as keeping things interesting can develop relationships with this segment. Membership that doubles as a pass into new and extraordinary experiences may increase the loyalty of an otherwise promiscuous segment.

Top Tip: Stimulation will associate with brands and activities that align with their own self-image. Aware of how they're perceived by others, cultural experiences can be great conversation starters, and reflect well on them. Their early adopter nature also means they make good brand ambassadors

Messaging should focus on...

Offering events and activities on weekends and evenings

Riskier, less well-known activities

Promoting the social element

“When I think of art I think of possibility. I expect art [to] act as staging grounds for speculation and desired futures.”

Introducing Befreiung



Beschäftigt
Prioritäten setzen
Ambitioniert
Entfliehen

The Befreiung segment is looking for escape from the stresses of everyday life. They can feel a little under siege from all the different pressures and conflicting demands on their time. For some, these conflicts may be reality, but often being in the Befreiung segment is more a state of mind. It is the feeling of being time-poor, rather than the actual fact of not having any time.

Attitudes and life priorities:
Work, home and family
Relaxation
Juggling commitments

We should do this more often

Most likely to say...

Least likely to say...

There's plenty of time

“Getting away from my everyday life and feeling special for the night.”

Introducing Befreiung

Capturing their attention

For Befreiung you have to assume you have just one shot at capturing their attention. Put it all on a plate, with multiple reasons to go – and a hard stop call to action. If it is only happening this week make sure they know. Highlight multiple benefits – maybe an activity to entertain the kids is also a great chance to catch up with neglected friends (and it's guaranteed their kids will like it too).

Building relationships

Befreiung tend not to be forthcoming in support for arts and cultural institutions and are unlikely to find time to make the most of cost-saving benefits of membership. For them, it's more about efficient transactions than becoming a close ally to the cause.

Top Tip: Befreiung may not be the first port of call to build a supporter base. However, schemes that reward return at the same time as providing concierge-style services could help keep you top of mind and decrease the perceived obstacles of planning a visit.

Messaging should focus on...

The whole visit not just the show / concert / exhibition itself

A relaxing, enjoyable experience

If you only do one thing, make it this

'Nice attraction and learning experiences for my family. In theory, we would try new stuff - we should visit more.'

Introducing Perspektiven



Ausgeglichen
Selbstgenügsam
Fokussiert
Glücklich

Perspektiven are fulfilled, happy doing their own thing, driven by their own agenda. They are very focused on a limited number of interests they find satisfying and rewarding and have a low appetite for expanding this repertoire.

Perspektiven have a need to make their own discoveries, so it will be their desire to learn that provides a focus for any cultural engagement.

Attitudes and life priorities:

Reading

Learning

Personal space

The outdoors

I'm fine doing my own thing

Most likely to say...

Least likely to say...

Let's do something totally different

“I don't go to many shows or exhibitions, but I'll be there with bells on if it's something that aligns with my interests... Marketing doesn't matter - just the subject matter..” 24

Introducing Perspektiven

Capturing their attention

When it comes to marketing, Perspektiven are the one segment that have no fear of missing out.

If what you're doing aligns with their pre-existing interests and ignites their passion, then they will arrive with great motivation to engage, hoping you will really bring things to life for them. However, given these tend to be private passions it will be for them to discern its relevance to them.

Building relationships

Perspektiven tend to be self-centred and not ultimately interested in having a relationship with you. Remote is fine. They are concerned with the world rather than people.

Top Tip: Given that Perspektiven have a relatively small set of activities they turn to, their loyalty can be valuable to those able to win it. Membership will provide them with access under their own terms, giving them the functional benefits of flexibility and good value. They're not, however, interested in being part of something collective.

Messaging should focus on...

The event will be personally rewarding

The event is something special to do as a treat

It will be engaging and spark the imagination

'The information does nothing to enhance my interest in [the topic]. I would attend purely because of my personal interest.'

Introducing Unterhaltung



Mainstream
Populäre Beliebtheit
Freizeit
Spaß

Unterhaltung tend to see arts and culture as very much on the periphery of their lives. Their occasional forays into culture are likely to be for mainstream events or days out. Leisure time is for fun and this segment is looking for entertainment and escapism.

If they do attend it will be socially motivated and their engagement is typically among the lowest of all segments.

Attitudes and life priorities:

Home and pub

TV, celebrity, sports

Thrill and spectacle

Priorities close to home

Go on - entertain me!

Most likely to say...

Least likely to say...

Let's find something new with plenty of food for thought

“I like taking time out with friends and family and being thoroughly entertained.”

Introducing Unterhaltung

Capturing their attention

Unterhaltung prefer to stick with the tried and tested, and they view popularity and celebrity casting as endorsements of quality.

This segment likes marketing and advertising – it's a useful way to get information. They can tell a lot from marketing – a big, expensive billboard campaign for example is an indicator that something has high production values.

Building relationships

Unterhaltung very rarely invest in a supportive way. They don't see culture as contributing to community or society at large. On the other hand, the instrumental benefits of hospitals and schools are clear to see.

And neither would benefits-driven transactional schemes work – purely because they wouldn't make much use of it so it's unlikely to feel relevant or worth it.

Top tip: This is not a segment to target for membership or support. Instead, try to increase spend while they're onsite through catering, retail and added extras. And at the same time help them make a real day or night of it.

Messaging should focus on...

The popularity of the event

It's a great event that everyone will enjoy

Celebrity appearances or endorsement

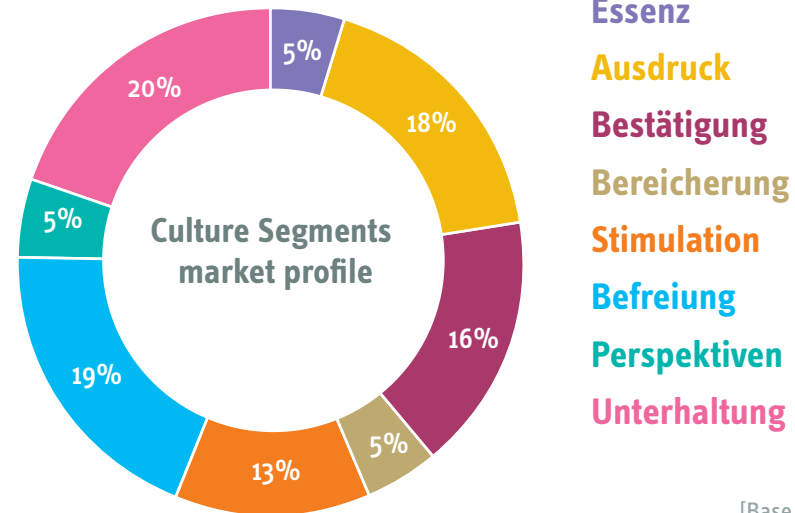
'I'm not saying do it all the time, but occasionally things pop up... It's easy to forget about a place if you've already been once.'

Culture Segments market profile: four dominant segments

All eight Culture Segments are present in the defined performing arts market across Germany, but four segments stand out as particularly dominant: **Unterhaltung**, **Befreiung**, **Ausdruck** and **Bestätigung**. Whereas in a nationwide study that includes the whole population or culture market we would find the segments more evenly balanced, as we have focused in on a more specific, defined performing arts market, it is perhaps unsurprising that some segments are more dominant.

It is expected that **Ausdruck** and **Bestätigung** are among the most dominant segments in the German market. They are typically among the most culturally active and engaged across all artforms, and we typically see them as the most dominant segments within organisations' audiences.

The **Unterhaltung** and **Befreiung** segments are unusually large within the market; however, as subsequent analysis will show, whilst their previous engagement with many artforms is significantly lower than the average and other segments, their expression of interest positions them in this "potential" market in the broader sense.

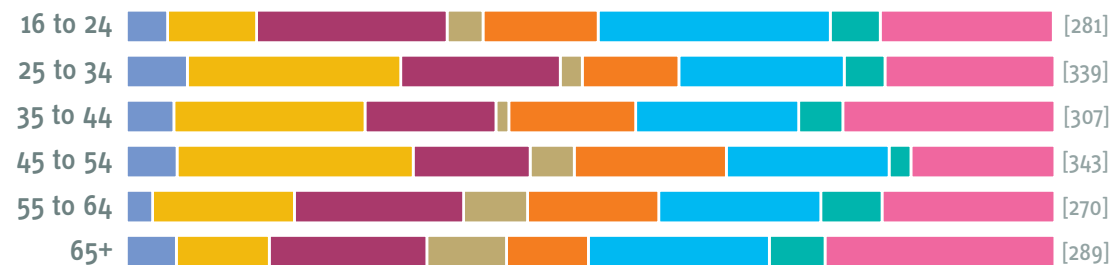


[Base 1829]



Few differences in Culture Segments profile by age

Culture Segments: by age



Essenz Ausdruck Bestätigung Bereicherung Stimulation Befreiung Perspektiven Unterhaltung

Overall, the Culture Segment profile varies little between different age groups, with the same dominant segments. The significant differences are as follows.

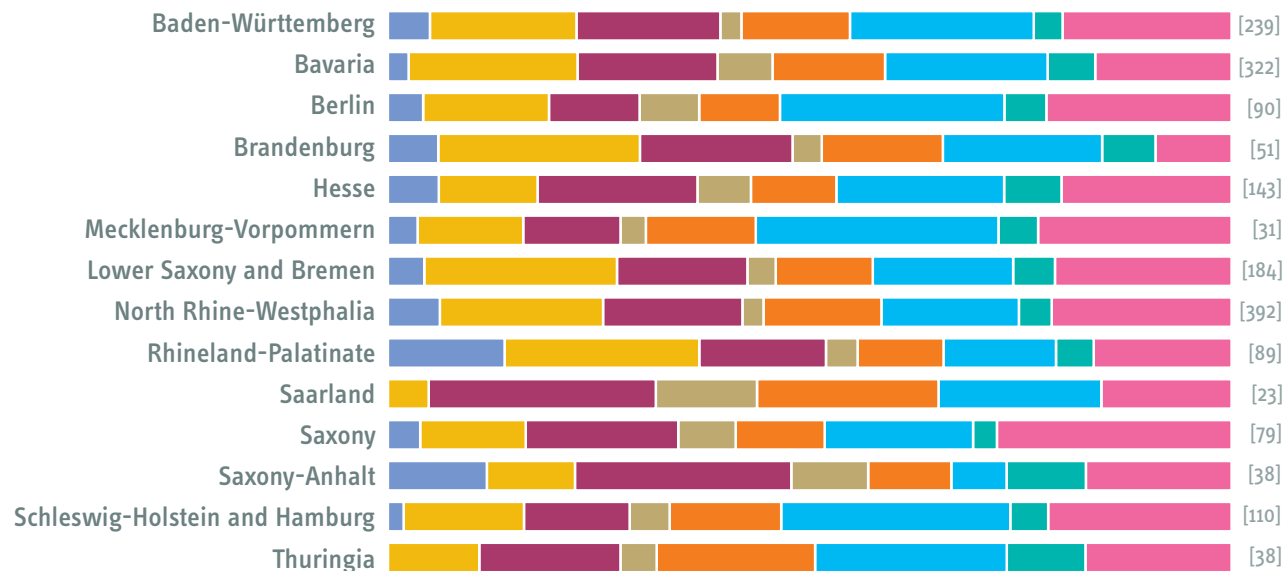
Those aged 16 to 24 are significantly more likely to be **Befreiung** (26% versus 19% overall), which is not uncommon. This segment wants to engage more with cultural activities but can experience or perceived functional barriers, particularly around time and money spent on culture. It is therefore likely that this young cohort is experiencing pressures around the current cost of living crisis, in particular. This is then reflected in the significantly lower-than-average proportion of **Ausdruck** within this age group. The 16-24 cohort also includes the highest proportion of **Bestätigung**, which could reflect a lower level of confidence around cultural consumption, compared to older, more experienced groups.

Other notable differences include those within the 65+ age category. **Bereicherung** is a significantly more dominant segment than in any other age group, reflecting the cohort's more established, and often traditional, cultural preferences. This cohort, like 16-24 year-olds, also has a lower-than-average proportion of **Ausdruck**.



Similar Culture Segment distribution across most states

Culture Segments: by state



Essenz Ausdruck Bestätigung Bereicherung Stimulation Befreiung Perspektiven Unterhaltung

Owing to the sample sizes of some regions, there are few statistically significant differences in the Culture Segments profile. The Culture Segment distribution is very similar across all states, with only the following two exceptions: Those living in Rhineland-Palatinate are significantly more likely to be **Essenz** (14% compared 5% average). Those in Saxony-Anhalt are significantly less likely to be **Befreiung** (7% versus 19% average).

In some countries, we see the profile of the capital city vary significantly to other regions, but this is not the case in Germany. This is likely due to proportion of the Berlin population (out of the whole of Germany) being much lower (c. 4%) than in many other European countries (e.g. UK 13%, Sweden 12%). In these two examples, we see the more culturally active segments, particularly Essenz and Ausdruck, much more dominant in both London and Stockholm.



MOTIVATIONS AND BARRIERS:

A predominantly socially-motivated market

Introducing the hierarchy of visitor motivations

Human behaviour is driven by needs

People engage with arts and culture to meet deep-seated needs, including: spending time with friends and family; learning about the world; experiencing nostalgia; feeding a hobby or professional interest; to experience awe and wonder; to gain inspiration; to derive therapeutic experiences, to achieve an 'altered state' and many others.

Over the course of several years, Morris Hargreaves McIntyre has repeatedly asked people to articulate why, in their own words, they choose to visit cultural organisations. Having explored these motivations with visitors and modelled this data, we developed statements that reflect how people actually express these motivations, refining the model and the questions down to a set of statements.

These motivations reflect the beliefs that people have of the value of cultural organisations to them and therefore the needs that drive their visits. They are based on their personal experience and on the assumptions they hold.

These motives are what make people set off for a visit. As they enter the building, they become expectations and as they leave they become outcomes. This is why they are so important: understanding people's underlying motivations can help us design services and experiences that meet their needs; being able to measure motivations, expectations and outcomes can provide deep insight into visitors and the visitor experience.

The progressive depth of visitor engagement

The power of this approach is that these motivations can be grouped into four broad categories, which represent the key drivers of a visit: Social, Intellectual, Emotional and Spiritual.

The diagram below describes how a visitor's primary driver for making a visit will determine how they perceive cultural organisations and inform the expectation of the benefits they will derive from a visit. These range from seeing cultural destinations as visitor attractions offering an enjoyable, sociable day out to seeing them as a 'church' offering benefits that can be described as spiritual.

Hierarchy of Visitor Motivations

See the venue as a:	Have this driver:	And they seek this from a visit:
CHURCH	SPIRITUAL	Creative stimulation and quiet contemplation, they see the visit as an opportunity to escape and recharge their batteries, food for the soul
SPA	EMOTIONAL	May have a personal connection to the subject matter, want to see fascinating things in an inspiring setting, seek ambience, deep sensory and intellectual experiences
ARCHIVE	INTELLECTUAL	Keen to encourage their children's or their own interest and knowledge, may have professional interest in the subject, seek a journey of discovery, to find out new things
ATTRACTION	SOCIAL	See visit as an enjoyable place to spend time with friends and family, seek ease of access and orientation, good facilities and services, welcoming staff

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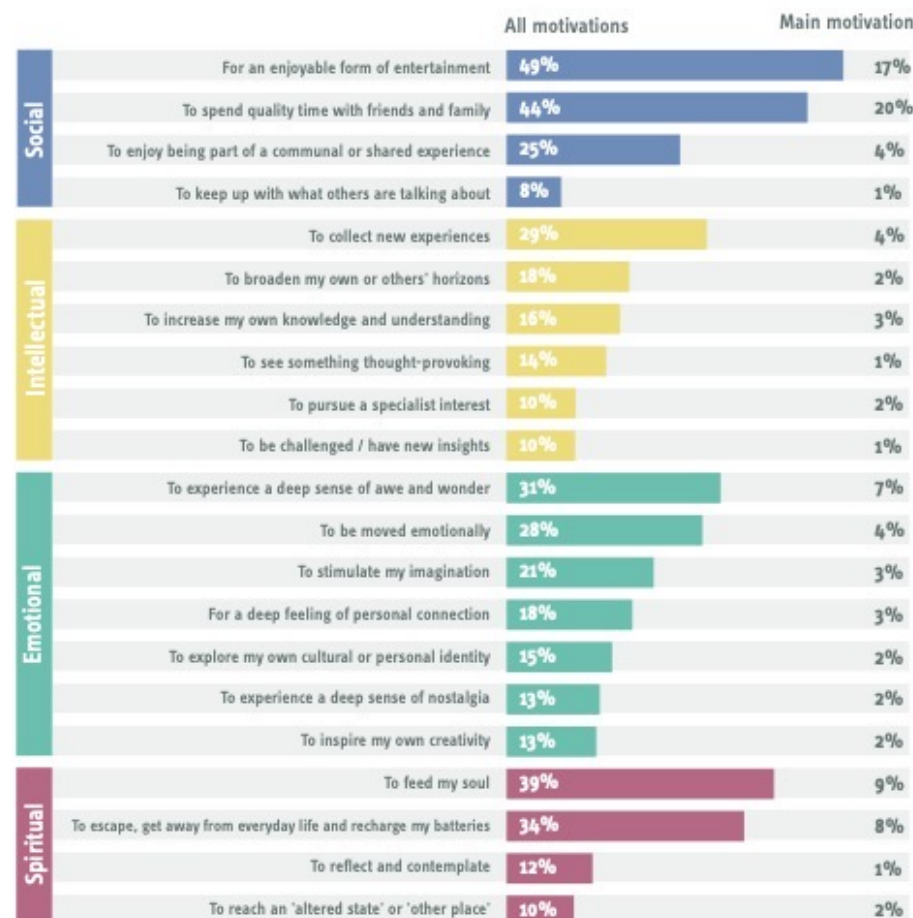
Social motivations for engagement are most prevalent

Thinking about motivations for attending arts and cultural events, respondents were presented with: ‘Think of the last time you attended a classical music, theatre, or festival event within the last five (5) years. My reasons for visiting were... [select]’.

Responses show that social motivations were most commonly selected: “for an enjoyable form of entertainment” and “to spend quality time with friends and family”. Cross-analysis shows that across both statements, those aged 55+ were significantly more likely to be socially-motivated to attend.

Spiritual drivers were also common, with around four in ten respondents choosing either/both “to feed my soul” or “to escape from everyday life”.

Given the context of the past five years, in light of the pandemic, it is perhaps unsurprising that social drivers for engagement are so prevalent.



[Base 1829]

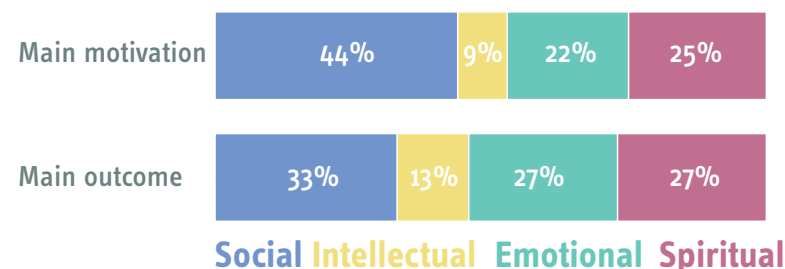


Many experience shifts towards deeper, more rewarding outcomes than intended

Looking at the market's main motivations, compared to their main outcomes, we see several significant shifts, which is typical.

While the most common visit motivation was social (44%), this is where we see a significant shift in outcomes, with a lower proportion (33%) typically reporting a main social outcome, instead experiencing a deeper intellectual, emotional or spiritual outcome instead, which is often what cultural organisations are trying to elicit. This is not to say that people cannot have a perfectly satisfactory social visit: the issue for organisation is to meet the visitors' needs whatever their motivation and then work to deepen their engagement to provide the fullest possible experience.

Main motivation for recent cultural engagement



[Base 1774, 1795]



16 to 24s less likely to be socially motivated

MAIN MOTIVATION		Total	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
	Social	44%	32%	39%	48%	44%	46%	53%
	Intellectual	9%	14%	13%	10%	6%	6%	5%
	Emotional	22%	25%	23%	22%	21%	24%	21%
	Spiritual	25%	29%	25%	21%	28%	24%	22%
	[Base]	1774	269	333	300	331	261	280

Younger members of the market (16-24s) are significantly less likely than other age groups to report a **Social** main motivation. However, they are the most likely age group to report an **Emotional** main motivation, such as “to experience a deep sense of awe and wonder”. This may be because younger adults are more likely to fulfil social needs through alternate means (e.g., playing sport or going to bars/clubs). In terms of outcomes, this age group sees some of the biggest shifts between motivations and outcomes. In particular, they are more like experiencing deeper emotional outcomes than anticipated.

MAIN OUTCOME	Outcome	Total	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
	Social	33%	24%	31%	30%	31%	42%	41%
	Intellectual	13%	17%	18%	12%	12%	8%	8%
	Emotional	27%	36%	27%	26%	25%	26%	23%
	Spiritual	27%	22%	25%	32%	32%	24%	28%
	[Base]	1795	275	337	304	335	266	279

Conversely, those aged 65+ are the most likely to report a **Social** main motivation and subsequent outcome and are consequent among the lowest for **Emotional**, **Intellectual** and **Spiritual** motivations.

Red datapoints indicate that this age group is motivated by this type of factor significantly more than average.

Blue indicates that this age group is motivated by this type of factor significantly less than average.



Austruck and Essenz are most likely seeking deeper, richer cultural experiences beyond social and entertainment

Main motivation	Total	Essenz	Austruck	Bestätigung	Bereicherung	Stimulation	Befreiung	Perspektiven	Unterhaltung
Social	44%	31% -	37% -	40%	41%	49%	42%	56% +	53% +
Intellectual	9%	18% +	7%	8%	5%	9%	13% +	5%	7%
Emotional	22%	30%	26%	24%	21%	19%	22%	13% -	21%
Spiritual	25%	22%	30%	27%	32%	23%	23%	27%	19% -
[Base]	1774	88	323	297	80	226	337	82	341

Austruck and **Essenz**, the two segments most commonly dominant within organisations' existing audiences are the most likely segments to seek deeper motivations beyond social. They are less likely citing a main social motivation, but rather an intellectual, emotional or spiritual one. Observation of, and exploration with, audiences has revealed that people with intellectual, emotional and particularly spiritual motivations engage at a deeper level than those with social motivations. While people can have satisfactory social visits, it is more fulfilling if organisations facilitate experiences which elicit deeper engagement and outcomes.

The same is also true for **Stimulation** and **Bestätigung** to some extent; however the social aspects of cultural activities are a more important part for these segments.

At the extreme are **Unterhaltung**, who are most commonly the segment most associated with social experiences and see culture predominantly entertainment, meaning other types of drivers are below-average.

There are no significant differences in outcomes by Culture Segment among this market; patterns are reflective of motivations.



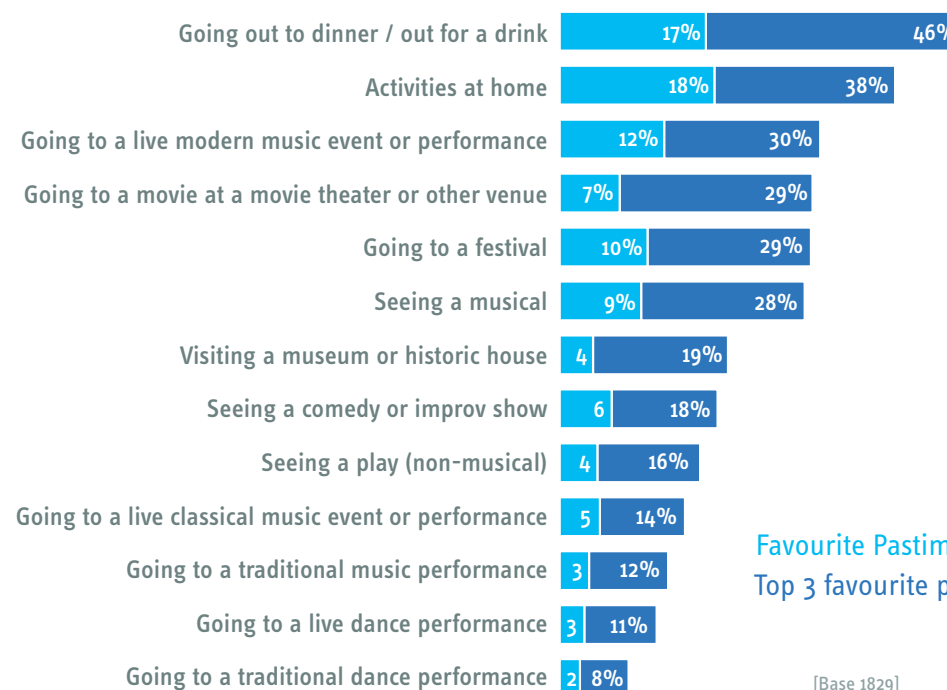
Going to the theatre or classical music event features in top three leisure activities for around 16% of market

Respondents were asked about a range of leisure activities and pastimes to understand where going to various cultural events fits within their lives more broadly.

As we might expect, activities such as going out for dinner/drinks and hobbies at home featured most highly.

Most relevant to Deutscher Bühnenverein and its member organisations, going to a musical featured among the top three pastimes for 28% of the market, and was the favourite for 9%. Furthermore, going to a play (non-musical) was top for 4%, and among the top three for 16%. This was similar to classical music (5% and 14% respectively).

Favourite Pastimes



Favourite Pastime
Top 3 favourite pastimes

[Base 1829]



Sense of importance of performing arts increases with age

Three-quarters (73%) of the market believe performing arts to be of the same level of importance currently as they did pre-pandemic. This is split between 57% feeling it is important, 12% neither important nor unimportant and 4% not important. Similar proportions believe arts to be of greater and lesser importance (13% and 14% respectively).

Sense of importance of the performing arts increases significantly with age. Older members of the market are more likely to rate performing arts as important, both pre- and post-pandemic, than younger members: 75% of over 45s rate as important post-pandemic compared to 53% of 16 to 24s.

		Before the pandemic		
		Important	Neither	Not important
Currently (post-pandemic)	Important	57%	8%	2%
	Neither	9%	12%	2%
	Not important	4%	2%	4%



Perceptions of the importance of performing arts increases significantly with age

	Total	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Pre-Covid	69%	54%	65%	69%	74%	74%	79%
Post-Covid	68%	53%	66%	64%	74%	73%	77%
[Base]	1829	269	333	300	331	261	280

Perceptions of the importance of the performing arts, both pre- and post-Covid, increases significantly with age. Younger respondents in the market were least likely to agree the performing arts were important in their lives: 54% felt it important pre-Covid, similar to 53% post-Covid. This increases with each age cohort, up to those aged 65+, where 79% felt the arts important pre-Covid and 77% post-Covid, both of which are significantly higher than the average.

There were no statistically significant shifts in perceptions pre- and post-Covid among any of the age groups.



Essenz, Ausdruck and Bestätigung most likely to rate the performing arts as important, pre- and post-Covid

	Total	Essenz	Ausdruck	Bestätigung	Bereicherung	Stimulation	Befreiung	Perspektiven	Unterhaltung
Pre-Covid	69%	86%	87%	78%	68%	74%	55%	58%	54%
Post-Covid	68%	72%	83%	74%	69%	74%	58%	56%	57%
[Base]	1829	90	325	301	83	232	351	88	360

The Culture Segments' perceptions of importance of the performing arts reflects what we would expect – Essenz, Ausdruck and Bestätigung were significantly more likely to rate as important pre-Covid (and Stimulation, on the cusp of above average). Conversely, the typically less actively engaged segments Befreiung, Perspektiven and Unterhaltung were significantly less likely to rate as important.

For the most part, the patterns among the segments is similar both pre- and post-Covid. The only statistically significant shift is among Essenz, which is highly unusual. The proportion of Essenz rating the performing arts as important fell significantly from 86% to 72%. While 72% is still slightly above average (68%) this is an unusual shift for the segment which is usually considered one of the “core” segments within many performing arts organisations.



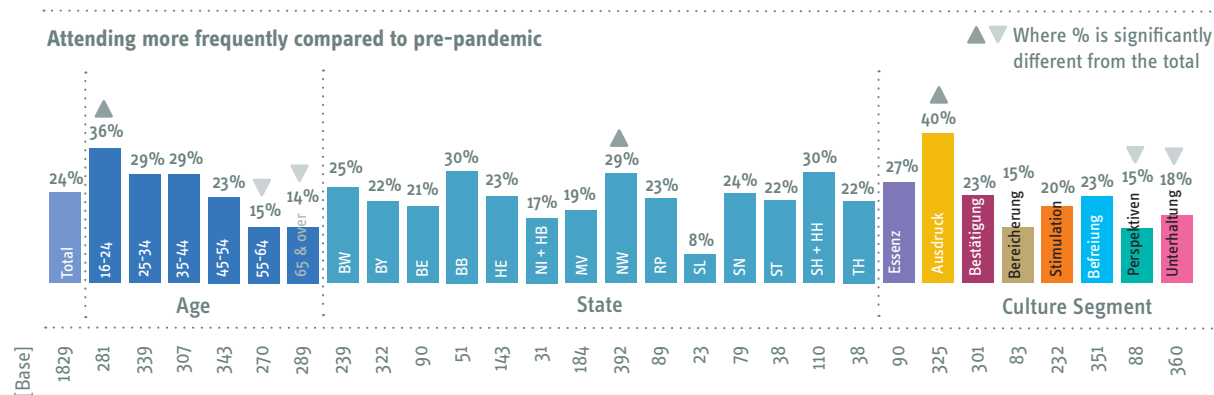
Half report their current attendance to be as frequent as pre-pandemic

Since the pandemic, audience attend arts and cultural events...

24% More often 51% About the same 24% Less often 1% Unsure

Half (51%) of the market report attending cultural events about the same as pre-pandemic, with equal proportions (24%) citing they attend more and less often. Similar attendance frequency post-pandemic is reflective of largely consistent attitudes towards performing arts (shown on previous slide).

16- to 24-year-olds and those in the **Ausdruck** segment are significantly more likely than average to report attending more frequently post-Covid. 55-64 and 65+ are significantly less likely to report this, as are **Perspektiven** and **Unterhaltung** Culture Segments- given the dominance of **Unterhaltung** in the market, this is worth considering.



Post-pandemic spend consistent with attendance

Since the pandemic, audiences spend...

23%
More
money

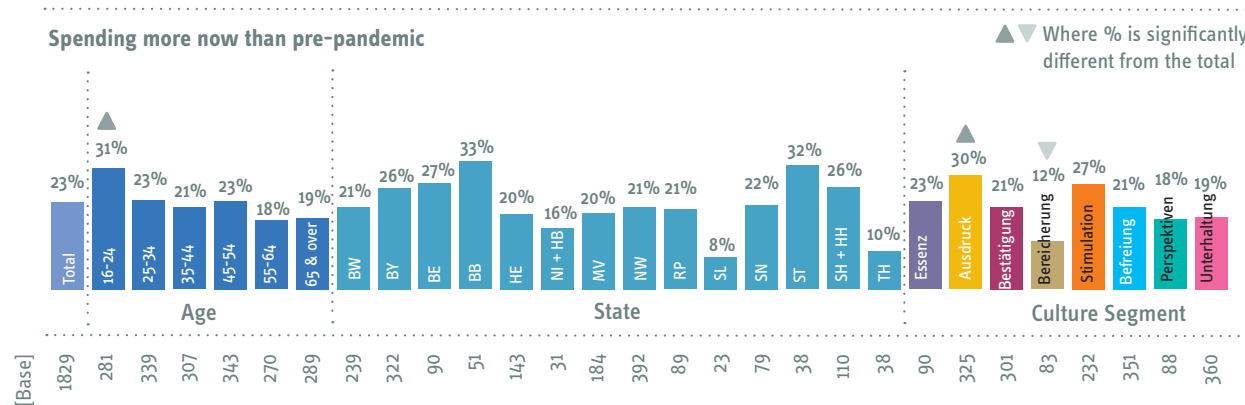
49%
About the
same

26%
Less
money

2%
Unsure

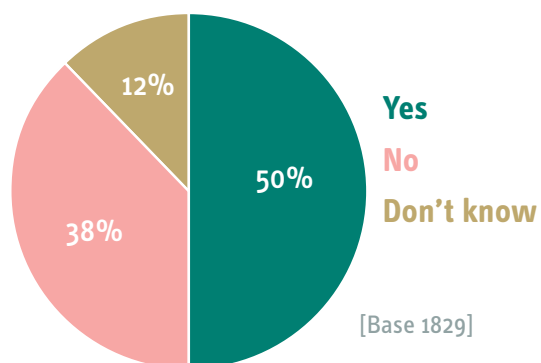
Similarly to attendance, approximately half (49%) of the market report spending about the same amount of money on performing arts and culture events currently, as they did pre-pandemic. Once again, as with attendance, almost equal proportions report spending more and less money.

The same core groups that are attending more frequently are also reportedly spending more money post-Covid (16-24 and **Ausdruck**).



Segments most likely to have engagement inhibited due to more “insatiable” appetite for culture

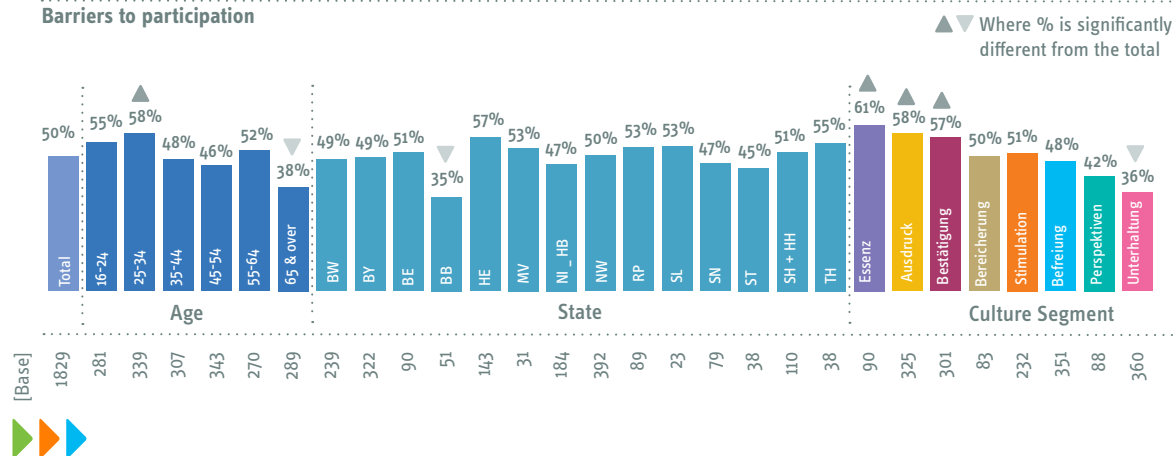
In the past 3 years, can you think of an occasion when you would have liked to attend a classical music, theatre, or festival event but something prevented you from doing so?



It is somewhat unsurprising that **art-essential Essenz** and “yes-people” **Ausdruck** are the most likely to have been unable to attend as much as they would like, due to external factors, as they typically attend most frequently and they have a more unsatiable appetite for culture. **Bestätigung** are also significantly more likely than average to have faced a barrier to attendance.

Given many are retired and therefore have more spare time, it is perhaps unsurprising 65+ are significantly less likely to have experienced barriers to attending. Whereas those aged 25-34 are significantly more likely to have been prevented from attending than average (58% vs 50%).

Barriers to participation



Covid-related factors clearly impacted attendance of last 3 years

When asked about the specific barriers to attending in the last three years, it is clear that Covid was a direct or indirect factor. The most common reason for not attending was performances selling out too quickly (24%), which could be due to more limited capacity and runs in the period during and post-Covid. Similarly, concerns around safety were prevalent for one fifth of the market (22%) While this has likely subsided to a great extent now, it is worth remembering the context in which this study was conducted.

A similar proportion also reported prioritising other things in their leisure time (23%), which reflects the shifts in importance of performing arts in peoples lives, on previous pages.

There are no significant differences between Culture Segments, states or age groups. Live broadcasts of sold-out shows may be a good method of tackling this barrier, if additional showings are not possible. This may also combat the problem of venues being too far away (reported by 16%).



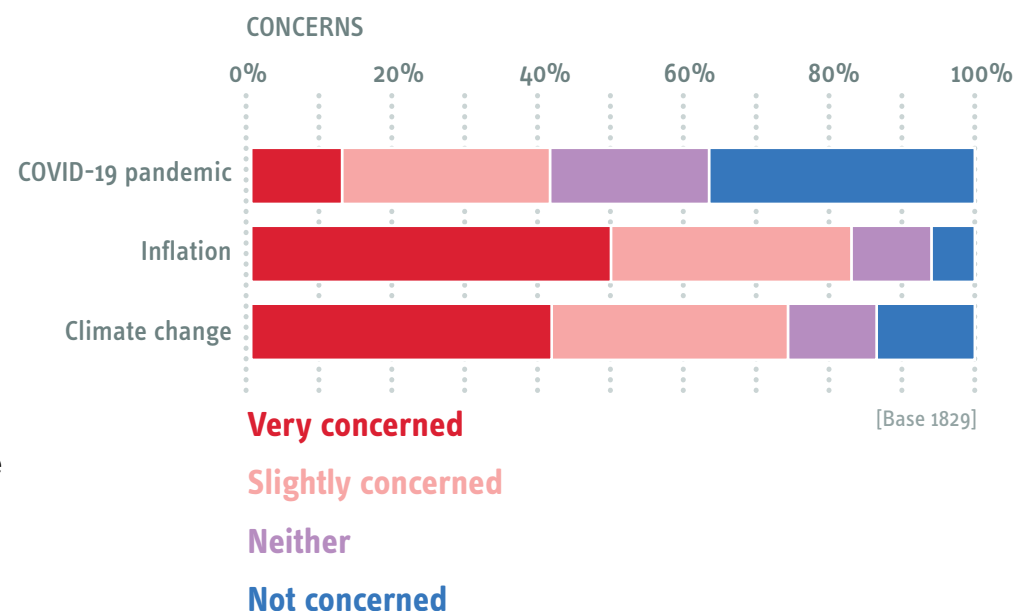
Reasons for not attending in last three years	%
The performances I wanted to see sold out too quickly	24%
I prioritised other things in my leisure time	23%
I was concerned about safety following the COVID-19 pandemic	22%
The tickets were too expensive	17%
Venues were too far away from where I live(d)	16%
I was concerned about the rising cost of living	16%
I didn't know my schedule in advance so couldn't plan ahead	15%
The travel logistics were too complicated	14%
I had no one to go with	13%
My family commitments took priority / made it difficult	13%
The performance times did not suit me	10%
The costs of attending was too high when factoring in food, transport etc.	10%
I did not feel comfortable / like I would not fit in	9%
I was concerned about my/others health	8%
I did not know enough what the performance would be like	6%
The shows did not interest me at the time	6%
The facilities were not fully accessible	5%
Other – please specify	9%
None of these	1%
[Base]	910

Inflation is of greatest concern to the market; and expectations of sustainable organisations are also heightening

When asked about levels of concern around wider societal factors at present, inflation was clearly the cause of greatest concern among the market (83%): 50% very concerned with and additional 33% slightly concerned.

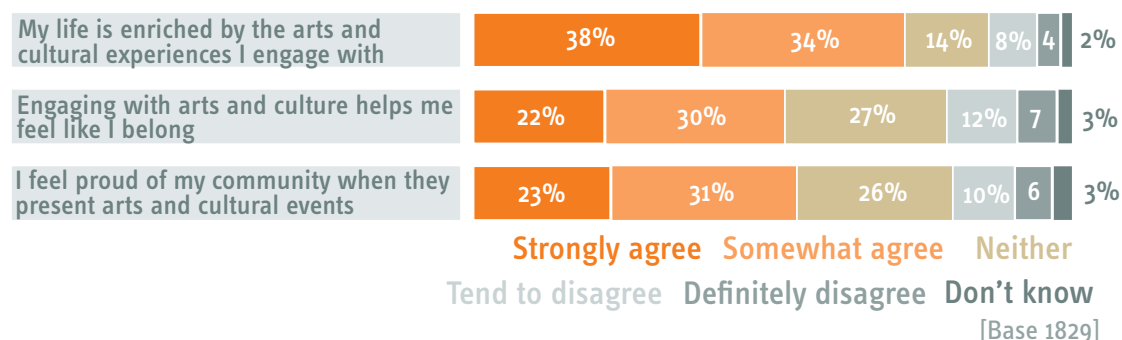
Climate change is similarly affecting the market, three-quarters (75%) are very or slightly concerned. This therefore demonstrates the importance of cultural organisations taking steps to become more sustainable as an organisation, as this will likely increasingly be an important consideration for the market.

Over 4 in 10 (41%) report lingering concerns over Covid-19. Among different age groups, level of concern is broadly in line with the average; on some points, particularly Covid-19 older audiences are more likely reporting a higher level of ongoing concern.



Ausdruck most likely to feel a sense of belonging and community pride from the arts and cultural experiences

Attitude and alignment statements



7 in 10 (72%) agree that their lives are enriched by arts and culture, older people are most likely to strongly agree (47% and 43% for 55-64 and 65+ respectively, compared to 38% average). Perspektiven and Unterhaltung (the segments most likely to report social main motivations) are significantly less likely than average to agree with this statement, further indication of a more casual relationship with the arts. Befreiung were also less likely to agree.

Just around half the market agree they feel a sense of belonging through cultural engagement (52%) and feel proud of their community (53%). Ausdruck are the segment most likely to feel a sense of belonging, (75% vs 52% average) and community pride (79% vs 54% average), further highlighting the importance of inclusivity in gaining their attendance, they may be a good target for membership or 'friend' scheme.



ARTFORM ENGAGEMENT:

High levels of engagement across many artforms, and room for further growth

Artform engagement

Respondents were asked their level of engagement with a range of classical music genres, theatre genres and festival types, relevant to Deutscher Bühnenverein and its member organisations. Engagement with these is mapped in this section, highlighting in more detail artforms with the higher levels of engagement, and those most relevant to Deutscher Bühnenverein.

Classical music (concert performances)

- Orchestral music
- Chamber music
- Choral music

Theatre (staged performances)

- Plays - classic /by established playwrights (e.g. Shakespeare, Goethe)
- Plays - new or contemporary
- Immersive or experimental theatre
- Family theatre productions
- Live broadcasts / screenings of plays
- Musical theatre
- Opera / Operetta
- Ballet / classical dance / modern dance

Festivals

- Rock or pop music festival
- Opera festival
- Classical music festival
- Jazz festival
- Poetry / Literature
- Theatre
- Dance
- Food

Within this section we also split the artform markets according to their visit history and recency, using the below terminology.

Current

attended or engaged within the past five years

Lapsed

Have attended or engaged before, but not in the past five years

Potential

Have never attended or engaged before, but might be interested in doing so in future

Rejector

Have never attended or engaged before, and would not be interested in doing so in future



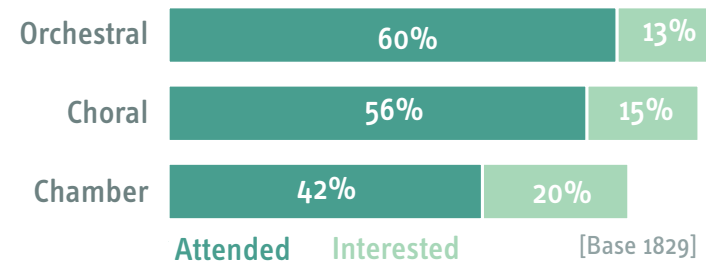
Classical music:

Orchestral music has the highest level of previous engagement

Among the listed classical music sub-genres, orchestral is the clear frontrunner in terms of the highest level of previous engagement, with over half (60%) having engaged at some point in the past, with a further 13% interested in attending in future. This is closely followed by choral music.

Chamber music has a significantly lower level of previous attendance (42%), but does have more substantial interest (20%), particularly from those aged 34-45 (27%), Essenz, Bestätigung and Stimulation (all 25%).

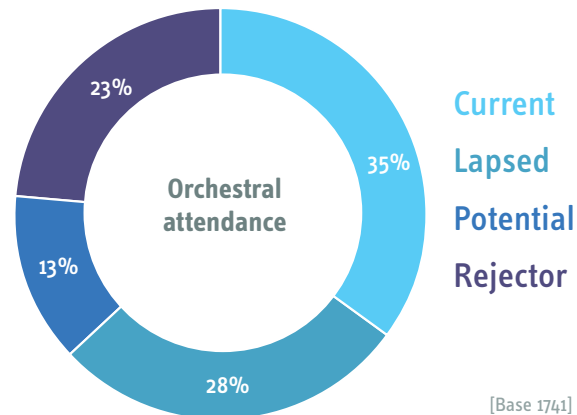
CLASSICAL MUSIC: attendance and interest



We will explore orchestral music in more detail on following page.



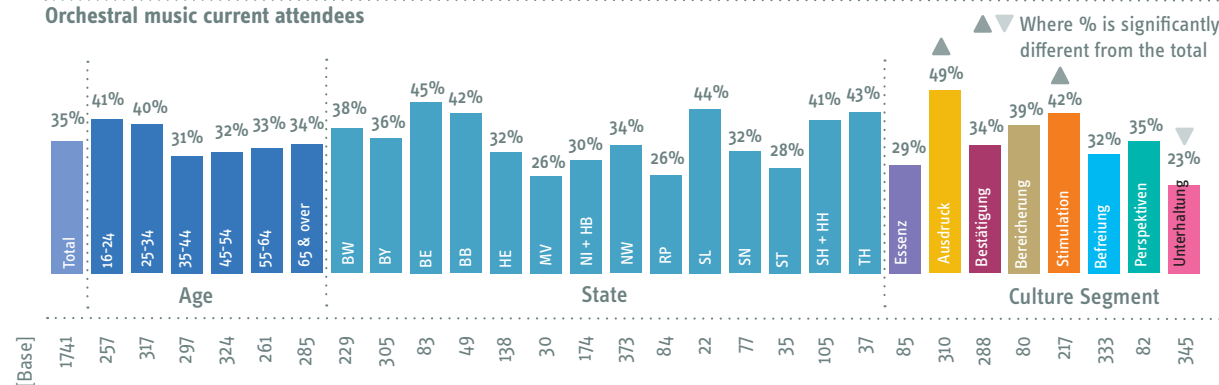
Culture Segments more divided on orchestral events



Around a third of the orchestral music market is considered current, having engaged in the past five years. There is an almost as large portion of the audience considered lapsed: those who have engaged with classical music before, but not in the past five years.

There are no significant differences in current attendance between age groups or state for orchestral music. **Ausdruck** are significantly more likely to be current attendees than average (and significantly less likely to be rejectors), as are **Stimulation**. **Essenz** are significantly more likely to be lapsed attendees (having previously attended but more than three years ago), this can be at least partially explained by them being one of the more Covid-conscious segments. They could therefore also represent a good target market for orchestral events. Despite representing a large proportion of the market, **Unterhaltung** are significantly more likely to be rejectors (40%) and least likely to be current attendees (23%).

Orchestral music current attendees



Theatre:

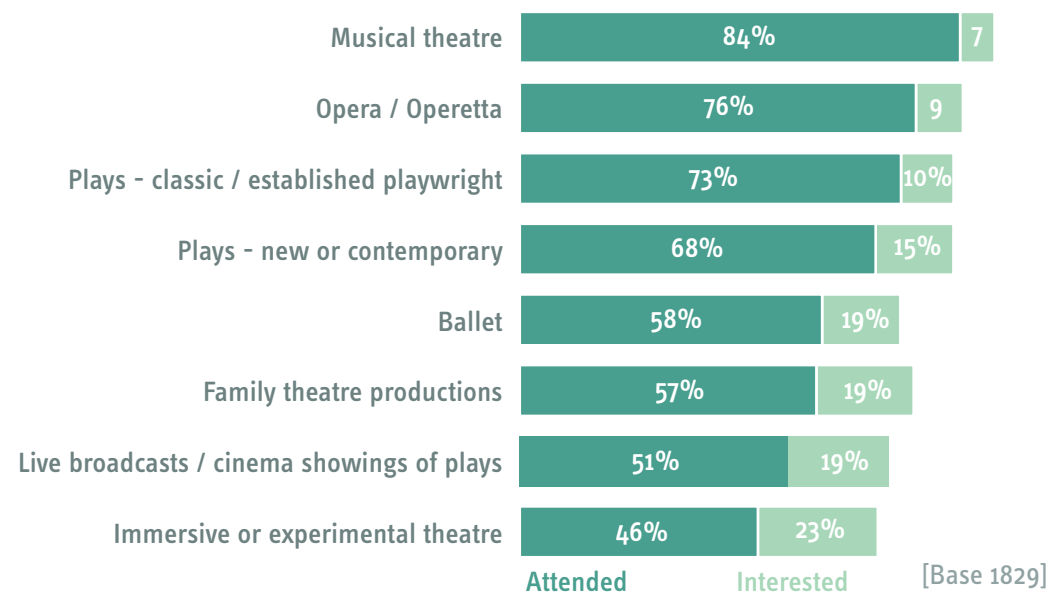
Musical theatre is, perhaps unsurprisingly, most popular genre

As we often find, musical theatre was the most popular theatre genre, with 84% having engaged with this before and a further 7% interested. This is followed by opera / operetta, where three-quarters have engaged previously.

Classic/traditional and contemporary plays are similarly popular; 83% have either attended or report an interest.

More niche, types of theatre (e.g. family productions) have a more limited level of previous engagement, as well as newer forms of theatre experiences (e.g. live broadcasts, and immersive); however there is clearly room to grow with around a fifth of the market expressing an interest in future.

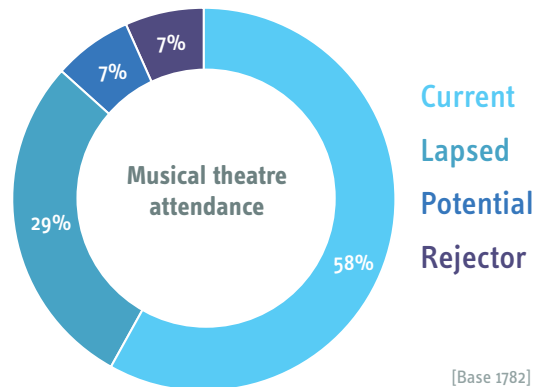
THEATRE: attendance and interest



We will explore musical theatre, opera and plays in more detail on following pages.

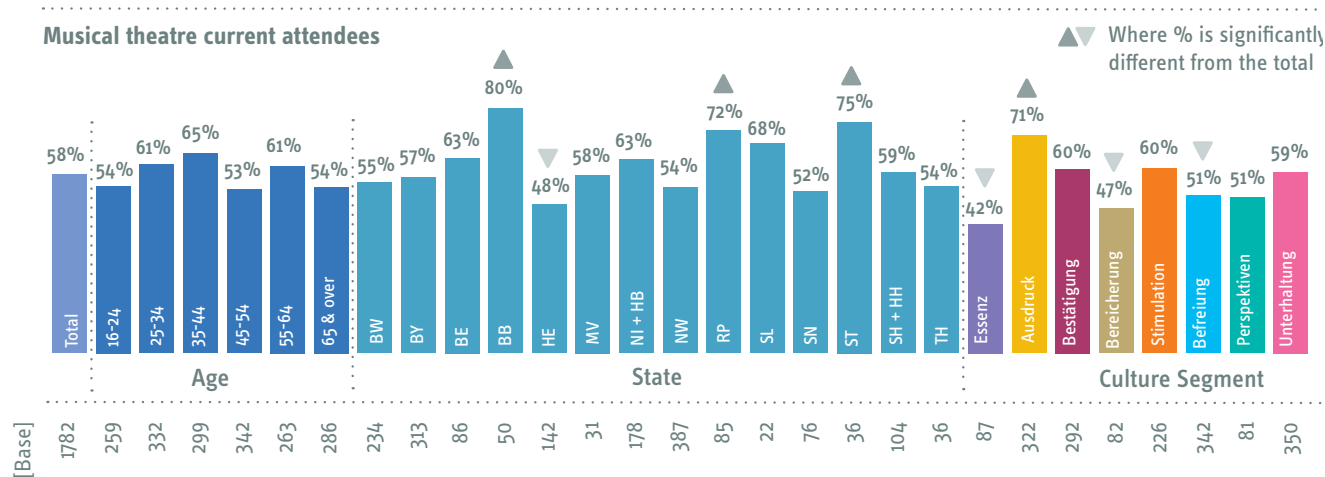


Musical theatre divides Culture Segments and states

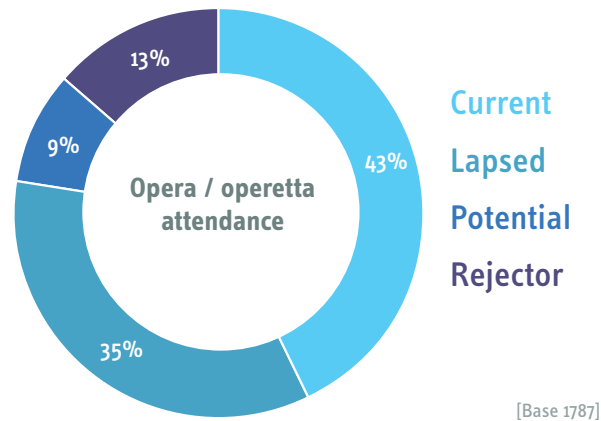


Over half the market have engaged with musical theatre in the past three years (58%), with a further third (29%) having engaged, but less recently. Despite no significant age differences, there are many significant differences between different states and Culture Segments in the proportions of current attendees. As with most artforms, **Ausdruck** are significantly more likely to be current attendees than average, **Befreiung**, **Bereicherung** and **Essenz**, significantly less so.

This is also one of the few artforms with many significant differences in the proportions of current attendees between states.

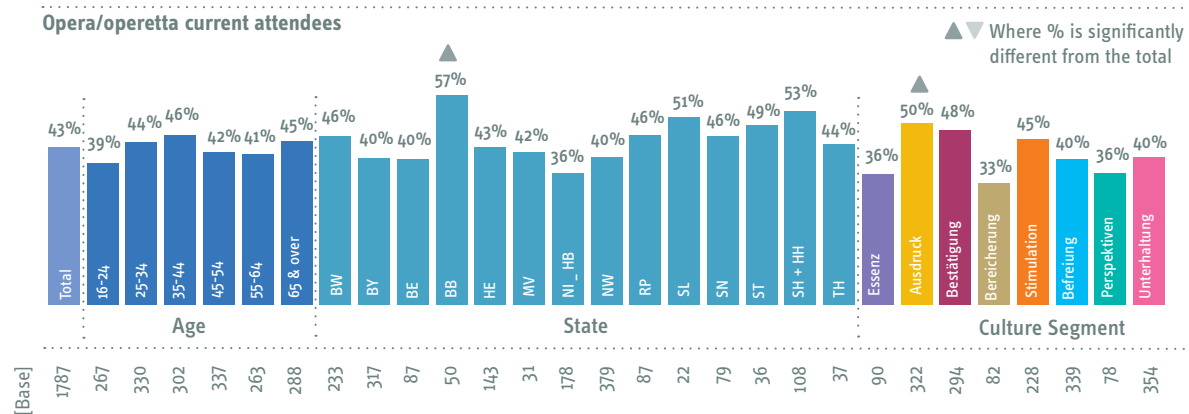


Ausdruck most likely to be current opera attendees

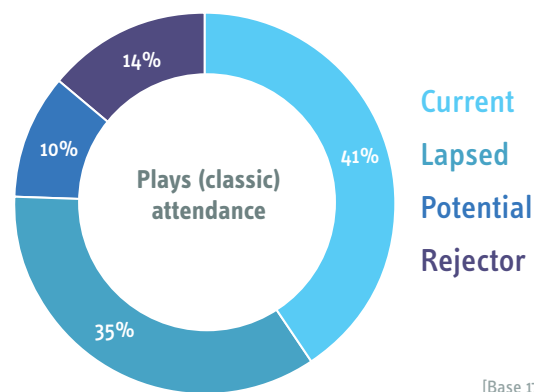


While the level of previous attendance is high, those who have not attended recently (lapsed, 35%) is not far off from the level of recent attendance (43%), meaning there are significant numbers of audiences ripe for reactivation.

In terms of current attendees, there are no significant differences between age groups for opera events. However, there are Culture Segment differences; **Ausdruck** are significantly more likely to be current attendees than average (50% vs 43%), they are also significantly less likely to be rejectors than average. This segment typically prioritise inclusivity, leaning into this may encourage future attendance from the lapsed and potential markets. Similarly, **Bestätigung** are among the highest current attendees, are significantly less likely than average to be rejectors (7% compared to 13%).



Younger audiences drive attendance for classic plays

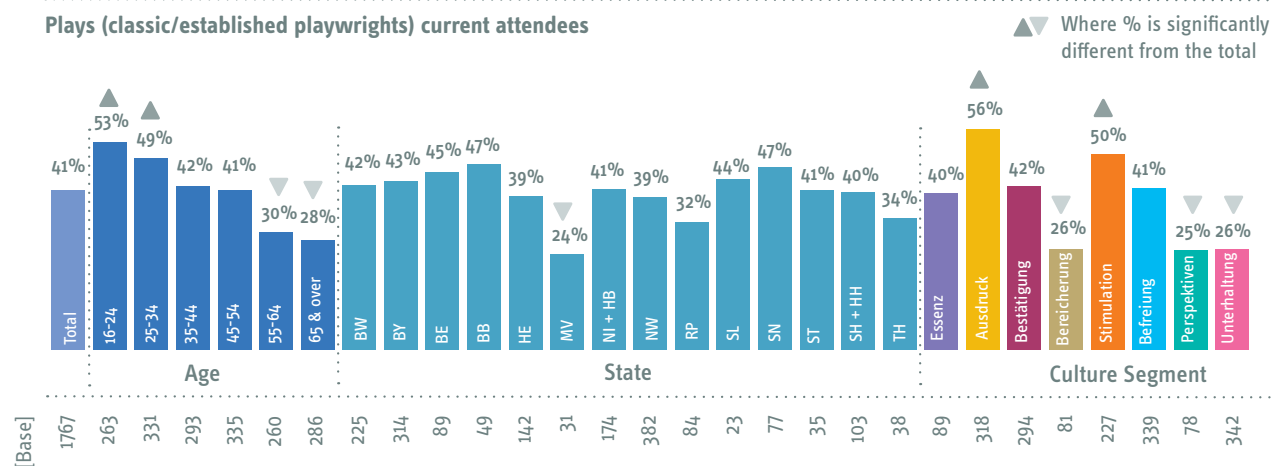


[Base 1767]

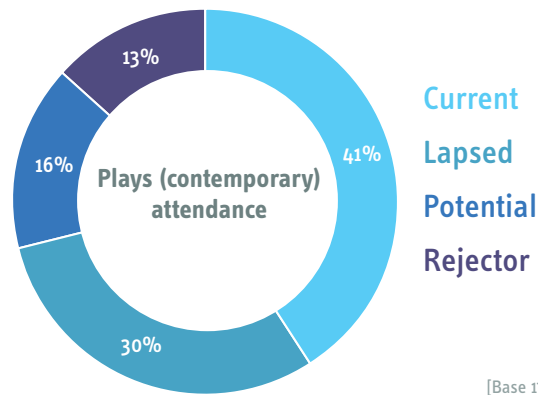
Younger people (16-24 and 25-34) are significantly more likely to have attended a play by a classic playwright in the past three years.

Essenz are the most likely to have previously attended (88%), however, this is majority lapsed attendees (48% lapsed, 40% current) and could represent a good target market, especially as covid-related concerns subside over time. Whilst being the least likely to be current attendees, socially motivated **Unterhaltung** and **Perspektiven** are significantly more likely to be interested having never previously attended (16% and 22% compared to 10% average), focusing on social benefits (perhaps introducing/promoting group ticket discounts) would engage these segments.

Plays (classic/established playwrights) current attendees



Contemporary plays vary less by age than classics and those by established playwrights

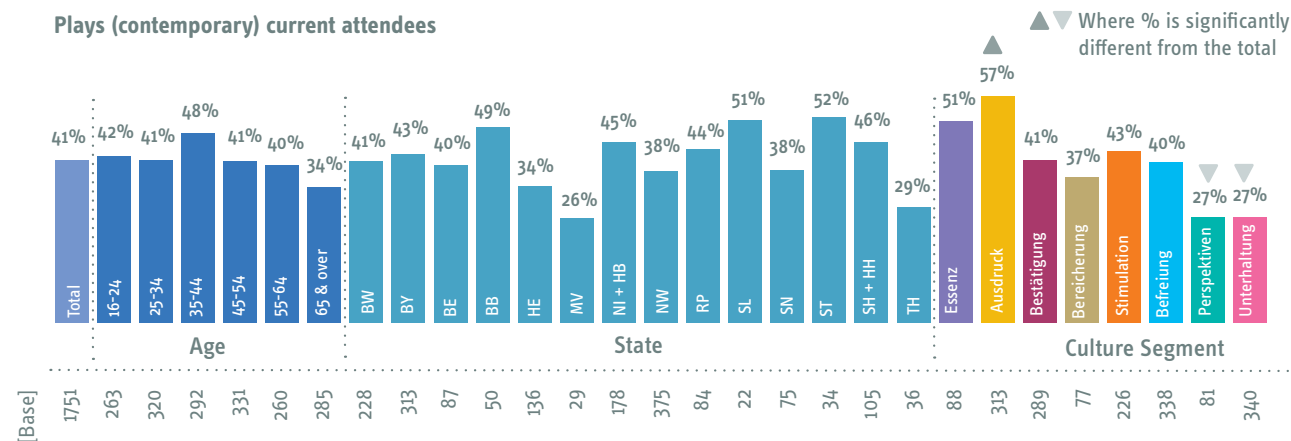


[Base 1751]

In terms of Culture Segments, the profile of current attendees for new and contemporary plays is very similar to classic plays (Ausdruck most likely and Perspektiven and Unterhaltung least likely).

The proportion of potential attendees is significantly greater for contemporary plays than for musical theatre or classic plays (16% versus 7% and 10% respectively). Unterhaltung are significantly more likely than average to be interested, having not previously attended (23% vs 16%).

Plays (contemporary) current attendees



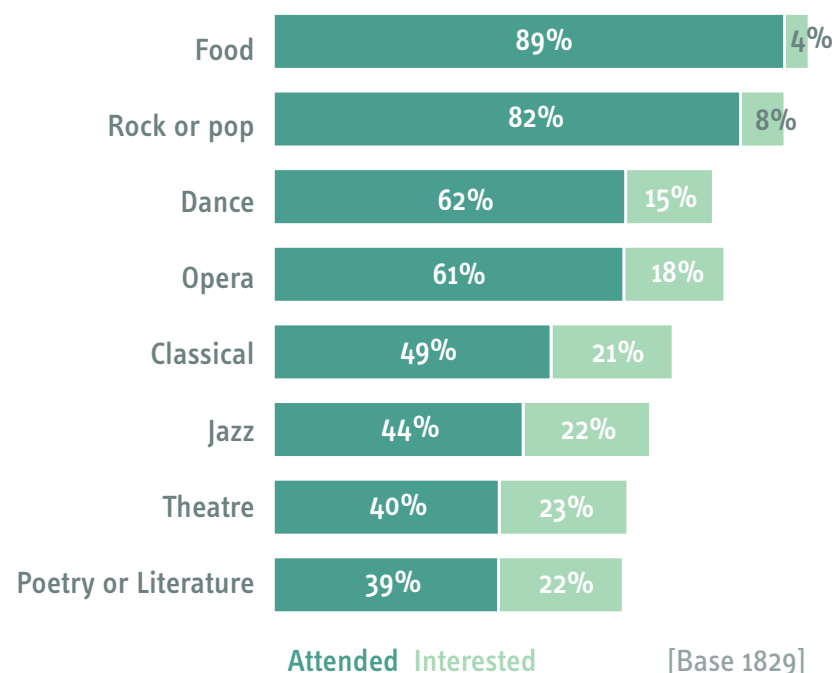
Festivals:

Attendance at various festival types likely reflects their relative frequency

As we might expect, the types of festival deemed most accessible and populist are the best attended – 89% of the market have attended a food festival, and 82% a rock/pop festival.

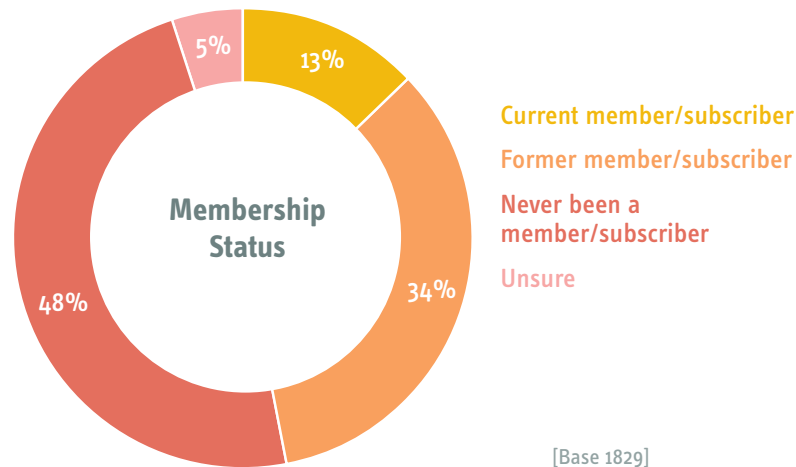
Similar proportions have engaged with, or would be interested in, dance and opera festivals. Classical music festivals have been attended by around half the market (49%) and theatre by 40%; but both show room for growth with around a fifth of the market interested in engaging in future.

FESTIVALS: attendance and interest



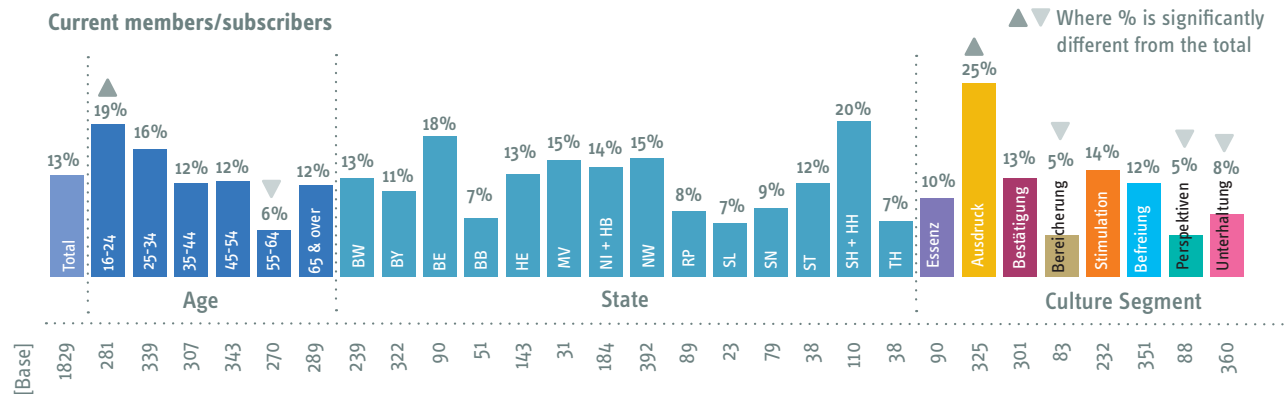
SUPPORT FOR CULTURAL ORGANISATIONS:

Ausdruck are the best membership prospects for organisations



Around 13% of the market are current members/subscribers of a cultural organisation, with a further third (34%) having previously been a member. Unsurprisingly, community-minded **Ausdruck** are significantly more likely than average to be current members or subscribers of a performing arts organization (25% vs 13% average). They are also the most likely segment to be former members; they therefore remain the best target for organisations to expand their communities.

16 to 24s are also the age group most likely to be members, with older age cohorts are less likely. This could perhaps be a post-Covid symptom, as older audiences have been slower to return to cultural organisations than younger audiences. Additionally, we have seen an increase in the number of youth-focused membership schemes in recent years (e.g. Under 30s) to encourage attendance and engagement with cultural organisations.



Financial incentives most likely to encourage membership

Given the increasing cost of living, it is perhaps unsurprising that saving money is the most popular factor for taking up membership with a cultural organisation (36%); all ages and Culture Segments report similar agreement. Related to this, flexibility is an appealing benefit of membership for 31% of the market.

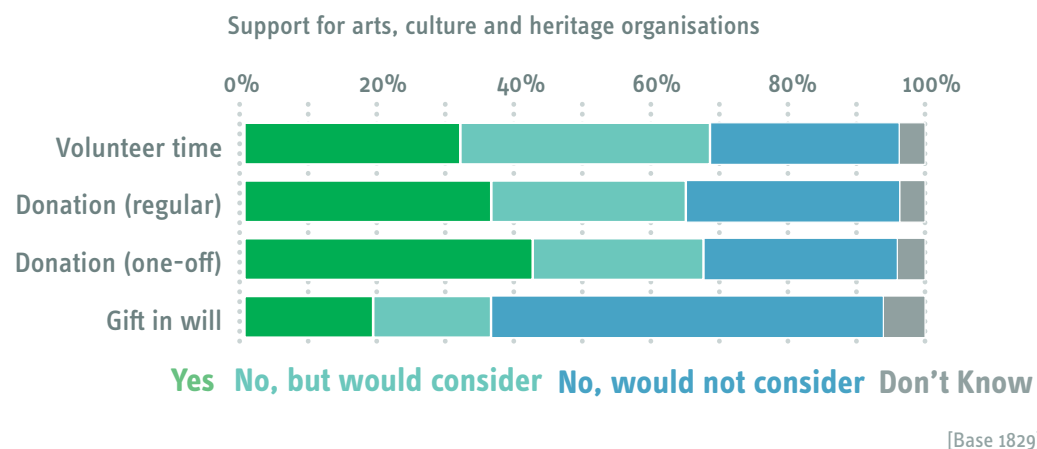
Ausdruck, the segment most likely to be members or prospects, are significantly more likely to be interested in most listed membership benefits. In particular, the most important factor for this segment is access to exclusive offers and events (40% vs 30% average).

Perspektiven, **Bereicherung** and **Unterhaltung** are significantly more likely to select none of the options (40%, 32% and 30% respectively), which is consistent with their lesser likelihood to be interested in membership generally.

Membership benefits	%
Saving money	36%
Flexibility – so I can visit / attend as often and for as long / short a time as I like	31%
Access to exclusive offers and events	30%
To allow me to try new arts or cultural experiences which otherwise I might not	25%
A way to support arts, culture or heritage generally	24%
A way to support a specific arts, cultural or heritage organisation	20%
The opportunity to connect / meet with like-minded people	18%
To give structure to how and when I engage, e.g., through a subscription to a set number of theatre performances	17%
For a sense of connection within a community	16%
The opportunity to have a say in the future development of an organisation(s)	13%
Other	1%
None of these	19%
[Base]	1829



Younger market most likely to support arts, culture and heritage organisations



Respondents were asked about other various ways in which audiences might support cultural organisations. One-off donations are the most popular way of supporting organisations - 42% have done so in the past – followed by regularly giving (36%) and volunteering time (32%). Leaving a gift in will is the least popular option, with around 19% having done so and a small additional proportion would consider it.

As we might expect, Ausdruck are significantly more likely to support organisations in all four ways than the average.



Ausdruck are by far the most philanthropic segment

	Total	Essenz	Ausdruck	Bestätigung	Bereicherung	Stimulation	Befreiung	Perspektiven	Unterhaltung
Volunteered time	18%	16%	30%	16%	11%	16%	20%	16%	11%
Donated (regularly)	24%	22%	40%	20%	10%	24%	24%	20%	15%
Donated (one off)	24%	30%	38%	27%	10%	26%	24%	16%	12%
Gift in will	12%	10%	22%	13%	1%	8%	16%	9%	6%
[Base]	1829	90	325	301	83	232	351	88	360

As we might expect, Ausdruck are significantly more likely to support organisations in all four ways than other segments. They are naturally predisposed to support organisations who champion causes they care about, and do this in a variety of ways.

Segments least likely to support cultural organisations through time or money are Unterhaltung and Bereicherung.



MEDIA AND MARKETING PREFERENCES

Television, radio and social media the most prevalent media engagement

As we might expect, the media platforms most traditionally ubiquitous are the most used amongst the performing arts market, particularly television, radio and now social media. However, the picture of media usage is vastly different between age cohorts.

Older respondents are significantly more likely to use more “traditional” media sources, such as television, radio and printed newspapers/magazines. Whereas, younger cohorts are less likely using many sources generally, which is perhaps unexpected.

Media Type	Total	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Watch free to air television	62%	41%	47%	62%	65%	74%	85%
Listen to the radio	54%	29%	35%	58%	57%	69%	80%
Use social media	54%	48%	55%	58%	60%	61%	41%
Watch a subscription streaming service, (e.g. Netflix)	51%	46%	60%	59%	57%	53%	29%
Read an online German news site or app, (e.g. Bild.de)	38%	25%	37%	44%	36%	45%	39%
Read a print version of a German local newspaper	30%	20%	20%	26%	27%	43%	49%
Watch on demand television – German channels	26%	21%	29%	29%	31%	23%	18% -
Read a print version of a German national newspaper	23%	15%	18%	26%	22%	26%	29%
Read a print version of a German magazine	20%	13%	14%	23%	17%	30%	27%
Read an online international news site or app	20%	18%	20%	22%	23%	21%	16%
Read an online version of a German magazine	19%	19%	14%	23%	20%	22%	15%
Listen to the radio through a streaming platform	18%	19%	18%	22%	20%	17%	8%
Watch on demand television – international channels	15%	21%	21%	17%	13%	10%	8%
Read an online blog	13%	11%	14%	17%	16%	14%	7%
Read an online version of an international magazine	11%	15%	10%	12%	10%	11%	7%
Read a print version of an international magazine	9%	10%	11%	9%	9%	8%	6%
[Base]	1829	281	339	307	343	270	289



Social media and content platform usage predominantly corresponds with age

Among the listed social media and content platforms, YouTube is by far the most used, by three-quarters of the market (76%), followed by social media channels Facebook (62%) and Instagram (61%).

As we might expect, engagement with all listed platforms decreases with age, for the most part. The one platform to buck this trend is Facebook – engagement with Facebook is highest amongst those aged between 35 and 64 (around 72%), compared to just 39% of those aged 16 to 24 years-old.

Social media & content platforms	Total	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
YouTube	76%	82%	82%	81%	79%	78%	53%
Facebook	62%	39%	60%	73%	71%	71%	54%
Instagram	61%	81%	76%	67%	63%	45%	26%
Tik Tok	40%	72%	52%	41%	42%	20%	7%
Pinterest	33%	46%	36%	38%	31%	34%	16%
Snapchat	25%	70%	35%	19%	18%	6%	2%
Twitter	25%	38%	27%	29%	28%	16%	9%
LinkedIn	19%	11%	25%	25%	23%	16%	11%
Twitch	16%	38%	26%	15%	12%	5%	-
Vimeo	5%	7%	9%	4%	2%	3%	2%
Wechat	3%	6%	6%	4%	2%	2%	-
Weibo	2%	5%	5%	2%	1%	1%	0%
None of these	5%	-	0%	0%	2%	5%	23%
[Base]	1829	281	339	307	343	270	289



Recommendations the most trusted marketing source for cultural activities

Over one-third (37%) of the market find out about cultural offers through personal recommendations from people they know, highlighting the power of positive experiences and subsequent word of mouth.

As the table overleaf highlights, younger age groups are less likely to rely upon the most common sources on average (e.g. personal recommendations, organisation-specific websites etc.), and instead are more likely using digital sources such as streaming platforms, online reviews, Twitter/X and blogs.

Whereas, older audiences are still more heavily reliant upon personal recommendations, local newspapers, free-to-air televisions and printed brochures/flyers.

How do you find out about cultural offers?	% used
Recommendation from someone I know	37%
YouTube	32%
A specific organisation's website	31%
Facebook	30%
Local / community newspaper (print)	29%
Radio (streamed or live)	29%
Instagram	27%
Outdoor media (e.g. billboards)	25%
Brochures or flyers	25%
Free to air television	22%
Online news site or app	20%
Newsletters from organisations	18%
Online listings, e.g. Eventbrite	14%
Magazine (print or online)	13%
Recommendation from someone in professional capacity	13%
Recommendations through streaming platform, e.g. Spotify	13%
National newspaper (print)	12%
Online user reviews, e.g. TripAdvisor	11%
Twitter	10%
On demand television	8%
Blog	6%
None of these	1%
[Base]	1829



How do you find out about cultural offers?	% used	16 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65+
Recommendation from someone I know	37%	25%	32%	36%	40%	46%	44%
YouTube	32%	44%	45%	34%	29%	22%	13%
A specific organisation's website	31%	20%	28%	31%	33%	37%	35%
Facebook	30%	24%	32%	34%	43%	29%	17%
Local / community newspaper (print)	29%	15%	17%	23%	27%	46%	52%
Radio (streamed or live)	29%	21%	27%	26%	34%	33%	34%
Instagram	27%	50%	41%	25%	27%	13%	5%
Outdoor media (e.g. billboards)	25%	22%	24%	22%	28%	26%	27%
Brochures or flyers	25%	16%	22%	21%	24%	36%	30%
Free to air television	22%	13%	14%	16%	23%	27%	41%
Online news site or app	20%	19%	24%	24%	18%	19%	15%
Newsletters from organisations	18%	13%	14%	18%	18%	25%	22%
Online listings, e.g. Eventbrite	14%	20%	20%	17%	13%	9%	6%
Magazine (print or online)	13%	11%	11%	14%	16%	14%	13%
Recommendation from someone in professional capacity	13%	13%	19%	12%	13%	10%	10%
Recommendations through streaming platform, e.g. Spotify	13%	23%	19%	11%	13%	7%	2%
National newspaper (print)	12%	11%	8%	12%	10%	17%	12%
Online user reviews, e.g. TripAdvisor	11%	17%	18%	12%	9%	7%	4%
Twitter	10%	22%	14%	8%	9%	5%	1%
On demand television	8%	12%	13%	8%	6%	5%	4%
Blog	6%	12%	11%	7%	4%	3%	0%
None of these	1%	2%	2%	1%	1%	2%	1%
[Base]	1829	281	339	307	343	270	289



How do you find out about cultural offers?	Total	Essenz	Ausdruck	Bestätigung	Bereicherung	Stimulation	Befreiung	Perspektiven	Unterhaltung
Recommendation from someone I know	37%	21%	18%	26%	22%	22%	22%	24%	22%
YouTube	32%	10%	8%	9%	4%	7%	8%	12%	7%
A specific organisation's website	31%	9%	16%	16%	11%	13%	11%	3%	8%
Facebook	30%	23%	28%	33%	31%	32%	25%	21%	32%
Local / community newspaper (print)	29%	18%	26%	25%	23%	18%	15%	13%	17%
Radio (streamed or live)	29%	29%	30%	33%	26%	30%	23%	27%	32%
Instagram	27%	17%	20%	14%	9%	14%	14%	8%	7%
Outdoor media (e.g. billboards)	25%	10%	11%	8%	3%	4%	6%	2%	4%
Brochures or flyers	25%	23%	24%	18%	17%	24%	14%	16%	14%
Free to air television	22%	37%	32%	31%	27%	35%	28%	25%	30%
Online news site or app	20%	41%	26%	29%	28%	26%	20%	22%	20%
Newsletters from organisations	18%	33%	25%	29%	30%	28%	22%	20%	21%
Online listings, e.g. Eventbrite	14%	21%	14%	16%	7%	12%	12%	3%	6%
Magazine (print or online)	13%	18%	22%	17%	9%	16%	11%	3%	10%
Recommendation from someone in professional capacity	13%	21%	16%	15%	6%	11%	11%	9%	11%
Recommendations through streaming platform, e.g. Spotify	13%	46%	34%	40%	57%	43%	33%	30%	32%
National newspaper (print)	12%	12%	19%	18%	8%	12%	12%	6%	9%
Online user reviews, e.g. TripAdvisor	11%	24%	43%	33%	21%	27%	24%	23%	31%
Twitter	10%	10%	14%	10%	6%	11%	10%	3%	7%
On demand television	8%	32%	40%	32%	19%	30%	29%	23%	31%
Blog	6%	32%	34%	31%	24%	29%	22%	18%	24%
None of these	1%	-	0%	1%	2%	1%	1%	4%	3%
[Base]	1829	90	325	301	83	232	351	88	360



Thank you



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