



# AUDIENCE DEVELOPMENT

## AUDIENCE MANAGEMENT IN THE AUTONOMOUS COMMUNITY OF THE BASQUE COUNTRY

### Executive Summary



Kulturaren  
Euskal Behatokia  
Observatorio Vasco  
de la Cultura



EUSKO JAURLARITZA  
GOBIERNO VASCO

KULTURA ETA HIZKUNTZA  
POLITIKA SAILA

DEPARTAMENTO DE CULTURA  
Y POLÍTICA LINGÜÍSTICA

# Executive Summary

This study is an update and expansion of the report carried out in 2015 by the Basque Observatory of Culture entitled → **Study on Audiences, Theoretical and Practical Analysis**. This report stems from a specific need: the cultural sector’s concern regarding the difficulty of recovering pre-pandemic audience levels. It has been prepared with the main aim of analysing the state of the matter with regard to the development of audiences in a context still affected by the paralysis of activity arising from Covid-19.

To achieve this aim, it is based on the theoretical debate by adopting a perspective based on cultural participation and contextualises some of the factors most affecting audience development at the present time. It also takes a deep empirical look at the loss and recovery of audiences, analyses audience development experiences taking place in the Basque Country and, finally, it specifies strategic action lines.

After the arrival of the pandemic, a change was detected in cultural consumption habits, something which had already been glimpsed as a result of digitisation and the progress of new technologies. The digital revolution had led to a process of transformation of society which had a direct impact on the cultural field, changing relationships and communication channels and opening doors to new scenarios. Faced with these changes which had been brewing for years, the arrival of Covid-19 accelerated and widened the changes in cultural consumption patterns, since it was a window of opportunity to try new alternatives to traditional cultural practices.

To delve deeper into the knowledge about culture audiences and audience development, this report adopts a perspective based on four focal points of analysis:

<p><b>Transformation in the modes of cultural participation</b></p>	<p>The transformation in the modes of cultural participation that have been observed for years brought about a change in cultural consumption habits. Traditionally, audience analysis focused on attendance at cultural activities of the receptive type, but currently presence has ceased to be an essential factor in cultural consumption. Thus, it is necessary to be aware of several types of cultural participation (receptive, active, physical, digital, legitimised or popular).</p>
<p><b>Access to culture as a basic right</b></p>	<p>Access to culture as a basic right is one of the focal points to be taken into account to focus on the objective of any study on audiences. Beyond increasing the audiences in a certain cultural facility, access to culture must be an effective right for the citizenry as a whole. That is why the demolition of access barriers and the promotion of cultural participation must be at the heart of public policies and audience strategies.</p>
<p><b>The typology of cultural audiences</b></p>	<p>The segmentation of cultural audiences into beginners, active, loyal and deactivated allows us to get to know audiences better and adapt the actions to be carried out more efficiently. Knowing the audience profile upon which an action should be carried out allows the adoption of different strategies (attraction, activation, loyalty promotion or recovery).</p>

**The existing offer**

The wide and diverse cultural offer results in competition between facilities to attract audiences. We are living at a time of great cultural production and the loss of audiences is concentrating on those receptive activities linked to the most traditional live arts. In this context, ensuring that audiences have good experiences will be key to ensuring their return.

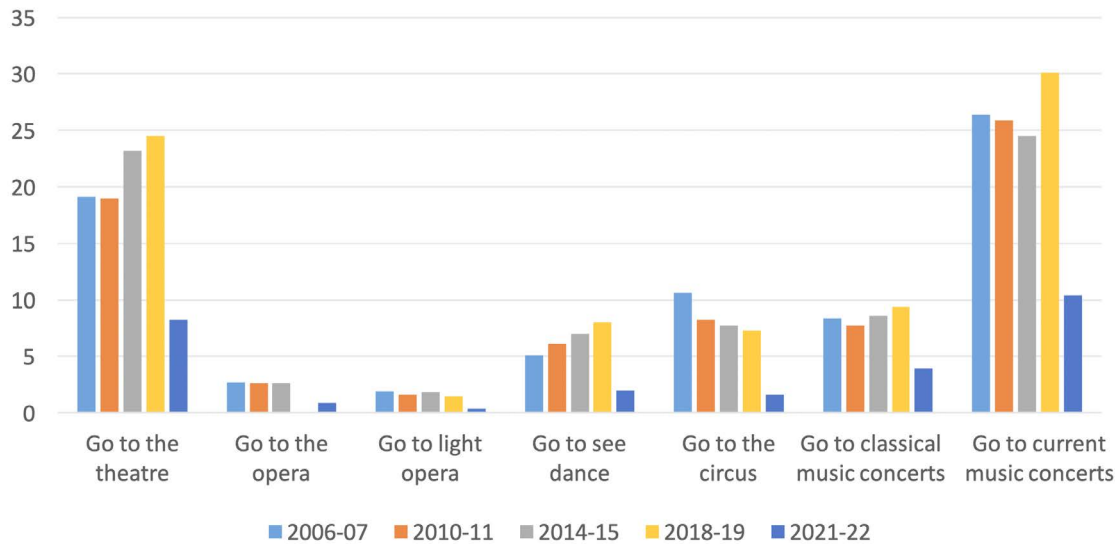
If a theoretical approach based on the extension of the concept of cultural participation is adopted, it is observed that the sector’s recovery is better than that indicated by some data. However, if the study focusses on the recovery of audiences in fields that require presence and receptive practices, such as the performing arts, great difficulty is observed with regard to the recovery of audiences to pre-pandemic levels.

This report provides a review of current trends which permits an X-ray of what is happening with audiences in the cultural field. This section provides a double gaze at the empirical analysis of them.

- Firstly, a temporal perspective is established which allows evolution before and after the pandemic to be captured, showing the starting point audience levels and those which have managed to recover.
- Secondly, the existing audience profile is analysed along with the particularities of this audience drop.

An opening temporal approach to the current situation allows us to see the evolution of the audience levels over the last few years, as well as the shock caused by the unexpected arrival of Covid-19.

**Graphic 1:** Evolution of audience levels in receptive cultural practices 2006-2022 (percentage of attendees)



Source: own preparation from data from the Survey of Cultural Habits and Practices in Spain



What can be drawn from the empirical analysis carried out is that in 2021 audience levels climbed back up again but did not manage to establish pre-pandemic levels. Performing arts and musical shows were the activities that suffered the greatest reduction in audience attendance after the pandemic and attendance at the theatre and concerts are the activities with the greatest level of recovery. The cultural activity least affected by the pandemic was, by a long way, the reading of books, followed at a distance by attending libraries and visiting monuments and museums.

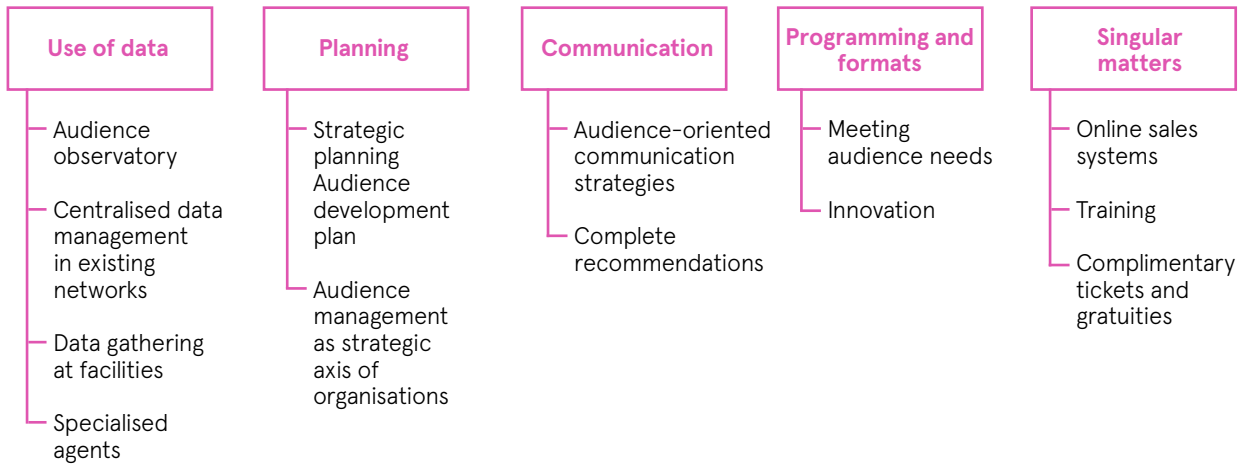
A second empirical approach allows us to analyse the audience lost after the pandemic. The comparison made in the report (2018-2019 and 2021-2022) shows that, in the majority of receptive activities analysed, a drop in audiences was detected along with an increase in non-audiences, data which corroborates the difficulty of regaining pre-Covid-19 audience levels.

The biggest audience drop took place in theatre, although the activity with the largest levels of non-audience recorded both before and after the pandemic was opera, followed by dance and attendance at classical music concerts.

After laying out the main audience analysis perspectives and presenting empirically the data showing the difficulty of recovering pre-pandemic audience levels, experiences are collected and analysed that are currently being carried out in the Basque Country in regard to audience development and, more specifically, in the field of live arts. The analysis is carried out on the basis of different agent typologies:

<b>Universities and research centres</b>	These participate in the area of audience development by means of the generation or transmission of knowledge, promotion or participation in projects linked to this specialisation.
<b>Sectoral associations</b>	Internal actions (oriented towards members) and external actions (oriented towards the population as a whole) are differentiated. Standing out among the internal ones are actions linked to improving the sector's cohesion, the training offer and specific advice in areas of interest for members. External actions are above all linked to the fact that sectoral associations function as communication spaces specialising in the area of their activity.
<b>Large facilities</b>	These carry out actions that affect accessibility, adaptation of prices, programming, strategic planning and data analysis.
<b>Networks of facilities</b>	Outstanding actions include the carrying out of recommendations or itineraries which improve the lack of information and soften the psychological barriers associated with access to culture. Also, these networks can build bridges between audiences and the offer with communicative actions or actions linked to the preparation of didactic programmes, presentation of open rehearsals, talks with experts, collaborative actions, etc.
<b>Public agents</b>	The public sector provides incentives for audience development through strategic planning actions or direct incentive actions.

To close the report, strategic lines are noted, from specific action areas and previously analysed practices, on which to act in audience development.



In conclusion, the pandemic has had effects on the transformation of cultural habits, although these have not arisen purely due to the arrival of Covid-19. The degree of cultural participation of the population varies according to the perspective adopted and the typology of practices and activities associated with cultural consumption.

Currently, it is also important to highlight that, in addition to altering the typology of cultural activities, there is a wide leisure offering which competes with the cultural offer.

The theoretical debate generated, along with the empirical analysis of the current situation and the diagnosis of actions carried out in the Autonomous Community of the Basque Country, allows an X-ray of the current state of audience development in the Basque Country. It also allows the specification of strategic action lines which can help the sector adapt itself to the new scenario and to move closer to a precise study of audiences adapted to the needs of the sector.

