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ANALYSING EXPERT AND CONSUMER’S INSIGHTS ABOUT THEIR PERCEPTIONS OF THE THEATRE AND RELATED ISSUES TO HELP SETUP THE PERCEPTUAL MAP AND CONJOINT ANALYSIS.

Work project carried out under the supervision of:

Daniela Schmitt

15-12-2022

A Work Project, presented as part of the requirements for the Award of a master's degree in Management from the Nova School of Business and Economics.

ANALYSING EXPERT AND CONSUMER'S INSIGHTS ABOUT THEIR PERCEPTIONS OF THE THEATRE AND RELATED ISSUES TO HELP SETUP THE PERCEPTUAL MAP AND CONJOINT ANALYSIS.

Thesis players	Thesis Topics
Margarida Marinho	Analysing expert and consumer's insights about their perceptions of the theatre and related issues to help setup the perceptual map and conjoint analysis surveys.
All team members	Determine the Theatre's situation in the EU and Portugal. Understanding perceptual maps and conjoint analysis methodologies and analysing people's perceptions of the theatre based on conducted perceptual maps

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Abstract

Nowadays everyone is aware of Portugal's Theatre declining situation. "The Portuguese don't go to the theatre" is a commonly heard sentence. The main goal of this study is to analyse the Portuguese preferences and associations towards theatre and then point to some recommendations that might be put in practice to change the present situation. The proposed suggestions will be based on our findings from conducted expert and consumers interviews, surveys, and market research techniques, such as conjoint analysis and perceptual maps.

Keywords: Theatre in Portugal, Market Research, Perceptual Maps, Conjoint Analysis, Consumer perceptions

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1. Introduction

As the world and society evolve, the arising of new forms of communication and entertainment is inevitable, leading to an increase of potential for digital interaction and a fundamental modification in the way the general public connects and assimilates live performances.

The emergence of new pieces of media, such as cinema or television, threaten to oust what is considered the oldest and most influential medium of mass communication: theatre. As such, the audience demands more power of choice, different contents, appealing incentives, and competitive prices within the alternatives for leisure activities and entertainment services.

Consequently, the innovation and development of new marketing and communication strategies, as a reflection of society's new values and interests, is imperative, in order to regain and retain theatre performances' position in the market.

On the other hand, there is an intensifying market pressure on the overall cultural institutions, stemming from a lack of financial budgeting options and investments from governments, necessary to the success of theatre arts. In addition to this, attendance of theatre performances seems to be decreasing at a worrying pace, demanding further research on what might be causing this effect on consumers.

This thesis seeks to research and analyse the reasons for this trend. The key question which this project aims to answer is:

'Why is the demand for Portuguese Theatre stagnated and possibly declining?'

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Additionally, 3 sub-questions will be introduced in order to break down the main query. These have as a primary objective to systematize the core discussion and facilitate its research and understanding.

1. How do people perceive the Portuguese theatre? What do they say about it, and what are the associations they have towards it? What are the main perceptions associated with Portuguese theatre?
2. Which attributes are valued by consumers? What would be the ideal scenario for consumers?
3. Are there relevant clusters when it comes to Portuguese theatre consumers?

To be able to further understand the proposed questions, it is first necessary to understand what ‘theatre’ means and what it refers to when mentioned throughout this work project.

The word ‘theatre’ is referent to the term that originated from the Greek word ‘theatron’ which means ‘place where something is seen’. The word was first used in English in its current form in 1576 by James Burbage when originally naming his playhouse. In the course of time, the word started being applied to both the building or structure, and the genre itself. Additionally, ‘drama’ derives from the Greek word ‘action’ or ‘to act’. The principal dramatic modes are comedy and tragedy, from which other forms emerged, like farce and melodrama respectively. Dramatic arts and theatre arts refer to the same, and so are used interchangeably.

Finally, a theatrical production consists in converting one form of art, a text, to another, a visual display of performance, which can rely on a combination of speech, gesture, music and sound.

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An overview of this study will now be presented. This thesis is organized in the following way: first it will present an overall look at the performing arts and theatre market, narrowing then on the Portuguese theatre landscape. Secondly, relevant literature on the subject of theatre, relevant theories and frameworks will be introduced; then the setup process of preliminary interviews and survey, to both industry professionals and consumers, and respective conclusions will be discriminated; afterwards, in order to collect and analyse perceptions by consumers on the Portuguese theatre, the methodology of the perceptual map was employed as well as the results of its analysis; additionally, a choice-based conjoint analysis was selected as a means to determine, analyse, and evaluate theatre events' attributes most influential on consumers; as a last analysis tool, a cluster analysis is included; finally, a discussion of the most relevant findings and some recommendations will be identified.

A summary of the results obtained will now be introduced.

From the Interviews and Preliminary Survey, it was possible to conclude that consumers consider ticket price, quality of customer service for theatre plays reasonable and should not be the main cause for lack of attendance to these events. The channels of communication used by the industry and variety of play were identified as inadequate and could present one of the main problems for these cultural events.

The Perceptual Map analysis indicated that consumers think of customer service, quality of service and ticket price the most when reflecting on Portuguese theatre, and the 3 aspects are deeply correlated and tend to be thought of as reasonable. On the other hand, channels of communication and variety of offers are the least correlated features and are presented as a source of unsatisfaction, which could suggest that a root of the main issue can be found on the lack and unsuitable usage of channels of communication utilised to advertise the current variety of offers. Additionally, Portuguese theatre is perceived as sincere, competent, and sophisticated.

When conducting the Conjoint Analysis, it was found that consumers in general seem reluctant to pay more than 18€ for any play, which implies that consumers are generally unwilling to pay higher prices for any type of Portuguese theatrical performances. Overall, ticket price seems to be the most influential attribute and the preferred partworth utilities regarding fame of cast members was the one that included the highest number of famous actors, which could be explained by the perception that the highest the number of well-known cast members, the highest the quality of the play. On the other hand, accessibility as an attribute, suggests the least influence on play choice. In conclusion, theatre consumers have similar preferences regarding all the attributes and its levels (variances in the results are reduced) and customers are mainly looking for the cheapest deal with all the best presented features, indicating a high level of resistance to taking a less ideal proposal despite lower prices.

Regarding the Cluster Analysis, it was used to identify possible segments in the Portuguese theatre. There were not a lot of insights that could be taken due to the weak model. Therefore, further research was advised in order to obtain a more accurate, stable and stronger model since the problems might not even be related with the variables analysed (age, gender, frequency of attendance to theatre and price satisfaction for theatre) but other external factors. (e.g. theatre's structure, price strategy,etc.) Thus, restricting the creation of meaningful segmentation clusters.

Group part

2. Literature Review

2.1. Market Research

To further understand the theme of this thesis it is necessary to analyse the overall market of the performing arts and, more specifically, theatre. As such, the focus will be on the European Union market landscape, and later, on the Portuguese theatre's position within the cultural sphere.

2.1.1. Situation of the Theatres in the EU

The subsector of performing arts has had a growth of value added of 8.6% between 2013 and 2017 regarding its compound annual growth rate. Reaching 44.7 billion euros in 2017, the performing arts subsector contributed an average of 0.6% towards the EU Member State's overall value added, according to the European Investment Fund.

When looking at the Theatre sector, European theatre is highly diverse in its composition, as it encompasses both public and private organizations, funded by public or private entities, or commercially oriented venues that rely mainly on in-house revenues.

Limitations when researching the European theatre stem mainly from the lack of reliable available sources of data. This issue is aggravated by the fact that data has not been orderly compiled both nationally and in the EU, in most cases not singling out theatre from the rest of performing arts (such as concerts, operas, festivals, circus, dance and other interdisciplinary forms of performance arts). This is the reason why figures relevant to this study depict a superficial outlook of the theatre sector in the EU.

Theatre institutions in the EU Member States can range from very few, 7 in Latvia, to a significant 4,252 in Spain. However, these institutions might spectrum from official venues and unofficial companies diverging in each country. The number of staged performances between the season of 2018 and 2019 varies between 3,021 in Bulgaria and 65,995 in Germany. On the other hand, attendance to these performances fluctuated from 371,000 audience members to more than 18.5 million, respectively, which reflects the sector's promising ability to engage a considerable portion of each country's population, as per the study prepared by PPMI, KEA European Affairs. The greatest amount of revenues produced by theatres were in Germany (586 757 000€) and Austria (174 586 000€) in 2018 season.

Theatre, as many of the other sectors in performing arts, is responsible for a wide range of employment in the form of artists, administrators, and technicians. According to the data found in Eurostat, performing arts has had a strong growth in value-added regarding employment between 2013 and 2017, when 2 million people represented approximately 25% of the work force in the European Cultural and Creative Sector (which includes theatre and music), in a total of 814,530 companies (an average of 3.2% of companies per Member State), amounting to 9.4% compound annual growth rate.

Public support has commonly taken the main role regarding the subsistence of the theatre industry, which is reputed to experience a 'cost disease' in productivity levels, characterized by the fact that there are high fixed production costs (such as location, equipment, costumes, etc) additional to the marginal costs, which are associated to each individual play and performance, and cannot be charged to the consumer in its entirety, since it would drive the ticket price up significantly.

However, a trend of decreasing in budgetary financing has risen in the last years in Europe. This might be caused by financial crisis resulting from unmanageable circumstances. As the main form of public theatres funding, this has affected the industry in general. Great Britain and France decreased their financing by 20%, Italy and Spain by around 30% and 40% in the Netherlands, between 2012 and 2013.

2.1.2. Situation of the Theatres in Portugal

Shifting focus to the Portuguese theatre scene, the picture is quite different. According to some research conducted a priori, it is noteworthy that education is frequently mentioned as being a determining factor to why the Portuguese don't have theatre habits and are less interested in going to the theatre. A problem that comes from a long time ago.

Starting in the 80s, culture began to be a recurring topic in the politic discourse, and cultural concerns started taking space in Parliament. In 1985, a law was passed which declared the cultural Portuguese patrimony as crucial to its cultural identity. Such law stated the preservation of cultural patrimony as well as the creation of cultural intellectual property. Although this was seen as a major leap for Portuguese culture, especially for theatre and dance, little to nothing was done regarding legislation to guarantee the fulfilment of the new law.

In fact, Portugal has since been witnessing a decrease on the country's budget allocated to culture, with its public funding dropping 75% between 2002 and 2012. This decision started to express itself in 2006, the first year since 1997 when there was a decrease on revenues with a downturn of 11.5 million in 2005, to less than 9 million in 2015, a decline of 22.3%. When compared to the 0.56% European average in terms of culture as a percentage of GDP, Portugal comes below at 0.42%, only ranking higher than Greece, Germany, and Ireland.

However, contrary to what happened in previous years, in 2016, the sector saw an increase of 30 million euros in the proposed State budget when compared to the year before. More recently, Portugal's 2023 State budget augmented its funding to the theatre sector alone with a whopping increase of 106%. This is in line with the Government's firm commitment with Culture, with the goal of finishing this legislation with a 2.5% discretionary spending destined to Culture alone.

The added public investment made towards theatre saw a rise on the number of sessions: in 2019, 13,516 sessions took place, an increase of more than 280% when compared to the year 2000. The number of spectators also rouse quite significantly, almost quadrupling in 20 years, finishing 2019 with a total of 2.19 million. This translates to 212.9 in every 1,000 citizens that went to the theatre, with an average number of spectators per theatre showing of 162 in the year before the pandemic hit.

Box office revenues hit a record number of 125.3 million in 2019 as well. However, when comparing the theatre with other live exhibitions, the numbers don't look as promising. In 2019, of the 37,049 total live exhibitions, which also include concerts and other live cultural events, 36.5% were from theatre sessions alone but only 13% of total spectators were from theatre shows. In fact, going to the cinema was the most practiced cultural activity by the Portuguese, with 41% saying they go to the cinema, while theatre ranked the lowest with only 13%.

It is safe to assume that the theatre sector is highly dependent on public funding. Only when public funding is higher, is it possible to see more theatre shows and sessions, and subsequently more spectators. But when looking at the average number of spectators per session, the number hasn't changed substantially. When in 1990, the average was of 144.6, in 2019, the number had only increased to 162. Profit margins are also quite low. When examining D. Maria II National Theatre, one of Portugal’s most emblematic and one of the oldest theatres still in operation, the expected profit margin for 2018 was a mere 2.5%.

For the purposes of this thesis study, the years of COVID-19 pandemic were excluded, namely 2020 and 2021, as they were abnormal times and don’t reflect the evolution of the theatre sector. In fact, in 2020, the number of theatre spectators dropped 69.3% and revenues fell in 56.4% when compared to 2019. The number of sessions also suffered a drop of 54.4%. However, theatre was one of the cultural sectors where the decrease in spectators was less drastic. The cinema and music sectors dropped 75.5% and 86.5% in the first year of the pandemic, respectively.
The government’s restrictions to fight the spread of coronavirus also played a big role on these numbers. Whilst cinema and music almost fully ceased their operations, theatres in Portugal were allowed to open in a revised schedule to comply with regulations and the imposed curfew.

Based on the market research, it is safe to assume that the theatre sector is problematic in Portugal. A standalone analysis of theatre might give off a wrong impression and it’s only when compared with other similar industries, that its weak nature is realised. As mentioned above, not only is it highly dependent on public funding, but it also operates on significantly low margins for the type of sector. It is, therefore, relevant to further dissect the defects and reasons behind it being such a frail industry.

3. Preliminary Interviews & Surveys

3.1. Methodology

During the elaboration of this thesis, several research techniques (qualitative and quantitative) were utilized to better explore the targeted audience. The qualitative approach was measured by preliminary interviews conducted to both professionals and final consumers, while the quantitative approach was assessed through a survey which aimed to collect subjective data shaped by all the participants with the purpose of getting key insights on their perceptions to support the development of a perceptual map and conjoint analysis. Later, this will help in answering the main question of this paper and come up with potential recommendations.

Therefore, the methodology part is split into three different parts. The first part will focus on the interviews conducted to professionals with the objective of gathering more details on their expertise in the field, their understanding of how consumers perceive the activity of going to the theatre and what aspects may be influencing their decision. While the second one is related with the interviews performed to theatre attendees. The purpose was to collect more information about consumer perception of the Portuguese theatre in general, the underlying problems related with the industry, the attributes that have an impact on their decision regarding going or not to the theatre, and their overall preferences. Both types of interviews served as the foundation for the questions on the multidimensional perceptual map included in this work project, which aimed to explain the psychological associations consumers have about the theatre, and compare those to other cultural activities, such as concerts, cinema, and museums; and conjoint analysis, which was created to help better understand the most valued attributes and preferences of the regular theatre consumer when presented with different plays characteristics. Lastly, the third part centres on the overview of a survey, exclusively related to the theatre, which was conducted to both professionals and consumers. The reason behind this was to test if the opinions of the interviewees were indeed realistic and representative of the Portuguese population. Additionally, this was a way of assuring that no relevant information that should be included in this study was missing.

Preliminary Experts Interview

The preliminary expert interviews were conducted to 7 people from which 5 have more than 6 years of experience in the industry while the rest, 2, have just 1 year. The ones with a more solid background on the field were mostly actors, singers, producers, directors, and teachers. Some of them have their own production company.

Those interviews were performed mostly by telephone, face-to-face, and Google Meets. Its duration was between thirty and sixty minutes each. The interview script (*Appendix 2 – table 1)* had different types of questions with the purpose of evaluating what industry professionals know about the theatres' declining situation, but also their beliefs regarding consumers' valued attributes, preferences, and motivations and, finally, the actual consumers' opinions about this matter. The first part of the interview was mostly concerning the identification of the problem (decrease rate of theatre attendance in Portugal) and its causes (e.g.: price, plays diversity, accessibility, and channels of communication), while the second one focused on the solutions that could be implemented to solve this decrease of the rate of attendance. There were also two questions in the script exclusively cantered on the consumers' values and perceptions (the last ones of *Appendix 2 – table 1)*. The choice of the questions was mostly based on priori market research and previous group assumptions.

Preliminary Consumers Interview

Regarding the preliminary consumer interviews, these were also conducted between mostly by telephone, Google Meets and some were presential. The duration of the meetings was between thirty and sixty minutes each. In total, 4 people were interviewed (all female) but from a variety of ages (mostly between 20 to 56 years old). The interview script was split into two distinctive parts, as you can see on *Appendix 2 – table 2*. The first one focused more on issues related with public opinion about today's threat to theatre performances, lack of adhesion to these cultural events, potential reasons that support that situation, and solutions to overcome the present challenge. The questions of this section were the same as the ones conducted to professionals with the objective of knowing if the expert's beliefs were correctly aligned with the reality of their audience. The second part of the script was more focused on the consumer experience, motivation, influencers, and preferences.

Preliminary survey

With the purpose of gathering more data to find what are the main reasons that have been contributing to the lack of attendance at theatrical performances, a preliminary online questionnaire was developed using Microsoft Forms. This survey was then released after performing the experts' and consumers interviews. Then, social media networks such as Facebook, Instagram, LinkedIn, Reddit and WhatsApp were utilized to reach the audience. The choice of these channels was due to their size and range of people, here it was possible to get answers from people with different ages and backgrounds, meaning more diversity and a higher number of respondents. This survey had the option for both Portuguese and non-Portuguese speakers since it was important to take into consideration the opinion of foreign people who currently live in Portugal and attend the theatre. The first draft was done in Portuguese and later some members of the team translated it into English.

This survey had in total 32 questions and was divided into three different sections: (i) respondent characteristics, (ii) service characteristics and (iii) brand personality. For the first one, respondent characteristics, the purpose was to collect data about people's gender, nationality, and frequency of participation in cultural activities (such as: theatre, museums, art galleries, music festivals, concerts, and cinema). In the second section, service characteristics, the aim was to assess the perception that respondents have about the logistics and the service itself provided by the theatre sector in Portugal by focusing on the most important attributes (price, service quality, theatre plays quality, language, location and facilities conditions, event recognition, theatre plays diversity, customer service, channels of communication, and direct association). Each of these attributes contained a short explanation of what they consumers should consider while answering the questions, as visible in (*Appendix 2 – table 3)*. Regarding the third part, brand personality, the objective was to evaluate the personality of the several Portuguese theatres by asking consumers to select from one to five how rugged, sincere, enthusiastic, competent, and sophisticated they believe Portuguese theatres to be. This was done mainly to grasp what the common consumer associated theatres with, so that later it can be proposed how the several theatres should better convey their characteristics and values to the audience. For both the second and third sections of the survey, a multi-choice question was utilized, where people were presented with four to five different options, and they had to select the one that they deemed the most suitable for them personally. This way, it was possible to ensure that there were no vague answers. The multi-choice options ranged from 1 – "Not satisfied/pleased/familiar/happy at all" to 4 – "Highly satisfied/pleased/familiar/happy" and, sometimes, a 5th option which corresponded to "Never went to the theatre" was added to contemplate the cases of consumers that never participate in such cultural activity, as seen in the (*Appendix 2 – table 3)*. For the brand personality part, each individual answer was adapted. The ruggedness dimension scale was from 1- "Very frail" to 4 - "Very sturdy", sincerity from 1-"Very unreliable" to 4-"Very Sincere", enthusiasm from 1-"Very dull" to 4-"Very enthusiastic", competence from 1-"Very incompetent" to 4-"Very competent" and finally, sophistication from 1-"Very basic" to 4-"Very sophisticated". Here, it was also maintained the 5th option of "Never went to the theatre". The survey had the following set up (*Appendix 2 – table 3).*

The inquiry form was completely anonymous, and participants had 30 days to complete it. Afterwards the survey was closed and N=266 observations were collected in total, with an average time of completion of 9 minutes and 17 seconds. The results were later used to support the creation of a perceptual map.

Afterwards, the data gathered from these preliminary survey and interviews was analysed, as it is visible in the following chapters.

3.2. Results

Professionals Interviews

The main key takeaways of the interviews and surveys collected are presented as follows.

From the 7 professionals interviewed, all of them agreed there are indeed several problems related to the theatre that are contributing negatively to people's presence on these cultural events. Most respondents (5/7) mentioned that the main root of this problem is related to the lack of cultural education and awareness. They also linked this issue with the ‘priorities’ that Portuguese people have been setting over the past few years, such as: attending football matches, concerts/ musical festivals, and the cinema. This led to the inclusion of a question in the perceptual map questionnaire about the frequency with which people tend to attend other cultural events (like the ones mentioned before), that consequentially create a competing effect with the theatre (*Appendix 2 – table 4)*. By adding this question, comparisons, and conclusions about the theatre in relation to the other activities of the sector were made possible.

In addition, all interviewees agreed that the lack of governmental support is a major issue that has been damaging to the Portuguese Theatre. This aspect is particularly interesting since according to them, this is the root of most problems. From their point of view, the lack of investment forces productions to increase ticket prices to be able to bear all the costs they incur when putting together a show. Then, the higher the prices, the lower the attendance rate, either because Portugal is always on a constant financial crisis, according to João Pedro Santos and Lucas Millions Dutra, or because Portuguese people are not willing to pay more than a certain amount of money to watch a play, since theatre is at the bottom of their priorities list.

Furthermore, 2 of our interviewees highlighted the lack of social communication as a cause for the decrease of public’s general adhesion to the theatre, and one of them even mentioned the difficulties of accessibility, namely the schedule incompatibilities with the plays, the lack of a free parking place or even the absence of direct transportation (*Appendix 2 – table 4)*. Bearing in mind these opinions, it was decided to add 2 questions about the location & facility conditions, and the channels of communication within the following surveys, in order to acquire more insights on which service characteristics may affect people's decisions the most.

Also, to collect data on the possible attributes to include in the surveys, the professionals were asked about their feedback on pricing, variety of current theatre plays, and today's channels of communication to announce theatre performances, to see if any of it could be considered a possible limitation. The answers to these questions, that can be seen on *Appendix 2 – table 4*, reinforced initial thoughts, that these are crucial attributes which deserve to be studied. Six out of six emphasized the fact that the current communication channels to advertise the plays may be what is holding people from going more to the theatre and, thus, is highly relevant to be included in the analysis. Regarding the variety of plays, the experts stated that there are a lot of different options, therefore this shouldn't be a problem. But some of them highlighted the possibility of the existing offers do not correspond to people's desires regarding what they want to watch. João Prior and João Pedro Santos mentioned that despite today's huge variety, people prefer to watch plays that they are already used to, such as comedies or vaudevilles. This finding encouraged the inclusion of a question about the play's diversity on the perceptual map survey and in the conjoint analysis to better comprehend people's opinion of which genre of play they prefer (e.g.: tragedy, comedy, satire, musical…). Moreover, in terms of pricing, despite the common opinion among the experts that it does not influence people's decision, it was decided that it should be included on the research anyways, since it has been proven in other similar studies that pricing has a prominent role on the general consumer preference and should be studied further.

Moving onto the motivations and preferences that drive people to attend the theatre, one question was asked to grasp professionals' thoughts about what spectators valued the most when frequenting the Theatre. Their answers were helpful in confirming the attributes discussed within the literature review, such as: service quality, language, theatre plays quality and fame of the cast members (*Appendix 2 – table 4).* Most of the specialists highlighted the quality of the actors, the quality of the story itself and the quality of the special effects (e.g.: sound & lights) as the most appreciated aspects for people who tend to go to the theatre more frequently. Additionally, the place where the plays occur, in terms of geographical location and the facilities itself were also mentioned as having a greater impact on the public's decision process of which play to watch. Consequently, a question about the existing service quality of the industry was included to understand the overall client satisfaction on the matter. Finally, it was added a language component and the fame of the cast, as part of our surveys because two out of six respondents revealed that, in their opinion, people tend to watch more international plays with foreign actors or with famous Portuguese cast members since these are perceived as superior.

Consumer Interviews

From the interviews that were conducted to consumers it was possible to conclude the following.

In terms of frequency of attendance most of them tend to go to the theatre once or twice a year.

Going over respondents' motivations (*Appendix 2 – table 5)*, they mentioned the following aspects that encourages them to go to the theatre: (1) Getting out of their routine to help clear their minds (3 out of 4), (2) Learning something new (2 out of 4), (3) Getting instant entertainment (4 out of 4), (4) be an excuse to hang out with their friends and family members (2 out of 4).

While covering the topic of the industry's main issue, the decline on theatre's attendance rate, in order to have a clearer idea of the public's general perceptions some extra factors were denoted, which were only briefly mentioned during the expert's interviews, and were then added to the list of the attributes, such as the language used in each theatrical play (e.g.: Portuguese, English, Italian, Spanish or other) and the event recognition, meaning its popularity among all the other cultural activities. This resulted from one highlight done by an interviewee related with the fact that there are many other cultural alternatives offers, that are easy and cheap to consume (e.g.: cinema) as can be seen in (*Appendix 2 – table 5).*

In general, the respondents when confronted with the same questions as the ones made to experts, had the same reactions and answers. All of them agreed that the main issues related with the theatre are the lack on financial independence from the government, the absence of public due to poor cultural education or old associations that are holding back people, especially younger generations (e.g.: 'the theatre is for old people' as Carolina Vieira mentioned in her interview - *Appendix 2 – table 5*), lack of advertisement/gap in the communication channels that have been used, and the problems associated with accessibility (not having a free parking option, schedule mismatch with the hours of the plays and lack of public transport alternatives to commute to these events). These comments confirmed the points initially thought to be covered in the first draft of the perceptual map questionnaire and conjoint analysis survey.

Concerning their preferences, 2 out of 4 confirmed the specialists' beliefs regarding people having a favourite genre of play or a desired topic that they are more willing to watch. The location and accessibility conditions also play an important role in their decision, according to Maria de Fátima Duarte Velez: the furthest the theatre venue, the hardest it can be to attend that cultural activity and thus, closest places are preferred. Furthermore, one of the respondents highlighted that the producer's reputation can affect the public's decision of which play to attend. According to the same consumer, the most recognized the theatre company is, the more public it will attract. The same reasoning was used to emphasize the fame of the cast member. Two out of four interviewees stated that the more famous the actors are, the more appealing the play is to them, and the public in general. Finally, one last preference mentioned, although not by all the members interviewed, was the price. Some of them (2 out of 4) consider that the smaller the price the greater the attendance rate (*Appendix 2 – table 5).*

Since all these factors were not perfectly aligned and in concordance among all the interviewed consumers, it was decided to explore each one of them in more detail through the perceptual and conjoint analysis.

The following section focus on the examination of consumer perceptions, in a more technical manner. As such, it is relevant to elaborate on the results of the quantitative survey that later will support this thesis. This part is particularly crucial to achieve a better understanding on how the public perceives this cultural activity, based on the attributes defined on the literature review (*Chapter 2.3.1.1*).

Preliminary survey

From 266 responses, more than half (144) were people with ages between 18 and 25, 78 respondents were between 26 and 45 years old, 31 were above 58 years old, and 13 were of ages under 18 (*Appendix 2 – figure 3).* This can represent a significant discrepancy in the study, since most respondents belong to the same generational block and thus, can create a limitation in the analysis of the results. In terms of nationality and gender the sample covered both Portuguese and non-Portuguese people resident in Portugal, but the majority of answers came from Portuguese (98%) and women citizens (57%), as can be seen in *Appendix 2 – figure 4 and 5*.

Further analysis of the survey shows that most respondents, about 38%, tend to go to the theatre once a year, while 18% go two or three times a year, 12% go four or more times a year and 32% said that they never go to the theatre throughout the year. It is, then, possible to conclude that there is, undeniably, a problem of engagement, since two thirds of the studied population doesn't attend the theatre at all or do it only once a year, which is far too little (*Appendix 2 – figure 6).*

Following up on the motivations for this general lack of engagement, consumers were asked what they thought about today's theatre average ticket price (17,8€) and 63% of them agree that this value was acceptable, while 23% believed it to not be acceptable, as shown on *Appendix 2 – figure 7*. Reflecting on these numbers, it can be remarked that the price may not be the main cause for the theatre's declining situation, but it still going to be further analysed.

Following this, when looking at the overall service quality, this is the quality of the facilities, customer service and theatre plays (i.e., everything that happens from the moment the client buys the ticket until the end of the play), 60% of people manifested that they are satisfied with it, 23% are highly satisfied, and 8% are not (*Appendix 2 – figure 8)*. A similar result was obtained when asking about the quality of the theatre plays, which comprises the quality of the actors, the story, and the special effects (such as, sound and lights). More than 50% (138 out of 266) are satisfied with it, 16% are highly satisfied, while 14% are not, as is visible in (*Appendix 2 – figure 9).* Additionally, when examining consumers perceptions about the location and conditions of theatre facilities in Portugal, it was understood that this is, once again, not the main source of theatre's problems. From 266 responses, 156 (about 59%) are pleased with the amenities and places where the various plays performances take place, 15% are highly pleased, while 17% stated that they are not, as shown in (*Appendix 2 – figure 10).*

However, a factor that may be increasing theatre's main issue is the choice of communication channels for advertising the events (e.g.: social media, google ads, TV commercials, radio, street ads, magazines, etc.). According to the sample collected, 50% of the respondents have indicated that they are not satisfied with the way information regarding theatre plays reaches them. This contrasts with the 34% that are satisfied (*Appendix 2 – figure 11)*. Moreover, another relevant element that has been influencing theatre in a similar manner is the lack of event recognition in the Portuguese cultural agenda, as well as its popularity among all the other cultural activities. In respect to its familiarity, 177 out of 266 (*Appendix 2 – figure 12)* stated that they are not very familiar with the activity of going to the theatre, which can support the argument of the experts regarding lack of people's cultural education. Other aspect that was aligned with the opinion of the specialists and consumers interviewed, was the perception of the public about theatre. Most of them mentioned in the interviews that people tend to go to the theatre because they believe it is a 'fun' activity to do as a family, and it is a way of gaining educational knowledge. In fact, as seen on (*Appendix 2 – figure 13)*, 146 of individuals (55%) perceive theatre to be fun, while 76 (29%) say that it is educational. The rest believes it to be formal, 28 (11%), and 16 (6%) see it as boring activity to participate.

Other important motivators are the variety of theatre plays available and the overall customer service. Out of the total, 45% are satisfied with the current number of different genres of plays available, 4% are very satisfied and 21% are unsatisfied with it (*Appendix 2 – figure 14)*. Regarding the quality of employee's services (e.g.: leading people to their seats) and customer support (selling tickets and dealing with clients' complaints), 220 individuals (83%) are pleased with the present process, and only 6% believe it could be improved (*Appendix 2 – figure 15)*.

Concerning people's preferences, a question about the language of the plays was included and 249 out of 266 answered Portuguese as their favourite language, 15 preferred English and 2 chose the 'other' option (*Appendix 2 – figure 16).* This can be supported by the fact that most people answering the survey were Portuguese native speakers.

Furthermore, five additional questions were incorporated about theatre's personality, where the evaluated traits were ruggedness, sincerity, excitement, competence, and sophistication. The main takeaways were the following:

In terms of ruggedness, 161 (61%) of the people say it is very sturdy (*Appendix 2 – figure 17)*, 165 (62%) believe it can be seen as reliable (*Appendix 2 – figure 18)*, 160 (60%) imagine the theatre as enthusiastic, challenging, and creative (*Appendix 2 – figure 19)*, 166 (62) agree that it is competent (*Appendix 2 – figure 20)* and finally, 122 (46%) perceives the theatre as charming, elegant, and glamorous (*Appendix 2 – figure 21)*. Furthermore, the likelihood of recommending this type of activity to other people was also analysed through the 'net promoter score' metric, which was developed by Fred Reichheld in 2001, and classifies respondents into one of these 3 categories: promoters (the ones who would recommend the product/service and usually score between 9 and 10); passives (the ones who are satisfied with the product/service but would not promote it, with a range between 7 and 8) and detractors (the ones who actively discourage other people from trying the product/service and score 6 or less) (D. F. Hamilton 2014).

Despite an overall strong and positive perception of the Portuguese theatre, 146 out of 266 individuals can be considered as ‘detractors’ (customers who are unsatisfied with their experience) when questioned about their level of emotional attachment, and only 34 as promoters (satisfied clients who provide a net promoter score of 9 to 10, meaning they are likely to be loyal customers who recommend theatre to other people) (*Appendix 2 – figure 22).* The same can be seen when asked about recommending theatre to a friend. Out of the total, only 68 are promoters, 99 are passives and the other 99 are detractors, which ends up generating a total net promoter score of -11 (*Appendix 2 – figure 23).*

To conclude, the price, the quality of the overall service (including the play itself and customer service), and its facilities and amenities are not the primary drivers for the reduction of people’s willingness to go to the theatre. On the contrary, the main attributes that have been the most influencing are the choice of communication channels and the lack of event familiarization within the public, which confirms the observations made by the professionals and consumers that have been previously interviewed. As a result of this accuracy, it was decided that the same questions and attributes should be taken into consideration for the development of the perceptual map questionnaire and conjoint analysis.

As a next step, this thesis will do an in-depth study of the produced perceptual map.

4. Analysis

4.1. Perceptual Map

By building a perceptual map it is possible to understand, graphically, how theatre is positioned when compared to other cultural events (Cinema, Museums and Concerts), gain insights on the different perceptions that customers have regarding each event, and be able to identify if there are any possible gaps that theatre can take advantage of to improve its presence.

Firstly, a description of the composition of the survey will be presented, and how the sample was collected. Secondly, it will be presented an in-depth analysis of the results obtained in the survey related with the demographic characteristics, and, afterwards, some observations regarding in which category the respondents include each cultural event in. This is followed by different multidimensional perceptual maps, in which it is possible to gather insights on the perceptions that customers have on this variety of events and their attributes, and ultimately help answering this thesis' main question: **Why is the demand for Portuguese Theatre stagnated and possibly declining?**

4.1.1. Methodology

In order to gather data to analyse the consumer's perceptions, it was created a survey on Microsoft Teams that was accessible for 5 days. The survey had a total of 17 questions, there was a Portuguese and English version, and all the answers were anonymous (*Appendix 3 – table 6)*. Due to the research being focused on the Portuguese market, the biggest target of the study were people familiarized with the different cultural events in Portugal. Therefore, a Portuguese version of the survey was created to be easier to reach the Portuguese population. It is important to add that the perceptions collected are not only from the customers of each of these cultural events, but some are also from non-customers (of cinema, concerts and museums activities) that shared their perception relatively to the one event they have never been.

At the beginning of the survey a small introduction was written identifying the study, the subject, the university and the goal of the survey. The first three questions consisted of demographic information: the respondent's age group, gender, and nationality. The age group had different options to characterize the different personas: under 18, 18-25, 26-35, 36-45, 46-58, +59 (*Appendix 3 – table 6).* The number of age groups options were reduced relatively to the preliminary survey to make it more concise and meaningful. As for the gender it had three options: women, men and other. In the question related with nationality it was added three nationalities that were considered the more common, Portuguese, French and German, and an "other" option.

In the next section of the survey, the main focus of examination was to compare 4 different common cultural events in Portugal, namely, Theatre, Cinema, Museums and Concerts. These 3 cultural events were chosen since they are perceived as being the closest substitutes of the Theatre. Through this analysis it will be possible to take conclusions on what may be failing or working with each one of them, taking into consideration the customers perceptions. At the beginning of this section of the survey, two key questions were taken into account: one to understand the frequency of attendance of the respondents, and other to observe which category (Fun, Formal, Educational, and Boring) they would insert each one of the cultural events in (*Appendix 3 – table 6).* The rest of the questions on the survey were the questions more critical and relevant to develop the perceptual analysis. It consisted of 12 questions structured according to the 4-points Likert scale. The 4-point

Likert scale does not offer a neutral option, but it has multiple advantages, it is “desirable for young respondents and for respondents with low motivation to complete the questionnaire” and also “easy to understand and they require less effort to answer”. (Nemoto e Beglar 2014) The Likert scale allowed to collect the consumer’s perceptions about each cultural event (Theatre, Cinema, Museums and Concerts) according to the attribute being questioned in an intuitive way. The 4-points Likert scale was used in order to force the respondents to have an opinion about each attribute and avoid the results to stagnate in an inconclusive answer (for example, if people would frequently choose the option “neither agree nor disagree” so they would finish the survey faster). When analysing the preliminary survey, it also helped conclude that the Likert scale could be more intuitive and an easier method for the respondents to interpret. The scale was adapted to each question, therefore the first 7 questions consisted on an interval from 1 to 4, being 1- Not Satisfied and 4-Highly Satisfied, followed by the “Never been” option. The characteristics analysed in those first 7 questions were: Price, Service Quality, Promotions, Channels of Communication, Variety of Offers, Customer Service and Location and Conditions of the Facilities. The other 5 questions were based on the 5 different brand personality dimensions with the scale adapted to which one of them, followed by the “Never been” option: Rugged (1-Very Frail to 4-Very Sturdy.), Sincere (1-Very Unreliable to 4-Very Sincere), Enthusiastic (1-Very Dull to 4-Very Enthusiastic), Competent (1-Very Incompetent to 4-Very Competent) and Sophisticated (1-Very Basic to 4-Very Sophisticated), as can be seen in *Appendix 3 – table 6.*

Before the survey was officially launched, the group double checked each question, its translation and asked to friends to fill the survey in order to understand if it was intuitive and confirm if there were no mistakes. With these tests it was necessary to make some adjustments to the survey. Some questions needed to be rewritten in order to make more sense and to be easier to understand what was asked. Moreover, examples were added to the different attributes to help the respondents imagine the characteristics and components present in each cultural event.

In order to collect all the answers necessary, it was used different platforms: Facebook, Instagram and WhatsApp. These platforms allowed to take advantage of personal social media accounts and share the survey with friends and families (Instagram, Facebook and WhatsApp) but also share the survey in groups from university or related with theatre and cultural events. (WhatsApp and Facebook)

The survey resulted in 214 observations with an average time to completion of 16 minutes and 35 seconds. In order to have a good sample to analyse, some respondents had to be excluded since they were inserted in certain conditions. People that never been to theatre or did not answer some of the questions in the attributes and left it blank had to be excluded. Moreover, respondents that answered that they have been to one of the cultural events (Theatre, Cinema, Museums or Concerts) but in the following questions answered “never been” also had to be excluded. This could mean that they did not understand the question or were not following the instructions given. This were unreliable and inconsistent answers, therefore, it was better to exclude in order to obtain more accurate observations and analysis. Consequently, only 146 out of the 214 respondents were taken into consideration for this study, whose answers will help build the perceptual maps and analyse customer’s perceptions.

The program used to compute the analysis relative to the different variables was the IBM SPSS software platform.

Group part

In the next section it will be possible to analyse the aggregated results obtained by the 146 respondents in the survey for the perceptual map and highlight some observations relatively to the different parameters.

Group part

4.1.2. Results

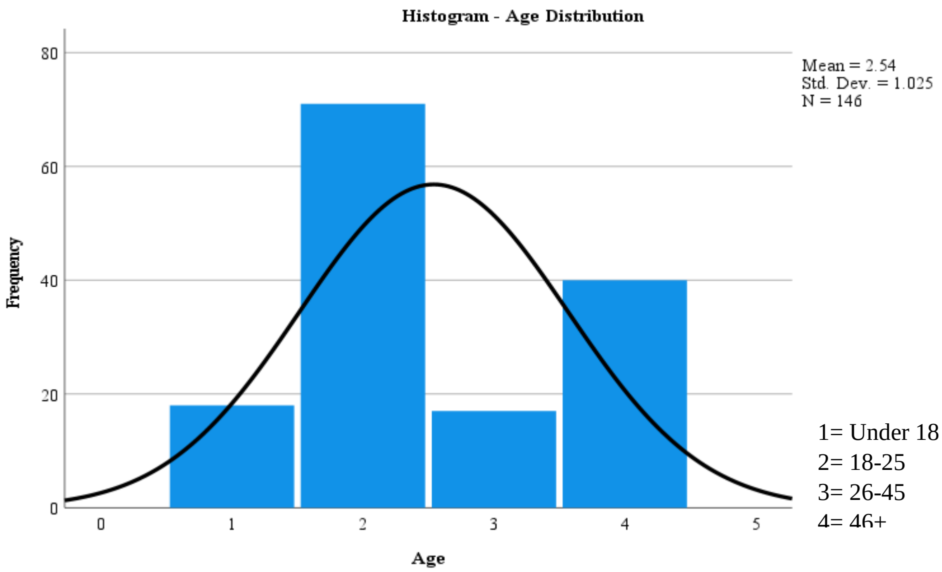
Sample characteristics

As mentioned before, after filtering the results, 146 respondents' answers were considered and based on those perceptual maps were built. It is important to mention that some of the questions- age, gender, nationality, category and frequency - were in nominal values that had to be converted into a numerical scale, connecting the different options to a number. In the next sections, it will be specified to each number corresponded each option.

Age

As said before the survey contained 6 different age groups (under 18, 18-25, 26-35, 36-45, 46-58 and +59) but once the data started being analysed some of the groups had a low number of answers. Therefore, some of the age groups were merged in order to make the interpretations easier and more concentrated, resulting in 4 different age groups: under 18; 18-25; 26-45 and +46. The numbers present in the histogram correspond to different age groups, 1 corresponds to the age group of under 18, 2 refers to the age group that include ages from 18 to 25, 3 is for the age group between 26 and 45 and finally, number 4 for the respondents that were 46 or older. As observed in the *figure 23*, the age group between 18 and 25 years old is the majority and represents almost 49% of the respondents (*Appendix 3 – table 7).*

Figure 13: Frequency distribution of the age histogram



Looking into the under 18 age group, they account for around 12%. As for the last two groups, the third age group represents 11.6% and the fourth age group represents 27.4% (*Appendix 3 – table 7)*. These percentages seem to show that younger respondents are the ones more familiarized with these cultural events. Although, this conclusion can be influenced by the fact that the survey was shared on multiple social media platforms, which have a tendency to be used by younger ages. It would be beneficial if it was possible to have a larger and unbiased sample of the population in order to make this interpretation.

Gender

The numbers present in the *Appendix 3 – figure 24* correspond to different genders, 1 corresponds to women, 2 refers to men and 3 is for the respondents that answered other. Moreover, as visible in *Appendix 3 – figure 24*, the gender distribution is skewed towards women and it is possible to observe that they constitute the majority of respondents, corresponding to a percentage of 61.6%.

As for the remaining respondents, 37.7% were men and 0.7% felt into the category of others (*Appendix 3 – table 8).*

Nationality

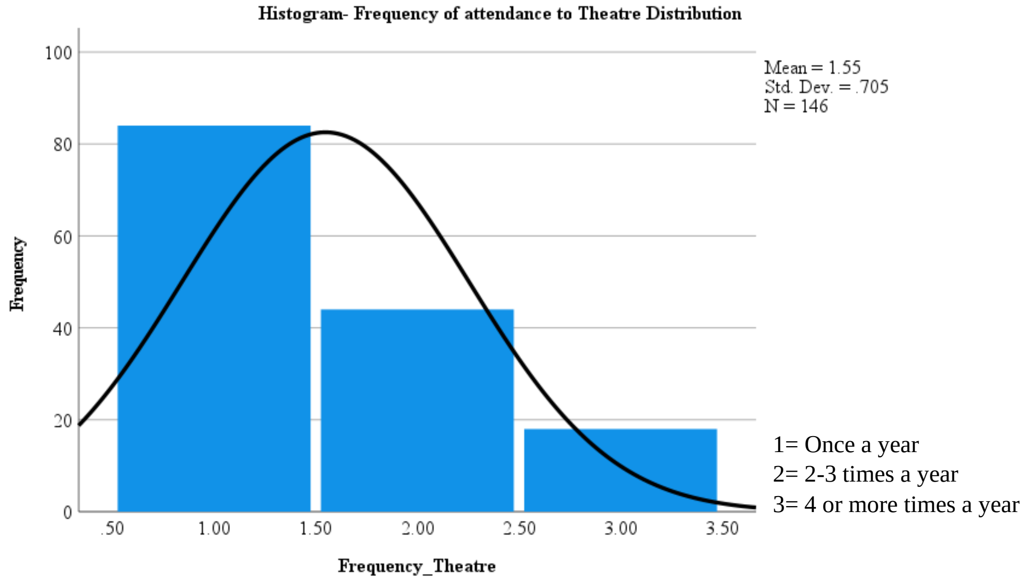
Observing the data relative to nationality, in *table 9 from appendix 3*, the reason why is skewed to the right it is because 98,6% of the respondents answered they were Portuguese, except for 2 people (1.4%) that did not answered the question (*Appendix 3 – figure 25)*. These statistics can be understandable since it makes sense that most of the people that are familiarized with these cultural events in Portugal to be Portuguese respondents.

Frequency of Attendance

Continuing with the analysis, it was collected the frequencies of attendance of each respondent according to each of the compared cultural events (theatre, cinema, museums and concerts). The numbers present in the histogram correspond to different types of attendance, 1 corresponds to once a year, 2 refers to an attendance from 2 to 3 times a year and 3 is for the respondents that have an attendance equal or superior to 4 times a year. As mentioned above, the reason why it is not presented the frequency relatively to "never been" is related to the fact that when filtering the results of the survey the respondents that have never been to theatre had to be excluded. Those answers could have become too vague and unsupported, and it was necessary a real and practical perspective of the consumers, leaving us with the 146 respondents that have been to theatre at least once.

In *figure 26* relative to theatre, the normal curve is skewed to the left, towards an attendance of once a year, accounting for a percentage of 57.5% (*Appendix 3 – table 10)*. It is possible to also analyse through the *Appendix 3 – table 10* that the attendance of 2 to 3 times a year corresponded to a percentage of 30.1% and only 18 people would go 4 or more times a year (12.3%).

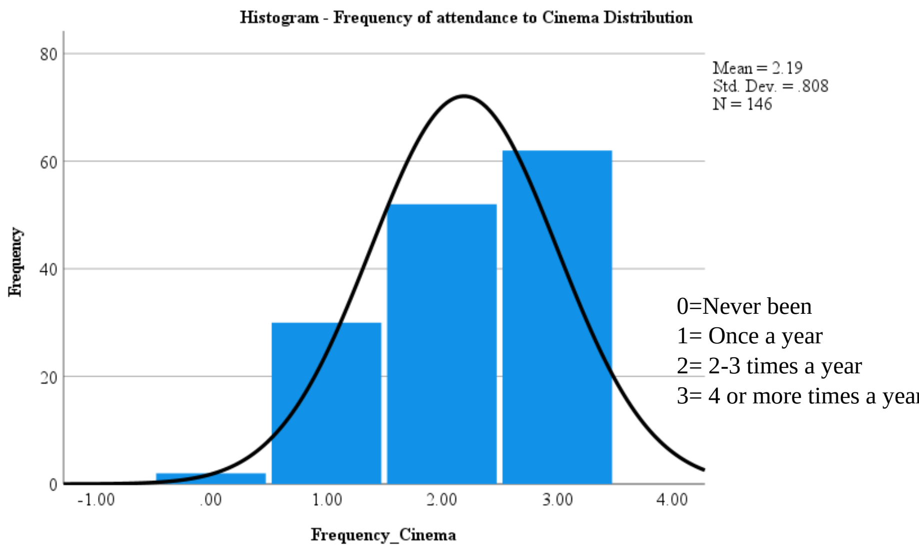
Figure 26: Frequency of attendance to theatre histogram



As for cinema, it is possible to observe through *figure 27* that it is skewed towards the right side, with an attendance more frequent throughout the year. Looking at the *Appendix 3 – table 11*, the attendance of once a year accounted for 20.5%, 2 to 3 times a year corresponded to 35.6% and more than 4 times a year represented the highest percentage of 42.5%. Only 2 people (1.4%) have never been to the cinema. In case of this cultural event, there was 3.4 more respondents that would go more than 4 times a year to the cinema (a total of 62 people) than to theatre (a total of 18 people). This is an interesting insight to have and possibly retrieve some observations when comparing the different cultural events.

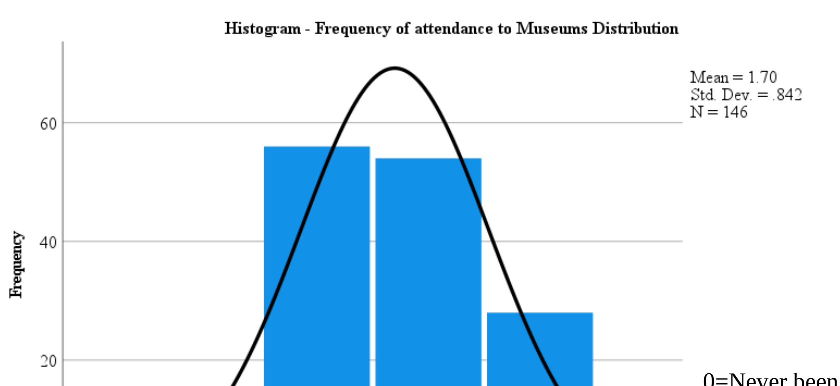
Group part

Figure 27: Frequency of attendance to cinema histogram



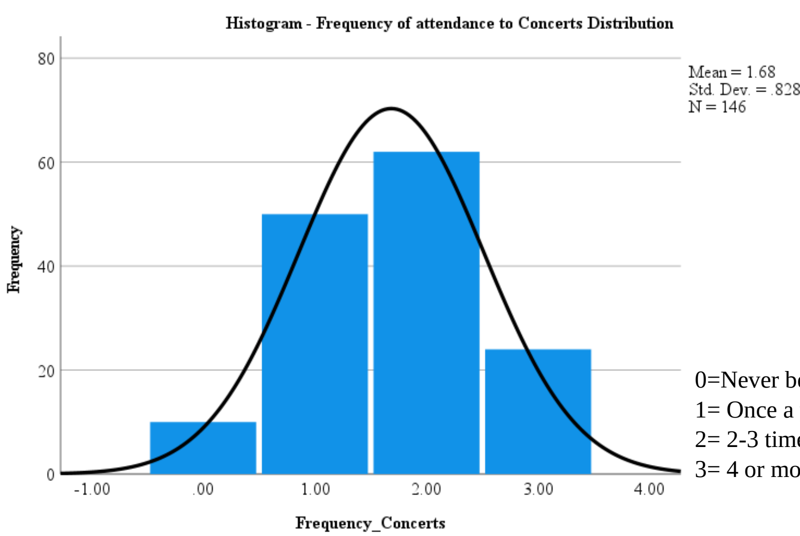
By observing *figure 28*, it is noticeable that the attendance to museums has a more disperse distribution. 5.5% of the respondents (8 people) have never attended a museum, once a year represented the highest percentage of 38.4%, 2 to 3 times a year corresponded to 37% and more than 4 times a year represented 19.2% (*Appendix 3 – table 12).* The amount of people that attended museums more than one time in a year (82 people) was 1.3 higher when compared to theatre (62 people). Leading to believe that it was more common for people to repeat the experience of going to a museum than to a theatre. But still an attendance to museums not as high and repetitive as the frequency of attendance to cinema.

Figure 28: Frequency of attendance to museums histogram



As for concerts, its frequencies can be observed to be similarly dispersed in *figure 29* as in *figure 28*, the frequencies of the museums. From the respondents, 6.8% never been to concerts, 34.2% have been once throughout the year, 42.5% have been between 2 and 3 times a year and more than 4 times a year accounted for a percentage of 16.4% (*Appendix 3 – table 13).* Concerts were the cultural event with more people that never went to one (10 people) when compared to cinema and museums (2 and 8 people, respectively). Moreover, for this cultural event the respondents have also showed to have an attendance more frequent when compared to theatre. The survey showed that approximately 1.4 times more people went to concerts more than once in a year (86 people) when compared to theatre (62 people). Even though concerts did not represent the highest percentage for the frequency of more than 4 times a year, it represented the highest frequency for an attendance between 2 to 3 times a year (42.5%) when compared to the other three cultural events.

Figure 29: Frequency of attendance to concerts histogram



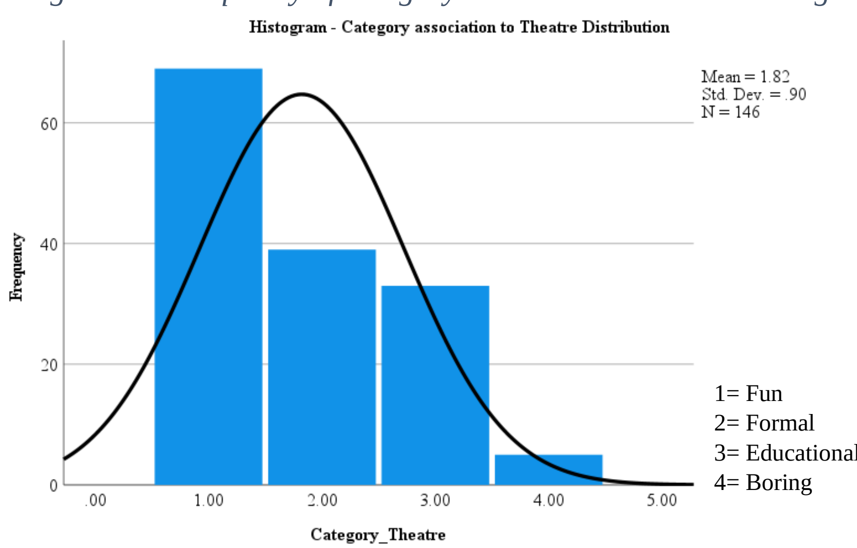
0=Never been
1= Once a year
2= 2-3 times a year
3= 4 or more times a year

Category

In order to understand the respondent's perception and feelings towards the different cultural events, a question regarding the categorization of each cultural event was created into the following options: fun, formal, educational and boring. When converting the nominal into numerical data the correspondence was: 1 to fun, 2 to formal, 3 to educational and 4 to boring.

In *figure 30* relative to theatre, the normal curve is skewed to the left, towards the fun and formal categories. Most of the respondents, 47.3%, considered theatre a fun cultural event and 26.7% associated it with formal. Moreover, 22,6% answered that theatre is related with the category educational and only 5 people (3.4%) considered theatre to be boring (*Appendix 3 – table 14)*. When comparing this data to the one from the preliminary survey the most common category associated to theatre was also fun with a percentage of 55%. Although, when looking for the second more common category in the preliminary survey it differentiated from the one above, being presented the educational category with a percentage of 29% (*Appendix 3 – table 14)*.

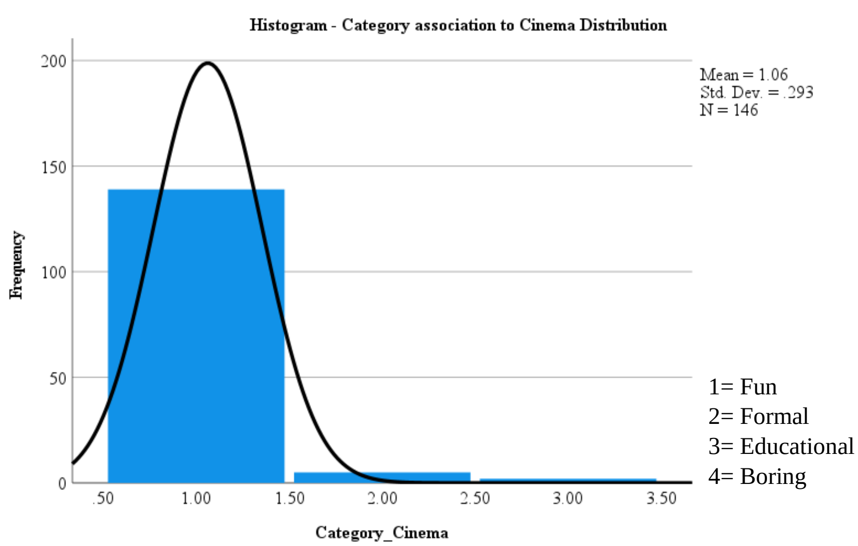
Figure 30: Frequency of category association to theatre histogram



As for cinema, through *figure 31* can be observed that is skewed to the left, towards the fun category. For this cultural event, it showed a huge consensus between the respondents to allocate cinema to the fun category with a percentage of 95.2%. Besides that, 5 people (3.4%) considered it to be formal, 2 (1.4%) educational and 0 people considered it boring (*Appendix 3 – table 15)*.

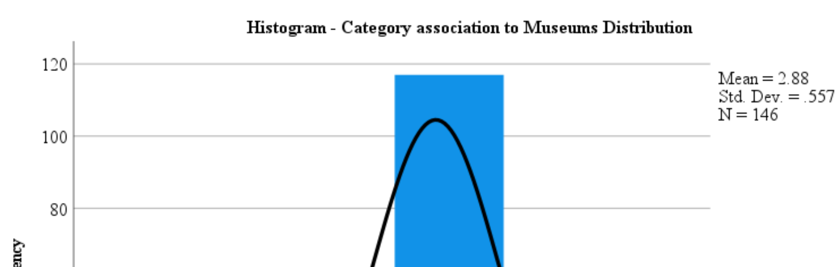
Approximately, the double of people considered cinema to be inserted in the category of fun when compared to theatre.

Figure 31: Frequency of category association to cinema histogram



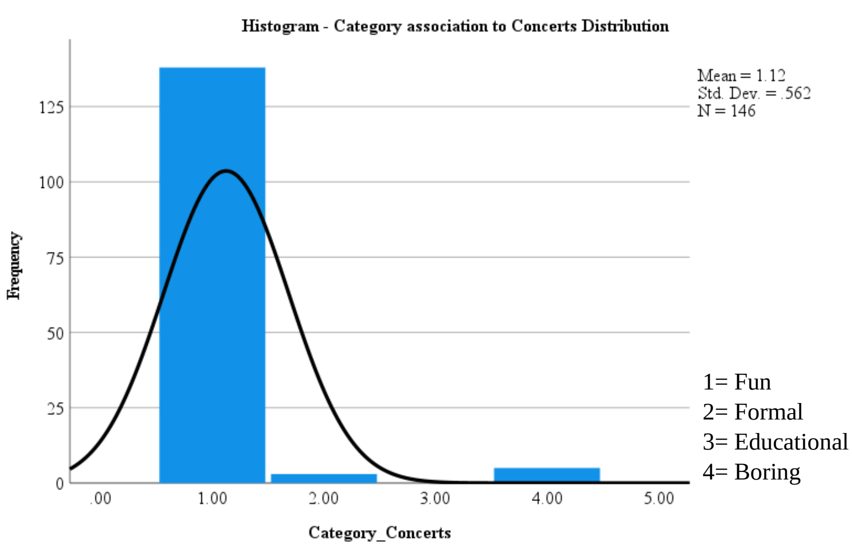
When looking at museums, the normal curve is slightly skewed to the right, towards the educational category. By observing *figure 32*, is visible a high consensus between the respondents to allocate museums to the category of educational with a percentage of 80.1%. Moreover, 6 people (4.1%) considered museums fun, 14 (9.6%) formal and 9 (6.2%) boring (*Appendix 3 – table 16)*. The category educational seems to be the one more strongly connected to this cultural event.

Figure 32: Frequency of category association to museums histogram



Lastly, for the concerts, its graphic is skewed to the left towards the fun category. (*figure 33*) In this cultural event there is also a big consensus towards the category associated with concerts, being considered fun with a percentage of 94.5%. Besides that, 2.1% considered concerts educational and 3.4% considered it boring. No respondents considered concerts educational. In this case, concerts have a similar percentage (94.5%) to the cinema with 95.2% associated with the category of fun (*Appendix 3 – table 17)*. This allows to analyse that the respondents have a similar perspective and idea of both of these cultural events. Besides it opens the possibility of considering cinema and concerts the closest alternatives when taking into consideration all four of the cultural events but it will be possible to observe that in the next section.

Figure 33: Frequency of category association to concerts histogram



To summarize this section, it was observed that most of the respondents belonged to the age group between 18 and 25 years old, were women and all of them had Portuguese nationality.

Looking at the frequency of attendance, theatre revealed to be the cultural event with the highest number of people that just attended once in a year (84 people) and with the lower number of people that would go 2 to 3 times a year or more (with a total of 62 people). This opens the possibility to believe that people prefer to go more frequently to cinema, which represented the higher numbers of frequency of attendance. The same for museums or concerts that had similar numbers between each other and higher frequencies of attendance than theatre. The reasons for these results can have different possibilities: people do not like the yearly experience they have in theatre and avoid going. It will be possible to also analyse these factors in the next section and compare between all the attributes and cultural events studied to retrieve some observations from the perceptual maps originated.

As for the category section, theatre was the only cultural event that did not have a consensus answer between the categories presented, the percentages were mainly distributed by the first three categories (fun, formal and educational). The more common categories used for theatre was fun with a percentage of 47.3% (lower than the cinema and concerts percentage relatively to the category of fun) and formal with a percentage of 26.7%, which contradicted the results obtained in the preliminary survey which contained fun and educational as the two main categories chosen. In this case it might translate into a lack of good positioning of theatre, incorrect communication, or inaccurate perception of the respondents relatively to theatre (as observed in the preliminary survey and interviews as a possible problem of the theatre) and it will be possible to analyse that aspect in the following parts of the paper. Relatively to the other cultural events, cinema and concerts have a similar percentage representing the number of people that associated these events to the category of fun. This might indicate that both of these cultural events are possible alternatives to satisfy the same wants or needs since people perceive them with an identical category. Moreover, looking at museums, it was the only event that the category of educational was strongly associated with a high percentage of answers, when compared to the others 3 cultural events.

In the next section the data collected in the survey will be gathered in order to build the perceptual maps and to be possible to analyse some of the aspects mentioned before and withdraw new insights relatively to theatre.

Multidimensional Perceptual Map

To further analyse how people perceive the theatre a perceptual map was generated through SPSS (an online statistical software). This tool facilitates the discovery of variables that are very correlated, or incredibly negatively correlated and then it collapses those into smaller dimensions, which at the end helps to make better sense of the data. The chosen method to compress information was factor analysis. With this method it is possible to find variables which are latent and can be good descriptors of the data set.

Throughout this assessment two-dimensional solutions were generated, as presented in *table 18 and 19.* The reason behind the quantity of dimensions produced lies on the method chosen, and according to the picked one (factor analysis), a dimension is only accepted if the different values related with the linear system of equation (eigenvalues) are higher than 1, as proposed by Kaiser in 1960 (Cliff 1988). Therefore, a cumulative variance of 97.72% and 92.86% can be seen in *table*

18, just leaving a small portion of the variance not being explained by the selected dimensions. When looking into more detail, to the different parts of the cumulative variance, it becomes clear that the first dimension explains 56.27% of the variance while the second one explains 41.45%, as can be seen in the table below.

Table 18: Total variance explained – attributes

Total Variance Explained

Component	Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings[a]
	Total	% of Variance	Cumulative %	Total
1	3.939	56.272	56.272	3.874
2	2.901	41.448	97.721	2.991

Extraction Method: Principal Component Analysis.

a. When components are correlated, sums of squared loadings cannot be added to obtain a total variance.

For the second factor analysis conducted, alike the first one, the first dimension justifies 78.51% of the variance, while the remaining 14.36% was allocated to the second dimension.

Table 19: Total variance explained - personality

Total Variance Explained

Component	Extraction Sums of Squared Loadings			Rotation Sums of Squared Loadings[a]
	Total	% of Variance	Cumulative %	Total
1	3.925	78.506	78.506	3.654
2	.718	14.355	92.861	2.124

Extraction Method: Principal Component Analysis.

a. When components are correlated, sums of squared loadings cannot be added to obtain a total variance.

To better represent the dimensions mentioned above, two scatter graphs were originated, where in both the X-axis represents dimension 1 and the Y-axis concerns dimension 2, as shown in *Appendix 3 – figure 34 and 35.*

To describe both dimensions and the correlations between the several variables and factors it is necessary to interpret the factor loadings to have a deeper understanding of how each variable relates with a given factor. Loadings can go from -1 to 1 and the closer they are to these two values the more the factor impacts the variables. The opposite can be observed when the loadings are closer to 0 (Sarstedt 2010). Another way of analysing the factor loadings can be by looking at the closeness of the vectors to the different axis. If a vector is very close to a specific axis this means that that vector contributes more to the interpretation of such dimension than another one. By looking at the following table and analysing the factor loadings, one can identify 2-dimension groups.

Table 20: Rotated Component Attributes Matrix | Varimax with Kaiser Normalization

Group part

	1	2
Customer_service	.999	.033
Ticket_price	.959	.282
Channels_of_communication	-.914	.321
Service_Quality	.780	.583
Location_and_acessibility	-.009	1.000
Promotions	.343	.921
Variety_of_offers	-.607	.789

Extraction Method: Principal Component Analysis.
Rotation Method: Varimax with Kaiser Normalization.[a]

The first comprises the ticket price, the customer service, and the service quality. The second one is mainly related to the location and accessibility, the variety of offers and promotion. Thus, dimension 1 can be understood as the main/primary impactful service attributes since it is mostly related with the quality of the offering, price, and customer support, while dimension 2 can be seen as the additional, and secondary most important attributes that can impact the service (*table 20*).

Still related with consumers perceptions of the Theatre personality, as can be seen in the table below, the first dimension shows a strong aggregate on competent, sophisticated, and sincere, whereas the second dimension comprises ruggedness (*table 21*). Therefore, the first one can be associated with adjectives with positive denotation while the second one as the opposite.

Table 21: Rotated Component Personality Traits Matrix | Oblimin with Kaiser Normalization

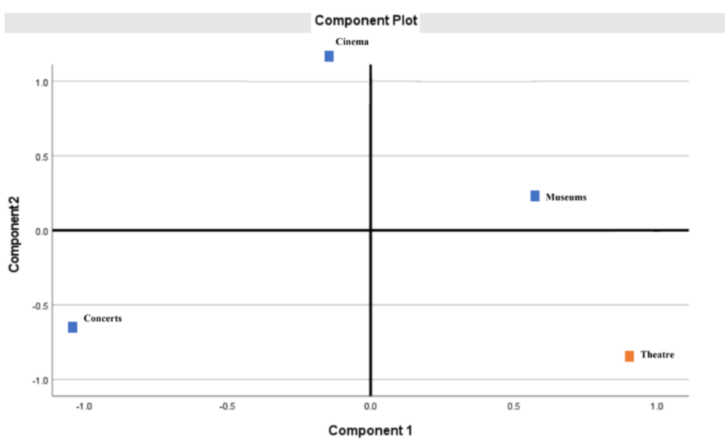
Group part

	Component	
	1	2
Enthusiastic	-1.009	-.270
Competent	.915	-.173
Sophisticated	.796	-.309
Sincere	.742	-.384
Rugged	-.072	.921

Extraction Method: Principal Component Analysis.
Rotation Method: Oblimin with Kaiser Normalization.

To check if what professionals and consumers expressed during the interviews about people setting priorities (putting on top of their list other types of cultural activities (e.g.: cinema)) was true or not and the main reasons for this happening, some other activities (museums, cinema, and concerts) were included on the perceptual map analysis. Hence, by adding them in the study conclusions can be made about people's perceptions of each activity (which can then present information to support the idea mentioned above) and spot the similarities among the Theatre and the other events, which can be further explored to potentially revert the present situation of the Theatre.

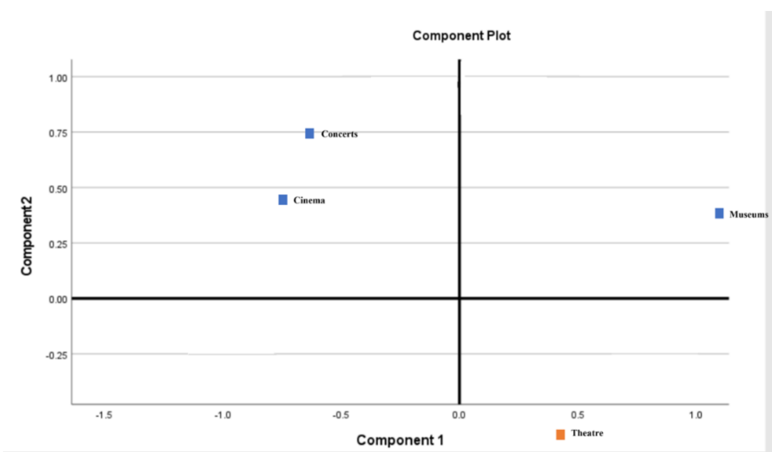
Figure 36: Perceptual Map cultural activities positioning - attributes analysis



Moving onto *figure 36*, the position of the various categories of cultural activities, while bearing in mind the ranking of the different attributes, the main takeaway is that these events can be divided into 4 different groups: the Museums in the 1st quadrant, the Cinema in the 2nd one, the Concerts in the 3rd quadrant and lastly, the Theatre in the quadrant number 4 (if the cartesian plane is divided into 4 different section, starting from the top right quadrant and moving counter clockwise). According to people's perceptions, all these activities are different. They do not share similarities and that can be concluded due to their peculiar location on the graph. Also, that may be the case since each one of them focus on offering a different experience and thus, have specific characteristics that cannot be comparable to the other activities (e.g.: theatre and concerts showtimes - very specific, do not happen every day at every hour like the expositions and movie sessions). Therefore, it suggests that an individual's perception of the Theatre has little to do with the other activities.

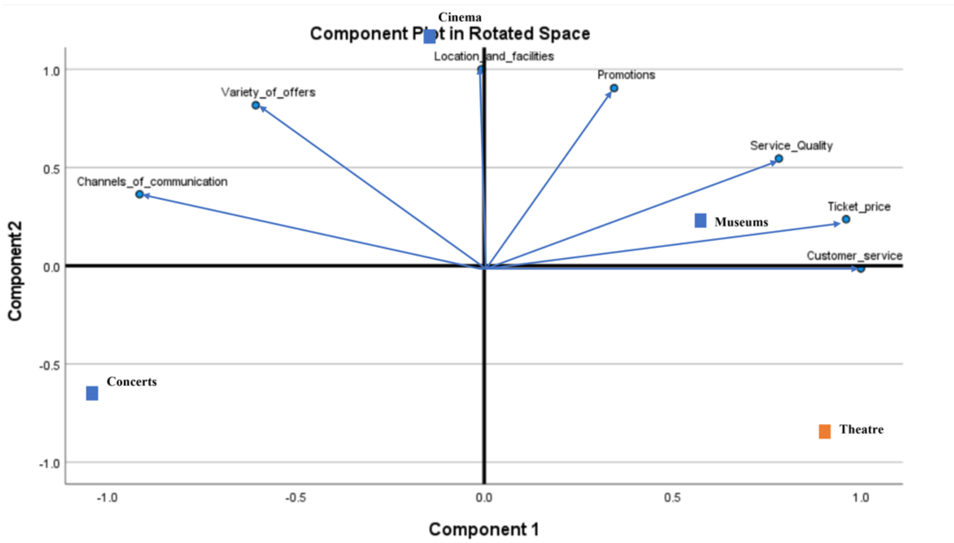
A similar conclusion can be applied to people's perception of the Theatre's personality (*figure 37)* when compared to the rest of the activities, since none of them are in the same quadrant as the Theatre, as can be seen in the figure below.

Figure 37: Perceptual Map cultural activities positioning – personality traits analysis



When merging the position of the several cultural events with the positions associated with the 7 defined attributes (Customer service, Ticket price, Service quality, Promotions, Location and accessibility, Variety of offers and Channels of communication), using its coordinates (*Appendix 3 – table 22)* while considering the length and direction of the vectors the following interpretations can be made (f*igure 38*, below):

Figure 38: Perceptual map – activities and attributes position



1) There are attributes with similar directions, which implies that if one of them is rated high then other ones in the group can expect a similar score. In this case, there is only one group that indicates a clear positive correlation among the several attributes (ticket price and customer service). Hence, if ticket price rates high then this will implicitly cause a high ranking rate in customer service as well, and vice versa. There is also a positive correlation between this previous group and the service quality attribute, although not that clear through the graph. Consequently, when the ticket price or the customer service rates high the service quality scores the same and vice-versa, which makes sense since usually people expect that a higher price will come with a better output (service quality) and better treatment (customer service).

2) There are attributes that are negatively correlated with the others (vectors with opposite directions): channels of communication, variety of offers, location and accessibility and finally, promotions. This suggests that a high rank in one attribute will be negatively associated with the opposing attribute and vice versa.

3) There are attributes perpendicular to one another, which reveals that they are extremely uncorrelated, as it is the case of the location & facilities and customer service, which is logical since one thing does not relate to the other whatsoever.

To analyse the perceptual map properly, several associations between the attributes and the activities were performed and the main conclusions were the following: individuals perceive every activity as different, since each one of them is in a different quadrant, as explained before. On the one hand, according to *figure 38* the activity that was perceived as having the highest quality service, customer service and better price was the Museums. On the other hand, the Cinema is highly associated with having a great location and accessibility conditions. The Theatre is also positively associated with the customer service, ticket price and service quality, although less obvious than the Museums. Lastly, the Concerts occupy a unique position on the maps, which leads to negative associations with all the attributes (*figure 38*).

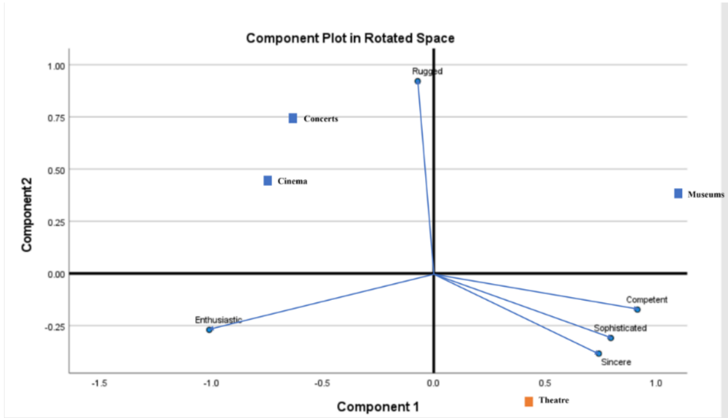
Another interpretation can be made based on the ranking of the 7 attributes per type of cultural activity, with special focus on the Theatre. The process involved creating an imaginary perpendicular line along each attribute line. Then the movement of the line started from the point contrary to the origin and would go to the centre of the map. This way it was possible to ensure which attributes were influencing the activities position, more specifically the theatre position, that can also be verified by observing the perceptual map in *figure 38*. The higher the rank, the higher the level of individual's correlation between an attribute and the activity in question.

Regarding the Theatre, it is perceived by consumers as having great customer service, high service quality and good prices. It ranks moderately in promotions and, location and facilities. The opposite is visible with the channels of communication and variety of offers. Respondents were not so sure about a possible strong association between the theatre and these two attributes, and they aren't clearly satisfied with the current used channels of communication and variety of plays available. These results confirm what was initially discussed in the preliminary interviews and survey: people are pleased with the overall service quality that is provided by the theatre and its prices, so the issue must fall on the communication channels and the variety of plays offered, since these are the 2 attributes that ranked the lowest score.

Moving onto *figure 39*, the theatre is also perceived as very competent, sophisticated, and sincere, and not so rugged or enthusiastic as the concerts and the cinema. This conclusion could only be taken after calculating the coordinates of each cultural activity (*Appendix 3 – table 23)* and positioned each one of those into the perceptual map containing the different dimensions of a brand's personality.

Figure 39: Perceptual map – activities and personality position

<u>Group part</u>



An additional aspect to take into consideration is the vectors length associated with the different attributes, which can produce different types of interpretations. The attributes with the longest vectors are the customer service, ticket price, channels of communication, variety of offers and service quality, while the shortest are the promotions and location and facilities.

Furthermore, the higher the attributes length, the better that attribute differentiates among the various activities. Thus, it is simpler for consumers to differentiate the cultural events in terms of customer service, ticket price, channels of communication, variety of offers, service quality (*figure 38*) ruggedness and enthusiasm (*figure 39*). Besides that, vectors can explain the associations people make with the corresponding attributes. Hence, when the attribute is located closer to the direction of the vector (further away from the origin), the highest the association people make between that attribute and the activity, which is the case with the theatre and the service quality, customer service, price, sophistication, sincerity, and competence as previously mentioned.

Finally, it is essential to emphasize that the angles between the vectors, in *figure 38,* can also convey important information, such as similarities in consumer perceptions. For example, regarding the attribute's perceptions, the vectors related with ticket price and customer service have a smaller angle between them, which can be interpreted as having higher similarity among them, meaning when people think about the theatre having a great customer service, they also think about having a great price. The same logic can be applied to people’s perceptions of the location & facilities and promotions and then, to the variety of offers with the channels of communication. On the other hand, customer service and channels of communication have a big angle between them which can tell that an activity when associated with having a great customer service usually has few channels of communication and vice versa.

The same rationale can be applied when looking at consumers' perceptions of the Theatre personality (*figure 39*, above). The angles between sincere, sophisticated, and competent are small, which implies that there are high similarities among them. When the Theatre is perceived as sincere it is also highly associated with being extremely sophisticated as well as incredibly competent. The opposite happens with sincerity and enthusiasm, suggesting that the theatre can be understood as super sincere but not enthusiastic at all.

To sum up and after analysing the perceptual map, the following takeaways can be made:

1) All these activities are perceived differently by the public, not comparable since they have different offerings and operate in distinctive ways. Which makes it difficult to explain why people chose to go to the Cinema instead of the Theatre – idea of prioritization (mentioned by experts on the interviews);

2) The Theatre is more correlated with customer service, quality service and prices than with promotions and localization & accessibility and is even less related with the variety of offers and channels of communication. Which is aligned with what was argued in the preliminary interviews and survey. When confronted with the question about the main problems associated with the Theatre in Portugal, what came to their minds was the price and service provided. None of them

mentioned the channels of communication or the variety of plays in the first place. That was brought to their attention by the interviewers. Another aspect that confirms the findings of the preliminary research was that the ticket price, the service quality, and customer service are not an issue for the attendees. In fact, the Theatre is understood as having a great overall quality (in terms of service (e.g.: play) and customer service) and good prices. Additionally, one conclusion that can be taken from this analysis is that the current chosen attributes for this study are not the main drivers for the precarious situation that the Theatre has been living in. Instead, what makes people not go to the Theatre is a genuine lack of interest, driven from absence of cultural education and establishment of priorities, in which the Theatre is not one of them;

3) The Theatre is incredibly perceived as being sincere, competent, and sophisticated and not so much rugged or enthusiastic, probably due to being more associated with an educational activity which is consequently perceived as being less exciting, especially by younger generations (which were the majority of our respondents).

4.2. Conjoint Analysis

After assessing the perceptions that consumers have regarding Portuguese Theatre, the characteristics they value the most and how these could be comparable to other cultural activities, this chapter will cover the conjoint analysis' surveys and results.

As a first step, a brief introduction on the attributes that will be tested in the conjoint analysis will be made. Following this, an analysis and interpretation will be made regarding the results of the conjoint questionnaire.

Group part

4.2.1. Methodology

It was determined that the optimal approach for this Conjoint analysis should be based on Rao's (2019) described methodology. As such, the first step was the choice of attributes and their levels.

The attributes chosen to introduce in the conjoint analysis were methodically selected when presented in different relevant moments, such as during the preliminary research, survey and interviews carried out by the team members either with the industry experts or with consumers. These steps allowed a deeper understanding regarding the perceived problematics from both the industry and consumer side, the attributes that either most valued and seem essential, and what each group believed the "other side" considers important.

The first draft of the list of attributes to include in the study was initially longer than the final version, initially containing 9 attributes, and finishing with only 4 of them. The decision to reduce the number significantly was made as to not overwhelm the respondents, thus increasing respondent friendliness and cooperation for the study.

Initially, the attributes that were to be added to the study were: price range of theatre tickets, fame of the cast (number of famous actors/actresses in the cast), language in which the play is performed, the genre of the play (musical, comedy…), the style of the play (classic, modern, post-modern, expressionist…), the distance from the theatre venue to the responders' house, the duration of the play, the time at which the, and the accessibility conditions to the venue (proximity to public transportation, providing of parking, free or paid, nearby).

Based on the feedback collected from peer discussions, interviews, and considerations with the presence of the thesis advisor, the decision to drop attributes like style of the play, distance from the venue to the responders' house and the duration of the play was made. This was mostly due to the belief that these were not the most influential characteristics for theatre attendance for the respondents. Additionally, the language in which the play is performed, according to an overview of the 2022 past, current, and planned offer in terms of plays, did not present a variation regarding language and, therefore, led to the consideration that this attribute was not worthy of entering the study. Moreover, the decision to not include the 'style of play' was connected to the fact that the genre of play surfaced more frequently as a discussed topic, while 'style' seemed to not be clear as a characteristic to many consumers.

The final list of attributes chosen to be part of the conjoint analysis are genre of the play, accessibility of the venue, famous actors/actresses on the cast, and price of the ticket. It is important to note that it was assumed that the attributes are non-overlapping and are independent from each other. *Table 24* presents an overview of the attributes and their levels.

Table 24: Conjoint Analysis – attributes and respective levels

Attribute	**Attribute Levels**
1) Genre of the play	• Drama • Musical • Comedy
2) Accessibility of the venue	• No parking nearby • Nearby public transportation • Free parking
3) Cast	1. No famous actors 2. < 3 famous actors 3. > 3 famous actors
4) Price of the ticket	• < 12€ • 12 - 18€ • > 18€

Group part

In the following section, it is explained the reasoning for the inclusion of the attributes mentioned in *table 24* in the Conjoint analysis.

a. **Genre of the play**: This attribute was included, in an effort to better understand how much the type of action in the play affects audience interest.

   The incorporated genres were drama (as in tragedy), musical and comedy since these are the ones with the highest degree of representation in the current offer landscape of Portuguese Theatre.

   Initially, other genres were considered, however after initial consumer interviews, it was concluded that these genres (such as the Portuguese classic "Teatro de Revista", historical, farce, etc) were less known and considered as secondary genres by the consumers.

   As mentioned previously, the decision to focus on the 'genre of play' and not the 'style of play' was made when it became clear, through consumer interviews, that only those with a higher understanding of theatre and its terminology were able to identify the distinction between genre and style of the play. This led to the conclusion that its difference was not common knowledge, and therefore only the most generally recognized should be included in the study.

b. **Accessibility:** It felt necessary to incorporate an attribute that could reflect the theaters' amenities, the services they can provide to consumers, and the overall experience surrounding the theater, other than the play itself.

   During the conducting of the interviews, this topic caused some confusion, since the interviewees felt that it was not considerably important in their decision-making process to attend a theatre play. However, upon further inquiry, it was discovered that consumers valued it more than initially expected, as the accessibility conditions dictate the initial step encountered by audiences to be able to enjoy the play. It became clear that, although this aspect might become a secondary condition to motivated consumers, if the interest to see said play is not substantial (which could be connected to the cast or genre of play, among others), the accessibility conditions have a bigger impact on the decision to go or not to the theatre. Therefore, the inclusion of this attribute seemed relevant, as an attempt to understand the correlation between accessibility and other attributes, and overall theatre attendance. Surprisingly, by far the most mentioned aspect of accessibility was the ability to commute to the venue, whether this meant proximity to public transport or the offer of parking. It was recognized that how consumers could get to the theatre's setting influenced how much they were willing to pay for the play or what distance they were willing to travel. When free parking was referenced, all the consumers recognized it as a noteworthy incentive to go to the theatre. As a result, attribute level-wise, it was decided that it should focus on transportation, being the levels Free Parking, No Parking Nearby and Nearby Public Transportation.

c. **Cast of the play:** One of the hypotheses elaborated during industry experts' interviews was that the consumer's interest was heavily dependent on the cast members' notoriety and professionalism. Moreover, it was theorized that there was a correlation between the theatre's box-office performance and number of 'famous' cast members – the more famous and higher the number of familiar actors in the cast, the more play tickets are sold. A priori, empirical evidence seems to show that this assumption is correct, according to literature and consumer interviews, where it was established that, in general, consumers felt more inclined to go to a specific play depending on its cast. This way, the inclusion of this attribute serves as a means of having a deeper understanding into the truthfulness of this hypothesis.

Regarding the levels for this attribute, they were based on what the current landscape of theatre displays, by considering the 2022 cultural agenda. For this purpose, ‘famous actors’ was defined as people who were recognized by name, either from TV shows, movies or theatre (e.g. Diogo Infante, José Pedro Gomes). Then, by observing the number of famous cast members associated to each theatre show and it was concluded that the preferred way of categories would be ‘0 Famous Actors’, ‘1 or 2 Famous Actors’ (<3 Famous Actors) and ‘>3 Famous Actors’.

d. **Price of the ticket:** as the final selected attribute, the ticket price was considered a clear choice, due to its overall importance regarding the studying of consumer interest. The range of prices chosen takes into account both the obtained consumer insights from the preliminary interviews and survey, as well as empirical evidence gathered from research on the current Portuguese theatre market and its base prices. For simplification purposes, the prices were bundled into <12€, 12-18€ and >18€.

The chosen order for the attributes was made considering how theatre plays are commonly advertised in Portugal. In the survey, visible at first is the Play Name, which in this case is rather irrelevant, however, in order to identify the distinct plays, the labels ‘A’, ‘B’, and ‘C’ were used. Following this, the Genre of the Play is introduced, the reasoning being that with no title, this is the performance’s characteristic that best allows the consumer to create a more concrete idea of the different options introduced, the type of environment that each choice represented and the type of show they would be attending. The Cast of the Play is usually announced in a prominent way as an important feature, or accompanied by a clear picture of their faces, and consequently takes third place on the survey. In order to include the Price of the Ticket in the last place, and since Accessibility is considered to have less importance than cast, it is introduced in the fourth category of the questionnaire. The last attribute is Price, and it represents the final component to be considered. It occupies a prominent position since it is identified as a crucial attribute in overall consumer behaviour.

Constructing the Survey

In the following section the building and design of the conjoint analysis survey will be described.

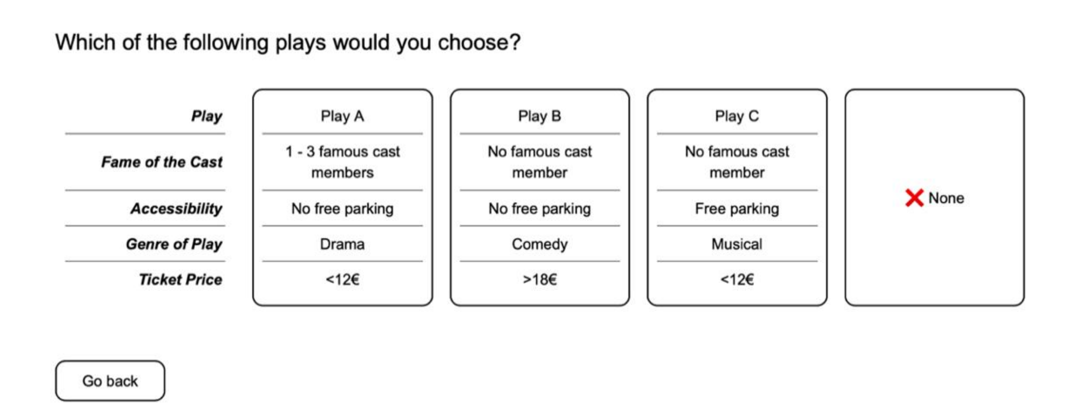
Regarding the conjoint format chosen, the choice-based conjoint was the method considered the most effective and relevant for the study.

In order to create the survey, the platform Conjoint.ly was chosen. This decision was made primarily due to the website being advised by the professors, and secondly due to the useful and effective features of the all-in-one research platform. The advantages included unlimited responses, unlimited questions, translation into multiple languages, and easy collaboration within the team.

Consumers were asked about both product attributes and price, taking into account competitors' offerings and pricing, hence the choice of the brand-specific conjoint (or choice-based alternative-specific/labelled conjoint) design.

The survey was designed so that once the respondent accessed the provided link, they were greeted with the automated message: 'Welcome to this study. It will require less than 10 minutes of your time. We appreciate your participation.'. Afterwards, the choice-profiles were presented at random following the previously set layout of attributes and respective levels. The number of alternatives per choice-set stipulated was 3 (corresponding to one choice per selected genre) and an additional option of ‘None’, the order of the attributes showed as described on the previous section. The number of choice-sets for each respondent was left at ‘Automatic’, since it was recommended that Conjointly made that decision depending on the consumer’s quality of answer. Furthermore, it was determined before the beginning of the launching of the questionnaire that Conjointly would terminate low-quality respondents early, as to guarantee a consequently higher quality of results. It is also important to note that for all attributes, except for ‘genre of play’ (for which each genre was associated with one of the three Play Names ‘A’, ‘B’, and ‘C’) all possible combinations between attributes and levels were accepted. Once the assembling of the survey was completed it was translated to Portuguese. See final result in *figure 40.*

Figure 40: Layout of the Choice Profiles – by Conjoint.ly



Pre-Test and Data Collection

Conjoint.ly allows for the survey to be previewed as a participant, which was helpful in the determining of the effectiveness of the final version. Once team members began answering the questionnaire, as well as some friends and family members, it became clear that the number of attributes and profiles per choice-set had to be reduced from 9 to 4 (as formerly mentioned) and 5 to 3, respectively. The preview was once again showed potential participants for final feedback, where it was observed that the survey was slightly long and could be perceived as repetitive, but it was, comparatively more straightforward and user-friendly.

After the launch of the survey, it was apparent that the computer version was more easily operated and the layout was more favourable, than the mobile version. In order to improve the situation and prevent the waste of answers which could be more rapidly deemed as low-quality, when promoting the survey, it was recommended the answering be made on the computer. Additionally, as Conjoint.ly had recommended a significant number of responses, 300, it was decided the questionnaire should be launched as early as possible.

The survey was made available on November 4^{th}, 2022 and was only closed on November 22nd 2022, when the minimum number of recommended answers was reached. Its promotion was made by diverse channels, ranging from Instagram, Facebook Groups, LinkedIn, Reddit, and WhatsApp, by the 5 group members on both private and public personal channels. Although a great effort was made to advertise the survey, it was evident that due to its complexity, the successful interaction with the respondents was limited when compared to that of the Perceptual Map Analysis.

Group part

5. Discussion

5.1. Results

The following chapter will summarize the main findings gathered by the study, and present some managerial implications identified, by degree of actionability.

How do people perceive the Portuguese theatre? What do they say about it and what are the associations they have towards it?

The major findings regarding the perceptions that people have about Portuguese theatre and what they associate it with were studied in two distinct phases: during the initial phase, where interviews to both consumers and industry experts were carried out and a preliminary survey was launched, and, finally, via the perceptual map survey.

An initial objective of this thesis was to compare Portuguese theatre to other activities that pertain to a similar category (e.g., concerts, cinema…). This was done to understand if there were any resemblances that could be studied and/or explored as a mean to obtain relevant insights about theatre. Yet, both initial stages of information gathering ruled out the possibility of such comparison due to the divergence in perception that consumers present on these different activities – the overall understanding was that these activities were too dissimilar to be effectively compared among themselves. To build on these differences, the way in which these activities are significantly different than the theatre, which makes this comparison even more complicated.

As for the interviews and preliminary survey, the main findings can be found below.

Most people interviewed agreed with the statement that the current level of pricing is acceptable, rejecting the belief that lack of adhesion to Portuguese theatre was caused by the current pricing of the shows. However, guesses were made regarding the significance of ticket pricing and how it could influence consumer behaviour.

The interviewed respondents also believe that in the theatre establishments they are well treated and cared-for and get a level of service that is in line with the paid price. As such, customer service and service quality are not considered the key drivers for the low attendance experienced in Portuguese theatre.

Additionally, people seemed to have an overall favourable view of the theatre, associating it with mostly positive aspects. There is a consensus that theatre is an educational and fun event, one to experience with family members and friends. Moreover, it qualifies as a trustworthy and reliable event, as well as an activity that is competent, and sophisticated, which can be described as charming, elegant, glamorous, and modern. Overall, these associations do not seem to distance people from the theatre, aside from the sophistication impression, which could be interpreted as negative if it is considered that sophistication is related to the view that theatre is for the elite, a "posh" activity, exclusionary.

As for the feelings interviewees nurture for the variety of plays that the Portuguese theatre landscape presents, half of them agreed that this might be an influencing factor for the low levels of engagement with the Portuguese theatre. The perception that consumers have is that if the offer was more diverse, both in genre and variety within the same genre, it would most likely encourage them to attend more to the theatre, as well as influence other people to do so too. Only half of the participants displayed this type of rationality, the other half demonstrated contempt and acceptance of the current level of variety of plays offered in the Portuguese theatre market.

Finally, half of the people who participated in the study revealed to have issues with the channels of communication utilized to announce plays and publicize them to audiences. Many considered the current methods, such as outdoor posters and other types of street advertisements, to be essentially non-effective, and would prefer that this communication be conducted mainly in the digital sphere, whether through social media ads, or development of the theatre's presence online via their own accounts. This is perceived as a more powerful way to share about plays offered by the theatre company/venue and make promoting of the theatre performances increasingly dynamic and two-sided, besides adapting the communication to the digital era more successfully. This was, therefore, considered as one of the main reasons people do not engage more frequently with theatre shows. Moreover, there appears to be a connection between the channels of communications issue and the variety of plays – if communication was more effective, perhaps consumers wouldn't assume that the Portuguese theatre lacks variety. Since audiences would be further aware of the current offers and theatre overall condition, this could help perceptions on the events be closer to the reality, including the additional diversity of Portuguese theatre produced nowadays.

In the perceptual map, the understandings that consumers have regarding Portuguese theatre can be allocated to three groups – the concepts heavily they relate to the Portuguese theatre; the ones they relate, but not as heavily; and the ones they do not associate to Portuguese theatre. This last-mentioned group could, hence, be where the main issues concerning Portuguese theatre reside.

Beginning with customer service, quality of service and the ticket price, these are often associated with extremely positive perceptions by the public. Moreover, the three characteristics are correlated – usually, higher prices are associated with higher levels of customer service, and vice versa. By reaching this conclusion, the perceptual map survey, confirms the prior findings obtained in the interviews and preliminary survey, regarding these three variants.

On the other hand, promotions, location & facilities, are matters somewhat present in consumers' minds when thinking about Portuguese theatre, however, there is potential for improvements, meaning that if some issues are solved with regards to these aspects, people's perceptions might change. In essence, consumers are not fully pleased with these dimensions, but they also don't believe that these are the features that will drastically change the level of adhesion to theatre in Portugal.

Regarding attributes that respondents associate with substantial problems in the Portuguese theatre, two main elements were identified - variety of offer and the channels of communication -, which corroborates the findings gathered in the interviews and the preliminary survey. Consumers seems to hardly associate these characteristics with theatre, reiterates the importance of solving these potential issues, and their effect on the scope of Portuguese theatre.

The responders concur that theatre can be perceived as sincere, competent, and sophisticated. However, a surprising finding was that theatre is not considered an enthusiastic activity, which contradicts what was declared in the preliminary interviews. This may be due to the fact that the preliminary interviews had a considerably smaller sample of answers, and these could be skewed towards people who feel enthusiastic towards theatre. Since the perceptual map survey was answered by more people, it is natural to assume that the impressions expressed by this larger group might be more representative of the general opinion, rather than a smaller sample. Moreover, the conclusion that people do not consider theatre as an enthusiastic activity is more in line with the initial expectations of this thesis: regardless of personal opinion, the group believed that the general public considers theatre an outdated and niche cultural activity.

Which attributes are valued by consumers? What would be the ideal scenario for consumers?

The most relevant findings regarding the attributes that general consumers value in theatre were found in the conjoint analysis survey. This tool was extremely beneficial, because it allows for responders to compare different options and think about them in a practical manner, which also allowed to comprehend if responders' thoughts – theoretical aspect, analysed in the perceptual map – are in line with its actions or preferences – practical aspect, analysed in the conjoint analysis (e.g.: sometimes people believe they would act in a specific way if a certain situation occurs, but when they are actually confronted with that situation, they act differently than expected).

The first conclusion obtained through the conjoint analysis is that price is the most influential and important attribute, among the ones studied. Out of all the ranked scenarios, the ones that generated more interest and generated a higher "benefit" to consumers were scenarios were the price was <12€. This is not necessarily a contradiction to the information collected in the preliminary interviews and preliminary survey, where the belief was that the ticket prices were not considered the main issue behind the level of adhesion to Portuguese theatre. What this result means is that the conjoint analysis survey respondents were more inclined to, and valued more highly, scenarios in which the price for the ticket was the lowest. Another conclusion regarding price was that respondents overall are unwilling to pay higher prices (i.e.: >18€) for tickets for any genre of play or presented attributes.

About the genre of play, it was observed that Comedy is the favourite genre, and consumers are more inclined to pay a higher price for comedy plays than they are for the other two types of play. Musical is the genre for which people are less willing to pay a higher ticket price.

As for the number of famous cast members, the preference of the participants is the highest possible, a very natural conclusion, since consumers want to see their favourite actors, and the more famous members the play has, the more interest that show generates. Moreover, it might be the case that the level of fame and notoriety of the cast is associated with the quality of the play (i.e.: the more famous actors the play has, the better the theatrical performance), so this could also be an explanatory factor as to why the most popular choice for fame of cast was ‘>3 Famous Actors’.

About the accessibility condition to the theatre, this attribute has the lowest amount of influence on public interest in the play. However, it is worth noting that the most popular option was ‘free parking’. The preferred combination of attributes for any genre of play was price of <12€, >3 Famous Actors and Free Parking.

Are there relevant clusters when it comes to Portuguese theatre consumers?

The insights regarding the segmentation that might exist in the survey pool was collected based on the answers gotten from the Perceptual Map survey.

As for the conclusions that arose from this cluster analysis, the evidence collected does not seem to agree with the initial belief that there might be a difference in the way people perceive the theatre, regardless of gender or age.

In retrospect, there was the possibility to further research this topic if additional demographic questions were included, such as education level, or range of yearly earnings, which would have allowed a study of correlation between the economic status of consumers and their perceptions of the theatre (focusing on the perceived idea of theatre as a sophisticated activity, maybe for the elite) or how the level of education might have varied the perceptions consumers have on theatre. This would be something to consider for future research.

Group part

5.2. Managerial Implications

In order to understand the recommendations that arose from the study, and to identify their level of applicability, it is imperative to bear in mind that Portuguese theatre is an extremely government-dependent industry, where theatres' survival rests in the government's ability to introduce funds and subsidies so that it can prosper. This way, there is a lot of important and direct recommendations that would simply not be viable given the nature of this industry. To surpass that, the recommendations were divided into what is within the theatre's manager ability or those who are directly involved in theatre (e.g.: theatre companies, directors, actors, theatre investors…), and what the government could do to help the theatre industry in Portugal. However, to address the issues in the theatre landscape, the recommendations cannot be implemented in isolation – the industry will experience a positive "snow-ball effect", but it must start somewhere, and in this case, it starts with government intervention.

Given the role of the government in the subsistence of this industry, the continuous application of stimulus is necessary, and the optimal approach would be to increase the level of support given to businesses. This could be a redesign of the distribution of funds, which takes into account the type of institution (i.e.: a small theatre has different economic needs than a big theatre). Moreover, the ore sustainable subsidization of theatre would allow the industry to grow in a healthier manner, and to develop so that it could potentially, at a certain point, sustain itself.

Possible government interventions are presented below:

An increase in the subsidies provided, to allow theatre companies to increase the variety of plays available in Portugal, both smaller and bigger institutions, allowing them to increase the offer and possibly hire more famous actors, providing consumers with what they want.

Group part

By creating incentive programs for development of online communication channels for theatres and theatre companies. This would allow them to foster a closer relationship with their target audience, communicate with them in a bilateral manner, and in their preferred digital approach. Developing education programs would allow for more contact between the people and the theatre, which would help younger people to develop a greater interest in these cultural events and become more enthusiastic about them. These programs could materialize in different ways, but the optimal approach would be a dual approach. On one hand, the school curriculum throughout the country should be updated to contain theatre classes or lessons, with practical and theoretical components, in addition to the creation of theatre clubs in schools, to foster an environment of curiosity surrounding the theatre. On the other hand, the development of a cultural education program in theatre companies and regional theatre groups, which would include theatre classes, open lectures about theatre performances, to stimulate the public and lead to a greater understanding of these shows' inherent cultural value. If people are informed and truthfully recognize the non-monetary and monetary value of theatre, this could lead to a higher willingness to pay by the consumers.

As for what the Theatre industry can put into action, while backed by government funding, there are several actions proposed.

Firstly, these funds should be invested in channels of communication more fitting to the targeted customer. A strong presence in the digital space would allow for a closer and bilateral relationship with the customers and potential customers, as it would allow the generation of interest and capture potential customers. It would, in addition, create a conversation between the businesses and the consumer, allow for more direct feedback and deeper understanding of their preferences, and would make the consumer feel like the theatre can be a more personal activity than what is perceived as today.

Secondly, the funds are also necessary to develop different plays and cast more well-known actors to these theatrical performances – this goes directly into the feedback obtained from the conjoint analysis, where the conclusion was that consumers are more enthusiastic about the plays that bring on more famous cast members.

Finally, it would be suggested that compensation for a slight decrease in prices of theatre tickets is essential – this is an objectively difficult accomplishment, given the economic fragility of the industry, but as seen in the conjoint analysis, price is one of the key drivers of interest for any given play. As such, if there is a possibility to increase participation in the theatre, this is a measure worth discussion. The law of demand suggests that the lower the price, the higher the quantity, which can be utilized appropriately in this industry as well – the lowest the prices of the theatre tickets, the more people will want to attend.

5.3. Limitations and Outlook for Future Research

Preliminary Survey & Interviews:

Limited access. The study depended on having access to people and data from the industry (experts), and there wasn't access to a big network of people working within the industry. Therefore, only 7 expert interviews were conducted. If this number was higher, more insights would've been collected, and there would have been a deeper understanding of the industry and the forces that move it. Additionally, the conclusions obtained could have been more structured and accurate.

Self-reported data. 2 out of 7 interviewees do not have professional qualifications, or do not work full-time in the theatre industry, instead they participated in 1 official play. Therefore, their insights may not be completely accurate, and the perceptual map and conjoint analysis survey questions were based on them. The same thing happened with consumers interviews, only 4 people were interviewed and not all of them frequent the theatre regularly. All the information these participants shared can raise possible biases related with their memories, since they are giving their opinion based in just one or few experiences (baseless), or being influenced by one bad/positive experience they had, and their backgrounds (expressing the problems of the theatre based on their own problems) (Libraries 2022).

Age, gender and nationality bias. From 266 responses, more than half (144) were people with ages between 18 and 25. The same situation is observed with nationality. This study aimed to collect the opinion of people (resident in Portugal) about the theatre, and the data gathered was mostly from Portuguese (98%) people, meaning non-Portuguese citizens who attend the Portuguese theatre were neglected. Most of the study respondents were women (57%), additionally the customer interviewees were all conducted with women, which can lead to a discrepancy in the study. Man, and woman, young and old, Portuguese, and non-Portuguese people are hormonally, physiologically, and culturally different, and this can cause diverse ways of thinking and perceiving the same subject matter. Thus, if the collected data would have been more balanced (e.g.: equivalent number of woman and man answers) the conclusions and interpretations of the research paper would be different and more representative of the reality.

Longitudinal effects. The time available to make the qualitative and quantitative analysis (prepare, make, and interpret the interviews and surveys) was constrained by pre-determined due dates.

Group part

Surveys

All questions should have been programmed to be mandatory to answer in the survey, in order to avoid gaps and make sure everyone sees and responds to each question. The study should also have been tested in advance with different age groups before launched, to be sure it would be understandable to everyone. This would have potentially reduced the number of data that had to be excluded, and more data could have been successfully collected and analysed.

In line with making the analysis richer and less limiting, in the beginning of the survey, it should have been asked whether a person had already been to the theatre once in their lives. By doing so, a different kind of approach to these respondents could have been taken. For example, asking them the reason why they have never been, whether it being by lack of interest or other. Furthermore, it could also be asked different questions to understand what could potentially push or awaken that interest.

The 4-points Likert scale was used since it can be more appealing for the younger respondents, and it forces the respondent to form an opinion. But this scale can influence more distorted results, can become difficult to respond for a person that doesn't have an opinion and can also lead some respondents to prefer not to answer it, which is worse than them choosing a neutral option.

Common to all analyses

Small sample size. A large number of respondents was necessary to make the study more credible for all analyses. The presented sample was not large enough. This was felt even more greatly in the perceptual map analysis. Of the 214 responses only 146 could be used, once again they do not reflect properly the market perceptions. Some of the responses had to be rejected, the ones who

Group part

selected that they attended the theatre during their lifetime (one of the 1st questions of the survey), but then later in the survey they chose the option 'never been to the theatre'. It is believed that this happened because they did not understand properly the question, or they did not have an opinion regarding that matter. To avoid that from happening, a broader sample of the population should have been collected. Thus, for future research it is advised to use some different methods to share the survey. For example, by using social media it might have influenced the fact that most of them were young respondents (18-25) which are social media's most frequent age users. It was also better for the study to have had a higher number of respondents to have more variety of opinions from different genders and backgrounds.

Lack of literature. Studies with perceptual maps and conjoint analyses focus mostly on brands and products and not so much on services or even industries. This insufficient literature harmed our choice of dimensions to analyse and led to the research paper not having its literature and theoretical basis at an optimal strength level. But one source mentions that the growing awareness of inappropriate measuring of consumer habits regarding performing arts has been leading to more research being done (Angione 2017). It would be highly suggested revisiting this study in upcoming years to understand its relevance.

Perceptual map

Restrictive survey building. People who answered 'never been to the theatre' at first when questioned about their frequency to going to this cultural event were not considered in the study. Hence, this study only includes the perceptions of people who attended the theatre. This can limit and influence the results. If people who had never been to the theatre but had opinions to give, even if their answers would be based on pure assumptions and intuitions formulated by them, were considered, other types of conclusions and interpretations could have been taken. The answers from people who never attended the other activities (cinema, concerts, and museums) but attended the theatre were considered. This influenced the final results and made them slightly unbalanced, as a person that has never been to the cinema, for example, is unable to compare its prices to the theatre ones due to lack of knowledge.

Conjoint Analysis

Insufficient levels and attributes. Conjoint analysis typically utilises more attributes with a mix and match of different level quantities. In the presented analysis, 3 levels were used for every attribute, and only 3 attributes were used. That limited the conclusions as only so much can be deducted from 3 attributes. It would have been more advantageous to reduce the number of levels in some attributes and possibly add more attributes. Decreasing the number of combinations of the attributes would have also been better to reduce the time it takes to complete the survey to diminish the number of unusable answers, due to fatigue. Another point can be made regarding the choice of which features to include in each attribute. Clearer levels could have been used in order to make the levels more distinct, especially when looking at the "Accessibility of the venue" which features can overlap.

Cluster Analysis

Absence of demographics. It was limiting the fact that only a few demographic questions were asked to the respondents in the perceptual map survey, and no questions regarding this were asked in the conjoint analysis survey. It is believed that it would have been beneficial asking such questions to build a richer, more accurate analysis and reach better conclusions. That would have been an extra depth to our studies and would have helped us better understand the different types of customers based on common demographics (e.g., educational level, income, etc.).

Appendices

1) Preliminary interviews & survey

2.1) Preliminary interviews & survey setup

Table 1: Interview questions - Professionals

Professional experience	• Years of experience • Plays that have participated in • Current role
Problem & Solution	• What are the main problems with the theatre in Portugal? • What were the main issues you faced during your professional experience? • What can diminish those problems?
Attributes	• What do you think about the current diversity of theatre plays? • What is your opinion about the ticket price? Could it be a limitation? • What do you have to say about the communication channels used to announce the plays? Do you believe it is enough?
Market perceptions	• Do you think younger generations are losing interest in the theatre? If yes, what can be done to avoid that?
Preferences & Motivations	• What do you think the public values the most

Other	• What would you describe as the perfect client?

Table 2: Interview questions - Consumers

Demographics	• Age • Gender • Frequency of attendance
Personal experience	• Have you ever gone to the theatre? • Do you usually watch a specific type of play? If yes, what type and why?
Motivation	• What are the main reasons that drive you to go to the Theatre?
Preferences	• What do you think the public values the most? • What are the factors that have a bigger impact on your decision? • What do you value the most when watching a play?
Problem & Solution	• What are the main problems with the theatre in Portugal? • What were the main issues you faced during your professional experience? • What can diminish those problems?
Attributes	• What do you think about the current diversity of theatre plays? • What is your opinion about the ticket price? Could it be a limitation? • What do you have to say about the communication channels used to announce the plays? Do you believe it is enough? • What are the attributes that have the most impact on your choice (attending or not a play)?
Market perceptions	• Do you think younger generations are losing interest in the theatre? If yes, what can be done to avoid that?
Other	• What would you describe as the perfect client?

Table 3: Preliminary survey – Questionnaire format

	Attribute	Question	Description	Scale
Respondent Characteristics This section is intended at understanding the people who have answered the survey.	Age Gap	How old are you?	Please select the age gap that encapsulates your current age.	18-25 26-30 31-38 39-45 46-57 58-69 +70
	Gender	What gender are you?		Female Male Other
	Nationality	What's your nationality?		Fill in question
	Frequency that they go to: Theater Museums Cinema Art gallery Music Festival Concert	How frequently do you attend the following cultural events? In Portugal (?)		1. "Never" 2. "Once a year" 3. "Once a month" 4. "Once a week"
Service characteristics This section of the survey aims to assess consumers perception of the logistics and cultural activities provided by the Theatre sector in Portugal.	Price	Do you think theatre tickets are acceptably priced? Please, rate from 1 to 5	Average ticket price is of 17,8€ (2020)	1- "Totally unacceptable" to 4- "Totally acceptable" 5- "Never went to the theatre"

	Service quality	How satisfied are you with the overall service quality? Please, rate from 1 to 5	By quality of service, it is understood: the quality of the facilities, customer service and theatre plays. (Everything that happens from the moment the client buys the ticket until the end of the play)	1 – "Not satisfied at all" to 4 – "Highly satisfied" 5 - "Never went to the theatre"
	Theatre plays quality	How delighted are you with the quality of the current theatre plays? Please, rate from 1 to 5	By theatre plays quality, it is understood: quality of actors, quality of the story itself, quality of special effects (e.g: sound & lights)	1 - "Not delighted at all" to 4 - "Highly delighted" 5 - "Never went to the theatre"
	Language	In which language would you prefer to see a play?	In this case we want to understand in what language you would prefer to see a play.	Multiple Choice Portuguese English Italian Spanish Other (Which one?)
	Location & Facilities conditions	How pleased are you with the location of the theatres and the conditions of the facilities? Please, rate from 1 to 5	By location & facility conditions, it is understood: Place of the several theatres (city-centre or far way) and amenities of the theatre (e.g.: free parking or not, elevators for elderly and disabled people, etc.)	1 - "Not pleased at all" to 4 - "Highly pleased" 5 - "Never went to the theatre"
	Event recognition	How familiar are you with Portuguese theatre?	By event recognition it is understood: the level of presence in the Portuguese cultural agenda, as well as its popularity among all the other cultural activities	1- "Not familiar at all" to 4 - "Very familiar" 5 - "Never heard about it"

	Theatre plays diversity	How happy are you with the current variety of theatre plays? Please rate from 1 to 5	By diversity of options, it is understood: number of different available theatre plays (e.g: tragedy, comedy, satire, musicals, etc)	1- “Not happy” to 4 - “Super happy” 5 - “Never went to the theatre”
	Customer service	How satisfied are you with the theatre’s overall customer service? Please rate from 1 to 5	By customer service, it is understood quality of employee's services (e.g: orientating people to their seats), customer support (selling tickets and dealing with client’s complains)	1 - “Not satisfied” to 4 - “Highly satisfied” 5 - “Never went to the theatre”
	Channels of communication	How satisfied are you with the way information gets to your ears? Please rate from 1 to 5	By channels of communication, it is understood means of theatre plays announcements (online (social media, google search) vs offline (TV, magazines, radio, street ads))	1 - “Not satisfied” to 4 - “Highly satisfied” 5 - “Never heard about this type of information”
	Direct Association	To what category do you associate theater to?		1. Fun 2. Formal 3. Educational 4. Boring
Brand personality This section of the survey aims to evaluate the personality of the several Portuguese theatres	Ruggedness	How rugged do you think Portuguese theatres are? Please rate from 1 to 5	By ruggedness, it is understood: strong presence/structure, vigour, resistance, firmness	1 - “Very frail” to 4 - “Very sturdy” 5 - “Never went to the theatre”

	Sincerity	How reliable do you believe Portuguese theatres are? Please rate from 1 to 5	By sincerity, it is understood: honesty, originality, emotional, influence, trust	1 - "Very unreliable" to 4 - "Very Sincere" 5 - "Never went to the theatre"
	Enthusiasm	How enthusiastic do you imagine Portuguese theatres to be? Please rate from 1 to 5	By enthusiasm, it is understood: challenging, young, creative, unique, independent	1 - "Very dull" to 4 - "Very enthusiastic" 5 - "Never went to the theatre"
	Competence	How competent do you consider Portuguese theatres to be? Please rate from 1 to 5	By competence, it is understood coherence, reliability, success, intelligence, confident	1 - "Very incompetent" to 4 - "Very competent" 5 - "Never went to the theatre"
	Sophistication	How sophisticated do you suppose Portuguese theatres are? Please rate from 1 to 5	By sophistication, it is understood modern, charming, elegant	1 - "Very basic" to 4 - "Very sophisticated" 5 - "Never went to the theatre"
Respondent experience & associations This section is intended at understanding respondents' engagement and associations with the theatre		When you think of Portuguese theatre, what comes to mind first?		Open ended question

		/hat kind of feelings do you experience when you go to the theatre? In case you never went, how do you imagine it?		Open ended question
		/hat do you think could have gone better? (If you never went, please don't answer)		Open ended question
		ow would you describe Portuguese theatre to a friend?		Open ended question
		ow likely are you to recommend Portuguese theater to a friend or colleague?		Open ended question
		From 0 to 10, how would you rate your level of emotional attachment to the theatre?		Open ended question
		rom 0 to 10, how would you rate your last experience in the theatre? (If you never		Open ended question

		went, please don't answer)		

2.2) Expert's interviews main takeaways

Table 4: Key takeaways from expert's interviews

Main problems associated with the Theatre	• Lack of public; • Lack of cultural education; • Lack of government/public institutions support; • Portugal constant financial crisis; • Lack of accessibility options; • Lack of investment to explore different communication channels
Proposed Solutions	• More investment (higher allocation of state budget to culture); • Giving incentives to the public (promotions, discounts, vouchers, etc…); • Challenge people to have contact with the Theatre (in school, at work through workshops or even classes); • Bring international plays to Portugal; • Avoid doing plays that are only interesting for artists; • Create a mandatory theatre class at schools;
Opinions about variety of plays, ticket prices, channels of communication	• Variety - there is plenty but people are used to watch just 1 or 2 genres, their favourite ones; • Price – is not a constraint; • Communication Channels – few (due to lack of investment), which can indeed be correlated with lack of adhesion;
Market perceptions	• Some believe that younger generations are losing interest due to lack of cultural education both at home and at school and because of the increase of digitalization; • Other think younger generations are gaining the stimulus due to an increase in plays exclusively made to kids;
Preferences & Motivations	• If the play, actors and special effects have good quality; • Having famous cast members (e.g.: TV celebrities);

	• The theatre having a good reputation and a great location (e.g.: close home); • Knowing previous productions; • The play being famous (if it is internationally known); • Genre of the play – if they can connect with it;
Other (description of ideal consumer)	• People who show their emotions during the play; • People that do not chose a play because of its price, members cast, genre or location/facilities conditions;

2.3) Consumer's interviews main takeaways

Table 5: Key takeaways from consumers interviews

Personal experience	• Do not frequent the theatre very often (1 or 2 a year); • Some go to watch a specific genre of play;
Motivation	• Get out of their routine to help clear their minds; • Learn something new; • Get instant entertainment; • Be an excuse to hang out with their friends and family members;
Problem related with the theatre	• Lack of public adhesion; • Lack of financial independence; • Easier and cheaper cultural activities to consume (which compete with the theatre); • Lack of advertisement; • Accessibility issues;
Solutions	• More incentives, such as: discounts, promotions, different prices to different segments, etc; • More variety of plays; • More government support; • Educate people;
Opinions about variety of plays, ticket prices, channels of communication	• Variety - there is plenty but people are used to watch just 1 or 2 genres, their favourite ones; • Price – is not a constraint

	Communication Channels – few (due to lack of investment), which can indeed be correlated with lack of adhesion
Market perceptions	• Younger generations are losing interest for this activity. A way to fight this would be through education at school.
Preferences & Motivations	• Comedy plays; • Big and know productions; • If the play, actors and special effects have good quality; • Having famous cast members (e.g.: TV celebrities);
Other (description of ideal consumer)	• People who are paying attention to last play releases; • People who tend to attend the theatre frequently; • People who like to feel and express emotions during the plays;

2.4) Preliminary survey results

Figure 3: Age distribution of survey results

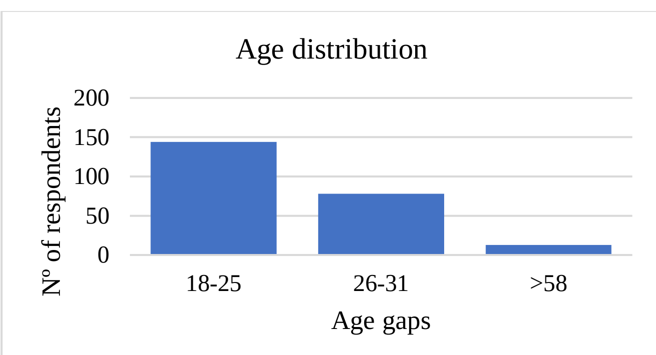


Figure 4: Nationality distribution of respondents

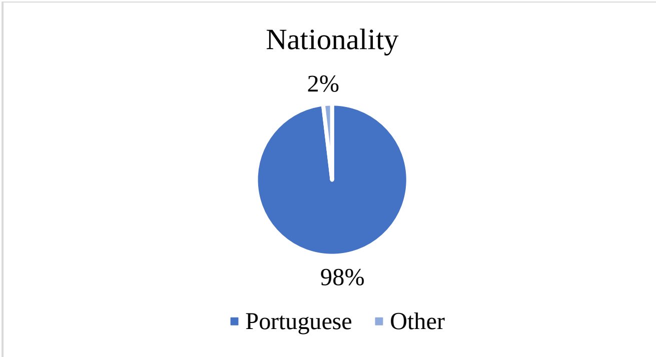


Figure 5: Gender distribution of survey results

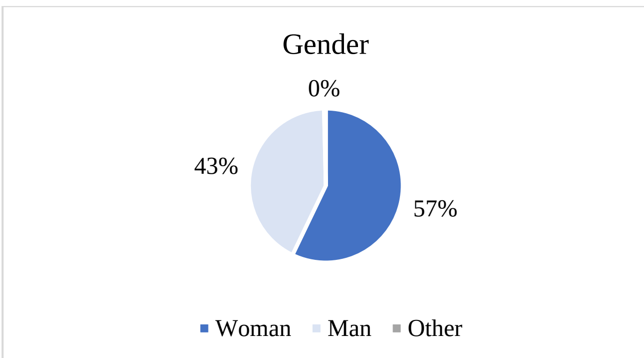


Figure 6: Frequency of Theatre attendance

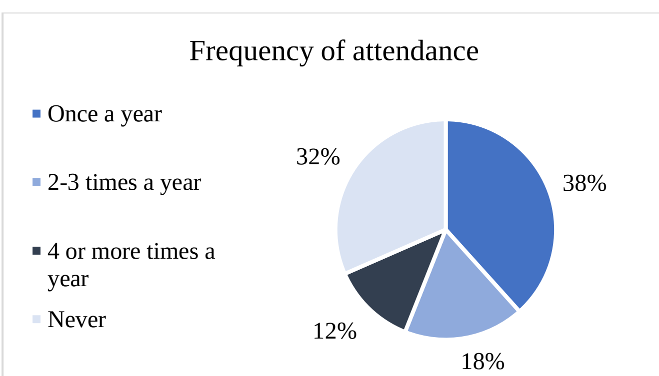


Figure 7: Ticket price – respondents' opinion

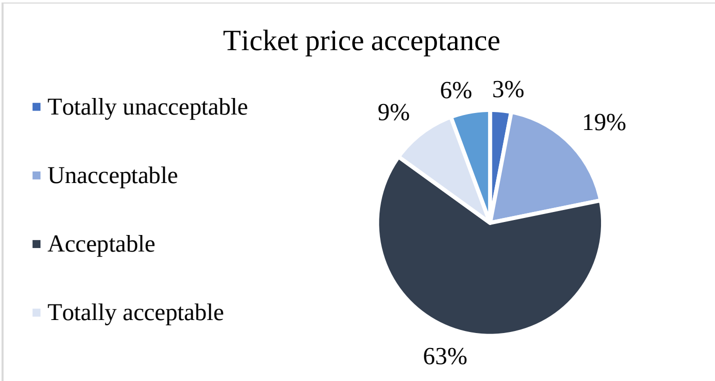


Figure 8: Service quality satisfaction

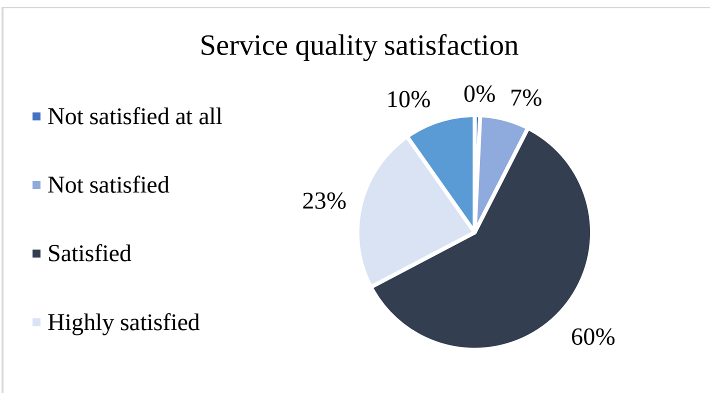


Figure 9: Theatre plays quality satisfaction

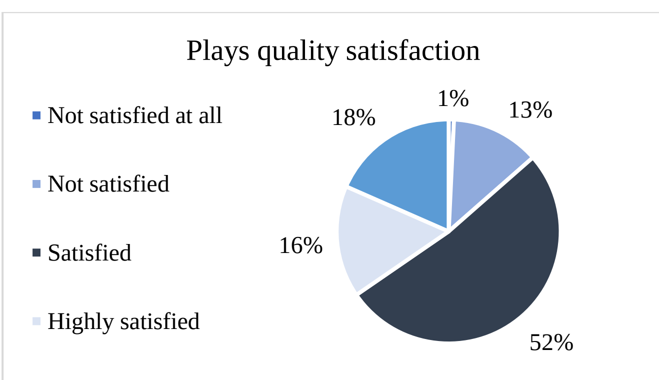


Figure 10: Location & facilities satisfaction

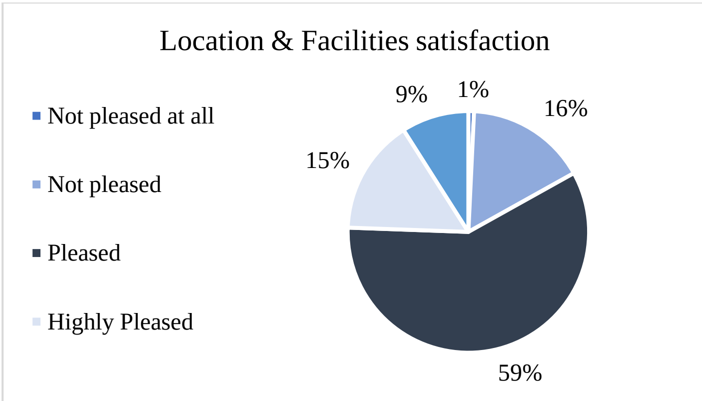


Figure 11: Satisfaction with channels of communication used to reach consumers

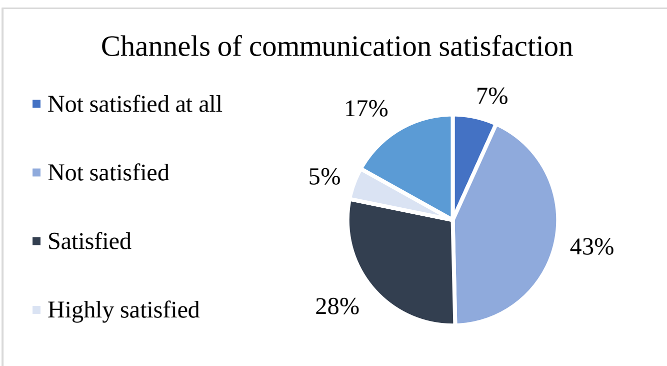


Figure 12: Familiarity with the Theatre among the other cultural events

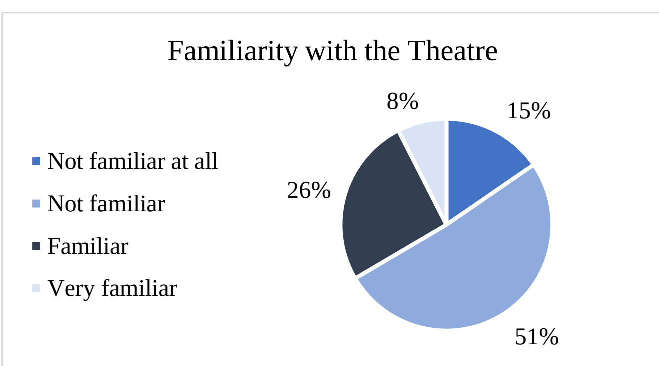


Figure 13: People's perception about the Theatre

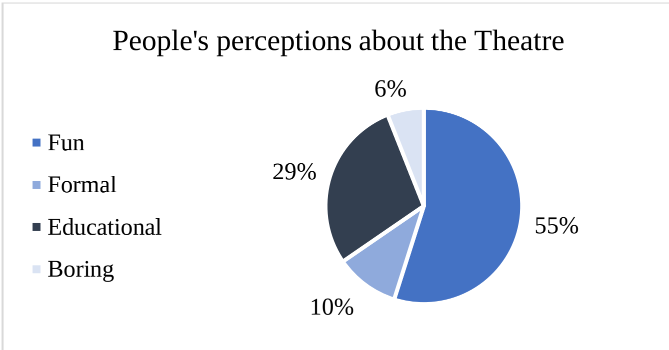


Figure 14: Variety of plays satisfaction

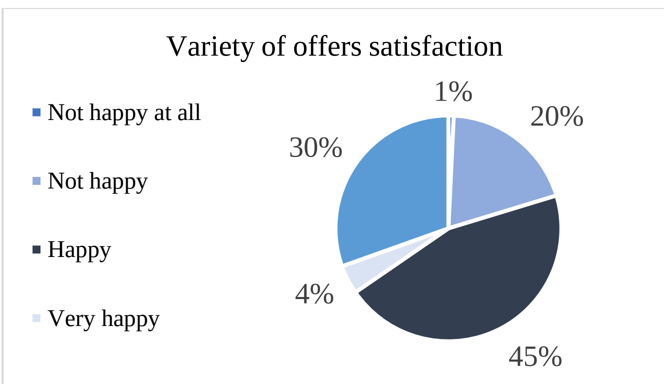


Figure 15: Customer service satisfaction

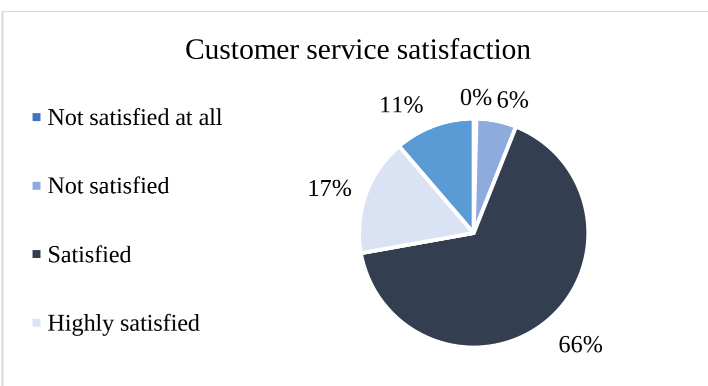


Figure 16: Plays language preference

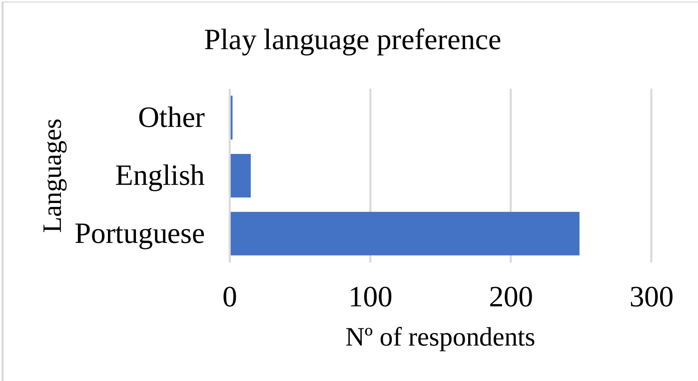


Figure 17: Perceptions of how rugged the theatre is

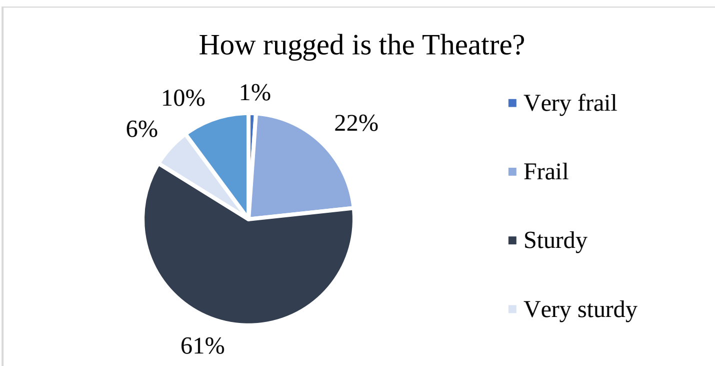


Figure 18: Perceptions of how reliable the theatre is

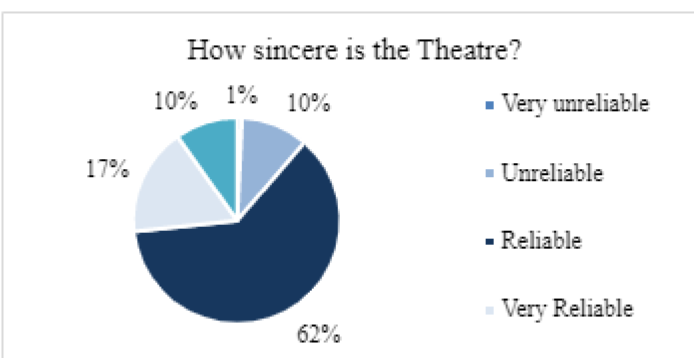


Figure 19: Perceptions of how exciting the theatre is

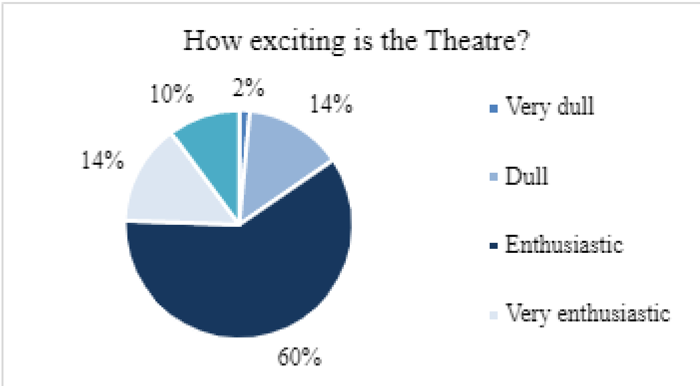


Figure 20: Perceptions of how competent the theatre is

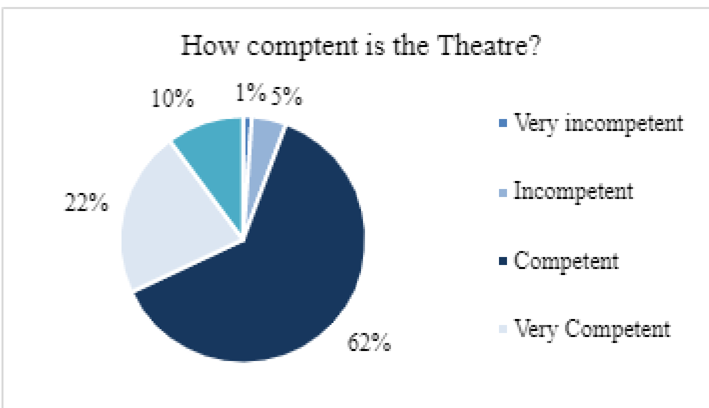


Figure 21: Perceptions of how sophisticated the theatre is

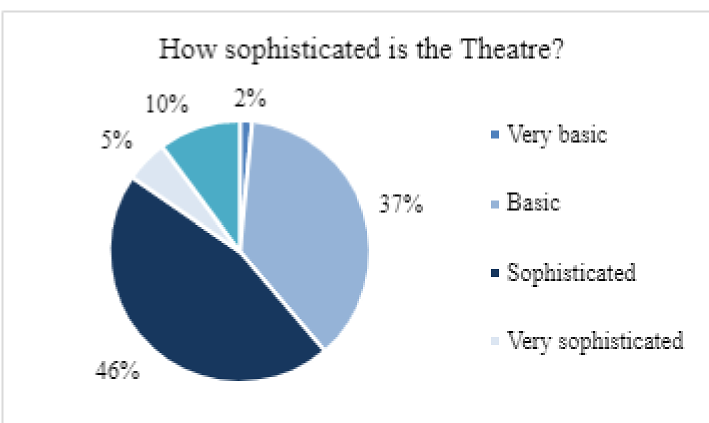


Figure 22: Consumers likelihood to recommend the theatre to a friend/colleague

Figure 23: Level of people's emotional attachment to the theatre

3) Perceptual Map

3.1) Perceptual Map Survey setup

Table 6: Survey setup

	Variable	Description	Scale
Demographic Information	Age	How old are you? Please select the age gap that encapsulates your current age.	Under 18; 18-25; 26-35; 36-45; 46-58; Above 59
	Gender	What gender do you identify as?	Woman; Man;

			Other
	Nationality	What is your nationality?	Portuguese; German; French; Other
Service Characteristics This section of the survey aims to assess the perception that respondents have of the logistics and cultural activities provided by the theatre, cinema, museums and concerts in Portugal.	Frequency	How frequently do you attend the following cultural events?	Once a year; 2-3 times a year; 4 or more times a year; Never been
	Category	To what category do you associate each one of these cultural events?	Fun; Formal; Educational; Boring
	Price	How satisfied are you with the Prices* in Portugal for the following cultural events? Average ticket price for Theatre in Portugal is 11,8€ (2020). Average ticket price for Cinema in Portugal is 6,6€ (2020). Average ticket price for Concerts in Portugal is 20,4€ (2020). Average ticket price for Museums in Portugal is not defined. *It does not include promotions/discounts	1-Not Satisfied To 4-Highly Satisfied; Never been
	Service Quality	How satisfied are you with the overall Service Quality in these cultural events in Portugal? By service quality, it is understood: how easily you can obtain your tickets, the quality of the facilities, security during the	1-Not Satisfied To 4-Highly Satisfied; Never been

		events, the plays/movies/exhibition/band/musician, how punctual it is,... (Everything that happens from the moment the client buys the ticket until the end of the play).	
	Promotions	How satisfied are you with the Promotions in these cultural events in Portugal? By promotions, it is understood: discounts set (family pack, senior discount, student discount, etc.), periodic promotions, events' partnerships,..	1-Not Satisfied To 4-Highly Satisfied; Never been
	Channels of Communication	How satisfied are you with the Channels of Communication of these cultural events in Portugal? By channels of communication, it is understood: social media ads, posters, tv advertisement,...	1-Not Satisfied To 4-Highly Satisfied; 5- Never been
	Variety of Offers	How satisfied are you with the current Variety of Offers in these cultural events in Portugal? By diversity of options, it is understood: number of different genres of plays, variety of movie genres, availability of different types of exhibitions in the museums, number of different genres of musicians and bands,...	1-Not Satisfied To 4-Highly Satisfied; 5- Never been
	Customer Service	How satisfied are you with the overall Customer Service in these cultural events in Portugal? By customer service, it is understood: quality of employee's services (e.g: orientating people to their seats), customer support (dealing with client's complaints), efficiency tracking problems and solving them,...	1-Not Satisfied To 4-Highly Satisfied; 5- Never been

	Location and the Conditions of the Facilities	How satisfied are you with the Location and the Conditions of the Facilities of these cultural events in Portugal? By location & facility conditions, it is understood: accessibility, place of the several events (city-center or far away) and amenities of the spaces (e.g.: free parking or not, elevators for elderly and disabled people, etc.).	1-Not Satisfied To 4-Highly Satisfied; 5- Never been
Brand Personality This section of the survey aims to evaluate to each personality dimension do the respondents associate theatre, cinema, museums and concerts in Portugal.	Rugged	How Rugged do you think these cultural events are? By ruggedness, it is understood: strong presence/structure, vigour, resistance, portrays a sense of strength, firmness,…	1-Very Frail To 4-Very Sturdy; Never been
	Sincere	How Sincere do you believe these cultural events are? By sincerity, it is understood: the feeling of originality, honesty, emotional, influence, trust.	1-Very Unreliable To 4-Very Sincere; Never been
	Enthusiastic	How Enthusiastic do you imagine these cultural events to be? By enthusiasm, it is understood: challenging, young, creative, unique, spirited.	1-Very Dull To 4-Very Enthusiastic; Never been
	Competent	How Competent do you consider these cultural events to be? By competence, it is understood: reliability, confidence, coherence, success, intelligence, successful.	1-Very Incompetent To 4-Very Competent; Never been
	Sophisticated	How Sophisticated do you suppose these cultural events are?	1-Very Basic To 4-Very Sophisticated; Never been

		By sophistication, it is understood: modern, charming, elegant, glamorous.	

3.2) Perceptual Map Results

Table 7: Respondents age groups and their corresponding percentage distribution (N=146)

Age

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1	18	12.3	12.3	12.3
	2	71	48.6	48.6	61.0
	3	17	11.6	11.6	72.6
	4	40	27.4	27.4	100.0
	Total	146	100.0	100.0	

Table 8: Respondents gender and their corresponding percentage distribution (N=146)

Gender

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1.00	90	61.6	61.6	61.6
	2.00	55	37.7	37.7	99.3
	3.00	1	.7	.7	100.0
	Total	146	100.0	100.0	

Figure 24: Respondents histogram gender distribution (N=146)

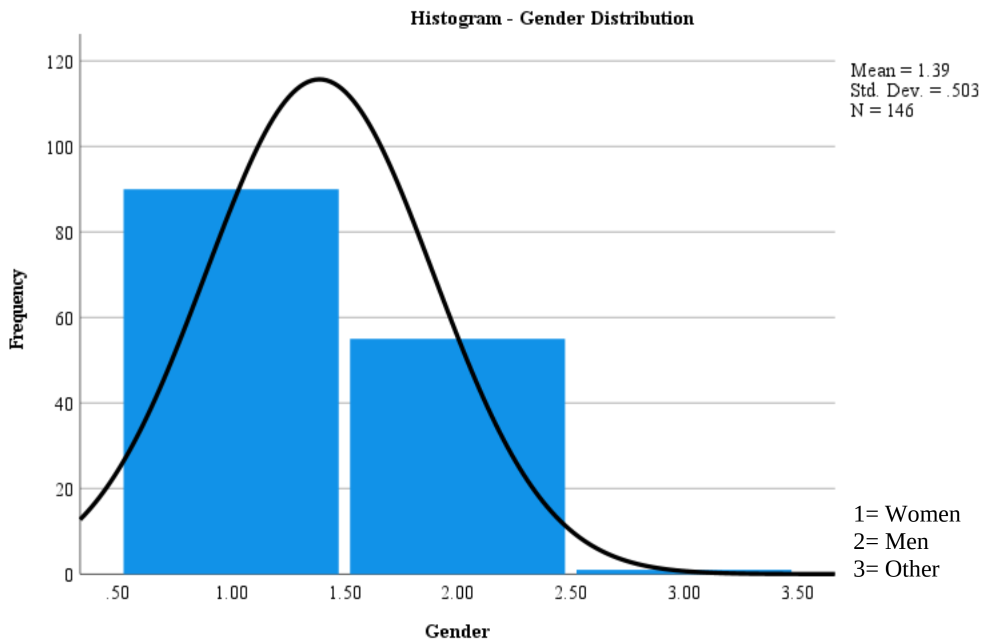


Figure 25: Respondents histogram nationality distribution (N=146)

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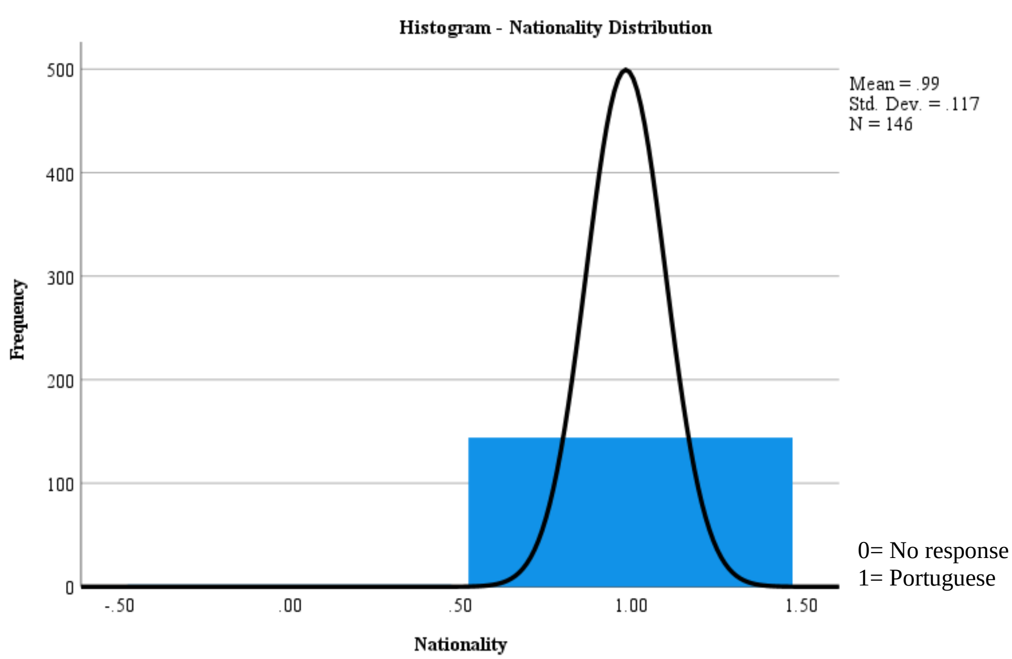

Table 9: Frequency distribution of nationality

Nationality

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	2	1.4	1.4	1.4
	1.00	144	98.6	98.6	100.0
	Total	146	100.0	100.0	

Table 10: Respondents frequency of attendance to theatre and their corresponding percentage distribution (N=146)

Frequency_Theatre

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1.00	84	57.5	57.5	57.5
	2.00	44	30.1	30.1	87.7
	3.00	18	12.3	12.3	100.0
	Total	146	100.0	100.0	

Table 11: Respondents frequency of attendance to cinema and their corresponding percentage distribution (N=146)

Frequency_Cinema

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	2	1.4	1.4	1.4
	1.00	30	20.5	20.5	21.9
	2.00	52	35.6	35.6	57.5
	3.00	62	42.5	42.5	100.0
	Total	146	100.0	100.0	

Table 12: Respondents frequency of attendance to museums and their corresponding percentage distribution (N=146)

Frequency_Museums

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	8	5.5	5.5	5.5
	1.00	56	38.4	38.4	43.8
	2.00	54	37.0	37.0	80.8

	3.00	28	19.2	19.2	100.0
	Total	146	100.0	100.0	

Table 13: Respondents frequency of attendance to concerts and their corresponding percentage distribution (N=146)

Frequency_Concerts

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	.00	10	6.8	6.8	6.8
	1.00	50	34.2	34.2	41.1
	2.00	62	42.5	42.5	83.6
	3.00	24	16.4	16.4	100.0
	Total	146	100.0	100.0	

Table 14: Respondents category association to theatre and their corresponding percentage distribution (N=146)

Category_Theatre

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1.00	69	47.3	47.3	47.3
	2.00	39	26.7	26.7	74.0
	3.00	33	22.6	22.6	96.6

	4.00	5	3.4	3.4	100.0
	Total	146	100.0	100.0	

Table 15: Respondents category association to cinema and their corresponding percentage distribution (N=146)

Category_Cinema

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1.00	139	95.2	95.2	95.2
	2.00	5	3.4	3.4	98.6
	3.00	2	1.4	1.4	100.0
	Total	146	100.0	100.0	

Table 16: Respondents category association to museums and their corresponding percentage distribution (N=146)

Category_Museums

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1.00	6	4.1	4.1	4.1
	2.00	14	9.6	9.6	13.7
	3.00	117	80.1	80.1	93.8

	4.00	9	6.2	6.2	100.0
	Total	146	100.0	100.0	

Table 17: Respondents category association to concerts and their corresponding percentage distribution (N=146)

Category_Concerts

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	1.00	138	94.5	94.5	94.5
	2.00	3	2.1	2.1	96.6
	4.00	5	3.4	3.4	100.0
	Total	146	100.0	100.0	

Figure 34: Cumulative Variance Screen Plot - attributes

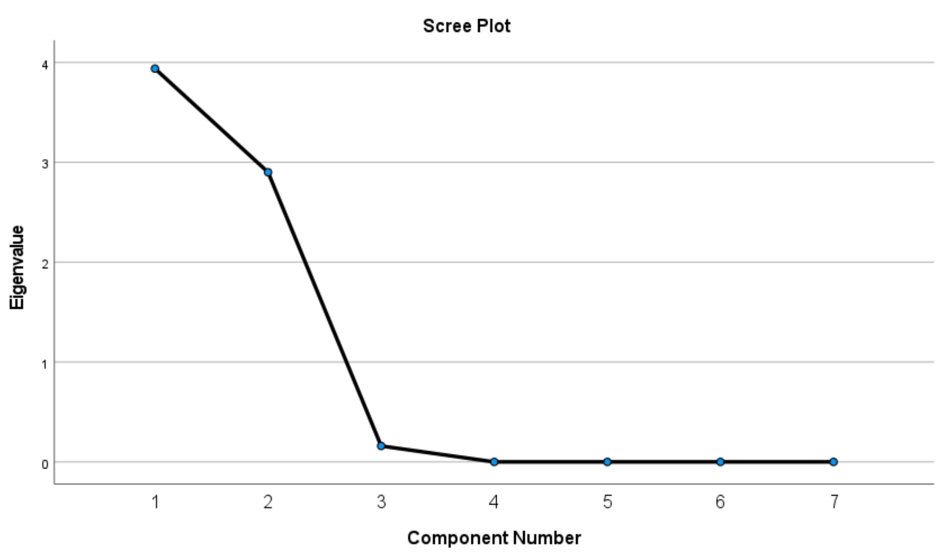

Figure 35: Cumulative Variance Screen Plot - personality

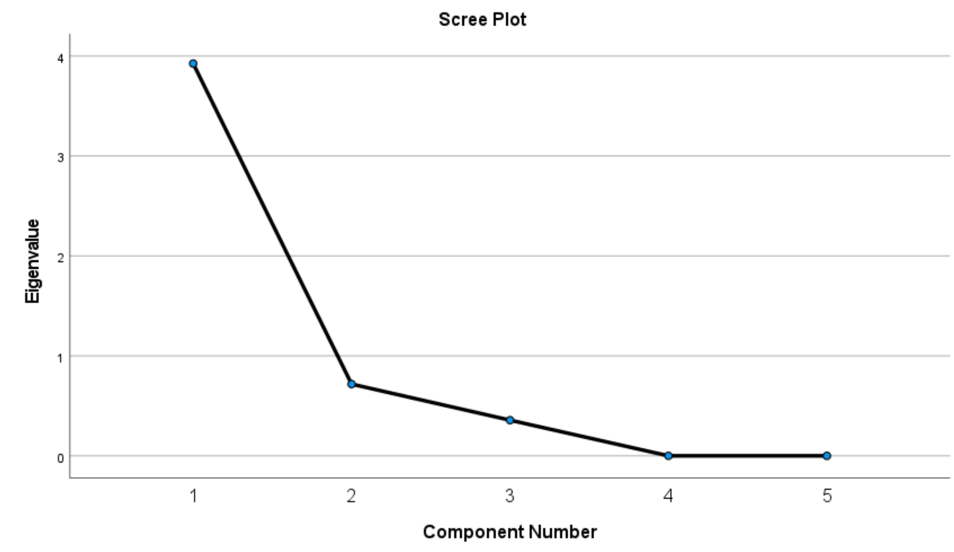

Table 22: Cultural Activities Coordinates within Attributes Analysis

	Dimension 1	**Dimension 2**
Theatre	0.88	-0.86
Cinema	-0.12	1.33
Museums	0.60	0.21
Concerts	-1.36	-0.68

Table 23: Cultural Activities Coordinates within Personality Analysis

	Dimension 1	**Dimension 2**
Theatre	0.47	-1.47
Cinema	-0.86	0.40
Museums	1.19	0.33
Concerts	-0.79	0.75

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