



HOW TO ATTRACT NEW POTENTIAL PUBLICS TO GULBENKIAN MÚSICA WITHOUT LOSING THE CURRENT ONES?

Master Thesis • Branding Lab

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“Music connects people
and speaks the language of humanity.”

(Risto Nieminen, Director of the Music Services)

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The present Master's Thesis embodies an unique opportunity of collaboration between a project team, composed by five students from the Master in Management at Nova School of Business and Economics (Nova SBE) and *Fundação Calouste Gulbenkian* (FCG). Through a brand consulting project, we were not only able to have a privileged access to confidential information about *Gulbenkian Música* – FCG's music division – but had also the possibility of applying frameworks learned in class in a real case scenario.

Being the challenge addressed inserted in a Branding Lab managed by Professor Advisor Catherine da Silveira, we would like to firstly thank the Professor for the great opportunity of personal and professional enrichment. For the last 4 months, Professor Catherine not only helped us on discussing several issues that emerged during the different phases of the project, but also showed an enormous support and availability throughout the work. The fact that the we were able to work together as a team and finish the Master's degree with a rich and practical project, focused mainly on the needs of a real client, was an opportunity owed to the Professor and the University too.

In what concerns *Fundação Calouste Gulbenkian*, it is

important to emphasize the preponderant role that the top management team and several FCG's collaborators who accompanied the project from the beginning had. Without their support and inputs the conquered results throughout each phase of the project would have not been possible. Firstly, our appreciation in this regard goes to Professor José Neves Adelino, who showed from the beginning a great enthusiasm for the project. His ability to give us a detailed feedback on the middle presentation held at the Foundation on the 11th November helped to look at the project with a greater critical sense and had an influence on the way results were presented later.

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very important for us to achieve the proposed goals.

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Moreover, our families played an important role throughout the project, giving to each one of us all the support and help needed to achieve successful goals.



EXECUTIVE SUMMARY (1/3)

This report refers to a Master’s Thesis project conducted under the format of a **Branding Lab**, as part of the Masters in Management at Nova School of Business and Economics (Nova SBE).

A Branding Lab is a group work that intends to deliver a consultancy report to a company that addresses a branding and marketing problem. It is therefore a problem-solving project involving a deep analysis of the elements of a specific brand, as well as the proposal of necessary modifications to those elements in order to achieve a certain set of objectives. This project was developed for **Fundação Calouste Gulbenkian (FCG)** by five Master students, from September 2016 to January 2017.

FCG is a “Portuguese Foundation for the whole of humanity” (FCG, 2015) that aims to educate the society in the fields of culture. The original purpose of FCG’s creation was to foster knowledge, culture and education and nurture people’s quality of life throughout five principal areas of activity: Arts, Education, Science, Development and Global Initiatives. The Arts department is a key part of the Foundation’s activities and its focus has been mainly on the development of

projects involving Museums, Music, Reflection and Contemporary Creativity. The music department, established as the brand *Gulbenkian Música* (GM), promotes the qualification of the music panorama according to high international standards. FCG’s orchestra and choir play an important role, being the core elements of GM alongside the Music Season.

Previous studies suggest that GM’s concerts are mostly frequented by an aged and loyal public. This affects not only the atmosphere and Brand Image of GM that is seen as elitist and restricted to music connoisseurs but also its capacity to attract new publics. With that in mind, FCG raised the following marketing question: **How to attract new potential publics to *Gulbenkian Música* without losing the current ones?**

The main objective of this project is to answer this question providing concrete recommendations on what GM should do. To address this issue, the project was divided in two main phases: (1) Diagnostic and (2) Recommendations. The first phase took place from September 5th to November 11th while the second phase occurred between 12th November and January 6th.

PHASE 1 | DIAGNOSTIC

In order to address the previously exposed marketing question, we performed a research that would support future marketing recommendations. The research was divided in two parts: (a) Analysis of the current offer and core & loyal public, and (b) Analysis of the publics with potential for growth.

The research was developed through **qualitative and quantitative methods**. A secondary data analysis was firstly performed in order to get a better comprehension of the current offer and core & loyal public. Followed by 8 observations of concerts, 5 internal interviews, 8 in-depth interviews (with projective technique) and 12 questionnaires were performed. Regarding the analysis of the publics with potential for growth, secondary data was analysed firstly as well. Afterwards, 25 in-depth interviews (with projective technique) and 411 face-to-face questionnaires were made.

From the research performed it was possible to get some important findings, which were the following:

- Age, social class and connection with music¹ are the main variables that influence attendance to concerts at FCG;

¹ Connection with music means having played an instrument or having had any other previous musical influences from the family - concept to be mainly explored on page 45.



EXECUTIVE SUMMARY (2/3)

In particular:

- Attending concerts at FCG before the age of 18 increases the likelihood of returning in later stages of life;
- The different stages of life have a strong influence on individuals' behaviour towards cultural & entertainment activities and GM's events specifically;

Additionally:

- The current price and offer of GM do not constitute an obstacle for most publics;
- The main obstacles identified are the communication and the experience management that should be addressed effectively in order to increase the attendance of current publics and attract new ones.

PHASE 2 | RECOMMENDATIONS

Through the diagnostic phase it was possible to clearly identify four segments according to the publics' frequency to GM's concerts¹: Platinum (attend more than six times a year), Gold (attend three to five times a year), Silver (attend

up to two times a year), Bronze (do not attend but know FCG at least by the name and like music). The New Consumer Decision Journey Model (McKinsey, 2009) was used as basis of the groups' analysis since they showed a heterogeneous perception and behaviour regarding culture & entertainment events and GM in particular.

The recommended marketing strategy was divided into three stages in order to have a clear separation among time and an accurate resource spending. These three stages comprehend different sets of initiatives for the short, medium and long term.

The Bronze public will eventually be excluded from the analysis due to its lower potential and higher conversion costs compared to the other publics (Platinum, Gold and Silver). The medium and long term strategies will also require a focus on different age ranges: 41-65 years old will be targeted on the medium run while 25-40 will be addressed on the long run.

SHORT TERM STRATEGY

On the short term, all publics are targeted since the main

objective at this stage is to **solve some identified issues** concerning the experience of attending a GM's concert in order to improve the service provided. Even though the four segments have different feelings and behaviour towards GM, these short-term initiatives aim to improve the experience for all of them.

For the Platinum public those issues are seen as "details" and do not influence their loyalty to GM (and FCG). However, overcoming them would **increase their satisfaction**. As for the Silver and Gold publics, those issues constitute barriers to attend (more often) GM's events and solving them would **increase their consumption**.

A set of initiatives was thus proposed for this timeframe, being all of them of high priority. These initiatives involve: (a) Improvement of the advertising management; (b) Adoption of new payment methods and improvement of the current sales system; (c) Development of alternatives for parking and improvement of signage; (d) Staff training and improvement of the complementary services efficiency; (e) Development of new ways of accompanying the events; and (f) creation of an efficient CRM system.

¹ Based on the attendance of the past two years.



EXECUTIVE SUMMARY (3/3)

B) MEDIUM TERM STRATEGY

After implementing the previously mentioned initiatives aiming to address the issues of the experience, it is important to start addressing specific aspects that may be inhibiting publics to converge. Hence, initiatives regarding communication and relationship between GM and its publics are suggested for the medium and long term. Thus, the Platinum public will be targeted to **improve the individuals' relationship with FCG** and **increase their consumption** of GM's events. For the Gold public the objective is to **increase its loyalty** (converging to Platinum) and **make it advocate** the brand towards new publics. The objective for the Silver public is **to stimulate interest** and preference towards GM and increase its consumption.

The initiatives proposed will be: (a) Implementation of a membership program; (b) Creation of an artistic contest; (c) Organization of auditorium visits for music connoisseurs and for non music connoisseurs; (d) Conception of a Christmas box; (e) Development of ads based on experiential marketing; (f) Implementation of an influencers' strategy; (g) Constitution of a 50% discount to music professionals;

(h) Creation of new points of sale; (i) Application of the possibility of splitting subscription payments 50/50; and (j) Delivery of new subscription options.

C) LONG TERM STRATEGY

The long-term strategy will then take place as complement of the medium-term initiatives. For the Gold and Silver publics, the objectives are the same, targeting only a different age range, as previously explained. For the Platinum public, the objective is to **deliver a continuous overall service of excellence** – ultimate GM goal. For that, the following initiatives are proposed: (a) Implementation of a mentoring program; (b) Development of a video presenting classical music to children; (c) Creation of new brochures; (d) Conception of a Spotify ad & playlist; (e) Development of a spontaneous concert accompanied by a vídeo; (f) Idealization of a family brunch on Sundays; (g) Creation of “Little Music Workshops”; and (h) Development of musical activities especially for pregnant women.

This strategy will then help GM to achieve the proposed goal and **attract new potential publics without losing the current ones.**

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1. INTRODUCTION



1. INTRODUCTION

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ABOUT THE BRANDING LAB

This report comprehends the final outcome of a Master Thesis project, developed in the format of a Branding Lab as **a partnership between Nova School of Business and Economics (Nova SBE) and Fundação Calouste Gulbenkian (FCG) - more specifically Gulbenkian Música (GM), its music department.** We defined Branding Lab as a problem-solving project involving a deep analysis, as well as the proposal of Branding and Marketing initiatives in order to achieve a certain set of objectives.

The marketing question that this work project aims to address is “How to attract new potential publics to *Gulbenkian Música* without losing the current ones?”.

To answer this question, the present Branding Lab is composed of two distinct phases:

- 1) **Diagnostic:** Analysis of qualitative and quantitative research outcomes conducted to understand issues and opportunities at hand.
- 2) **Recommendations:** Proposition of a marketing strategy and communication plan taking into account the findings from the diagnostic.

As part of Nova SBE’s work project rules, this report needs to be accompanied by five additional reports, conducted individually by each of the five members of the team.

After the presentation of the diagnostic findings to FCG, FCG’s management team along with Professor advisor Catherine da Silveira developed **specific topics to be addressed by each of the students.** Three of us address a specific public of GM while the other two focus on topics transversal to all publics¹.

It is important to note that **this report was developed in group** and is organised following the structure that made most sense in accordance to the management problem and not specifically following the five individual topics. The five topics are thus included in this report as parts that nurture the recommendations for the global project. Therefore, if the need arises of understanding what each student did on the each topic, it is recommended to **consult the individual reports in addition to this report.**



Fig. 1: FCG’s building

¹ These topics will be presented in detail on page 70 after the publics that supported their creation are well defined.



THE FOUNDER & THE FOUNDATION

FCG is a “Portuguese Foundation for the whole humanity” (FCG, 2015).

Calouste Sarkis Gulbenkian, the man who gave the name to the Foundation was born in Istanbul on 23 March 1869 and died in 1955, in Lisbon, where he spent the last years of his life. Calouste Sarkis Gulbenkian lived and studied abroad, mostly in Paris and London and became an oil expert. During the World War II, he was initially settled in France but later felt obliged to shelter in a neutral country. Amazed by the Portuguese hospitality, he felt welcomed and respected in Lisbon, a feeling he described as being unique - “que nunca havia sentido em mais lado nenhum” (FCG, 2015). During his lifetime, despite his oil and financial business, Calouste Sarkis Gulbenkian also developed a passion for arts. Hence, taking advantage of his travels and personal experiences, he collected an extensive and particular art collection of over 6.000 pieces from all over the world, dated from antiquity to the early twentieth century.

Calouste Sarkis Gulbenkian’s only wish at the time of death was to **preserve his collection all together** in the same place

rather than divided in different art galleries or museums.

In **1956**, Calouste Sarkis Gulbenkian’s final wish gave origin to the creation of *Fundação Calouste Gulbenkian*. His main purpose was to respond to the **most fundamental needs of the Portuguese society**. Hence, it is important to understand that FCG is a public-interest non-profit entity incorporated under private law and with perpetual duration (having celebrated 60 years the past year). The original purpose of FCG’s creation was to **foster knowledge, culture and education and nurture people’s quality of life** throughout four principal areas of activity: Arts, Charity, Science and Education. Indeed, nowadays FCG is one of the most **important Portuguese foundations** with a wide range of activities both in Portugal and abroad. Those activities may be own projects or partnerships with external parties, as well as scholarships, education grants and awards.

As time goes by, the Foundation needs to evolve proactively, following the evolution of the society. Thus, it has been redefined not to focus only in Portugal and Portuguese language countries but also considering an **international framework** and environment. This context

readjustment led to a more **transversal approach**, focusing FCG now in five main areas: Arts, Education, Science, Social Development and Global Initiatives.

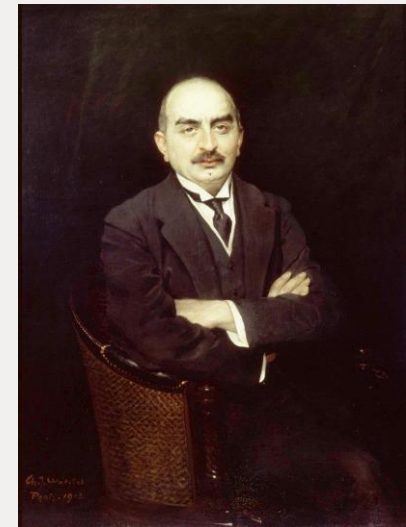


Fig. 2: Calouste Sarkis Gulbenkian in 1900



FIELDS OF ACTIVITY & GULBENKIAN MÚSICA

ARTS

The *Museu Calouste Gulbenkian* plays a central role in the field of Arts with its two different permanent collections – *Coleção do Fundador* and *Coleção Moderna* – alongside with the resident *Orquestra e Coro Gulbenkian*.

EDUCATION

The activities and projects developed by this area aim to support the education of the society and qualify new generations through the education for culture and science and the acquisition of new competences and skills.

SCIENCE

The main scope of the Science field is to raise health as a global public concern, innovating in health, educating for culture and science and qualifying new generations while also promoting biological and biomedical investigation.

SOCIAL DEVELOPMENT

At a national level, initiatives are developed focusing on the empowerment of people and organizations whereas at an international level the scope is to reinforce the knowledge and abilities of people and institutions in key areas of social development.

GLOBAL INITIATIVES

The importance of caring and empowering global initiatives combines predominantly two main topics: supporting and boosting the creation of new contemporary Armenian Culture and reflecting about new ways to confront issues concerning the conservation of Oceans.

GULBENKIAN MÚSICA

GM promotes the qualification of the music panorama according to high international standards. The *Orquestra e Coro Gulbenkian* play an important role, being the core elements of GM alongside with the **Music Season** that is the core activity of the department. The Music Season incorporates a variety of **cycles**, from *Piano* to *Grandes Vozes*. In 2015, **171 musical events** were held by GM, totalizing **146.268 spectators**. 78 of these 171 events were concerts performed by *Orquestra Gulbenkian* (around 78.316 spectators) and 33 correspond to *Coro Gulbenkian* concerts (total of 38.018 spectators) (GM, 2015).

In terms of the services provided by GM, the offer covers a **wide range** of styles,

languages, periods and formats.

Moreover, it is crucial for this project to understand the different types of tickets available. Tickets can be sold individually for each concert - as **loose tickets** - or seasonally, through **subscriptions**. There are subscriptions for each cycle of the annual season, with the price per subscription varying according to the cycle's number of concerts, performing artist(s), amongst other factors.

Alongside those activities, GM covers **educational programmes** that aim to qualify the audience and support artistic training, being *Estágio Gulbenkian para Orquestra* one example.



PROJECT CHALLENGE

FCG is one of the main Portuguese institutions that is feeling directly **the effect of an ageing population** in the country. This translates in being the majority of GM's audience composed by people already retired from their professional careers who have the time and economic availability to attend the concerts. These people are loyal and usually purchase a yearly subscription at the beginning of each season, which allows them to attend several concerts at the Foundation (GM, 2015).

Additionally, **children** get to know some of FCG's activities through school visits but tend not to return to other activities such as concerts and musical exhibitions when they become independent (Branding Lab team, 2015/16). There is a considerable percentage of **millennials** who attend the concerts but these are mainly those who study or are more related to classical music (Branding Lab team, 2015/16). In fact, **the larger part of GM's attendees, besides being older, are considered music connoisseurs**, who feel emotionally attached to music and culture and that regularly accompany FCG's agenda.

OCCUPATION RATES AND AUDIENCE

One of the main concerns of GM is related to **the active population**, aged approximately between 25 and 65, who represent a critically small percentage of those who regularly come to the musical events (GM, 2016). This project aims to uncover the reasons why this age gap exists and understand the potential opportunities that may be being lost.

Considering the way the offer is organised (subscriptions vs. loose tickets), the current scenario reflects an average of 70% of the GM's sales in each concert coming from the subscribers (GM, 2016). Following this line of thought, there are around **30% of seats in each concert that need to be filled through the sale of loose tickets** - here is where all the new potential consumers that GM is not generally being able to capture should fit in. To attract them it is important to understand the alternative offers available in the cultural and entertainment market – mostly on the music field.

BRAND

FCG is also facing brand concerns since it was, for many years, oriented towards a **beneficence vision and so did GM**. As a result, for the majority of its existence, FCG funded its activities without worrying about capitalizing on the offer. This means that for decades there wasn't a prioritized focus on the FCG brand nor on its marketing in general. Presently, however, the Foundation has been interested in **shifting to a more business-oriented mindset** where beneficence is still the main objective but there is now a concern to capitalize on some of its activities.

This has several implications, one of them being the necessity of reflecting an attractive Brand Image through its marketing efforts, communicating GM not only for music connoisseurs but by making its campaigns perceptible to everyone. This is especially relevant considering the competitive setting in which GM is inserted, where new sources of entertainment keep emerging.

MARKETING PROBLEM

How to attract new potential publics to *Gulbenkian Música* without losing the current ones?



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2. DIAGNOSTIC

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METHODOLOGY



METHODOLOGY

The Diagnostic phase, presented in this section, was conducted between September 5th and November 11th and was performed by addressing two main research questions:

What is the relationship of the publics with culture & entertainment and music in particular?

How is the relationship of the publics with FCG and GM in particular?

In order to answer these questions, primary data and secondary data were collected.

PRIMARY DATA

Primary Data consists of data specifically generated to address the project at hand. In this case, it helped us on understanding both the **current offer** and the **core & loyal public** of GM, as well as its **publics with potential for growth**. By core & loyal public we mean the spectators that regularly attend GM's concerts and have a strong connection with GM.

By publics with potential for growth we consider that this audience is composed by those who do not attend GM concerts and those who already attend but have likelihood to attend more.

All of the publics (a) know FCG at least the name; (b) like at least one kind of music, assuming that people who do not appreciate music at all it will never be attracted by GM; (c) live in Portugal for at least the last five years (since tourists

are considered an entirely different segment with very different characteristics and behaviour; (d) are aged 25-65¹; and (e) belong to social classes A, B and C1² according to Marktest's Table of Social Attribution (fig. 3). This table crosses a person's level of instruction with their occupation which results in a proxy of a certain social class that ranges from A (most instructed with high-skilled occupation) to D (less instructed with low-skilled occupation).

INSTRUÇÃO → OCUPAÇÃO ↓	Analfabeto Prim.Inc.	Primária Completa	Ciclo Preparatório	9º Ano	10º/11º/12º Ano	Curso Prof. /Artístico	Curso Méd. Freq. Univ. Bacha.	Novas Licenciaturas	Licenciaturas	Mestrado P.G. Dout.
Pens., Desempreg., a Viv.Rend. e Dom.Ref.	D	D	D	D	C2	C2	C2	C1	C1	C1
Ref. Trab. E/Q e ã E/Q	D	D	D	C2	C2	C2	C1	C1	C1	C1
Trab. ã Esp./Qual.	D	D	C2	C2	C2	C1	C1	C1	C1	C1
Trab. Esp./Qual.	D	C2	C2	C2	C1	C1	C1	C1	C1	C1
Ref. Serv./Com./Adm.	C2	C2	C2	C1	C1	C1	C1	C1	C1	B
Ref. Téc.Esp./P.P.	C2	C2	C1	C1	C1	C1	C1	C1	B	B
Peq. Prop.	C2	C1	C1	C1	C1	C1	C1	B	B	B
Emp. Serv./Com./Adm.	C1	C1	C1	C1	C1	C1	B	B	B	B
Técnicos Espec.	C1	C1	C1	C1	C1	B	B	B	B	B
Ref. Q.Med./Sup.	C1	C1	C1	C1	B	B	B	B	B	B
Quadros Médios	C1	C1	C1	B	B	B	B	B	B	A
Quadros Superiores	C1	C1	B	B	B	B	B	B	A	A

Fig.3: Table of Social Attribution (Marktest, 1998)

¹ This age range was chosen as it represents approximately people who belong to the active population.

² The focus of this research on classes from A to C1 is due to the fact that the low instruction associated with the C2 and D classes make their interest in classical music and cultural institutions unlikely.



METHODOLOGY

Primary data was obtained through the following types of research and correspondent methods: Qualitative research - **(I) Observations, (II) Internal Interviews, (III) In-depth Interviews** - and Quantitative research - **(IV) Questionnaires**.

The **(I) observations approach** was one of the first stages of the research and implied that we attended eight concerts hosted by GM, namely six from cycles available in the season of 2016/17 (*Metropolitan Opera Live in HD, Concertos de Domingo, Música Antiga, Músicas do Mundo, Grandes Intérpretes, Coro e Orquestra Gulbenkian*) and two out-of-the-subscription's concerts (*Festival Cantabile and Solistas da Orquestra Gulbenkian*) (Appendix 1). In these events, we observed the current audience of each cycle as also patterns or differences between the publics, while analysing the overall experience and logistics. This observation process involved an Observation Grid (Appendix 2) which helped us to describe the main aspects observed. These descriptions were either concrete (such as the average age of the attendants or whether they come accompanied or alone) or more abstract (such as if the audience seems interested or whether they look like connoisseurs of the matter). In order to give more substance to the analysis of the current offer of GM, we conducted also **(II) internal interviews** with a

reception/box office staff member, room assistants, the assessor of the music department (Dr. José Pinto) and two directors of the Marketing and Digital Transformation teams (Dra. Susana Prudêncio and Dr. Nuno Prego). For this purpose there were developed specific interview guides (Appendix 3). This step of the research aimed to get accurate information about the logistics of the music service and its organization, who are the publics and what are the main characteristics of the experience provided by GM, as well as its marketing and brand strategies.

The **(III) in-depth interviews** provided insights and enriched our knowledge regarding consumers' preferences and habits serving as basis to then formulate hypothesis to be tested quantitatively. All the interviewees had to fulfill specific pre-requirements presented on a pre-recruiting questionnaire (Appendix 4), namely (a) knowing FCG at least by the name; (b) liking at least one kind of music; (c) residing in Portugal for at least the last five years; (d) being aged between 25 and 65; and (e) belonging to social classes A, B or C1.

A semi-structured interview guide (Appendix 5) was used, as also a quota control sheet that guaranteed a balanced distribution of respondents - in terms of gender, age, social

class and any previous GM's attendance. At first, we only conducted 25 in-depth interviews to the publics with potential for growth, arising then the need for the additional 8, which focused on the core & loyal public of GM to sustained the main insights previously gathered (sample and details: Appendix 6).

The interview guide orientated the interviewers through a list of topics to be explored, namely the interviewee's relationship with culture & entertainment (mostly music) and with FCG and GM specifically. The interviews also included a projective technique in which the respondents were asked to describe a third person in order to indirectly describe GM and other relevant cultural institutions publics. It is important to mention that the interviewers did not disclose the topic of the study beforehand. Also, the sub-topics explored were conducted on the basis of funneling the contents so that the interviewee spontaneously ended up talking about GM.

Posterior to the qualitative research process, **(IV) questionnaires** were made under the form of a questionnaire was done in order to test the validity of the formulated hypothesis and to understand whether they apply to the generality of the target audience.



METHODOLOGY

This phase allowed us to estimate percentages by collecting data from a larger amount of people. The questionnaire (Appendix 7) was conducted face-to-face and was composed of 43 structured and standardized questions that were answered anonymously. For them to be valid, respondents had to answer positively to the first four questions that served as pre-requirements, namely (a) being aged from 25-65 years old; (b) residing in Portugal at least for the last 5 years; (c) having attended any cultural & entertainment event in Portugal in the last two years; and (d) having attended to any music event in Portugal in the past two years. The questionnaires covered a large part of the Lisbon Metropolitan Area¹ as the majority of GM's audience lives in Greater Lisbon – 94%, including the surrounding areas (Appendix 8).

In a first phase of questionnaires, 411 responses were collected, 288 considered valid (sample and details: Appendix 9). In a second phase there was the need to collect additional insights of core & loyal publics from GM. So we administrated the questionnaire at FCG in concert days, finding however difficulties: the core & loyal public belonging to the target defined (aged 25-65) either arrived almost at the time of the concert or went directly to the cafeteria to eat, turning the

mission to approach them very difficult. As such, we were only able to gather 12 additional face-to-face questionnaires (sample and details: Appendix 10). Being this number not statistically representative, the results of these questionnaires have therefore been analysed in a qualitative way to be incorporated in the global analysis and allow comparisons.

The first research question **“What is the relationship of the publics with culture & entertainment and music in particular?”** was mainly covered by the following topics: (a) Frequency of attendance in several events; (b) Companionship when attending the events; (c) Sources of Information for different events; (d) Willingness to pay; (e) Preference towards musical genres; (f) Behaviours towards classical music; (g) Connection with cultural institutions. For the second research question **“How is the relationship of the publics with FCG and GM in particular?”** was covered mainly through the following topics: (a) Perceptions about FCG; (b) Frequency of FCG's events; (c) Perceptions and Relationship with GM. Concerning this question, specific questionnaire sections were designed to distinguish frequent (attend three or more times/year) and non-frequent GM spectators (attend less than three times/year).

SECONDARY DATA

Secondary data refers to data that was not developed for the sole purpose of the project but helped to better define the problem at hand. This data, was collected from internal sources (GM's agenda, communication material and tickets/purchasing data) and external sources (research concerning the relationship of the Portuguese consumers with music & culture and their lifestyles). An additional analysis of other cultural institutions was also made through available data in order to benchmark the current offer and future recommendations.



Fig. 4: Elements of data collection by objective

¹ The project focused on this area, as it is more important to solve issues and attract those who live near FCG at a first stage. Those who do not live in Greater Lisbon present distance as a stronger barrier being more difficult to attract without changing the offer.


ADDITIONAL NOTE

Before the presentation of the diagnostic findings, the following points need to be clarified:

1. To ensure an effective research, both qualitative and quantitative methods required to be performed in the native tongue of interviewees and respondents (Weiss, R. S.; 1994). Given that our sample was entirely Portuguese, both interviews and questionnaires were conducted in this language. Furthermore, in order to preserve the richness of the insights and avoid distorting the information obtained, all graphs, quotes and other elements that were originated from this qualitative and quantitative research are presented in Portuguese. These elements are, however, interpreted in English as the rest of the report to keep the coherency in the language.
2. It was made clear during the definition of the project's objectives that the calculation of costs and budgeting for the recommended initiatives would not be our responsibility. Therefore, these elements were not calculated and are not going to be presented. Costs were, however, taken into account as all of our recommended initiatives are assumed to be within FCG's financial capabilities.
3. The age ranges that will be presented throughout this report (25-40 and 41-65) are a result of the SPSS analysis. After having done several statistical tests, we concluded that there was a significant difference between age ranges, in what concerns attendance to GM. This conclusion was reached by contrasting various ranges (constructed through intuition), in which 25-40 and 41-65 showed higher significance than the others.



CURRENT OFFER



BRAND ELEMENTS & BRAND ARCHITECTURE

When analysing the current offer of a particular brand, one of the first issues that stands out is the way the brand presents itself through its **visual elements**, namely its name and logo.

The *Fundação Calouste Gulbenkian* brand has undergone **important changes** in the recent years. Before 2012, the brand and logo were used for all areas of the Foundation (fig. 5), regardless of each service. At the time it was an **umbrella brand** - architecture in which there is a singular brand level that covers all its available services under its name (Appendix 11). Its usage on FCG's communication (brochures, agendas, mupis, etc.) did not follow specific rules and, hence, the logo and name were presented in different supports depending on the desires of the designer responsible for each area of the Foundation's activities. Also, there were 16 different websites belonging to FCG, each dedicated to a specific area. In sum, there wasn't a brand integration or an unification of the design rules behind the brand.

The music area was the first that started feeling the need of using a distinct and explicit name for its communication and, thus, **started using the name *Gulbenkian Música*** for its

activities, despite not being an official decision agreed with FCG.

In 2012, the idea of changing the FCG logo and architecture was taken to council and approved in 2013. The first line of the logo implemented (fig. 6) has only the word "Fundação" and the second the founder's name, in order to give emphasis to the person who made all of it possible. This **became a source brand** to the sub brands that previously existed in the main areas of operation, such as GM (Appendix 12). Now, every sub brand name must be accompanied by the new logo, that serves as a link to the parent brand (fig. 7). The logo is still based on the coin that belonged to Calouste Sarkis Gulbenkian and is displayed on the *Coleção do Fundador*. However, the outline of the coin became a "G" that opened on the right side and showed the horses riding towards its exit. This is supposed to imply the **new openness of the Foundation** showing it is not as elitist as it once was. This change was an affirmation of the sentence commonly used by FCG today: "**Uma Fundação portuguesa para toda a humanidade**" (FCG, 2015). The four horses represent the four main areas of the Foundation: Arts, Philanthropy, Science and Education.

The vision of serving all the humanity reflects FCG's current Brand Identity - what brand managers want the brand to be. Consequently, this Brand Identity influences the identity of all FCG's sub brands. Given that GM's Brand Identity is dependent of FCG's identity, there will be no recommendations to change it. The recommended strategy and initiatives will, however, take this current FCG's identity (Appendix 13) into consideration as the positioning(s) have to be aligned and integrated in it.



FUNDAÇÃO CALOUSTE GULBENKIAN

Fig. 5: FCG's logo before 2012



Fig. 6: FCG's logo after 2012



Fig. 7: GM's logo after 2012



PRODUCT & COMMUNICATION ANALYSIS

Every year, by the beginning of the Summer, GM provides its publics with the agenda for the following season. This is composed by several music concerts that, being part of different cycles, compose the annual season. In what concerns the **current season of 2016/17**, GM presents 10 cycles, namely *Coro e Orquestra Gulbenkian*, *Concertos de Domingo* (which focuses on the purpose of the democratization of culture and classical music), *Grandes Intérpretes* (featuring Portuguese and foreign well known names in the classical music panorama), *Grandes Vozes* (almost considered a subcycle of *Grandes Intérpretes* that has the interpreter's voice and singing as main focus), *Piano* (with repertoire from Beethoven to J.S. Bach, Mozart, Schubert, Schumann and other very famous names), *Música de Câmara*, *Música Antiga* (considered a trip over time, crossing authors such as Bach, Carlos Paredes or Madredeus), *Metropolitan Opera Live in HD* (*Met Opera* - consisting of high-definition broadcasts from the opera productions at the Metropolitan Opera House in New York), *Músicas do Mundo* (with a great variety of musical approaches) and *Jazz em Agosto* (a mix of payed and free jazz concerts in the Summertime) (Appendix 1).

As it has been explained, a person can buy a subscription of one or more cycles or buy loose tickets for a specific concert. Besides the presented **cycles under subscriptions**, GM also presents other concerts or cycles within its various offer to meet different music tastes. Mostly of the **non-subscription concerts** are though co-productions with other institutions that are only available through loose tickets.

The subscriptions can be acquired from the time GM announces the agenda for the season, being given priority to the subscription's renovations on the sales process. Only after the period of subscriptions a person can start buying loose tickets.

Regarding its communication, **GM is present offline and online**. Out of all FCG's fields of activities, GM is the one that invests the most in communication (GM, 2016). Regarding the **offline channels**, the brand communicates through its Music Seasonal Brochure, billboards and mupis. It also has its own reserved spot in the Expresso magazine and Ípsilon's back cover, which is the most read magazine by avid culture seekers (GM, 2016). The Music Seasonal Brochure is free and can be obtained directly at the Foundation or at some partner hotels. There is also a monthly foldout that is not

music specific and mentions the Foundation's main events occurring that month and can also be obtained at the Foundation. In what concerns the **online channels**, GM has a microsite inside FCG's website with various content (e.g.: agenda, articles, podcasts, etc.) and where it is possible to subscribe GM's newsletter and access FCG's social media pages (Facebook, LinkedIn, Instagram, Twitter, Livestream and YouTube). Moreover, GM very recently created a specific profile on Facebook for the sole purpose of their communications and interaction with its publics - musical activities are communicated on a daily basis through this channel. GM has also tried to do disruptive campaigns. As an example, in 2015 there was a collaboration between the music department, *Programa para o Desenvolvimento Humano* and *Serviço de comunidades Arménias*. The idea was to develop documentaries as podcasts regarding people that are related with the Foundation activities either directly or indirectly.

The information presented both on "Brand Elements & Brand Architecture" and "Product & Communication Analysis" is derived from the internal interviews that we performed (Appendix 14).



TICKETS AND SUBSCRIPTIONS (1/3)

SEASON 2014/15 vs. 2015/16

This section consists of a **quantitative comparison of GM’s last two music seasons**, namely the 2014/15 and the 2015/16 seasons using as basis GM’s box office data.

Starting off with the total number of tickets issued per season, a **significant decrease** between 2014/15 and 2015/16 can be observed (fig. 8). In 2015/16, GM issued less 15.839 tickets than in 2014/15, which translates into a 12,1% issued tickets loss between the two seasons. Fig. 8 also provides a breakdown of the total issued tickets separated in “Subscription Tickets”, “Loose Tickets”, “Invitations” and “Free Entry Tickets” for both seasons. Regarding “Subscription Tickets”, all the concerts in the cycle to which the attendee has bought a subscription for are thus counted individually. “Subscription Tickets” and “Loose Tickets” represent the tickets that are sold for a listed price and **translate into revenue** for the Foundation. “Invitations” represent the number of **tickets offered** to sponsors, partners or FCG’s collaborators friends. While “Free Entry Tickets” are the tickets issued for **free entrance concerts**, such as most concerts that do not belong to any specific cycle, some concerts of the *Coro e Orquestra* cycle and all concerts in the cycle *Festival Jovens Músicos*. Both “Invitations” and “Free

Entry Tickets” represent tickets that are **given for free and thus are not a source of revenue** for GM. Fig. 9 represents a distribution of total tickets by type of ticket issued for both seasons being this distribution similar for both of them. “Loose Tickets” represent the majority of the issued tickets and make up of roughly 42-43% of the total. “Subscriptions Tickets” are the second most frequently issued ticket with a weight of 29%, while “Invitations” make up of 16-17% of the total tickets and “Free Entry Tickets” have a weight of 12-13%.

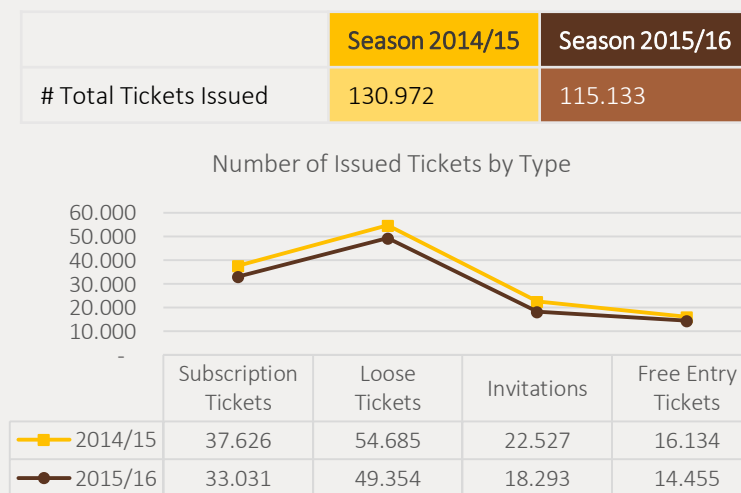


Fig. 8: 2014/15 & 2015/16 seasons - Number and type of tickets issued

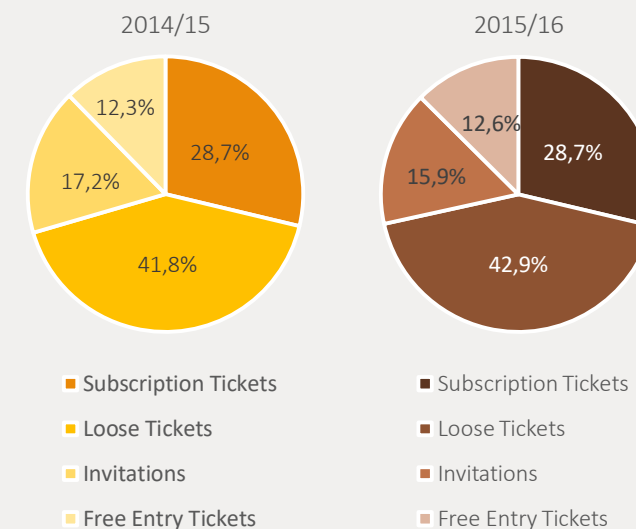


Fig. 9: 2014/15 & 2015/16 seasons - Distribution of tickets by type of ticket



TICKETS AND SUBSCRIPTIONS (2/3)

SEASON 2014/15 vs. 2015/16

Fig. 10 represents the **total number of issued tickets of each music cycle by type of ticket**. Both the 2014/15 and 2015/16 seasons have a similar ticket distribution, therefore only the most recent season is presented. For a better analysis of how GM manages the issuing of purchasable tickets, fig. 10 only presents data relative to paid concerts, excluding all concerts and cycles of free entry, namely the cycle *Portas Abertas*, *Festival Cantabile* and *Festival Jovens Músicos*, as well as

some free concerts that are not part of any cycle. Being the cycle with the highest number of tickets, *Orquestra Gulbenkian* has the highest number of absolute issued “Subscription Tickets”, “Loose Tickets” and “Invitations”. Most of its tickets are, however, issued as “Loose Tickets”. *Met Opera* is the cycle with the highest amount of “Subscription Tickets”, with almost all of its tickets being issued in this format. *Orquestra Gulbenkian*, *Piano*, *Grandes*

Intérpretes and *Met Opera* are the cycles to which GM sells the most of its subscriptions, being the amount of “Subscription Tickets” sold for other music cycles residual.

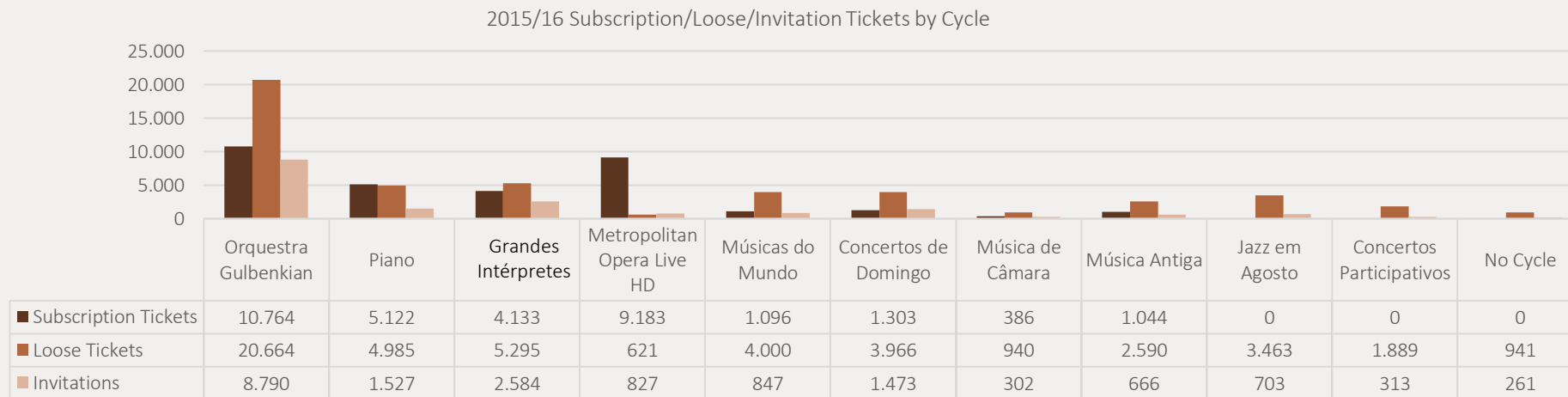


Fig. 10: 2015/16 season - Distribution of tickets by type of ticket



TICKETS AND SUBSCRIPTIONS (3/3)

SEASON 14/15 vs. 15/16

A further analysis of both seasons is possible by **breaking down the total number of tickets by music cycle** (fig. 11). *Orquestra Gulbenkian* is undoubtedly the cycle with the highest number of issued tickets per season, with more than 40.000 tickets for both seasons. This can be explained by the fact that this cycle has the highest number of concerts per season, with an average occurrence rate of one concert per week. In contrast, other music cycles have a significantly lower number of concerts per season. The second highest amount of issued tickets are from “No Cycles/Exclusive

Cycles”, which represents the tickets relative to concerts that do not belong to any particular music cycle or concerts of cycles exclusive to each season (*Rising Stars* and *Teatro/Música* cycles from the 2014/15 season and *Festival Cantabile*, *Concertos Participativos* and *Portas Abertas* cycles from the 2015/16 season).

Piano, *Grandes Intérpretes* and *Met Opera* cycles are relatively similar regarding the number of total tickets (between 10.000 to 15.000 tickets per season) and are the

cycles which issued the most tickets after the *Orquestra Gulbenkian* cycle. *Música the Câmara* is the cycle that issued the least tickets in both seasons, with less than 2.000 tickets. Finally, *Grandes Intérpretes* and *Música Antiga* were the only cycles that presented an **increase in the number of issued tickets** from 2014/15 to 2015/16, while all other cycles registered a decrease.

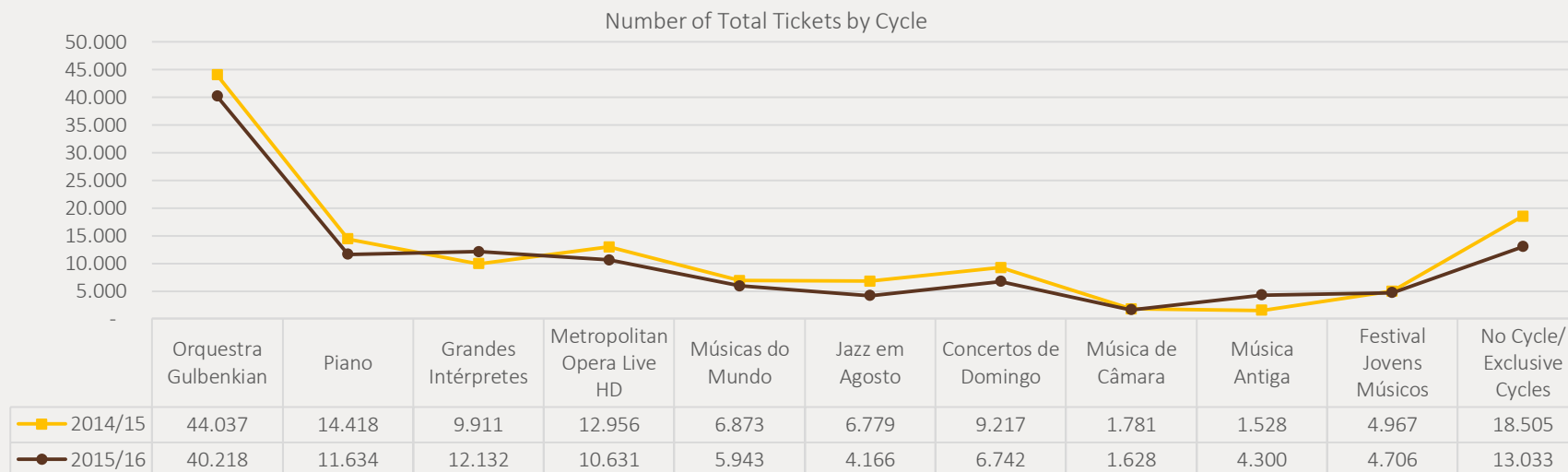


Fig. 11: 2014/15 & 2015/16 seasons. Distribution of tickets by music cycle



OCCUPATION RATES

SEASON 14/15 vs. 15/16

Regarding occupation rates, fig. 12 presents **the performance of each music cycle for both seasons**. Only the cycles which were common to both seasons are presented, not including as well concerts which are not part of any particular cycle. *Met Opera* is the most efficient cycle with an effective

occupation rate of 99% for both seasons, followed by *Grandes Intérpretes* (91-92% average occupation rate). *Música de Câmara* is the cycle with more empty seats per concert, having an occupation rate between 64-70%. When comparing both seasons, it can be seen that *Concertos de*

Domingo registered a drastic decrease in its occupation rate from 97% to 75%. *Música Antiga*, on the other hand, improved its occupation rate from 70% to 79%.

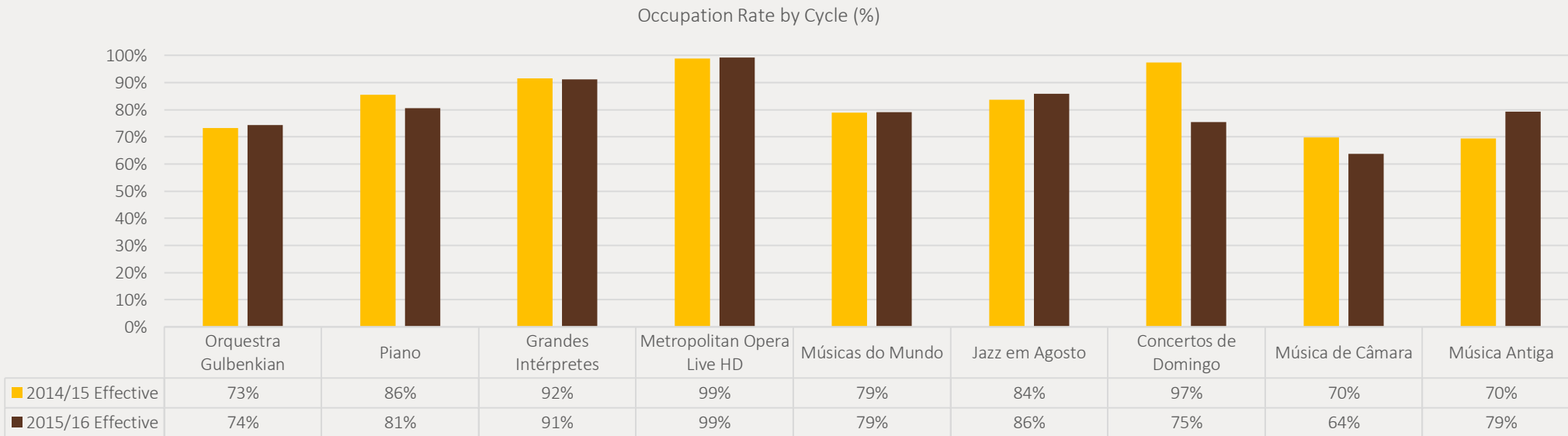


Fig. 12: 2014/15 & 2015/16 seasons - Occupation rate by cycle



STRATEGY OVERVIEW



PUBLICS' SEGMENTATION (1/2)

This section englobes the explanation of the publics' segmentation that was done on this project, according to the **STP model**¹. This is crucial to better understand the following sections. First of all it is important to define the market. According to Keller, the market is "the set of actual and potential buyers who have sufficient interest in, income for, and access to a product or a brand" (Keller, K. L., 2012). That market should then be segmented (STP's step 1), meaning that it should be divided into groups of homogeneous consumers (that have similar characteristics and behaviour within the group which differ from the other groups). The segmentation can be consumer-oriented (demographic, geographic and psychographic data) or behavioural (usage rate, buying conditions or benefits sought). Next, it is important to choose the group(s) that is/are more attractive (STP's step 2) for later defining a detailed positioning that will be directed to the target (STP's step 3).

We identified the **behaviour and characteristics** of consumers that would be the basis of a well defined segmentation of GM's publics. These characteristics (referred to as variables – such as age, social class, etc.), were first **obtained as insights** from the qualitative research and later confirmed through

the quantitative research. The next step was to test the **statistical relevance of each of these variables**, and for that, several contingency tables analysis were performed using IBM's statistical analysis software package, *SPSS Statistics*. After crossing several variables between themselves, it became clear that relationships were significantly more relevant when all the variables were crossed against another specific variable - the frequency to which an individual currently attends classical music concerts at FCG (having as time reference the past two years).

These contingency tables refers to the *Pearson's chi-squared test* - which measures the significance of the differences between two testing variables through sample variance (Plackett, R. L., 1983). The results were the following: (1) When crossing frequency with other variables, the resulting groups presented significant differences between themselves (P-value < 0,05), which means the variables are dependent of each other (2) When crossing variables other than frequency, the resulting groups did not present significant differences between themselves (P-value > 0,05) which means variables are independent from each other.

In other words, according to our statistical tests, **the frequency of attending GM's concerts is the characteristic of consumers that is the most influenced by other factors, and thus should be further analysed to uncover the reasons that influence the behaviour of different publics**. This insight is in line with this project's objective.

It was then suggested that individuals who attend GM's concerts with the same regularity often share common attributes and characteristics, such as:

Age: Older people attend GM's concerts more frequently than younger people;

Social Class: People of higher social classes attend GM's concerts more frequently than people of lower social classes;

Connection with music (having played an instrument or having had any other type of previous music influence from the family): People who have had a previous connection with music attend GM's concerts more frequently than people who haven't.

With that in mind, a **behavioural segmentation based on frequency** was performed.

¹ This model implies the market's Segmentation and Targeting and the product Positioning.



PUBLICS' SEGMENTATION (2/2)

The segmentation allowed for the identification of **four distinct segments** (fig. 13). These groups differ in age, social class and connection with music, amongst other factors. The identified segments are the following:

1. **PLATINUM PUBLIC:** Individuals who attend GM's concerts **more than six times per year**.
2. **GOLD PUBLIC:** Individuals who attend GM's concerts **between three to six times per year**.
3. **SILVER PUBLIC:** Individuals who attend GM's concerts **one or two times per year**.
4. **BRONZE PUBLIC:** Individuals who **have not attended GM's concerts** for the last two years but know FCG at least by the name and like music.

Individuals who have never attended GM's concerts, do not know FCG at least by the name and/or do not like any kind of music are classified as the **Non-Potential public** of GM and are therefore not going to be addressed in this project.

The Platinum public represents **core & loyal public** of GM. The Gold, Silver and Bronze publics are the publics which have the potential to attend more GM's events, and as such are defined as the **publics with potential for growth**.

These four segments are addressed over this project and constitute the substance of the team's recommendations.

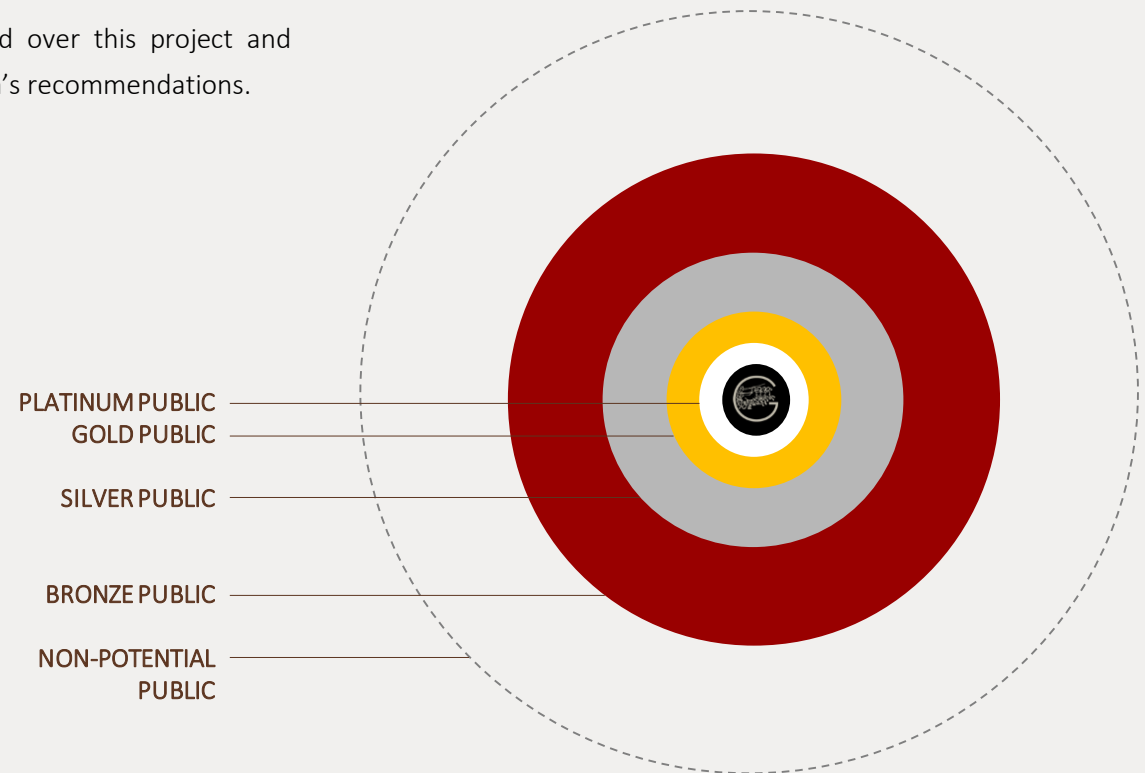


Fig. 13: Model representing both the proximity to GM and the relative size of each segment



CORE & LOYAL PUBLIC

PLATINUM



CHARACTERIZATION

In order to characterize the **core & loyal public** of GM it is necessary to understand its composition, behaviour and thoughts.

Regarding **age** it is possible to observe that the great majority (18 out of 20) of the sample's individuals from the Platinum public are aged between 41 and 65. However, it is important to bear in mind that this does not represent the total audience accurately since the sample only included people from 25-65 years old. The majority (72%) of the core & loyal public of GM has, in fact, more than 55 years old being the average age 62 (Appendix 15).

Regarding **social classes**, 11 individuals are from social class A and 8 from B, being only 1 individual from social class C1¹.

This indicates that individuals from the Platinum public are relatively old and have a high level of education and a high-skilled job.

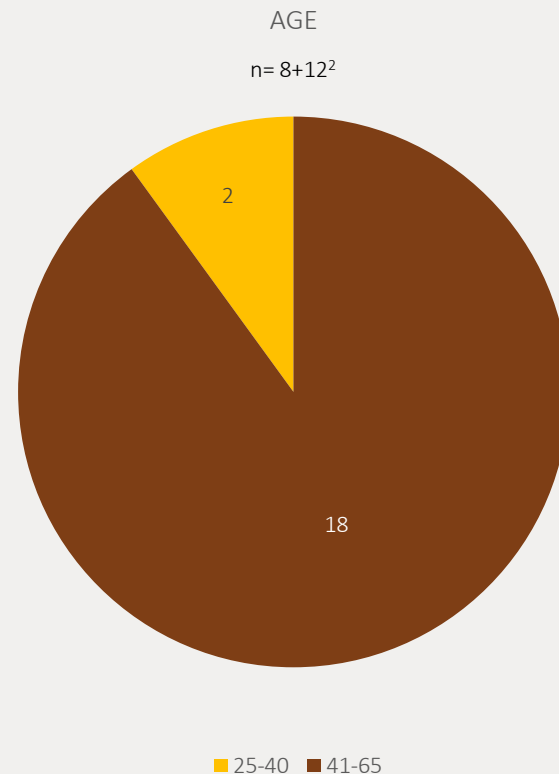


Fig. 14: Age of respondents belonging to the Platinum public

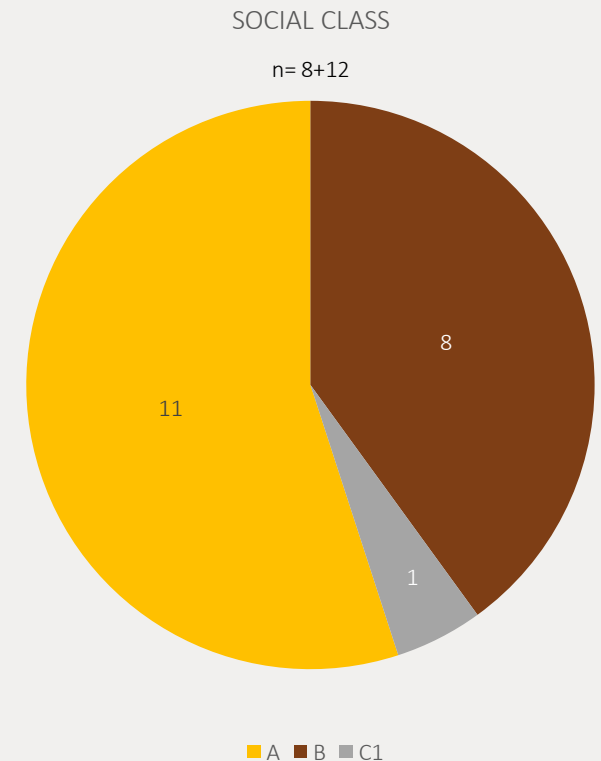


Fig. 15: Social Class of respondents belonging to the Platinum public

¹Since the data collected for the core & loyal public is not statistically representative, the graphs presented on this section are merely a visual representation.

²The first number corresponds to the in-depth interviews sample and the second one to the sample from questionnaires, everytime this appears.



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (1/2)

The Platinum publics' relationship with culture & entertainment is highly **related with GM's events** as this group is generally composed by **music connoisseurs** who have been attending concerts at the Foundation for several years. All the respondents from this group mentioned GM's concerts as the last cultural activity they have attended.

Due to its long experience and familiarity with these events, the Platinum public has developed **a deep relationship with FCG and is very loyal to GM**, seeing its offer as a top source of entertainment and which, thus, fills a great portion of their share-of-time (defined as the time that an individual dedicates to a particular activity out of its total free time). Thus, we know that this public attends "Concertos em Instituições Culturais" at least six times per year, given that GM is inserted in this category.

These individuals also dedicate a portion of their share-of-time to "Jantar em Restaurantes" and "Cinema" but by having **a strong connection with culture** they also have a high attendance to "Museus/Visitas a Monumentos" and "Espetáculos de Artes Performativas" (5 out of 12 go more than 6 times a year). On the other hand, the less frequented activities are concerts at big festivals (8 out of 12 have never

attended), sports events (7 go less than once a year), dance and other non-classical music concerts.

Regarding companionship, this group usually attends cultural events mainly with their **families and friends** (Appendix 16). Moreover, regarding "Concertos em Instituições Culturais", out of the 12 respondents, no one goes alone although they say it wouldn't be a barrier if they had to do so.

In what concerns the active search for information, this public only **"investigates"** about **"Concertos em Instituições Culturais"** since they do not show a high interest for the other type of activities as they do for concerts at cultural institutions. Information comes from various sources, with the most mentioned ones being the written press and digital communication of the institutions. Also, the majority of the interviewees receive information and newsletters from several cultural institutions.

"Recebo através do email newsletters da Casa da Música, CCB... mas também estou a par da imprensa escrita."
(M, 47, Platinum)

The research shows that **family/friends** are also a very **important source of information** and influence on what

regards classical music connection and involvement with GM in particular (4 out of 12 have mentioned it).

"(...) Mas a razão pela qual eu vinha aos concertos enquanto miúdo não era porque estudava música, mas sim por influência familiar. Mais tarde não, a partir de 1994 era por prazer."
(M, 55, Platinum)

"A música clássica não é uma coisa muito fácil, tem que ser criado um hábito (...) A verdade é que essa educação é muito importante, assim como também o facto de se habituar as pessoas a valorizar aquele género de música e a cultura."
(F, 57, Platinum)

It is also possible to observe that **education and family** were mentioned as the main factors **for starting to attend classical music concerts** and get to appreciate the genre. In fact, from the research, 10 out of 20 have studied music or played a musical instrument and almost all of the respondents have had a musical mentor. Also the attendance to classical music **concerts as a child** is verified in most of the individuals and is referred as the **main trigger** to create the habit of attending this type of events, together with having listen to the genre as a child.



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (2/2)

As this public is already knowledgeable about the prices of the “Concertos em Instituições Culturais” (and have GM as reference on their minds) they are all **willing to pay more than 15€ for this kind of concert**: Out of 12 respondents, 4 answered to be willing to pay between 15€ and 30€, 3 between 30€ and 50€, 3 between 50€ and 80€ and 2 would pay more than 80€. Their willingness to pay for other musical events is not as high since they are not so interested on the musical genres – they are more likely to **enjoy classical music** genres such as the ones played at FCG.

Another reason that justifies their high willingness to pay may be their **musical education**, as it is mentioned as main influencer for people to be willing to pay a certain amount for an experience they value. However, this public is very **interested on GM’s offer** and so they desire to attend concerts weekly or every fortnight what may decrease their willingness to pay – a very high percentage of their monthly available income would be spent on this.

When talking about the reasons why other people, and mainly younger generations, don’t attend those events the

education and society cultural side is blamed – they consider that culture should be more intrinsic in the Portuguese education.

“Acho que o preço é muito razoável, para não dizer muito bom. Claro que isto depois depende do interesse de cada um. A música clássica e este tipo de eventos têm de ser fomentados desde cedo através da educação.” (M, 28, Platinum)

“O problema não é o preço mas sim o facto dos jovens não estarem interessados na música clássica. (...) É o desinteresse e a falta de cultura.” (F, 64, Platinum)

Regarding music genres liked, the great majority only **refers to the central music genres played at FCG** – for ethnic music, for example, the majority is indifferent about it. This can be seen also from the observations (Appendix 17), since this public is a frequent attendee only of the GM core cycles (ie.: *Met Opera*, *Orquestra Gulbenkian*, *Grandes Intérpretes*, *Grandes Vozes* and *Piano*) – highly valued by them (Appendix 18). On the other hand, the cycles not so close to the FCG core such as *Músicas do Mundo* or *Concertos de Domingo* have a more diversified audience, including more individuals

from the Gold and Silver publics that are not so familiar with the core cycles and go to concerts at GM due to the music genre of those specific concerts or the more relaxed atmosphere associated. These publics may also frequent the core cycles due to other multiple reasons.

Finally, this public **values the entire experience** of attending a classical music concert at a cultural institution: The most valued aspects are the **room acoustic** and the **pleasant atmosphere and environment**, with all 12 respondents referring them as very important. Other aspects valued are: reserved seats and comfort of the room possibility of buying tickets at the institution’s own website, parking lot, existence of a cafeteria working during the concert break and moments before the concert starts, interaction between performing artists and the audience, accessible price, promotion and discounts, and the possibility of buying tickets at main points of sale such as Fnac, Worten or Ticketline.



RELATIONSHIP WITH THE FOUNDATION (1/3)

The Platinum public's relationship with FCG mostly concerns GM however they also frequent the "Exposições Temporárias", the "Museu Calouste Gulbenkian" and the "Jardim" (Appendix 19). More specifically, about GM, this public usually **attends concerts on a weekly basis** (43%) or at least monthly (38%) since they are more likely to have subscriptions (Appendix 20). Also, 41% of the subscriptions are bought by correspondence while only 10% of loose tickets are bought through this method (Appendix 21). For loose tickets 48% prefer to buy directly at FCG and 42% online.

Furthermore, it was possible to comprehend that this public is characterized by being:

- 1) Familiar with classical music – connoisseurs;
- 2) Familiar with other frequent GM's attendees: part of its "selective" nucleus;
- 3) Intrinsically satisfied with the offer and experience. Issues are described by the respondents as "details".

The following section describes in detail each characteristic of this public.

Characteristic 1) Familiar with classical music – connoisseurs

All individuals from this loyal public are **music connoisseurs** who recognize GM's superior quality. These always buy tickets at the beginning of the season in opposition to the non-loyal audience in which 30% buy tickets one week before the date of the concert (Appendix 22). **Education and family** were mentioned as the main factors for starting to frequent and appreciate classical music concerts. Actually, most of the respondents refer to have a **previous connection with music due to their families**, and the majority said that they are also influenced by friends and/or family to attend concerts at FCG.

Moreover, the majority had their first contact with music at FCG as a child, when attending the events with family members (17 out of 20 have attended a concert at FCG before the age of 18). This familiarity with classical music and GM implies that this public is always up to date in what regards GM's music events since they have interest on the topic and try to get as much information as needed – the Music Seasonal Brochure and the website are the most mentioned communication materials (Appendix 23) followed

by the mupis and written press.

"A FCG tem um programa de Música de Câmara e Ciclo de Piano que são notáveis, pois têm, por exemplo, grandes intérpretes de piano atual. Não [se] encontra melhor em Londres ou Nova Iorque ou noutra sítio qualquer." (F, 64, Platinum)

"Comecei por estudar música - piano - em criança, e sem reparar estava já a ser estimulado ao longo do tempo."
(M, 47, Platinum)

Characteristic 2) Familiar with other frequent GM's attendees: part of its "selective" nucleus

Even when sometimes attending GM's events alone, this public ends up meeting there people they know so in reality they are never alone, being therefore familiarized with the audience. In fact, many referred other **GM's attendees as being "part of the family"**.

Moreover, music events at FCG are seen as an escape and an opportunity **to enjoy the "pleasure of the moment"**. The atmosphere is one of the most positive aspects mentioned for attending GM's concerts. In fact, the majority of the respondents agree with the sentence "Considero que os eventos de música na FCG têm um ambiente de categoria e classe".



RELATIONSHIP WITH THE FOUNDATION (2/3)

However, even if all inquiries like GM's **atmosphere and environment**, some of the respondents claimed that FCG is "Só para Alguns" instead of "Para Todos".

"Vim sozinho, embora à Gulbenkian nunca se venha mesmo sozinho porque se encontra sempre dezenas de pessoas conhecidas do nosso meio." (M, 30, Platinum)

"Sinto que as pessoas já são regulares e conheço as caras na maioria das vezes. Existe até muita convívio entre as pessoas que vão regularmente." (F, 57, Platinum)

Hence, the Platinum public of GM expressed, on the projective technique, a very clear perception of the loyal attendees (Appendix 24) being those divided into two main types of individuals (as it has been mentioned in the Project Challenge):

- "Older" people** who buy subscriptions every year and regularly attend GM's concerts;
- Music students** who attend GM's concerts driven by curiosity and passion for classical music.

Those two groups form the "selective" nucleus of attendees ("círculo fechado").

The Platinum public also considers that no other cultural institution in Portugal offers the same "familiar" restricted nucleus of individuals, which is actually seen by them as a positive aspect since they **feel themselves as part of that group** of cultural and educated individuals. Besides sometimes attending concerts at other institutions, they only recognize a relationship with the Foundation.

In comparison to other cultural institutions either in Portugal or on an International level, FCG's standards in terms of **quality are considered very high**.

"Na Gulbenkian, a ópera é fantástica. A acústica do auditório é espetacular, das melhores do mundo. Eu ouço muito música erudita e o meu julgamento ficou mais exigente ao longo do tempo." (F, 58, Platinum)

"O melhor ambiente é o da Gulbenkian claramente. Sinto-me em casa e é muito confortável (...) Nós não temos uma sala em Lisboa com a mesma qualidade ou tão cosy como a Gulbenkian." (F, 57, Platinum)

"Acho que o CCB é um sítio mais transversal em termos de idades. É talvez mais barato e tem se calhar menos qualidade ou um cartaz um bocadinho diferente. Tem muita rotatividade, é mais popular e por isso mais pedagógico." (F, 55, Platinum)

"No São Carlos as pessoas são mais apaixonados pela música. Não são tão rígidas, vestem-se bem mas não são tão chiques. São da mesma idade [do que as da FCG] mas têm mais paixão na ida aos concertos." (F,58, Platinum)

Centro Cultural de Belém (CCB) is considered as having a **diversified public** aligned with the wide range of events this institution offers and also more frequented by with younger publics that are not so connected to classical music and to culture. The most common words associated with CCB (from the interviews' projective technique) were: "diferente", "estudantes", "diversidade", "versátil" and "jovem".

On the other hand, *Teatro Nacional de São Carlos* (TNSC) is highly associated with one musical genre only (Opera) and with a **public that enjoys classical music concerts**. The respondents recognize that TNSC has been diversifying its publics but that its core public seems as passionate with classical music as GM's public however being less rigid when compared with those. The most common words associated with TNSC were: "ópera", "glamour", "paixão", "música" and "chique".



RELATIONSHIP WITH THE FOUNDATION (3/3)

It can also be seen that attendees who are very loyal to GM such as the ones from the Platinum public are very proud to be part of the nucleus due to the **positive feelings and “status”** they associate with the experience. In fact, most of them agree with the sentences “Considero que ir à FCG me faz ter um estilo particular do qual gosto” and “Considero que ir à FCG me valoriza aos olhos dos outros”.

Concluding, the Platinum public give high importance to the familiar and elitist atmosphere of the music events.

Another thing that was verified on the qualitative research was that this public **does not seem to be very open to the idea of inviting “outsiders”** to attend concerts at GM (i.e. non-connoisseurs that do not belong to the nucleus and are not from their families). Moreover, since this public values the GM’s “selective” nucleus and do not want to “ruin” it, they **usually only bring their families and/or other connoisseurs** to attend concerts with them.

“As pessoas que vão lá são muito diferenciadas mas é um grupo elitista, não só do ponto de vista social mas também cultural e já com um vínculo estabelecido com a Fundação. Não é bem mas é quase como se existisse um ‘Clube Gulbenkian’.” (F, 43, Platinum)

“Gosto de trazer amigos interessados neste tipo de experiências ou que gostem do programa. Por exemplo, traria um aluno meu [do conservatório] porque tem que passar por essa experiência e ter sensibilidade.” (M, 30, Platinum)

Characteristic 3) Intrinsically satisfied with the offer and experience. Issues are described as “details”.

Although the Platinum public is **fully satisfied** with GM’s offer and experience, it is also very critical and therefore able to **identify some issues** and recognize space for improvement in some specific touching points of the experience.

However, their satisfaction, commitment and affinity towards FCG are the justification to their loyalty and make them see those issues on the GM experience as **“details”**, therefore not threatening their loyalty to the Foundation.

“Só recebo os bilhetes em casa. Não tenho nenhuma confirmação concreta mas também como nunca correu mal não questiono nem me incomoda.” (F, 43, Platinum)

“Não se percebe como é que a Gulbenkian não tem um método de pagamento como o PayPal. Existem variadíssimas formas de resolver o problema do pagamento, sem que eu tenha de comprometer a segurança dos dados do meu cartão de crédito, mandando-os por email ou por carta.” (M, 55, Platinum)

For instance, the way GM relates with its loyal public is described as an issue that could be improved. Specific issues were identified at this point such as the Music Seasonal Brochure not being available for deliver: this implies the obligation of people to go to the Foundation in order to get one physical brochure. Also, the Platinum public recognizes the fact that the existent relationship with the Foundation is “one-sided” - interviewees feel a personal relationship with GM but the majority feel there is no reciprocity from the Foundation side.

Solving the identified problems would **improve the relationship** between the Foundation and the core & loyal audience by delivering them an overall experience of excellence. Moreover, it could **mean a growth in the occupation rate of several cycles**, since individuals from this public seem to give up on buying tickets for more concerts when facing issues. For instance, solving it could increase the occupation of *Música de Câmara and Música Antiga* that are among the cycles with the lowest occupation rates in the previous musical season (2015/16).

“Quanto a uma relação mais próxima com a Gulbenkian, claro que gostaria de ser premiada pela regularidade.” (F, 43, Platinum)



PUBLICS WITH POTENTIAL FOR GROWTH

GOLD, SILVER & BRONZE



CHARACTERIZATION

In order to understand the diversified groups of **publics with potential for growth** it is mandatory to characterize them before analysing their behaviour and thoughts.

Regarding **age** it is possible to see that groups that attend GM's concerts at FCG more often tend to be older: the Gold public has 84% of individuals aged between 41 and 65, while there are 71% from Silver and 58% from Bronze on that age range. When analysing **social classes** it can be seen that the percentage of individuals from social class A decreases with the decreasing of the group attendance (Gold has 57% individuals from A, while Silver has 35% and Bronze has 32%). Social class C1 percentages, on the other hand, increases when the attendance becomes less frequent, having the Gold public only 16% individuals from C1 while Silver registers 25% and Bronze 38%. Also, other lower social classes only appear in Silver and Bronze publics. Moreover, all interviewees from social class A have attended concerts at FCG at least once in their lives, while the great majority of individuals from C1 have not.

With that in mind, one can say that **age and social class** (instruction and job related factor) are **influential factors for each person's attendance to FCG's music events**.

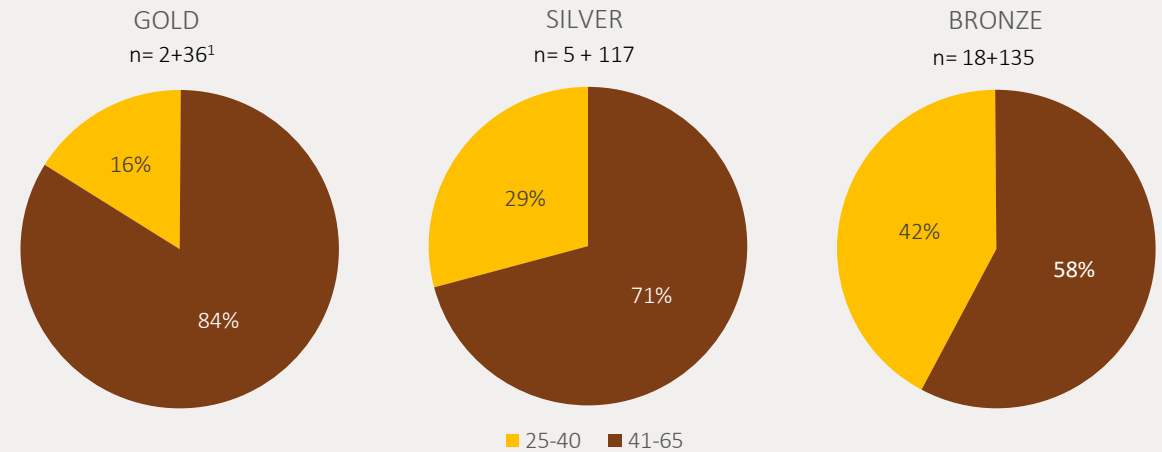


Fig. 16: Age of respondents belonging to the Gold, Silver and Bronze publics

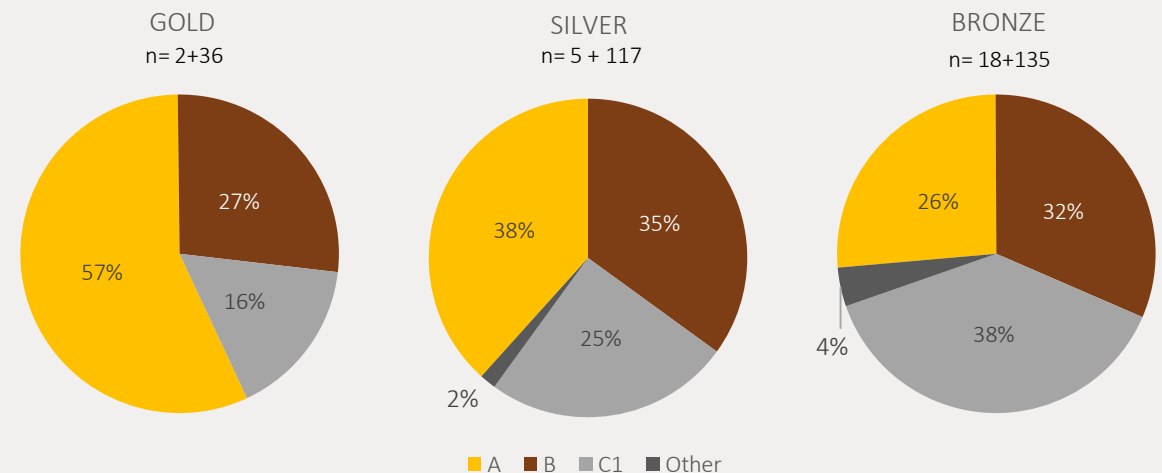


Fig. 17: Social Class belonging to the Gold, Silver and Bronze publics

¹ The first number corresponds to the in-depth interviews sample and the second one to the sample from questionnaires, everytime this appears.



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (1/8)

SHARE-OF-TIME

To analyse these publics' relationship with culture & entertainment it is firstly important to understand what they do in their free time since nowadays they face a wide range of possibilities. Entertainment and leisure activities that enable sociable experiences are a trend (INE, 2015) and thus have been considered in the analysis.

"Costumo ir a cerca de três espetáculos por ano. Uma vez à Casa da Música, outra vez a um concerto assim mais rock, ..." (F, 43, Silver)

"Costumo ir a eventos culturais na cidade, principalmente os que são ao ar livre, Também costumo ir ao cinema e jantar fora claro... Isso faço todos os fins de semana geralmente uma vez. Frequento mais eventos culturais e de entretenimento ao fim de semana." (F, 55, Bronze)

Regarding the share-of-time of each public, it can be observed that the publics who attend classical music concerts at FCG with more frequency tend to **go to more cultural and entertainment activities** overall (fig. 18) which may be explained by their **stronger connection with culture**. The most frequented activity is "Jantar em Restaurantes", closely followed by "Cinema" and "Museus/Visitas a Monumentos". Moreover, the majority of the events described occur at night and mostly at the end of the week (Thursday, Friday and the weekend). Thus those are the favourite times to go out, since weekdays seem to be more dedicated to work while **weekends give them more availability** to those kind of programs.

Besides existing a clear distinction on the regularity in which the publics attend cultural activities, it can be seen that the frequency of going to "Jantar em Restaurantes" and "Eventos Desportivos" is the same for all the groups with potential for growth. On what concerns music

¹ From this point onwards, the value associated to the "n" will represent the questionnaires' sample only.

activities, the Gold public tends to frequent music concerts more often. As for "Concertos em Instituições Culturais", it is obvious that the **Gold** public is the one with **higher levels of attendance**. However, the Bronze public is perfectly symmetrical with the Gold public (as can be seen on fig. 18). This suggests that the **Bronze public neither attends concerts at FCG nor at any cultural institution**.

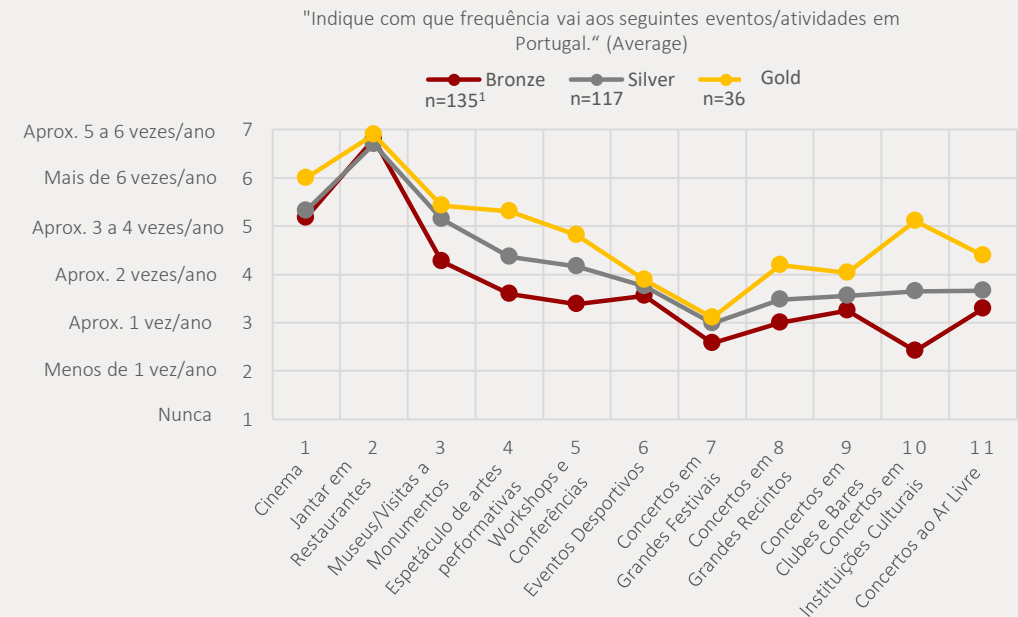


Fig. 18: Share-of-time



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (2/8)

Insights from the interviews show that the decision on how to fill their share-of-time often depends on the type of event and the offer itself. Also, about half of the interviewees usually present themselves as **influencers in the decision making process**. Moreover, accessibilities such as the transport and car parking were also referred as important decision factors since the majority of the interviewees use the car as the principal vehicle to go to those events (Uber and taxi were also much mentioned). The younger interviewees (around 25-40 years old) also refer price as a concern when choosing an event.

Regarding music events, respondents value not only the music itself, but all the factors that make up the whole experience, such as the **type of room and its acoustic**. This choice is also influenced by **time and money availability** although these barriers are easy to overcome depending on the desire they have to go to the event and the artist playing.

COMPANIONSHIP

It is important to understand as well with whom these publics frequent the entertainment and cultural activities (Appendix 25). In a country where people give a high importance to the family, it is possible to confirm that **family**

is a very important companionship for “Cinema”, “Jantar em Restaurantes”, “Museus/Visitas a Monumentos” and “Espectáculos de Artes Performativas”. Friends and colleagues are referred as main companionship in music related activities, “Workshops e Conferências” and “Eventos Desportivos” since these are more social activities.

Although for “Concertos em Instituições Culturais” this companionship pattern changes. Instead of having the family as their main companionship, all the groups show a diversified behaviour. For the Silver public, family is the only relevant companionship. The public who goes more often (Gold public) counts not only with **family but also with their friends/colleagues** as the second more important source of companionship. The Bronze public’s individuals see their **partners** as the ideal companionship for a concert at a cultural institution. Besides family, friends and partner, people sometimes go alone to these activities if there is something they really appreciate but do not have anyone to go along – while this is not verified for other music events.

In the qualitative research, some people spontaneously mentioned they would agree to go to GM’s events if their friends invited them, showing not only **openness** but also the

importance of ones’ network on their choices.

“Costumo ir a eventos culturais com o meu marido e/ou filhos, apesar de eles agora serem mais independentes e não quererem tanto vir a este tipo de programa com os pais” (F, 56, Gold)

“Costumo ir a eventos de música com os meus amigos. Não costumo ir sozinha. Ao cinema até sou capaz disso, agora a esse tipo de eventos não, vou sempre acompanhada.” (F, 25, Bronze)

SOURCES OF INFORMATION

Mass media is still a very important source of information in Portugal and that can be verified by the groups’ answers on the topic regarding sources of information (Appendix 26) for music related activities. More than 77% of each group say they keep themselves informed about “Concertos em Grandes Festivais” and “Concertos em Grandes Recintos” through mass media (TV, billboards and radio). For “Concertos em Clubes e Bares” the most chosen source of information is friends/colleagues (59%) and the same occurs for “Concertos ar Ar Livre” where this option was chosen by 54% of the respondents. In concordance, the qualitative research showed that the **personal network is truly relevant for people’s relationship with music events**.



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (3/8)

The majority of interviewees recognize **Below The Line (BTL) advertising**¹ as useful to make them aware of the market offer, due to the variety of digital platforms and new technologies. However, the excess of information often **overwhelms** them. So the digital sources of information are valued although they should not be abusively used to communicate with the publics.

Regarding “Concertos em Instituições Culturais” many sources of information appear (fig. 19) and the importance of the mass media is still recognized (around 20% of each group uses it to know more about the topic). **Social media appears with a high importance** for all the 3 groups (around 20%). For the Gold public, the most effective source of information is the circle of friends/colleagues that is similarly high valued by the other groups (18%). The printed press is also valued by all the groups as source of information. Thus, using a traditional strategy together with a digital strategy would help on reaching those publics. Also, it should be taken advantage of the high importance that family and friends/colleagues have as source of information.

“Eu vejo sempre esses cartazes porque estão ao pé da minha casa, e eu olho sempre. Portanto não há cartaz nenhum nem publicidade nenhuma que eu não leia.” (F, 56, Gold)

“Sou assinante da Visão e procuro sempre muito avidamente aquela revistinha que vem junto porque é um manancial de informação. A Visão é excelente em informar dos concertos que há. No outro dia também vi no jornal a programação da Gulbenkian que está agora *on.*” (F, 52, Silver)

As people go more often to GM’s concerts, the **importance of family** as a source of information for musical events at cultural institutions increases (17% of the Gold public mentions it, while from Silver and Bronze only around 10% find it relevant). The same pattern can be seen regarding the digital communication (apps, newsletters and websites) of the institutions, though not so strongly. Moreover, it is possible to infer that the **Gold public prefers owned media**² while the **Silver and Bronze publics prefer to use media of entities** that advertise and give information on more than

“Como obtém informação relativamente os seguintes eventos de música? (Concertos em Instituições Culturais)” (%)

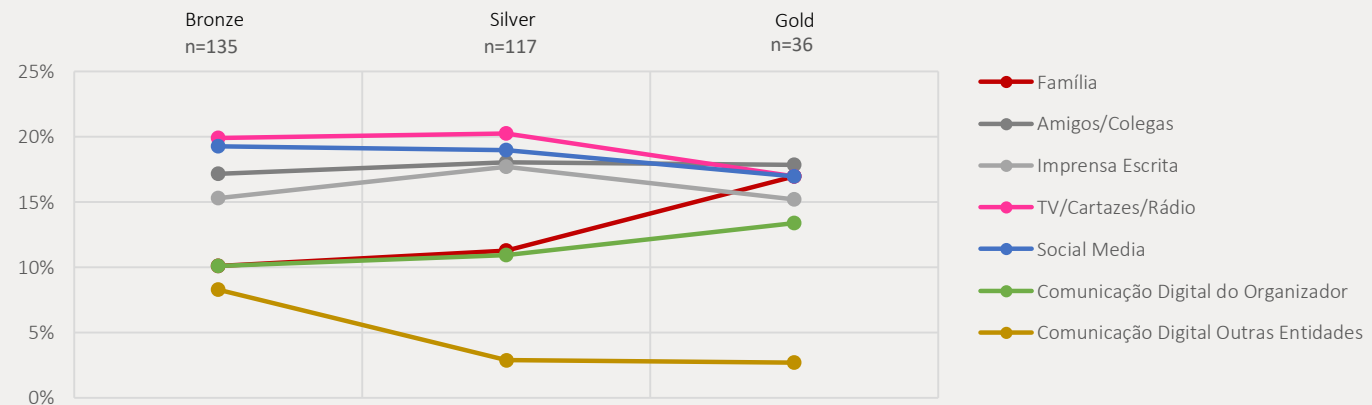


Fig. 19: Sources of Information

¹ BTL is an advertising technique that uses less traditional methods than the usual channels of advertising. referring to a one-to-one form of non-media advertising such as: Public relations, sales promotions, sponsorships, direct marketing, social media and events.

² By owned media we mean a channel that the brand controls. There is fully-owned media channels such as the brand’s website and partially-owned media channels like the brand’s Facebook page or Instagram account.



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (4/8)

one institution (e.g.: Everything Is New, Agenda Cultural, TripAdvisor, etc.). This may be explained by the **lack of knowledge** that these publics have on the matter and on where to get information. Also, it is essential to understand that the Silver and Bronze publics should be incentivized and taught to use owned media once they may have interest on GM.

It is also possible to observe that the Gold public searches more actively for information about “Concertos em Instituições Culturais” (92% answered “Yes” on that question). Thus it can be inferred that the Gold public is used to search more for information rather than receiving it

spontaneously from GM (fig. 20). Those who do not go to “Concertos em Instituições Culturais” almost do not search about it (only 34% of the Bronze public searches actively) while they do “investigate” about other types of concerts (e.g.: 61% of the Bronze search actively for “Concertos em Grandes Recintos”). Bronze individuals never spontaneously refer actively searching for information regarding cultural events at all. The Silver public knows about concerts at cultural institutions by searching in an active way. Overall, it is suggested that to **get to know about these events, there’s a need to do an active search since the information does not reach people who do not search.**

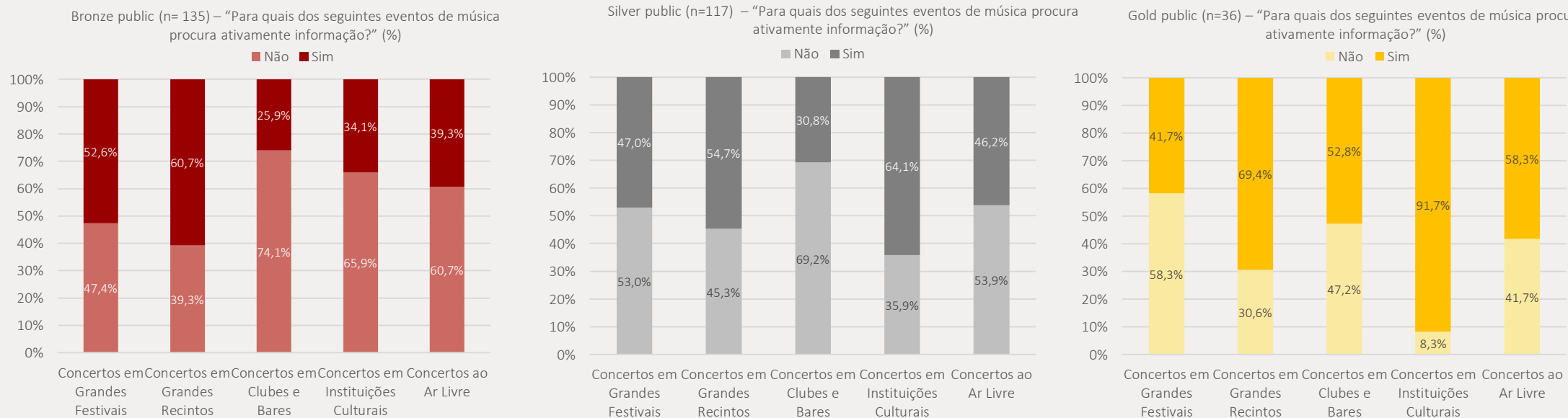


Fig. 20: Active Search for Information by public



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (5/8)

"Fui com amigos ao NOS Primavera Sound, é um festival a que vou sempre. Geralmente tento seguir alguns sites ligados à música como o site da Blitz e o próprio site do evento, para ver novidades."

(M, 37, Bronze)

"Como sigo as páginas de muitas instituições culturais, como o CCB, por vezes dou de caras com um evento de música qualquer." (M, 44, Silver)

WILLINGNESS TO PAY

Overall, people tend to be more willing to spend money on "Concertos em Grandes Recintos" and less on "Concertos ao Ar Livre" since the big music halls usually bring international and very well-recognized artists and open air places are associated with more informal concerts as can be seen on Fig 21. Regarding "Concertos em Instituições Culturais", the Gold public is willing to pay a price that is higher than the average price of a concert at FCG, while the other two publics' willingness to pay is aligned with this average. Therefore, all this suggests that the **price is not the problem for people to attend GM's concerts**, but Silver and Bronze publics may not be aware of it **thinking it is higher than it actually is**. In fact, some respondents from social classes B and C1 (whose age is not eligible for discounts) mention price as a barrier although admit to not be sure of how much going to a concert would cost. In general, even though price was commonly mentioned as a barrier to attend cultural and music related events, people tend to **disregard this topic frequently if the offer compensates**. In addition, the qualitative research reveals that GM is associated with quality and thus people would be willing to pay for concerts.

"Até quanto está disposto a pagar por cada um dos seguinte eventos de música?" (Average)

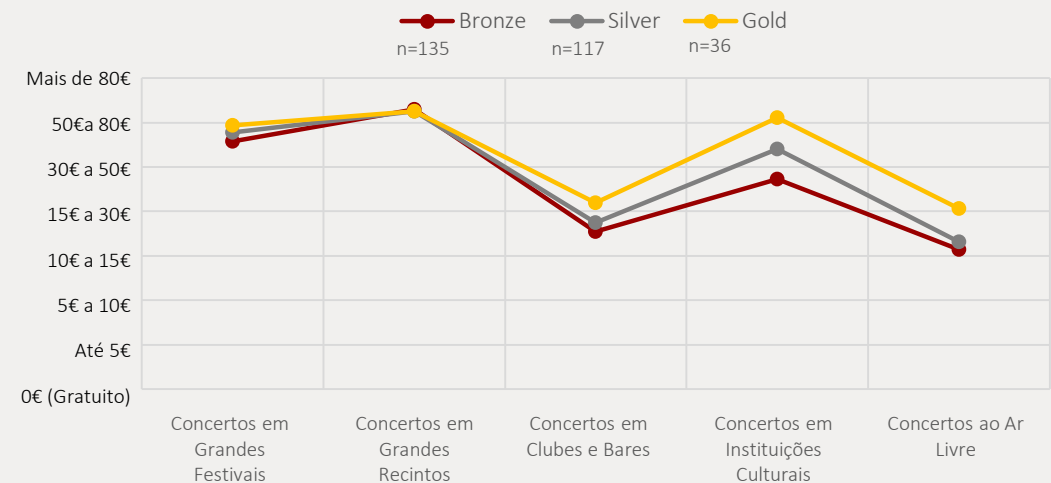


Fig. 21: Willingness to pay

"O preço é importante mas quanto mais interessante o evento mais estou disposta a pagar. Para o Pablo [Alborán], acho que gastei 40€, mas era capaz de gastar até aos 80€." (F, 27, Bronze)



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (6/8)

“Dos seguintes géneros musicais quanto gosta de cada um deles, numa escala de 1 (Não gosto nada) a 5 (Gosto muito) ?” (Average)

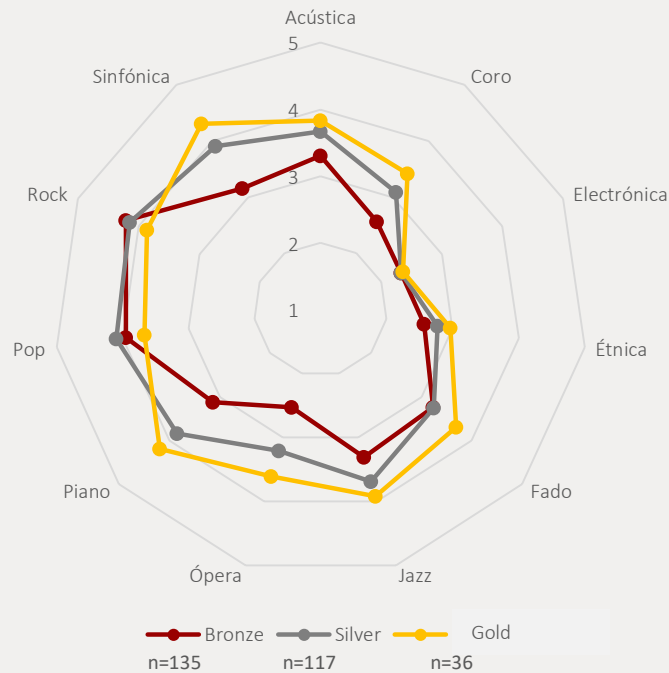


Fig. 22: Music Genres

MUSIC GENRES

While the Gold public shows a **bigger affinity for the core music genres** played at GM (fig. 22), the Bronze and Silver publics also appreciate those genres. Even from the Bronze public, who relates the least with GM music genres (specially “Sinfónica”, “Piano” and “Ópera”) the majority of the respondents says the offer goes in line with their musical taste (Appendix 27).

However, it was inferred from the qualitative research that even if respondents admit to enjoy listening to music, only a few **actually attend** to music events frequently.

This suggests that Silver (and even Bronze) publics may appreciate the music genres offered by GM and do not attend the concerts due to other barriers. **Moreover, as happens with price, the offer may not be known by the audience and that may be the reason for those groups not attending GM’s concerts more often.**

“Fui ao conservatório ver um concerto de música clássica e gostei imenso mas depois ‘arrefeceu’ e não voltei a procurar nem a ir a mais lado nenhum ouvir esse tipo de música.” (F, 55, Bronze)

VALUED CHARACTERISTICS

Besides the offer itself, interviewees also value other characteristics of music events:

- The possibility to take advantage of the time of the event to have a **dinner/lunch out near the place** where the concert takes place;
- The **interaction between the artist and the public** is also valued as a part of the atmosphere;
- The possibility to buy tickets not only online, but for instance in Fnac (**most referred choice for the purpose**);
- The ability to **seat** while watching the event is most valued by some of the respondents.

For the characteristics of “Concertos em Instituições Culturais”, the three groups presented **similar opinions** (Appendix 28) – almost all the aspects presented in the questionnaire are highly valued.



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (7/8)

CONNECTION WITH MUSIC

Fig. 23 represents the portion of individuals of each public who study/studied music or play/played a musical instrument. It can be observed that the majority of the Gold public (61%) studies/studied music or **plays/played a musical instrument**. The Silver and Bronze publics, on the other hand, are mostly composed by individuals who have never studied music or played a musical instrument (only 39% of the Silver and 38% of the Bronze did so). Thus, **people that have studied music or played a musical instrument are more likely to attend GM's concerts since they have a stronger connection with music.**

Another factor that was used to assess each individual's connection with music was the presence of a **musical mentor** who influenced them to go to classical musical concerts. By observing fig. 24, we suggests that individuals who go more frequently to concerts at FCG tend to be people who had a musical mentor in the family or group of friends.

Regarding this subject it is also important to observe that the musical education is very valued amongst all the groups, having the great majority said they agreed with the sentence "Acho importante a educação musical desde cedo" (Appendix 29) . That is also supported by the fact that all the individuals from the Platinum public have their children playing a musical instrument.

"Quais das seguintes atividades pratica/já praticou? (Estudar música/Tocar um instrument musical)" (%)

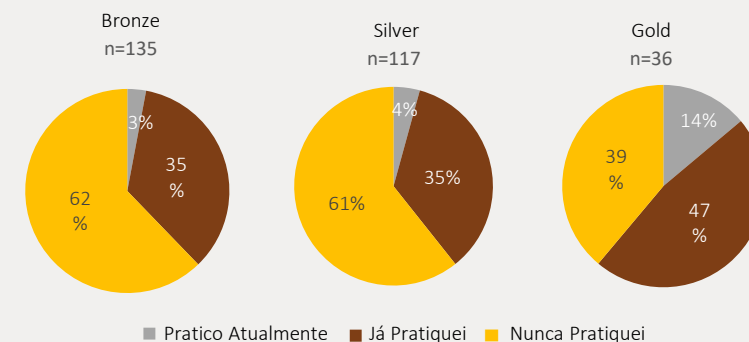


Fig. 23: Connection with music: Study of music/Playing a musical instrument by public

"Eu tive uma pessoa que desde miúda me levava aos espetáculos todos de música clássica, de ópera e fui habituada a ver e a apreciar." (F, 56, Gold)

"Estou a estudar ainda no conservatório, onde canto. Grande parte do meu tempo é então dedicado à música. Ao entrar no coro e depois no conservatório comecei a aprender e a gostar bastante de música clássica, o que eventualmente me trouxe à Gulbenkian." (F, 31, Gold)

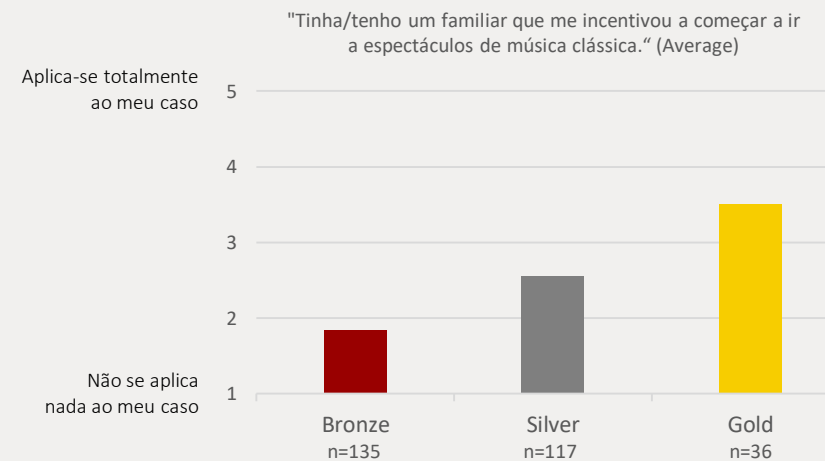


Fig. 24: Connection with music: Musical Mentor



RELATIONSHIP WITH CULTURE & ENTERTAINMENT (8/8)

The following factor required to analyse each individual's connection with music is their attendance to classical music concerts as a child, as represented in fig. 25. It is observed that **people who have frequented classical music concerts as a child are more prone to attend GM's concerts regularly** (Fig, 25). The same can be verified with the publics that listened to classical music as a child, being the Gold public's individuals the ones who listened more to it at younger ages (fig. 26). Thus, it can be said that the creation of an habit is significant, and the regular attendance of classical music concerts as a child is a factor of influence to keep attending these types of events at a later stage in life. Some people mention that they might had gone more if they had created that habit and a relationship with music earlier in their lives.

Taking in consideration the four previous factors described, the **Gold public is the one with a stronger connection with music**. Thus, this connection with music is of major importance for a person to become more willing to attend GM's concerts. The Platinum public registers an even higher proportion of people with a previous connection with music, which enhances this assumption.

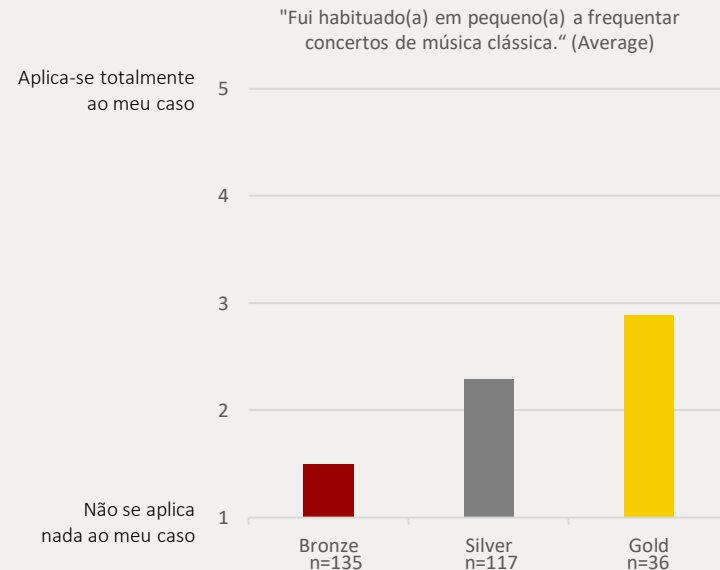


Fig. 25: Relationship with music: Attendance of classical music events as a child

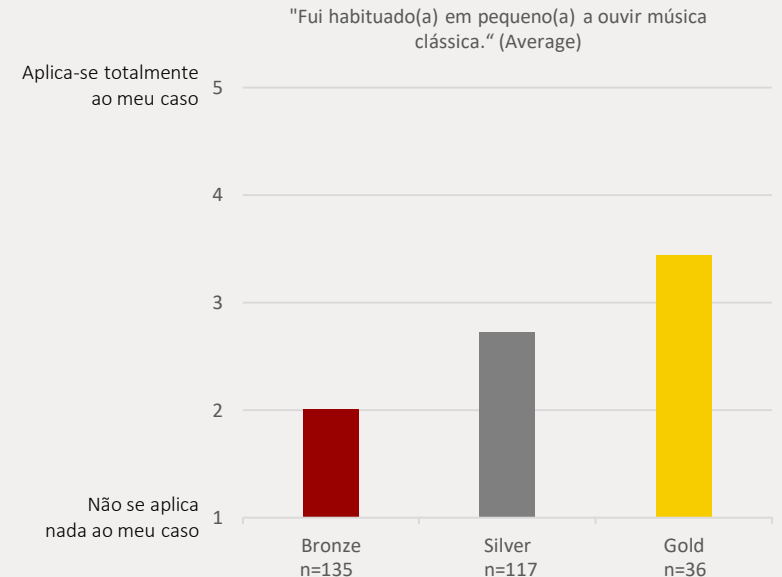


Fig. 26: Relationship with music: Listen to classical music as a child

"Fui habituada a ir aos espetáculos todos de música clássica. Havia uma coisa que eu gostava imenso de ver e que as pessoas da minha geração viam, que eram os concertos do Bernstein que ele fazia para os jovens. Ele apresentava as peças e tinha um auditório, só de jovens, onde as explicava, bem como os movimentos ao piano." (F, 56, Gold)

"Não vou simplesmente porque não tenho o hábito, acho que é o tipo de eventos a que uma pessoa deve ser habituada desde pequena. Sem hábito as pessoas nunca vão. De pequenino é que se torce o pepino." (F, 55, Bronze)



RELATIONSHIP WITH THE FOUNDATION (1/2)

ATTENDANCE OF OTHER SPACES AT FCG

It can be observed that the more people attend GM's events, the more they attend other spaces at FCG due to their **stronger relationship with the Foundation** (fig. 27). For all publics with potential for growth the **most frequented space is the "Jardim Calouste Gulbenkian"**, although Gold public's attendance is also very high for the "Cafetaria/Restaurante/Gelataria". As this public is the one who attends more concerts, the individuals' frequency to this activity is also very high.

Regarding the **Bronze public** in particular, it was assessed its relationship with FCG and whether this public frequents other spaces/activities of the Foundation despite not being a frequent attendee of GM's concerts. As seen in fig. 27, the only space the Bronze public seems to have attended more often in the past two years is "Jardim Calouste Gulbenkian", whereas on average they have not attended the other spaces/activities in this timeframe. This may be explained by the fact they **do not have a relationship with FCG neither an incentive to go there**. Attracting new publics for GM's concerts may start by gathering those who already go to other FCG's spaces (as for example, the garden), more often.

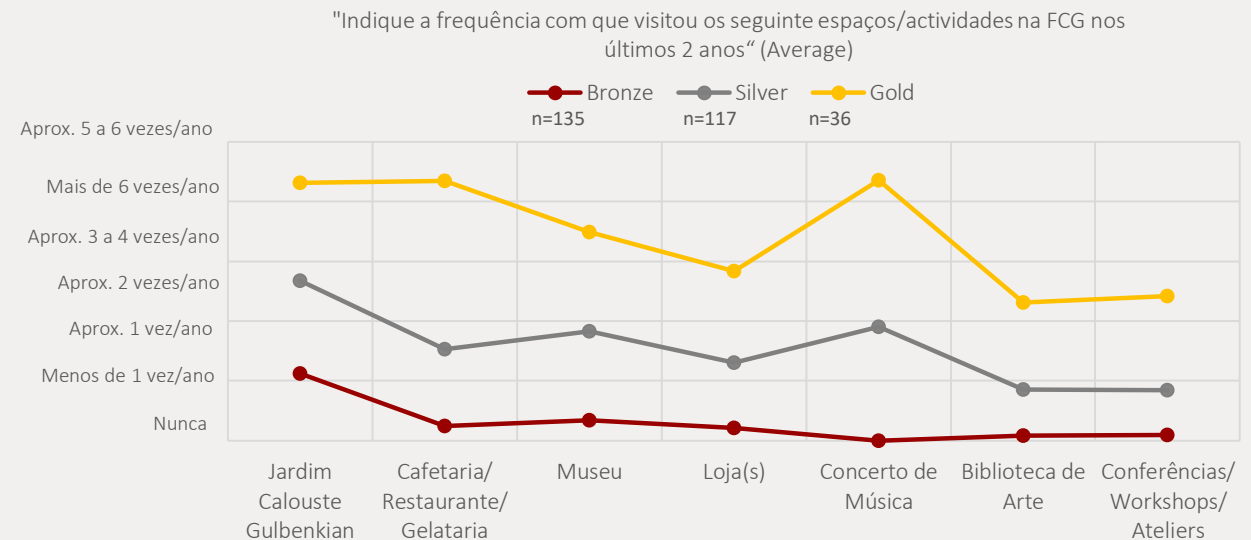


Fig. 27: Spaces attended at FCG

"Lembro-me de ir ao museu algumas vezes, mas já há uns tempos... não sou grande frequentador de museus de facto. Tentei ir a concertos de música mas nunca consegui bilhetes para os espetáculos que queria; ou estavam esgotados ou só soube que existiam depois, o que até é estranho para mim." (M, 36, Bronze)

"Na altura, voltámos [com a mulher] lá algumas vezes, para passear no jardim, é lindíssimo. E fomos também ao Museu do fundador. Mas depois tivemos filhos e deixámos de sair tanto para passear. Hoje em dia quase não nos lembramos que a Gulbenkian existe. Há muito pouca divulgação" (M, 60, Bronze)



RELATIONSHIP WITH THE FOUNDATION (2/2)

“Para cada par de atributos assinale o ponto que melhor define a sua percepção em relação à FCG.” (Average)

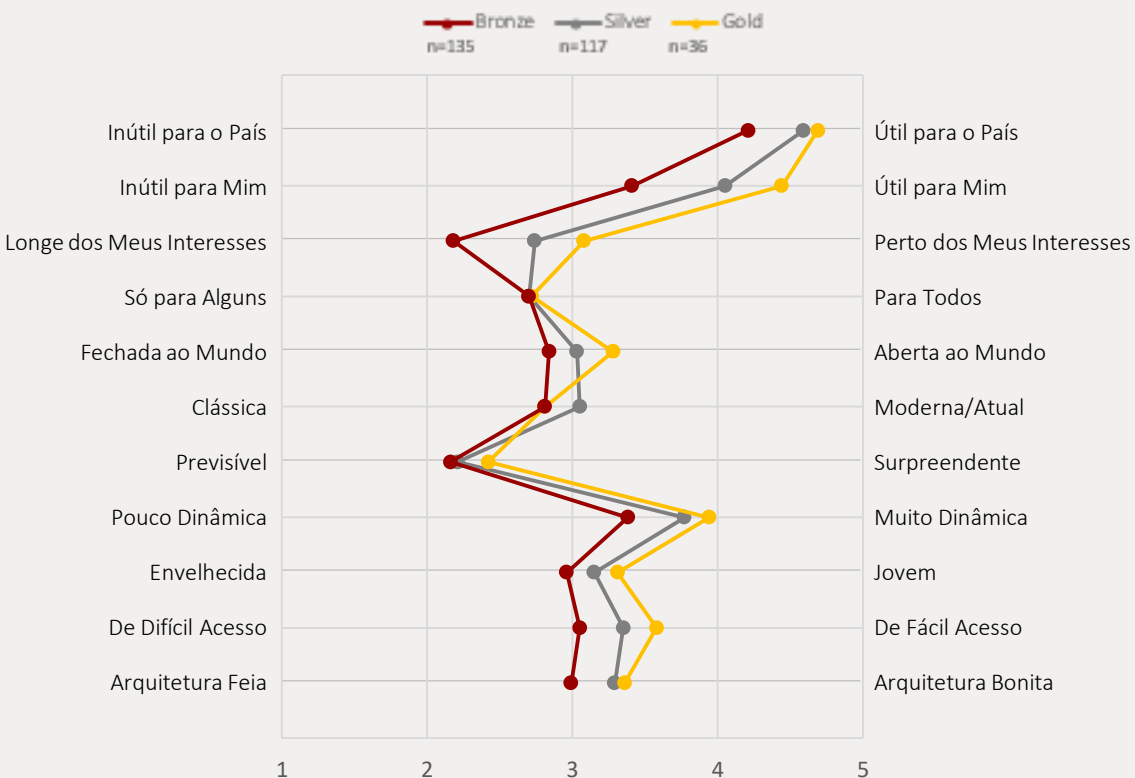


Fig. 28: Perceptions about FCG

PERCEPTIONS

The respondent’s perceptions about FCG were measured using a 5-point bipolar semantic differential scale whose results are represented in fig. 28. The distinct publics have aligned ideas regarding FCG but it can be seen that **when the frequency to GM’s concerts increases, the association of FCG to positive aspects also increases.**

Moreover, it can be suggested that people who attend GM’s concerts more often associate the Foundation with more positive aspects. Nevertheless, even the Bronze public perceptions are not that negative and, thus, one can infer that **the Foundation itself is not a barrier** for people not to attend GM’s events.

Since GM is associated to FCG as a whole, FCG should have **positive aspects associated** to its brand in order to be mirrored to GM.



RELATIONSHIP WITH GULBENKIAN MÚSICA (1/8)

PREVIOUS ATTENDANCE OF GULBENKIAN MÚSICA

Publics' attendance of GM's concerts **before the age of 18**, as represented in fig. 29, is a **key factor** to understand each individual's involvement with GM.

It is observed that 75% of the Gold public have been to a classical music concert at FCG before having 18 years old while only 60% of the Silver public and 17% of the Bronze public have done so. Another relevant observation that can be made regarding the Bronze public is that,

amongst those who haven't attend any GM's concert before 18 years old, only 15% attended a concert later on.

Therefore, besides the already presented connection with music, **the attendance of concerts at FCG before the age of 18** (the involvement with GM) is a relevant **driver for GM concerts' attendance**. With that in mind, FCG should think about younger generations in order to incentivize their connection with music and build a relationship with GM from young ages.

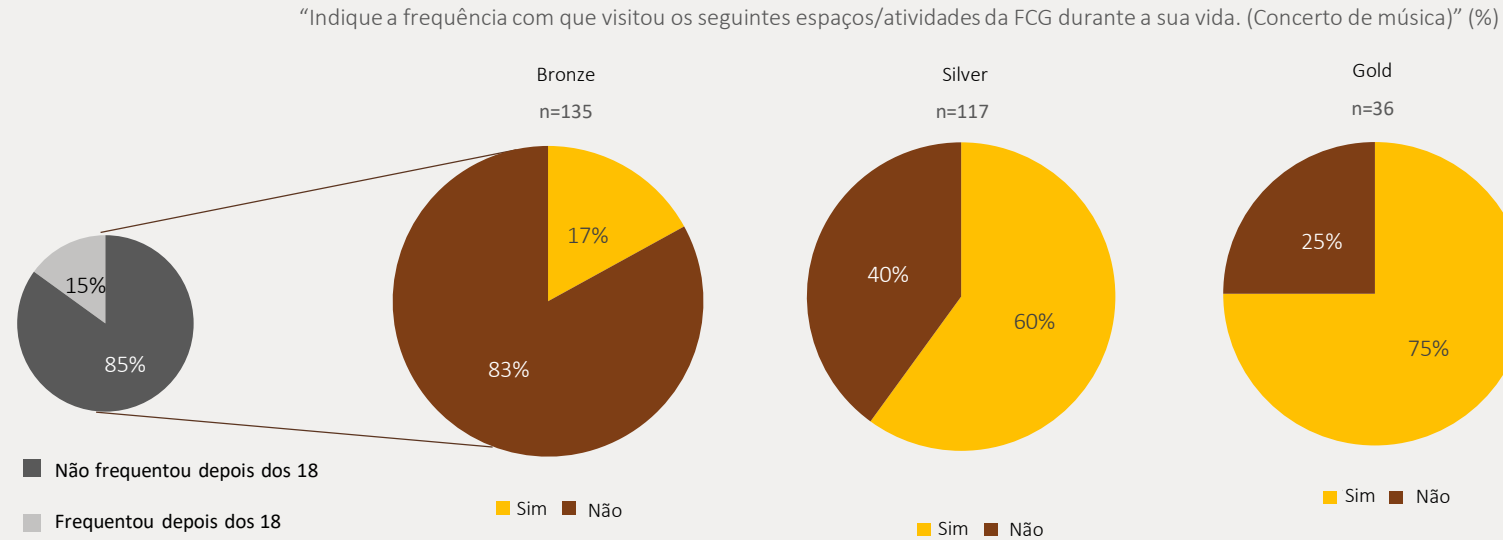


Fig. 29: Attendance of GM's events before the age of 18



RELATIONSHIP WITH GULBENKIAN MÚSICA (2/8)

SHARE-OF-TIME: CONSIDERING GULBENKIAN MÚSICA

Fig. 30 shows that the Bronze and Silver publics (who do not attend GM's concerts as frequently) do not even consider it to fill their share-of-time. **Many people do not remember FCG concerts** when filling their share of time and refer that FCG should work on including itself on their first choices when considering cultural & entertainment activities.

Despite not attending GM's concerts, **the Bronze public show openness** to start attending or at

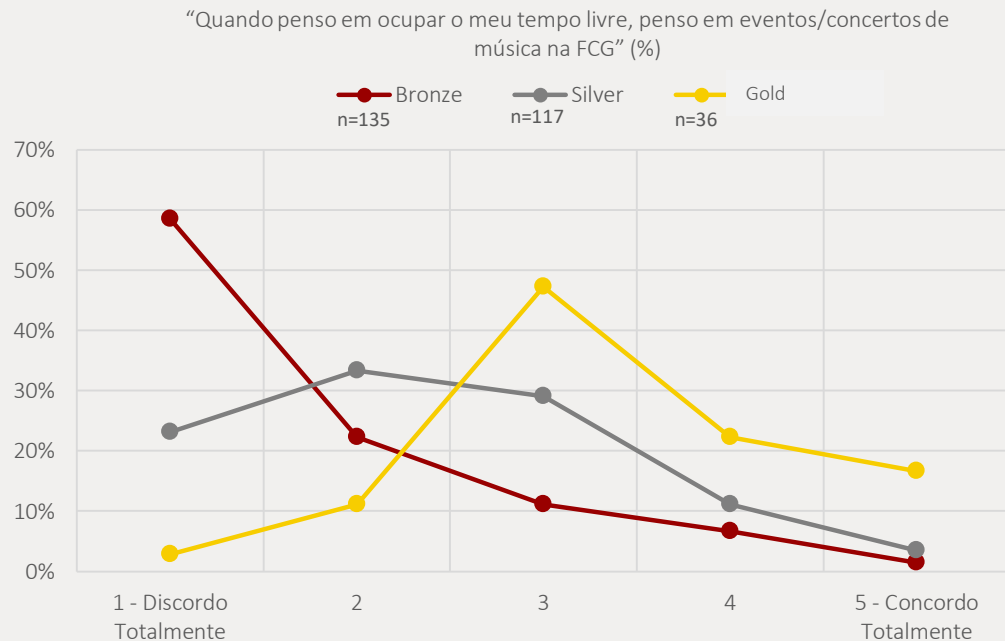


Fig. 30: Publics considering GM's events as an entertainment option

least try once (fig. 31). 52% of this public's individuals totally agree ("Concordo Totalmente") agree with this idea - this **openness should therefore be stimulated by FCG**. In accordance with previously presented findings, this could also indicate that the offer is not the problem and people enjoy this kind of concerts. In reality, from the qualitative research it is known that even individuals who are not avid lovers of the genre feel open to try and appreciate this type of event. Furthermore, this public does not relate with the sentences "Não sou apreciador de música clássica" and "Nao me identifico com instituições culturais" (Appendix 30).



Fig. 31: Openness from the Bronze public to attend to a concert at FCG

"Depois dessa primeira vez já lá voltei várias vezes, mais recentemente para ver a orquestra e o coro, acho. Mas já não é a minha primeira escolha de momento." (M, 40, Silver)

"Hoje em dia quase não nos lembramos que a Gulbenkian existe." (M, 60, Bronze)

"Se fosse convidado ou tivesse mais noção da oferta se calhar gostaria de ir mas acabo por não ter muita ideia do que se passa" (M, 36, Bronze)



RELATIONSHIP WITH GULBENKIAN MÚSICA (3/8)

BARRIERS TO ATTEND CONCERTS

It is then important to understand which are the barriers that are inhibiting the Bronze and Silver publics to attend (more) concerts at FCG. The Bronze and Silver publics seem to have the same opinions when it comes to barriers for attending GM's concerts – **the biggest barrier is the lack of knowledge about the offer connected to the lack of information available**. The price is not important although still identified as a barrier (fig. 32). As previously explained, our research suggests that the Bronze and Silver publics have a willingness to pay (for “Concertos em Instituições Culturais”) that matches the price practiced by GM and that GM is recognised for its high quality. However, when asked about barriers, the inaccessible price is seen as one of them. This strengthens the idea that there is a **low awareness of the prices practised** by GM.

The great majority of respondents from the qualitative research recognize FCG's value, but are **disappointed with its communication efforts** pointing out the lack of information as a major barrier of attendance. Another barrier mentioned is associated with **FCG's atmosphere** that is seen, by the Bronze public, as intimidating and elitist mostly.

Gold and the Silver publics also refer the **difficulty to buy tickets** – some mentioned they only find out about concerts when these have already occurred and others point out issues on the purchasing process.

Even though they are more satisfied than the other publics, the Gold public's individuals also said there should be a more national setting surrounding FCG by inviting national artists and targeting publics not only from Lisbon – although this is not a barrier, it is something that they would appreciate.

“O preço é importante porque estou a começar a gerir o meu dinheiro e se quero ter os meus objetivos tenho que gerir muito bem essa parte.” (M, 26, Silver)

“Eu sei que é bom e bonito porque um dia um amigo disse para irmos lá e fomos mas caso contrário a informação não tinha chegado até mim.” (M, 26, Silver)

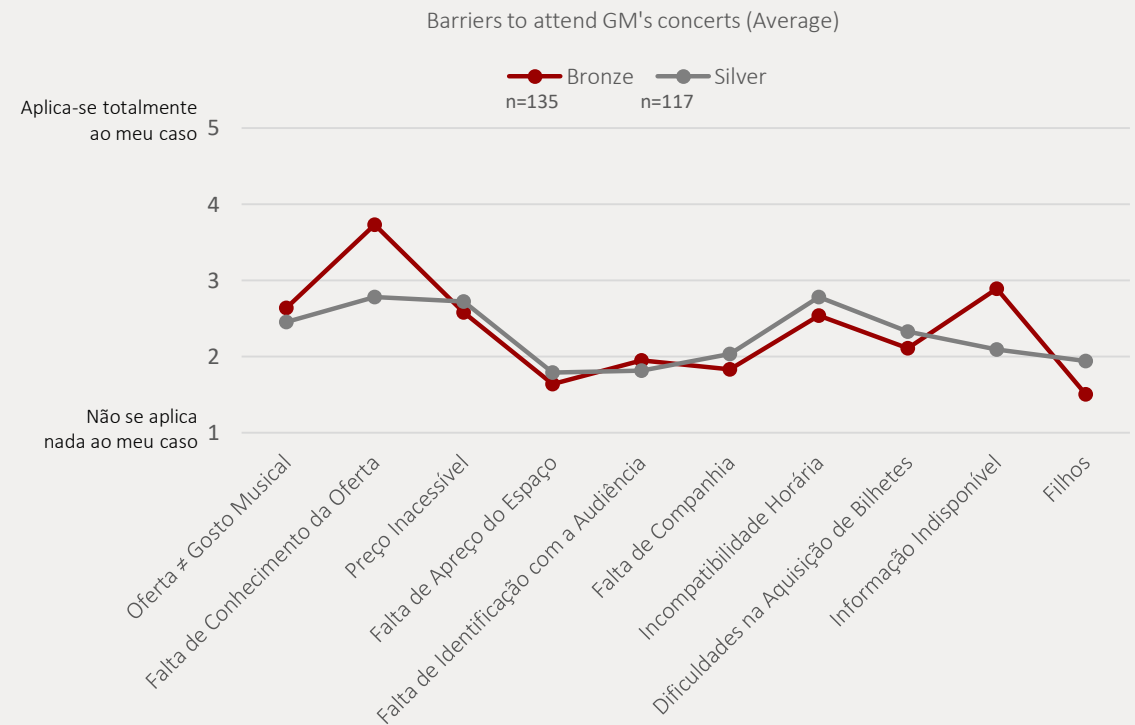


Fig. 32: Barriers identified by both segments Silver and Bronze

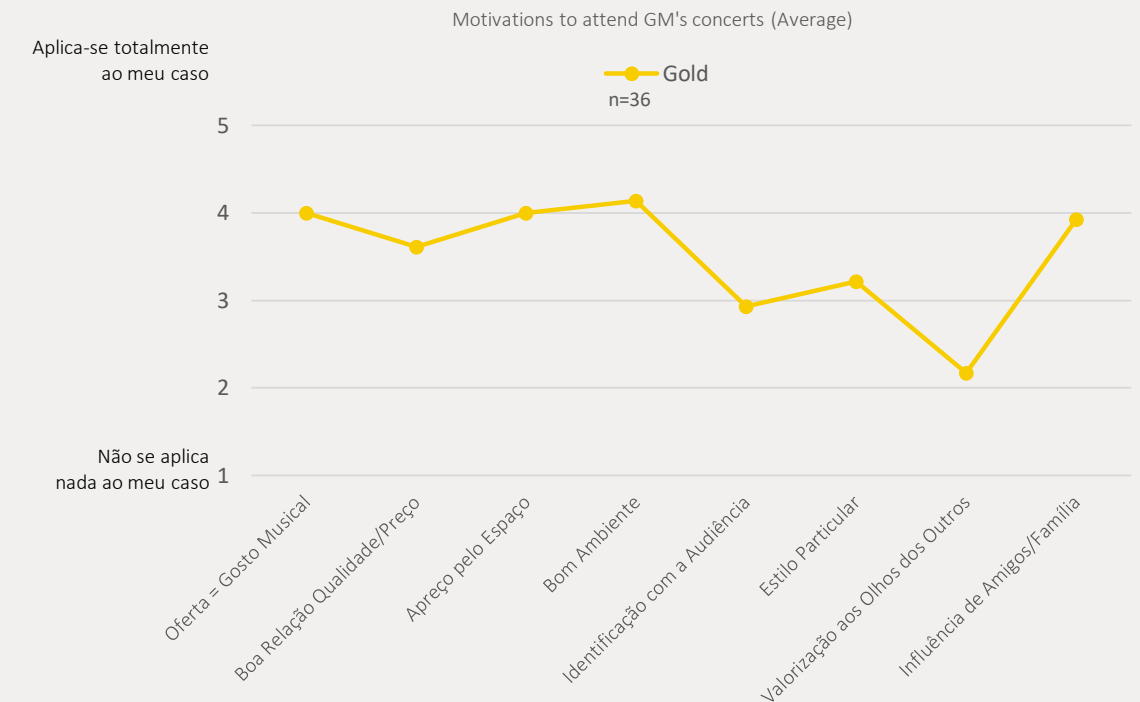


RELATIONSHIP WITH GULBENKIAN MÚSICA (4/8)

MOTIVATIONS TO ATTEND CONCERTS

As for the Gold public's individuals, it can be seen in fig. 33 that the biggest motivations for attending a concert at FCG are its **good atmosphere**, the fact that the **offer is aligned with their personal taste**, their appreciation regarding the **space/room** and the **influence of their own friends/families**. When looking at the motivations with the lowest score, the data suggests that, on the contrary to the Platinum public, the **Gold** public does not give importance to the fact that going to GM improves their personal image (low score for "Considero que ir a um concerto de música na Gulbenkian me valoriza aos olhos dos outros"). Furthermore, this public does not

seem to identify with the rest of the public of GM, giving no importance to the sentence "Identifico-me com a audiência da Gulbenkian". This suggests that this public is **different from the core & loyal public of GM**. As for the qualitative research performed, there was the additional insight that the Gold public recognizes the value and quality of GM, but is also **aware of the existence of certain issues**, namely regarding the ticket acquisition and overall communication of GM.



"Eu acho que a Gulbenkian tem bastante potencial, com os programas musicais que apresenta mas a divulgação não é a melhor." (F, 31, Gold)

"Eu gosto bastante da Gulbenkian e do tipo de música que eles passam.." (F, 31, Gold)

"A Gulbenkian tem uma imagem de grande tradição e formalismo e de alguma dificuldade para comprar os bilhetes." (F, 56, Gold)

"Desde a forma como somos recebidos como o sítio em si que tem muita categoria. A orquestra em si, os artistas que lá vão. Enfim, tudo muito cuidado, acho que não são espetáculos caros." (F, 56, Gold)

Fig. 33: Motivations identified by the Gold public



RELATIONSHIP WITH GULBENKIAN MÚSICA (5/8)

LACK OF INFORMATION

Lack of information is the most mentioned barrier, so it is important to deeply analyse the communication of GM and the publics' perception about it. Searching actively for a concert does not always mean feeling informed about it. Since the great majority of the **Gold public searches actively for information** (92%) on "Concertos em Instituições Culturais", a very high percentage of them feel informed about the GM's concerts as fig. 34 shows. Also, since this group is already interested in the topic, FCG's publicity "gets" to them more easily, the majority admits they see FCG ads frequently (fig. 35). As for the **Bronze public**, since they **do not**

"investigate" about this information they do not feel informed on the concerts nor spontaneously see publicity on the topic. All groups are **interested in information** regarding music concerts at FCG, but obviously as the attendance is more frequent, the desire to receive information is also higher – **the more people are involved the more they want to stay involved** (fig. 36). Hence, information is only available for those who search for the topic when it should reach everyone. Since all the publics have a high interest in receiving information about GM, this shows that less frequent publics might attend (more) concerts if they knew about them. In fact, when confronted about this subject, interviewees felt sad about not having enough information.

"Estou a par dos concertos que ocorrem na Fundação Calouste Gulbenkian" (%)

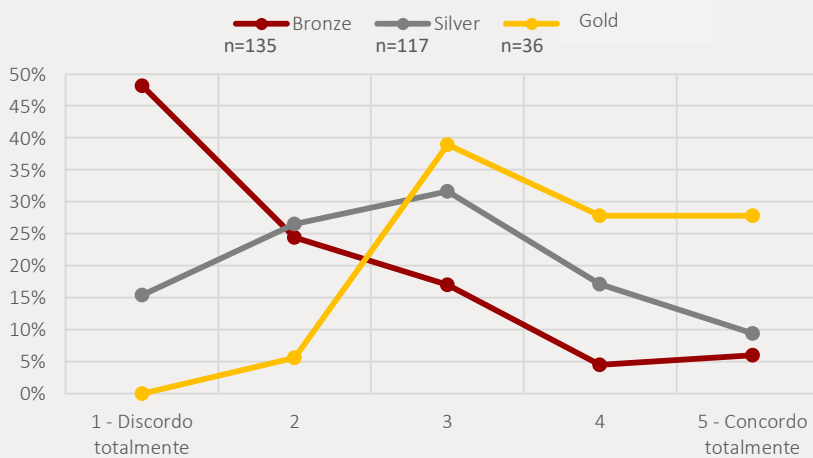


Fig. 34: Publics' knowledge about GM's concerts

"Costumo ver publicidade (ex.: redes sociais, cartazes, revistas, etc.) de eventos musicais na Gulbenkian" (%)

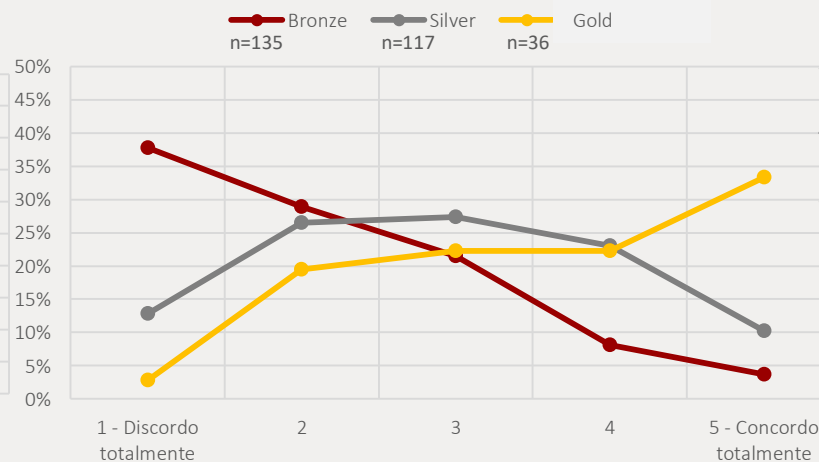


Fig. 35: GM ads awareness

"Gostaria/Gosto de receber informação sobre os principais espetáculos de música na Gulbenkian" (%)

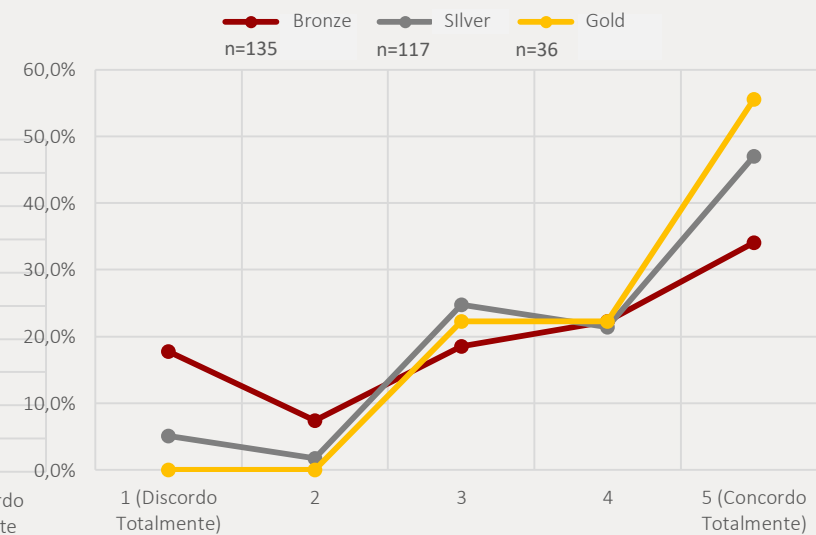


Fig. 36: Publics' desire to receive more information



RELATIONSHIP WITH GULBENKIAN MÚSICA (6/8)

WENDY GORDON CONSCIOUSNESS MODEL

One of the main findings so far is that GM’s publics have different perceptions, attitudes and therefore also different behaviours. As both the Silver and the Bronze publics are the ones who do not (regularly) attend concerts at FCG, there is a need to uncover the reasons behind this (non-regular) presence. Thus, the Wendy Gordon Consciousness Model (Gordon, W.; 1999) was applied in order to **understand the gap between what publics with potential for growth say, think and actually do** considering their different consciousness levels (Appendix 31).

Firstly, at the most impulsive level, the **Attitudes (1)** examine the initial and immediate opinions about GM. Both the Bronze and Silver publics demonstrate a general admiration for FCG’s spaces and environment and especially for GM’s events. The majority of the respondents from the Bronze and Silver publics consider FCG as being close to their own personal interests (fig. 38) what also englobes GM.

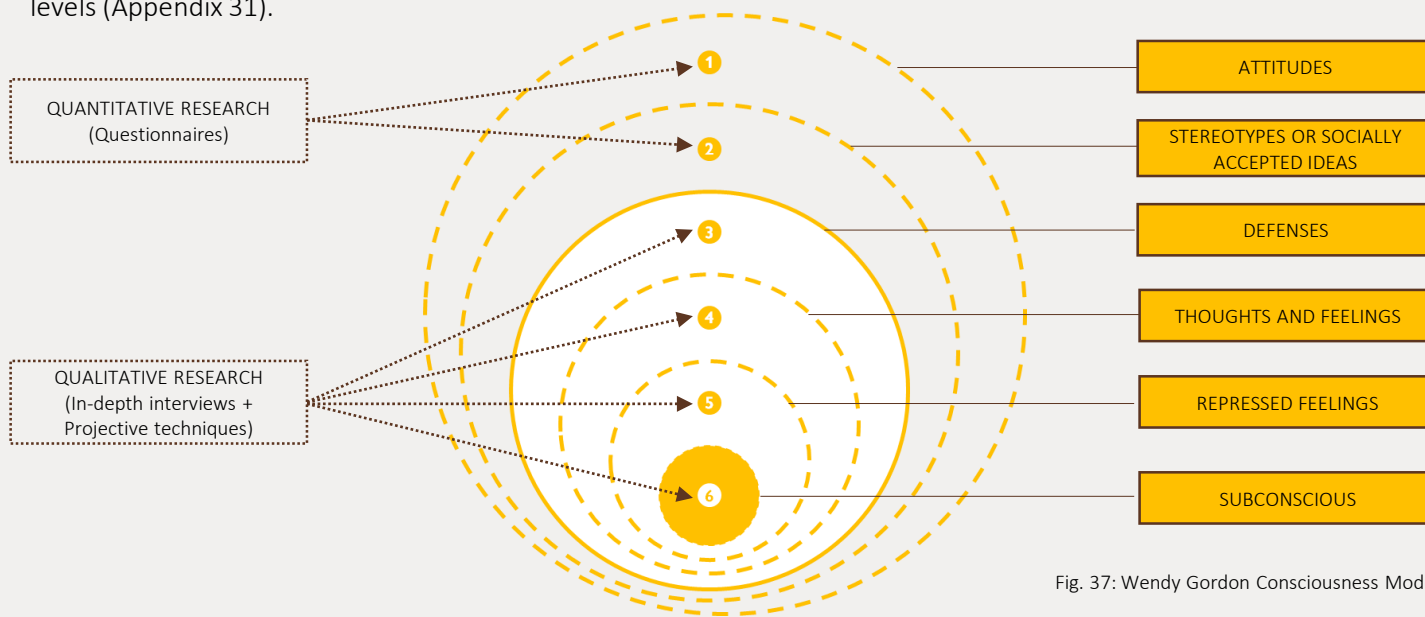


Fig. 37: Wendy Gordon Consciousness Model

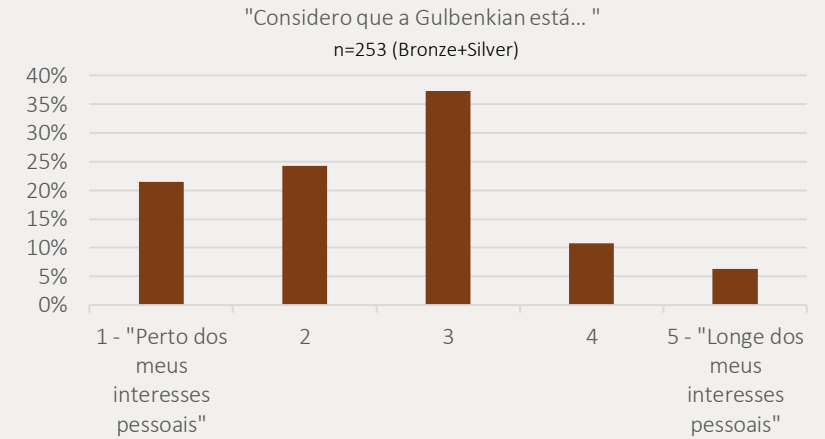


Fig. 38: Perceptions about FCG – Attitudes

“O ambiente é fabuloso, tem uma acústica fantástica e gosto do programa. E claro, as músicas têm qualidade.”
(F, 53, Bronze)

“A sala é linda, lindíssima. Aquilo tem tudo um ar antiquado, não é como o Meo Arena, mas eu gosto mais porque é mais pequenino, tem uma sala espetacular com o vidro atrás para o jardim. Eu vi lá concertos espetaculares.”
(F, 30, Bronze)



RELATIONSHIP WITH GULBENKIAN MÚSICA (7/8)

WENDY GORDON CONSCIOUSNESS MODEL

Secondly, the **Stereotypes (2)** refer to ideas that are socially accepted. About FCG, the majority of the Silver and Bronze respondents considers it as being “Útil para o país” (fig. 39) and being an important institution that promotes culture within the country.

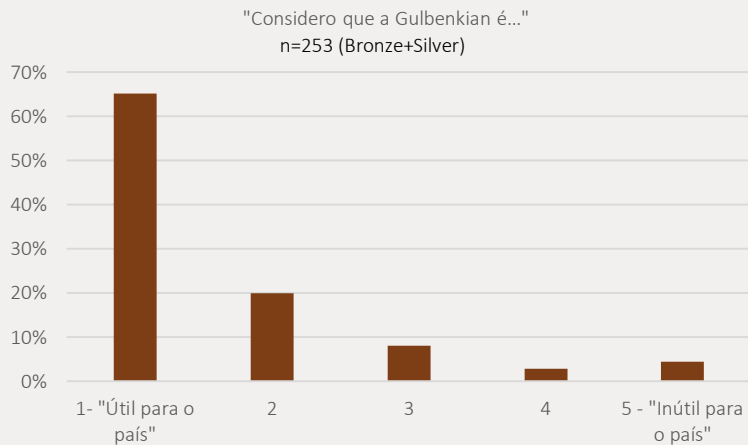


Fig. 39: Perceptions about FCG - Stereotypes

"A Gulbenkian é obviamente uma instituição que apoia e dinamiza a parte cultural (...)" (F, 27, Bronze)

"Claro que ouço muito falar da Gulbenkian e acho que tem uma visibilidade enorme e um papel muitíssimo importante em todas as áreas porque contribui imenso para o nível cultural do nosso país." (F, 53, Bronze)

Although these two first levels should have been analysed through data from the quantitative research, there was a need to complement it with qualitative insights. As mentioned by Cicourel "questionnaire items which seek to measure values, attitudes, norms, and the like tend to ignore the emergent, innovative and problematic character of everyday life by imposing a deterministic 'grid' on it with its fixed choice structure" (Cicourel, Aaron V., 1964). In this way, the analysis is complemented with quotes from the Silver and Bronze individuals' in-depth interviews.

The third level of this model concerns the **Defenses (3)**. By confronting individuals' previously described attitudes and socially accepted ideas with the reality, they demonstrate a need to justify and present "excuses" not to attend GM's events. Through the analysis of the in-depth interviews and projective techniques applied to these publics, it was possible to assemble five main justifications:

1) Lack of time availability;

"Durante a semana não tenho tempo para nada. E mesmo às vezes, trabalho ao fim de semana." (F, 29, Bronze)

"Depois de ser mãe deixei de ter vida" (F, 30, B, Bronze)

2) Not affordable price;

"O preço é a única razão. Porque senão, eu até ia mais vezes a esse tipo de espetáculos [Concertos de música clássica]" (F, 51, Bronze)

3) Lack of companionship;

"Se fosse convidado ou tivesse mais noção da oferta, se calhar gostaria de ir, mas acabo por não ter muita ideia do que se passa." (M, 36, Bronze)

4) Difficulties on information access;

"Agora não vou lá tanto porque sou um bocado preguiçosa, ou alguém me puxa para ir ou então por iniciativa própria não vou ver os programas, não vou procurar." (F, 30, Bronze)

5) Problems in the tickets acquisition.

"Tentei ir à musica mas nunca consegui bilhetes para os espetáculos que queria: ou estavam esgotados ou só soube que existiam depois." (M, 36, Bronze)

However, it is curious to confront this qualitative insights with the results from the questionnaires applied.



RELATIONSHIP WITH GULBENKIAN MÚSICA (8/8)

WENDY GORDON CONSCIOUSNESS MODEL

As it is possible to see in fig. 32, the respondents do not recognize the lack of companionship as being a barrier not to attend (frequently) concerts at FCG. Also, only a few assume not to have time availability and even less mention to have problems acquiring tickets for concerts at FCG.

The qualitative research helps to comprehend that the Bronze and Silver publics have low knowledge about the offer and dynamics of GM and that the aforementioned barriers may be “excuses”.

Going deeper, we reach the forth level which are the **Feelings and Thoughts (4)**. Exploring the feelings and perceptions about GM’s atmosphere, this is perceived as being disconnected from the world and reserved to a specific group of the society - belonging to an elite with a high intellectual and financial level.

“Muitas vezes uma pessoa ouve falar na Gulbenkian e pensa que aquilo não é para qualquer um e que nem todos podem lá entrar. Se calhar até nem é, mas a imagem que passa para o exterior, pelo menos para mim, é que é muito fechado...” (M, 26, Bronze)

“Associo a Gulbenkian a uma pessoa muito atenta culturalmente e com um gosto mais peculiar.” (F, 25, Bronze)

“Diria que seria alguém com 60 anos para cima, grau de escolaridade elevado, associado a uma elite cultural e financeira.” (M, 37, Bronze)

Moreover, in order to access the feelings and thoughts of this group, it was implemented a projective technique (Appendixes 32 & 23).

This technique applied for the four GM’s publics (Platinum, Gold, Silver and Bronze) and as the results were coincident, the following analysis counts with insights from all of them. The most common words being referred to project a person who would attend a concert at FCG were: “culto”, “senior”, “velho”, “intellectual”, “clássico”, “arranjado”, “elite” and “abastado”. GM is therefore seen as elitist, closed, exclusive to high social class publics and conservative since it is “not for everyone” and only targets individuals highly connected to culture/music and have a high status in the society. Other institutions are, in opposition, seen as more open and accessible due to having a more diversified public.

Moreover, the interviewees associate GM with two main types of audience: 1) An aged audience who is loyal and has already an established relationship with the people and

events there; 2) Music students who attend concerts at FCG driven by curiosity and passion for classical music.

“Temos aqui 2 personagens completamente diferentes: Por um lado, alguém com 60 anos, com assinatura e que gosta do espaço ou sente alguma ligação poética com a música. Associa a ideia de ir ver música clássica a algo ligado a uma elite. Por outro, um rapaz de 26 anos, jovem estudante ou interessado em música”(M, 30, Silver)

Lastly but not least, the fifth consciousness level refers to the **Repressed Feelings (5)** towards FCG. After having said that the Foundation is fantastic, very important for the country as it plays an important role for the promotion of culture in Portugal (pre-conceived and immediate ideas), individuals present “excuses” to justify their absence and then feel guilty for not attending (frequently) to concerts at FCG. Moreover, it is expressed an enthusiasm and eagerness to go in the future – also verified on the questionnaire analysis (Appendix 33).

“Se fosse convidado ou tivesse noção da oferta, se calhar gostaria de ir, mas acabo por não ter muita ideia do que se passa. Gostava de ir de vez em quando visto que sou um grande de música no geral e talvez até me apaixonasse pela música clássica.” (M, 36, Bronze)



INFLUENCE OF STAGES OF LIFE



INFLUENCE OF STAGES OF LIFE (1/2)

In addition to the segmentation made, we also considered interesting to do a **complementary analysis in which the age and social class of the publics are considered**. This is because, when looking at the different stages of life of a person, it is understandable that they highly affect that person's behaviour towards an experience such as attending GM's concerts.

During the **school years** (6-18 years old), there is no autonomy and the way an individual is educated is a crucial factor. For someone belonging to classes A and B, this means that they might go to GM with family and to other activities at FCG on school trips. As for individuals from social class C1, there is usually not the habit of going to FCG, neither with school nor with family (Branding lab team, 2015/16).

When a person is **at the beginning of adulthood** (18-24 years old), he/she is more independent and is able to pick their own activities. At this stage, there is usually a high curiosity and spontaneity, due to everything being new. This is when attendance to GM's concerts stops, unless there is a strong connection with music and/or GM – being, in that case, registered only a decrease on attendance. Social classes also play a part in this stage of life analysis. Individuals from social class C1 are less likely to have a strong connection with music

and, thus, are much more likely to pick other entertainment options at this stage of life.

When **the career takes a peak** (25-40 years old), there is a strong focus on its development. Life becomes agitated and unpredictable, with less time and a not high available income to spend on cultural & entertainment activities and hobbies. With **younger children** involved, parents have less available time for themselves and therefore go less frequently to cultural events, having preference for activities to which they can frequent with their children. **At this stage, people prefer activities that require less preparation and are more spontaneous due to their difficulty in anticipating their free time.**

"Durante a semana não tenho tempo para nada e mesmo assim às vezes trabalho aos fins de semana. Mas diria que aos fins de semana tenho muito mais probabilidade de ir fazer alguma coisa, vou por exemplo muito ao cinema. Relativamente a música, vou menos desde que comecei a trabalhar." (F, 29, Bronze)

"Fui ao concerto da Rita Lee com a minha mãe. Foi antes do meu filho nascer, claro. Estava gravidíssima. E desde que tive o meu filho deixei de ter tempo. E não é só isso, é preciso deixá-lo com alguém para querer sair. A pessoa paga um bilhete para um concerto mas depois tem de acrescentar a esse preço o custo da *babysitter* para deixar a criança." (F, 30, Bronze)

When **life is more stable** (41-65 years old), there is more time and money availability. With a more **solid career**, this stage implies a stronger **financial stability**, and thus price is less a barrier for attending entertainment & cultural events. Also, with **grown children**, parents have more autonomy when choosing how to fill their free time and "only" have to take into account their own preferences. Therefore, this group is more able to **plan their activities in advance**, which consequently allows for more anticipation of their free time.

"A partir de uma certa altura, eu deixei de ter crianças. Durante muito tempo abdiquei destas coisas porque para mim era mais complicado... Mas entretanto quando começaram a crescer, tornou-se tudo mais fácil. Nesta fase todos são autónomos." (F, 52, Silver)

"Ao longo do tempo comecei a ir a mais eventos, por ter os filhos maiores e dinheiro também. Nunca fui uma pessoa que gostasse de estar em casa... também fui educada assim." (F, 55, Bronze)

With retirement (>65 years old), individuals from social classes A and B are much more likely to attend GM's events, not only because time and money availability are not an issue "anymore" but because ageing usually brings more appreciation for cultural events and propensity to attend them. This is also verified for some of the C1 individuals.

This dynamic can be seen on the next page.



INFLUENCE OF STAGES OF LIFE (2/2)

Stages of life	6-18 years old School years	19-24 years old Young millennials	25-40 years old "Busy Life"	41-65 years old "Stable Life"	> 65 years old Retired
	<ul style="list-style-type: none"> - Are not independent - Need someone to influence them 	<ul style="list-style-type: none"> - Want to live life to the fullest - Spontaneous - Willing to try new things 	<ul style="list-style-type: none"> - Focus on career - Young children - Prefer activities that require less preparation 	<ul style="list-style-type: none"> - Stable career - Grown children - Might have more availability to think about activities in advance 	<ul style="list-style-type: none"> - Retired of active life - Have time and money availability
Social Classes A + B	Attend GM's events with family and other activities at FCG with school (Branding Lab team, 2015/16)	Stop attending unless there is a strong connection with classical music and/or GM	OPPORTUNITY TO RECAPTURE OR GROW THE PUBLIC		High probability of attending GM's events again
Social Class C1	Lower attendance with school and almost no attendance with family	Choose other entertainment options			Choose other entertainment options

When looking at social classes, it is possible to understand that **not everyone has the same potential** to attend GM's concerts. Social classes A and B, from the great possibility of having had some kind of contact with classical music from an early age, **always constitute a high potential for GM**. For social class C1, it is not the same. In page 38 it was suggested that only 17% of the Gold public belong to social class C1 while, in the Bronze public, there are 41% belonging to C1 or C2. **This implies that from C1, only some individuals have potential to attend GM's events and be recaptured.** This becomes even more noticeable when looking at the numbers from the Platinum public, in which only 1 person in 20 belonged to social class C1.



DIAGNOSTIC CONCLUSIONS



CONSUMER DECISION JOURNEY (1/4)

PLATINUM PUBLIC

The **New Consumer Decision Journey** – CDJ (Appendix 34) was developed by McKinsey & Company and **shows the touching points** (i.e. consider, evaluate, buy, enjoy, advocate and bond) in which companies can concentrate on if they want to influence their consumers in the right time and in the right way.

As already explained, the Platinum public appreciates GM, not only for the musicians it brings but also due to the entire experience and atmosphere. They value the familiarity in the events, where they encounter acquaintances and friends and feel part of a community, usually fostered for many generations. Moreover, this public has a strong connection with music and attends GM’s events since childhood.

These attendees are therefore “active loyalists” and GM is seen as their favoured source of entertainment. However, it **is curious to see that the CDJ model is not working as it should be for this public** (fig. 40). According to the model, the Platinum public, at the “post-purchase” moment, would Enjoy the brand (and its products/services), Advocate (recommend it to others), Bond and return to the Loyalty Loop, buying it again without considering other options.

Though, what is currently happening is that the Platinum public’s individuals buy, enjoy, recommend it only to their family and/or other connoisseurs and repeat the purchase in a subsequent occasion, **not advocating** the brand and experience for new potential publics.

Thus, there are some factors that influence their behaviour in the CDJ and that need to be point out:

1) The familiar atmosphere of GM’s events, which is highly valued by this public, as they are not very prone to invite outsiders to share this experience with them (however, they do wish for their own family to maintain a relationship with GM). This may be explained by the previous mentioned characteristic of recognizing the existence of a “selective” nucleus - elite group - and the positive sensation of being part of it, thus not wanting to “ruin it”.

2) Despite seeing GM as their primary source of entertainment, they recognize some issues in the experience, seen as “details”, that **preventing them from enjoying the experience as much** as they could.



Fig. 40: The New Consumer Decision Journey applied to the Platinum public

“A FCG tem um programa de Música de Câmara e Ciclo de Piano que são notáveis, pois têm, por exemplo, grandes intérpretes de piano atual. Não [se] encontra melhor em Londres ou Nova Iorque ou noutra sítio qualquer.” (F, 64, Platinum)

“Sinto que as pessoas já são regulares e conheço as caras na maioria das vezes. Existe até muita convivência entre as pessoas que se conhecem e vão regularmente.” (F, 57, Platinum)



CONSUMER DECISION JOURNEY (2/4)

GOLD PUBLIC

The Gold public, like the Platinum public, is composed by music connoisseurs who recognize the quality in GM's offer. They see GM as a source of entertainment and, thus, already attend several concerts at the Foundation. However, their attendance is not as frequent and certain as the Platinum public's – they show a more volatile behaviour. This is mainly due to two factors:

1) They are **more critical** regarding GM's service. Whereas for the Platinum public the issues on the service are considered "details", for the Gold public they are considered barriers that limit their attendance and might influence their decision in attending more music events at FCG.

2) They are **less emotionally involved** with GM and the Foundation itself. While most of the Platinum public show a very strong relationship with GM that comes sometimes from many generations before, the Gold public does not seem to show

such a high level of involvement for GM.

This public is, therefore, in the Buy phase of the CDJ and is yet to enter the loyalty loop. While GM offers the highest quality offer in the market, this is not enough for this public to become loyal to the brand considering other substitutes for its free time. As possible substitutes of GM's concerts, Gold public consider concerts at *Teatro Nacional de São Carlos (TNSC)* or *Centro Cultural de Belém (CCB)*, theatre plays or any other cultural event happening in the city.

GM's objective should be to **make them enter the Loyalty Loop** and make them become part of the Platinum public – "ultimate goal" of GM for all its publics. By entering on the loyalty loop the Gold public could take on the advocating role since individuals from this group do not have the sense of belonging to an "selective" nucleus.

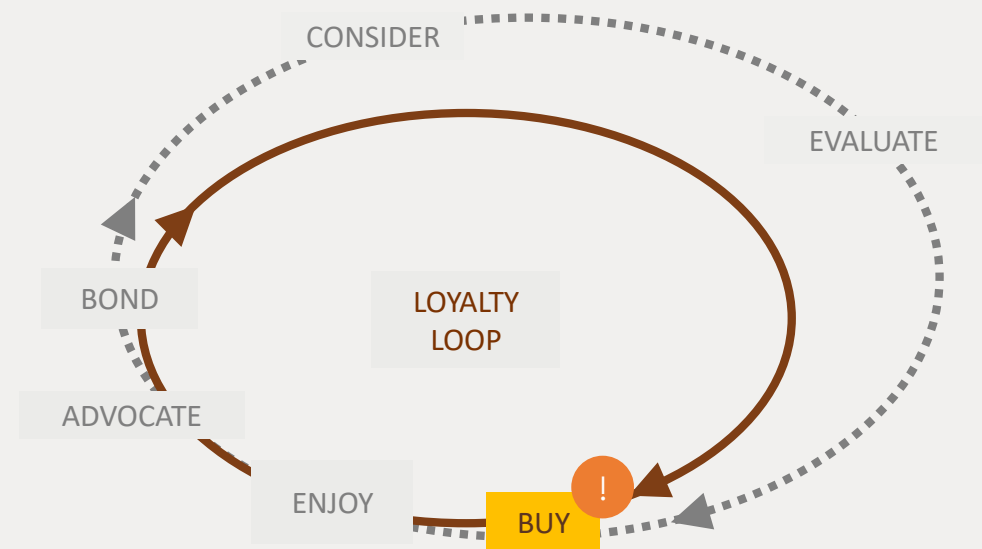


Fig. 41: The New Consumer Decision Journey applied to the Gold public

"Estou a estudar ainda no conservatório, onde canto. Grande parte do meu tempo é então dedicado à música. Ao entrar no coro e depois no conservatório comecei a aprender e a gostar bastante de música clássica, o que eventualmente me trouxe à Gulbenkian." (F, 31, Gold)



CONSUMER DECISION JOURNEY (3/4)

SILVER PUBLIC

The Silver public, despite going to GM's events at least once a year, is not as much a music connoisseur as the other groups. They appreciate classical music and include GM in their consideration set but are more subject to triggers and influences from other options. This means that in the Evaluation phase, they may discard GM if other options seem more desirable.

The main problem they see in GM is the lack of information that gets to them, which often is the main influential factor in deciding how to fill their free time. This public **requires that information reaches them passively** since they do not actively search for it as the previous two publics do. Also, this public is more critical about the offer and tend to pay more attention to the it rather than going for the experience. Their lack of relationship with

GM also means they are **more price sensitive** than the Platinum and Gold publics. Finally, the atmosphere and the audience nucleus may affect them as they may be intimidated by it.

The Silver public has as **possible substitutes any other entertainment options**, i.e. any activity that may fill their share-of-time, such as theatre plays, cinema and more relaxed music events.

If GM offers a flawless experience, makes itself more desirable than other options and presents itself as a good and pleasurable way of spending free time, the Silver public will likely increase their consumption, as they already show an interest in the brand and on its experience. The objective for this public is to **make them go into the Buy stage** of the CDJ, making them converge to Gold.



Fig. 42: The New Consumer Decision Journey applied to the Silver public

“Costumo ir a cerca de três espetáculos por ano. Uma vez à Casa da Música, outra vez a um concerto assim mais rock...” (F, 43, Silver)

“Eu sei que é bom e bonito porque um dia um amigo disse para irmos lá e fomos mas caso contrário a informação não tinha chegado ate mim.” (M, 26, Silver)



CONSUMER DECISION JOURNEY (4/4)

BRONZE PUBLIC

The Bronze public has **not been to GM** at least in the past two years. This public likes music in general (and some individuals might even appreciate classical music although the likelihood is not so high) but, when filling their share-of-time, they are faced with a wide range of entertainment options. This means that they might not even remember GM and, thus, not include it in their consideration set. This factor intensifies due to two factors:

1) This public **does not have a great connection with music** nor any type of previous relationship with GM, which are high influential factors in attending concerts at FCG.

2) The majority of this public **does not actively search for information** regarding GM's type of concerts. This means they are not informed about the offer and most likely will be triggered by brands whose information reaches them easily.

Therefore, the Bronze public is still at the first phase of the CDJ, which is the **Consideration phase**.

In order to reach this public, GM **would most likely have to adjust its current identity**, not only in terms of offer but also in the entire GM experience. The objective for this public would be to make them go to the Evaluation stage, converting them to Silver.

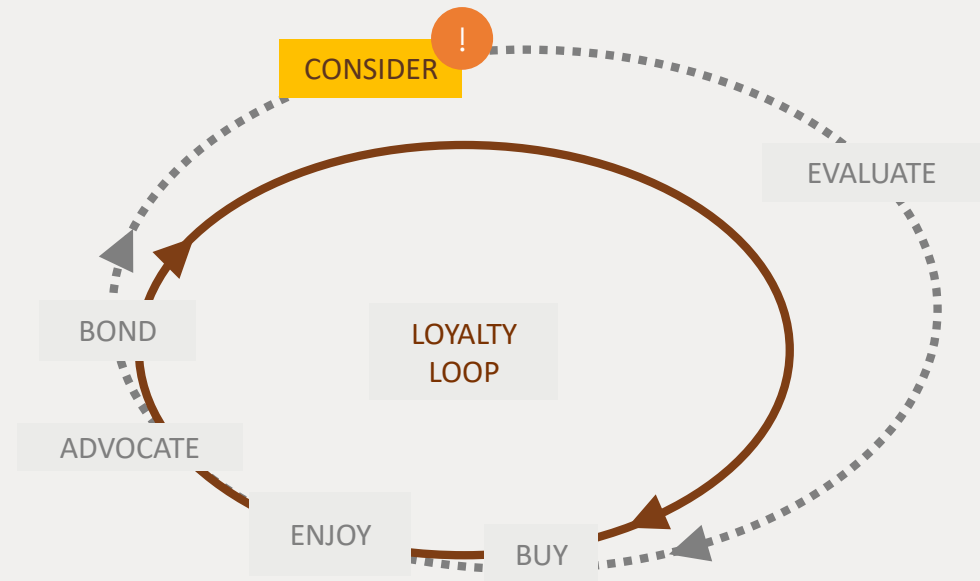


Fig. 43: The New Consumer Decision Journey applied to the Bronze public

“Não vou simplesmente porque não tenho o hábito, acho que é o tipo de eventos a que uma pessoa deve ser habituada desde pequenina. Sem hábito as pessoas nunca vão. De pequenino é que se torce o pepino.” (F, 55, Bronze)

“Se fosse convidado ou tivesse mais noção da oferta se calhar gostaria de ir mas acabo por não ter muita ideia do que se passa” (M, 36, Bronze)



THE EXPERIENCE (1/3)

The overall GM experience when attending a concert at FCG is different depending on the segment, although the steps of the experience are the same.

Going to the concerts **should be an integrated experience** that goes beyond the fact of assisting to outstanding musicians playing classical music instruments. GM should therefore manage its experience in order to be **able to deliver strong positive associations in every touching point** with the audience.

From the moment a person gets to know about a musical event at the Foundation until the moment the consumer leaves the Foundation after a concert, it is important to guarantee a good consumer care. Moreover, it is also crucial for GM to comprehend that its relationship with its attendees should not be over when the public leaves the concert – it is needed to follow up the “sale” with a **good consumer service** in order to build an ongoing relationship and enhance the potential of that specific person.

Taking that into consideration, **GM’s experience** was fully analysed (fig. 44) with the objective of understanding the **link between the current offer and the core & loyal public** and the **gap concerning the publics with potential for growth**. The figure aims to present the experience and its multiple touching points in the form of a cycle from the moment the consumer gets to know about a musical event at FCG (“Concert Awareness”) until the moment in which the Foundation keeps in touch with the consumer, stimulating the “Relationship”.



Fig. 44: The GM experience



THE EXPERIENCE (2/3)

ISSUES IDENTIFIED



Concert Awareness

GM usually communicates its concerts through both traditional and digital media. In what regards the advertisement this is managed with a big advance of the concerts dates, which results on the promotion of already sold out concerts. Thus, interested publics see the outdoors and printed press advertisements but cannot purchase tickets anymore. Moreover, the ads themselves are not always easy to read, as the concert date is written in small font and the way spectators can buy tickets is not clearly explained. The communication is also standardized not taking into account different targets/concerts.

"E depois quando vês publicidade a eventos a que gostavas de ir, estes parecem um bocado inacessíveis. É do género: «Já aconteceu.» Já aconteceu, como assim? Só me estão a dizer isso agora? Sinto que nem me deram a oportunidade de ir..." (M,26, Bronze)

"Eu adoro o Dudamel e quando ouvi falar do concerto dele na Gulbenkian os bilhetes já tinham sido postos à venda, tinham até esgotado (...) apesar de me terem dito depois que havia montes de lugares vazios." (F,31, Gold)



Ticket Acquisition

The purchasing process of tickets for GM's events is not seen as efficient. Those who try to buy loose tickets and/or

subscriptions at the beginning of the season **do not receive any confirmation** of the reservation, which can create some uncertainty. Spectators might think they are reserving their seat automatically when buying tickets but those can be denied by the Foundation, if tickets get sold out until that moment. Moreover, purchasing dates for loose tickets/subscriptions are confusing. The complex schedules, in which spectators have to think ahead the payment methods they want to use and remember the time in which they have to acquire the tickets is not helping them proceed with the purchase. All of this means that attending GM's concerts is something that needs to be planned in advance.

Moreover, the payment methods are not considered safe, as each spectator has to share their credit card data when buying a subscription through correspondence or email. Privacy issues generate some anxiety by often preventing people from buying or forcing them to physically go to the Foundation's box office.

"Mas depois não me informaram se tinha ou não conseguidos os bilhetes para os ir levantar, ou seja não tinha confirmação, tinha que ir lá verificar." (F, 57, Platinum)

"É ridículo que hoje em dia eu tenha que mandar um mail com os meus dados do cartão de crédito lá tudo escrito e escarrapachado, quando o email é uma ferramenta pouco segura. Portanto, hoje em dia não se percebe como é que a Gulbenkian não aderiu a um método de pagamento tipo Paypal" (M, 55, Platinum)



Arrival at FCG & After the Concert

Most of GM's spectators go by car to the events, being the parking lot one of the main complementary services offered to the audience. However, the parking lot at FCG seems to have some issues associated. The payment of the park is made only through a machine which is not always working and there are always queues for exiting FCG. Moreover, the parking lot has no car slots for every concert's attendee and the options available nearby the Foundation, such as *Parque Avenida de Berna* are expensive for the amount of hours the car has to be parked. Also, to get a good parking slot a person has to arrive very early to the concerts.

"O parque da Gulbenkian está sempre cheio de carros. Chegar pelas 18:15/18:30h para um concerto às 19h é muito difícil para se conseguir um lugar." (F, 64, Platinum)

"O pagamento automático do parque está a funcionar mas muitas vezes não dá. Até para entrar é difícil, acho que serve de armazém..." (F, 64, Platinum)



THE EXPERIENCE (3/3)

ISSUES IDENTIFIED

Still concerning the arrival at FCG, there are no clear directions to guide spectators to the different areas of FCG, including GM's facilities. The standard map in the garden, does not stand out, is incomplete and hard to read. This may be preventing publics from attending (more often) concerts and also other areas of the Foundation.



Before the Concert & During the Break

The long queues and the inefficiency at the main services offered during GM's concerts, namely the WC, the cafeteria and the cloakroom are mentioned as issues. These prevent the audience of fully enjoying the experience, by not feeling the support of the Foundation at crucial moments. What should be services that facilitate and help the audience on feeling comfort and satisfaction, are at the moment services harming the experience at FCG.

"A cafeteria é péssima, nunca vou ao balcão comer ou beber porque a Gulbenkian ainda não conseguiu resolver o problema das filas e o serviço é péssimo. O bengaleiro não uso, está sempre uma fila de gente enorme e não tenho paciência." (F, 64, Platinum)



The Concert

Although the offer at GM itself is not seen as a barrier for the publics to attend concerts at FCG, the dynamics of the concerts may represent obstacles for publics who do not consider themselves experts in classical music since: 1) There is no interaction between the public and the artists in the majority of the concerts, nor any explication about the music, the artist and the concerts' dynamics. This prevents publics who are not accustomed to classical music to understand the different parts of the concert as also the history behind each part; 2) The brochure for each concert is paid (2€) and limited and may be essential for spectators to understand the concept behind the concert; 3) The rigorous etiquette, not knowing when to applaud or when the break will occur can make some publics feel as "outsiders".

Also, some publics feel in fact rejected at FCG: While non-frequent attendees are not familiar with the atmosphere and audience, regular spectators appear as experts in the matter. Despite being the nucleus of attendees the source of that intimidation, FCG is the one blamed for those feelings.

"Nunca fui a um concerto de música clássica na Gulbenkian nem noutro lado, porque nunca fui educado a ir. Ouço bastante este tipo de música em casa, mas ir a um concerto é diferente, não é como ir ao teatro ou ao cinema. Há uma etiqueta e um protocolo que se têm de cumprir e as pessoas precisam de ser educadas no contexto da música clássica para compreender. E ninguém quer ir a um concerto quando não sabe como se comportar. É desconfortável e intimidante. E esse tipo de instituições também não querem essas pessoas lá." (M, 53, Bronze)



Relationship

GM has a standardized marketing strategy and communication approach, meaning it treats and communicates the same way with its different publics, not taking into account the preferences of each individual. On one hand this leads to the fact that the individuals who go regularly and are somewhat satisfied with their relationship with GM will continue to go frequently as they are used to the way the Foundation communicates with them - although they recognize it could be improved. On the other hand, the individuals who do not go frequently will remain unfulfilled and will not go more frequently as GM does not make the effort to address their individual needs. The feeling that GM is "only for a few" increases, and so does the "invisible barrier" between frequent and non-frequent publics.



3. RECOMMENDATIONS



3. RECOMMENDATIONS

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A close-up photograph of a brass instrument's valve mechanism, showing the intricate metal parts and the valve stem. The lighting is dramatic, highlighting the metallic surfaces against a dark background.

INDIVIDUAL TOPICS



INDIVIDUAL TOPICS

After the completion of the first phase of the project, namely the diagnostic, a second phase was developed as a set of recommendations responding to the main issue of the global project: **“How to attract new potential publics to *Gulbenkian Música* without losing the current ones?”**. This recommendation’s phase was conducted between November 12th and December 7th and includes the five main topics, each one addressed by each of us.

Each topic has been grounded on a particular issue identified in the diagnostic phase of the project. The **topics** overlap in several aspects and have to be analysed **as integrated parts of the global report** to jointly present a strong recommended strategy to GM. The **previous reading of the global report is recommended**, as the main insights of the diagnostic phase will help on understanding where each individual challenge came from.



Fig. 45: Topics developed individually

A close-up, low-angle photograph of a brass instrument's valve mechanism. The image shows the intricate, polished brass parts, including the valve stem and the surrounding housing, set against a dark, almost black background. The lighting highlights the metallic sheen and the complex geometry of the instrument's internal components.

STRATEGY OVERVIEW



TARGETING

Marketing recommendations were developed taking into consideration GM's problems and opportunities and dividing the initiatives according to their priority and timeframe. Consequently, there are initiatives for the **short, medium and long run**. However, it is not effective to address all the publics with this marketing plan and, for that reason, prioritizing and targeting is essential. Targeting consists on the decision of which segments to address considering the ones that represent greater opportunities for business.

PLATINUM	GOLD	SILVER	BRONZE
<p>This public has a very strong relationship with GM and FCG and a strong connection with music, which turns individuals into loyal attendees. Their loyalty and satisfaction can be used to increase consumption by making them attend more and different concerts/cycles.</p>	<p>This public has already some relationship with GM and attends its events regularly, also due to their great connection with music. Increasing their consumption and loyalty could lead to them attracting other publics and becoming brand advocates.</p>	<p>This public shows some interest on GM and, thus, have likelihood to attend even more concerts. To increase their attendance it is important to address experience issues and make GM options stand out amongst the wide range of entertainment options.</p>	<p>For this public, the growth opportunities identified are not considered enough to target them. Despite liking music, this public have a weak connection with it and, thus, has not attended any GM's event in the last two years (and the majority have never attended at all). Even though they have some potential because show openness to the idea of attending the concerts, attracting this public would represent high conversion costs requiring big investments and identity/offer adjustments .</p>



OBJECTIVES (1/2)

Giving the high importance of delivering a service without flaws, **the strategy for the short run addresses these issues targeting all the publics** and not having special objectives per public. This is because solving the issues is important to simultaneously break the barriers for the publics with potential for growth (Silver and Gold) and to increase satisfaction of the core & loyal public (Platinum). Furthermore, the strategies for the medium and long run address the existing opportunities by improving GM's communication and relationship. This means that, in the medium and long run, the specific publics will be targeted separately since their characteristics are very diversified. For each of the publics, the objectives are:

1) Platinum public: On the medium run the objective for this group is to **improve their relationship and satisfaction** with the Foundation and **increase their consumption** of GM's events, while on the long run it will be to deliver to them an **overall experience of excellence** – ultimately to be delivered to all the publics. Thus, for this public the marketing objective would be to foster their **Brand Loyalty**, focusing on the **Enjoy and Bond phases of the CDJ**.

2) Gold public: On the medium and long run, the goal should be to increase their loyalty to GM, making them converge to Platinum and **reallocating them to the Loyalty Loop** of the CDJ (as they are currently in the **Buy phase**). Hence, the marketing objective would be to encourage **Brand Purchase** and stimulate **Brand Loyalty**.

Moreover, enhancing this public's relationship with GM will make them advocate the brand and experience for new publics. With this, the loyal public of GM will be replaced by Gold individuals breaking the "barrier" between them and other publics.

3) Silver public: On the medium and long run, the objective should be to stimulate interest and preference towards GM, which will lead to an increase in their consumption (making them converge to Gold). Since this segment's individuals are already on the **Evaluation** phase of the CDJ the set of initiatives proposed for them should increase their **Brand Interest** in order to actually make them buy and acquire a GM's "products".

With these objectives in mind, a set of initiatives was defined to address each public. However, addressing one specific public as focus of the initiative does not mean that only this public will be affected having therefore effect on some of the other publics as well.



OBJECTIVES (2/2)

In addition, it is important to consider the “stages of life” as behaviour influencers when thinking about the targeting and objectives. Two dimensions need to be considered before exploring this subject:

SOCIAL MISSION
“Uma Fundação para todos”

V.S.

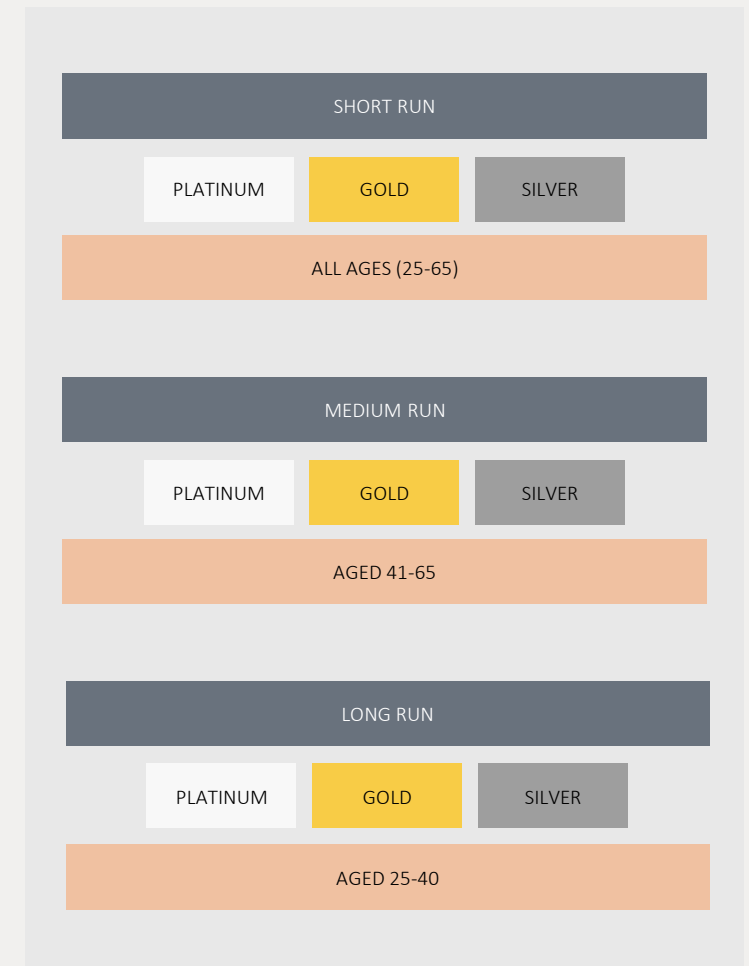
ECONOMIC GOAL
Generate Revenues

On one hand, FCG’s mission encompasses the openness of the Foundation to everyone from all ages. This applies to GM as well and, in the long run, attracting a variety of generations should be the focus of both GM and FCG as a whole. On the other hand, in the short and medium term, GM needs to **capitalize more on its concerts and generate revenues**. This means that the **public conversion should be realistic and prioritized**. Thus, targeting everyone at the same time is not the move to take. Publics aged 41-65¹ provide a faster Return On Investment (ROI), since (a) they are closer in age to the loyal public and (b) from the

¹ Age is used as a proxy for stages of life.

diagnostic phase, it was seen that frequency to GM is more likely to increase with age. Also, they are the ones for who the preparation GM requires, is not an issue. Thus, the **medium run initiatives** that will be presented will **affect all ages** although the **main target will be publics aged 41-65**. As for the **long run**, the **younger age range (25-40) will be especially targeted**. Attracting this group (aged 25-40) also intends to use them as influencers for the younger generations, making them appreciate and attend classical music activities. Remember that the diagnostic phase suggested that those with more connection with music since childhood are more willing to attend concerts when reaching older ages and that people from all the publics find it important to educate children on music.

This additional segmentation by age will be crossed with the objectives presented on the previous page – meaning that not only frequency is taken into account but also the age range of the publics. However, this will only be done for the Gold and Silver publics since the Platinum public has similar attitudes no matter the age and stage of life in which it is placed (they already have a strong connection with GM and thus react to GM’s communication and relationship in a similar way).





PROJECTED POSITIONING(S) (1/3)

In order to build recommendations, decision makers within the organization should comprehend the Brand Positioning(s) and use it as guideline for making decisions. Positioning “is the act of designing a company’s offering and image to occupy a distinctive place in the minds of the target market” (Keller, K.L. & Kotler, P.; 2012) – Appendix 35. This is a concept developed by the Brand manager, acting like a desirable way to position the brand - how the manager wants the brand to pursue in order to be distinct from its competitors and appealing to its consumers.

Hence, concerning what the brand is and what the brand could be for each one of GM’s publics, distinctive Brand Positioning(s) need to be developed.

For the Platinum public (aged 25-65) there is not the need to build a new recommended positioning since this public’s growth is not a matter of repositioning the brand or dealing with competition. This loyal public has already a strong connection with GM and do not consider other classical music offering as a GM competitor. Thus, for this group, GM’s only competitor is GM itself in the way that by solving the issues identified and delivering a better service and

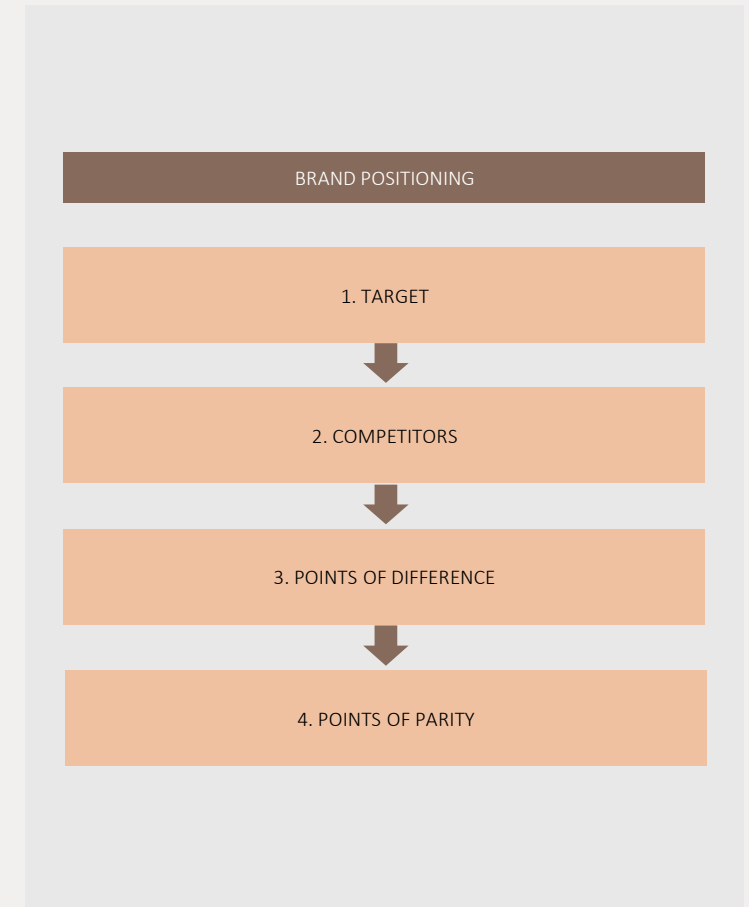
consumer care would help to address this public.

On the other hand, for the targeted publics with potential for growth – Gold and Silver – a GM’s positioning is required.

The Keller’s approach for Brand Positioning was, therefore, considered. This model follows four main steps:

- 1) Identify who the **target consumers** should be;
- 2) Identify who the **main competitors** should be;
- 3) Discover and clarify how the brand should be **different from its competitors** through positive associations that must be **relevant, distinctive and believable**;
- 4) Discover and clarify how the brand should be **similar to its competitors**.

Note: On the following projected positioning(s) (for the Gold and Silver publics) the **bold** words in the “Competitors” column represent the level in which the Points of Difference and Points of Parity are based on. As for the **bold** words in the “Points of Difference” column, it represents the Points of Difference in which the recommendations will focus on.





PROJECTED POSITIONING(S) (2/3)

GOLD PUBLIC | 25-65 years old

TARGET	COMPETITORS	POINTS OF DIFFERENCE	POINTS OF PARITY
<p>A public that already attends GM’s events regularly (between 3 and 5 times a year): adults from 25-65 years old, mainly from social class A, that have a great connection with music but are critical about GM’s service/experience and are somewhat emotionally involved with the Foundation.</p>	<ul style="list-style-type: none"> Product type level: Classical music concerts at cultural institutions (London Opera House, NY Carnegie Hall, CCB, Culturgest, Casa da Música, etc.) Product category level: Classical music concerts (CCB, Culturgest, Casa da Música, Coliseu dos Recreios, Teatro Thalia, etc.) Product class level: Cultural events (CCB, Culturgest, Serralves, Museu do Oriente, Igreja de São Roque, etc.) Benefit level: Culture and pleasure (Read a history book; Visit a museum; Having dinner out at an expensive restaurante, etc.) 	<ul style="list-style-type: none"> Friendly atmosphere Engaging experience Quality of classical music offer <p>Room acoustic & infrastructure quality</p> <p>Reasons to Believe:</p> <ul style="list-style-type: none"> Unique professional resident choir and orchestra Renowned artistis (solists, conductors and international orchestras) Carefully selected seasonal agenda 	<p>Category:</p> <ul style="list-style-type: none"> Variety of genres and artists Live music experience <p>Competitive:</p> <ul style="list-style-type: none"> Price Digital communication

POSITIONING STATEMENT

“For a public that already attends GM’s events regularly and have a great connection with music, *Gulbenkian Música* is a live music experience with a wide variety of genres/artists that offers a friendly atmosphere and an engaging experience besides the high quality classical music, due to its carefully selected seasonal agenda with the unique professional resident choir and orchestra and renowned artists.”



PROJECTED POSITIONING(S) (3/3)

SILVER PUBLIC | 25-65 years old

TARGET	COMPETITORS	POINTS OF DIFFERENCE	POINTS OF PARITY
<p>A public that attends GM’s concerts non-regularly (less than three times a year): adults from 25-65 years old, mainly from social classes A and B, that like music but that have a weak connection with music and low involvement with GM.</p>	<ul style="list-style-type: none"> Product type: Classical music concerts (CCB, Culturgest, Casa da Música, Coliseu dos Recreios, Teatro Thalia, etc.) Product category level: Music concerts (CCB, Casa da Música, Festival Músicas do Mundo, Meo Arena, Nos Alive, Casino de Lisboa, etc.) Product class level: Music (Spotify, YouTube, Radio, Television, etc.) Benefit level: Enrichment of knowledge and culture (Visit museums and exhibitions, Travel, Going to the cinema, Reading, etc.) 	<ul style="list-style-type: none"> A diverse and “open” cultural experience that is both interesting and understandable Diversity of classical music offer <p>Reasons to Believe:</p> <ul style="list-style-type: none"> Carefully selected seasonal agenda Strong support (before, during and after the concert) that allows a fully integration and comprehension 	<p>Category:</p> <ul style="list-style-type: none"> Live music experience Quality and recognition of performing artists <p>Competitive:</p> <ul style="list-style-type: none"> Digital communication

POSITIONING STATEMENT

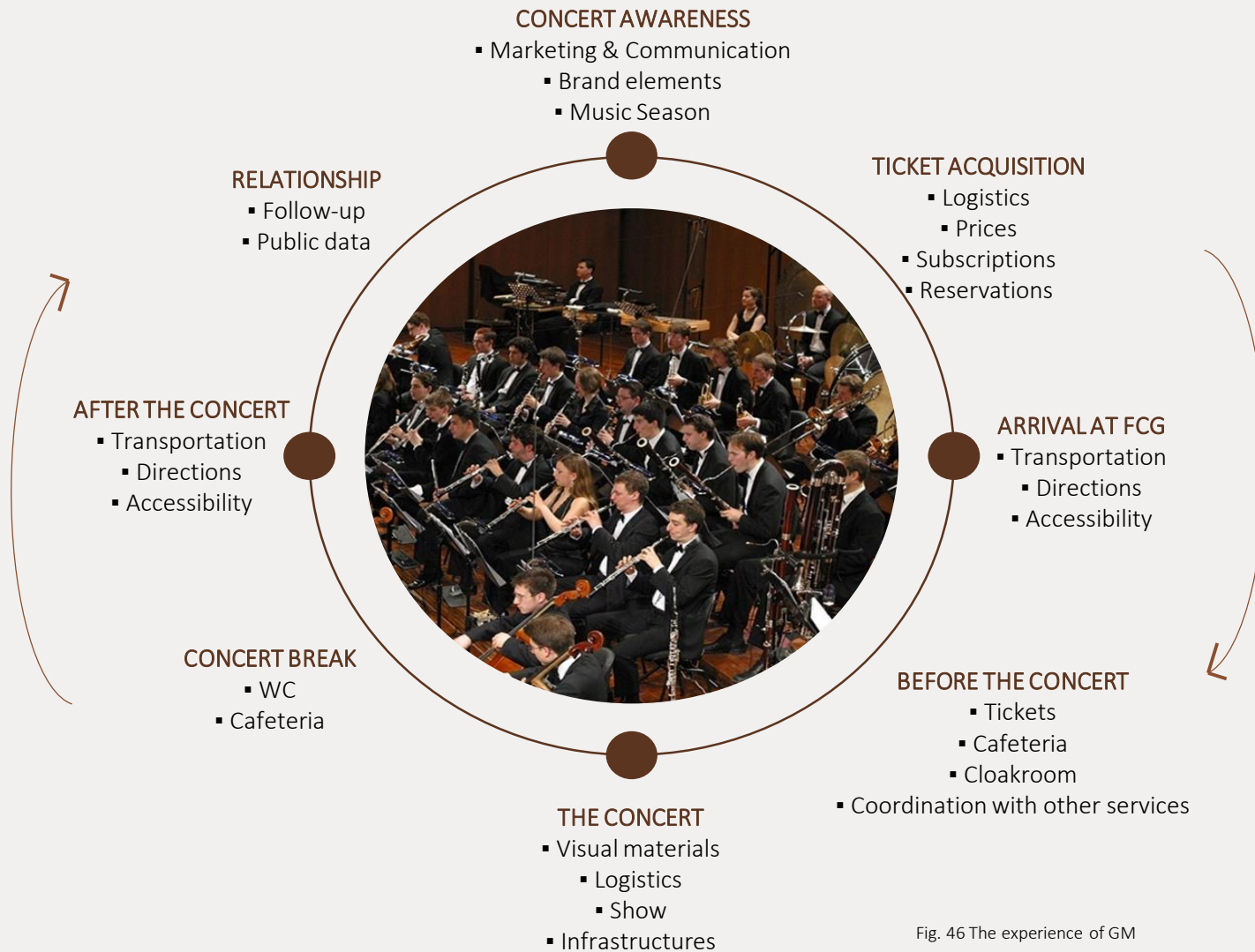
“For a public that attend GM’s concerts non-regularly and have a weak connection with music, *Gulbenkian Música* is a live music experience with quality and recognized artists that offers a diverse and open cultural experience that is both interesting and understandable, due to its carefully selected seasonal agenda and the strong support given which allows a fully integration and comprehension.”

A close-up, artistic photograph of a brass instrument's valve mechanism. The image shows the intricate, polished metal parts of the valve, including the piston and the surrounding housing, set against a dark, almost black background. The lighting highlights the metallic sheen and the complex geometry of the instrument's internal components.

SHORT TERM INITIATIVES



THE EXPERIENCE



The initiatives of this section will answer the issues for each of the steps in the experience of attending a concert at FCG.

Fig. 46 The experience of GM



CONCERT AWARENESS

ADVERTISING MANAGEMENT

The first initiative proposed corresponds to the first touching point between the consumer and the brand in what concerns the experience of GM. Thus, this initiative has several purposes. First, it aims **to improve the timings of outdoor advertisements placement** in order to avoid the promotion of sold out concerts. The second goal is to **increase the occupation rate of concerts which present a high number of empty seats**. Finally, it intends to **make the communication more effective for Platinum, Gold and Silver publics**. This allow all publics to easily interpret the message that the advertisements transmit and intuitively assimilate all the important information that will eventually translate into the purchase of tickets. Such will have an effect mainly on the Silver public, as the understanding of advertisements will allow for the capture of this public at the Evaluation stages of the CDJ.

The improvement of the advertising management has several specifications in order to achieve the aforementioned goals. The first is **a monthly communication plan**, where at the beginning of each month GM would analyse its box office data and verify what concerts are already sold out, so that no further communication to that

¹Quantitative and qualitative measurements showing how successfully an organization is achieving its investment(<http://financial-dictionary.thefreedictionary.com/Key+Success+Indicator>)

concert is started. Similarly, GM would also verify which concerts still have a higher number of tickets available and promote them through outdoor advertisement in order to encourage the purchase of tickets and thus decrease the number of empty seats. The music cycles of *Música Antiga*, *Música de Câmara* and *Músicas do Mundo* would greatly benefit from this initiative as these are the cycles with the lowest occupation rate. In order to preserve its Brand Image, GM would still advertise its core concerts and biggest artists. It is, thus, recommended **not to neglect the concerts which have a lower occupation rate and present a potential for higher ROI**. A communication that is balanced on promoting these two types of concerts is thus recommended – planning and communicating ahead the blockbusters and increasing the communication for concerts with lower occupation rates, closer to the events' date.

Finally, in order to make the communication effective for all potential publics, it is recommended the addition of elements such as the week day and time of the concert date and, more importantly, information regarding where and how to get tickets. With this GM would not communicate

on price (as it would go against FCG's identity) but on the easiness to acquire tickets.

In order to measure the effectiveness of this initiative, the Key Performance Indicator¹ (KPI) would be the variation in occupation rates of the different music cycles. The timeframe in which the desired occupation rate is reached, would also be important to analyse.



Fig. 47: Printed ad suggestion



TICKET ACQUISITION

NEW PAYMENT METHODS & REVISED SELLING DATES

In order to facilitate the acquisition of tickets for all publics of GM, the addition of new payment methods is recommended. **For online purchases, the two new payments methods implemented would be Paypal and MB references.** In the case of purchases done by correspondence or email, **it is intended that buyers are not requested to insert their credit card details** due to safety and privacy issues.

The way for this to be possible is a more rigorous purchasing process, where buyers have only to declare which concert(s) they are interested in attending, the number of tickets and desired seats. FCG, upon receiving this request, would send **a message to the buyer with a MB reference, entity and amount to pay. The buyer would then have 48h to make the payment in order to complete the purchase and acquire the tickets.** In case the tickets or seats are not available, FCG would communicate it to the buyer anyway. Upon the completion of the purchase, FCG would then send a message to the buyer confirming the success of the purchase. Likewise, in case of an unsuccessful purchase due to the payment not being done within the requested 48h, a message would be sent as well, informing the failure of the purchase and tickets would be then put to sale again.

Regarding the selling dates of subscriptions and loose tickets at the beginning of the season, in order to clarify and facilitate the entire process for all publics, **a merging of selling dates is recommended.** All purchases with different payment methods would then be done in the same time interval so that there is no confusion in the buyer's mind on when the purchase of tickets is supposed to be.

While renovations would be given priority, the same occurs for the purchases done by correspondence. Given that purchases done by this payment method are not automatic, there would be a higher chance of buyers losing their reserved seats if they were not given this priority.

Both these initiatives would affect the publics at the Buying stage of the CDJ, increasing the number of successful purchases.

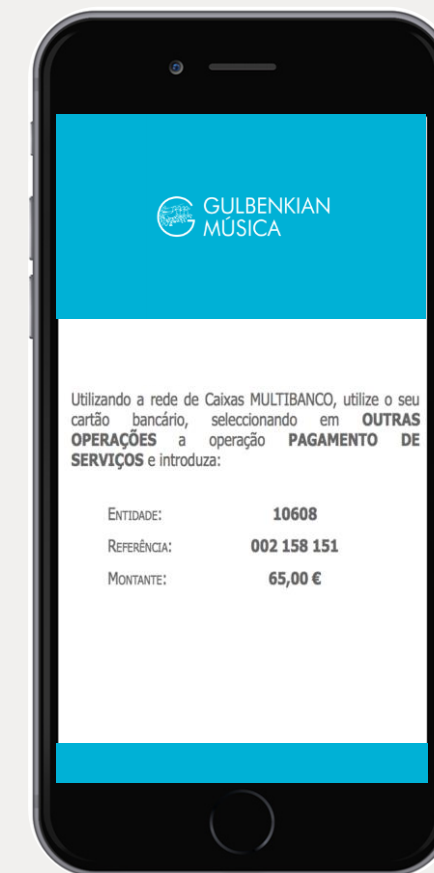


Fig. 48: MB references example



TICKET ACQUISITION

RENOVATED ONLINE BOX OFFICE

To address the online purchasing issues, a **renovation of the current box office is recommended**, by implementing a more intuitive and friendly user interface that allows for an easy and pleasant navigation. **This box office would be implemented inside with FCG's main website facilitating buyers navigation – uses only one platform.**

Users would be able to buy tickets online for a specific concert by navigating through FCG's website and going to that concert's descriptive page. The concert page would have an 'Add to shopping cart' feature that would redirect users to another page within the website, where they would then acquire the tickets. They would then be prompted to pay using a payment method of their choice, such as PayPal and MB reference.

Another point to be addressed regarding the online box office is the **confirmation email**. As it is currently, the confirmation email is very impersonal and poorly designed, not being in line with other GM's communication methods such as the email newsletter. It is then recommended the implementation of a more suitable design for this confirmation email, with an illustrative banner, thoughtful text formatting and a customized greeting for each buyer.

One of the most important details regarding the customized message is treating buyers by their first name in the salutation at the beginning of the email - this would be possible by asking buyers to insert their name when they buy tickets online.

The online box office would also have the **option of an electronic ticket**. This e-ticket would be an alternative ticket format and by no means would replace GM's current ticket formats. This would simply give spectators the QR code that they would be able to have in their smartphones and present at the entrance of the auditorium, where it would be verified with a QR scanner - by the room assistants.

This initiative would affect the publics at the Buying stage of the CDJ, increasing the number of successful online purchases. The KPI that would measure the effectiveness of these initiatives are the percentage of buyers who purchased tickets using PayPal and using MB references, the number of MB references sent and not used, the number of e-tickets used and the percentage of users per acquisition method (control numbers of online vs. offline purchases).



Fig. 49: E-ticket example



ARRIVAL AT FCG & AFTER THE CONCERT

TRANSPORTATION, PARKING AND ACCESSIBILITY

To address the issue of accessibility, a **partnership between FCG and a passenger transportation company** is recommended to give spectators a new option for going to GM's concerts. Companies such as Uber or MyTaxi would partner with FCG and develop special conditions giving discounts to spectators who want to go to concerts at FCG, or requesting a fixed price that is lower than the price of a regular trip. In return, these companies would have the opportunity of expanding their current market by having access to GM's publics. A great part of these publics belong to an older generation who is not used to deal with new technologies and, therefore, does not use online platforms to book car trips. By partnering with FCG, Uber and MyTaxi would then be able to access these new publics, increasing their market penetration rate and capture a segment that they do not yet dominate.

This initiative would require an initial effort from GM to educate its publics on how to use such transportation companies - having, for example, a room assistant at the entrance of FCG's main building, helping the spectators downloading the app or even booking a trip. Another way for FCG to educate its publics would be to share guides and

tutorials in its communication channels, such as the website, social media pages or in the Music Seasonal Brochure (section *Informações Úteis*).

The discounts would work using discount codes, which would be sold by the transportation company to FCG. GM would then share these codes to its publics, for them to use when requesting a trip in the app - giving an immediate discount for spectators.

Another partnership with Parque de Berna would also address the issues related with car parking. *Parque de Berna* is a parking garage which is geographically close to the Foundation and would provide an alternative option for spectators to park their car other than the FCG's own parking garage. Spectators who have their car parked at *Parque de Berna* would go to FCG's box office after the concert to receive a ticket. Upon presenting this ticket at *Parque de Berna* they would be given the opportunity to pay the parking for a reduced fixed price - for example, 3€.

Other recommendation to address the parking issues would be **the implementation of Via Verde option in FCG's own parking garage.** This would give spectators the option of

paying the park at the end of the month and not during the moment of the concert, allowing a more efficient and faster entrance and an easier traffic circulation inside the garage.

All these initiatives would be communicated through FCG's website and Music Seasonal Brochure (section *Informações Úteis*), and would allow for the capture of publics in Evaluation and Enjoy stages of the CDJ. The KPIs that would measure the effectiveness of these initiatives are the number of individuals who have used discount codes for the "partner" apps, the number of parking tickets for *Parque de Berna* and the number of individuals who have parked at FCG using *Via Verde*.



Fig. 50: MyTaxi platform example



ARRIVAL AT FCG & AFTER THE CONCERT

CLEAR SIGNAGE AND DIRECTIONS

The implementation of a new signage inside FCG's garden is recommended to aid the less frequent publics who are not familiar with FCG's spaces to **quickly and effectively find their way towards the main points of interest** - such as the main building, *Colecção do Fundador*, *Colecção Moderna*, and also GM's specific locations, *Grande Auditório* and box office.

Fig. 51 represents a map of the Foundation, where the red circles represent the key locations where the signage (fig. 52) would be more effective in guiding the publics. These points are the main entrances of the garden and Foundation, as well as the more obscure locations and complex pathway intersections where visitors are more likely to get lost.

This initiative would affect publics in the Enjoy stage of the CDJ and the KPI to control its success is the overall satisfaction regarding FCG's accessibility (measured through satisfaction surveys).

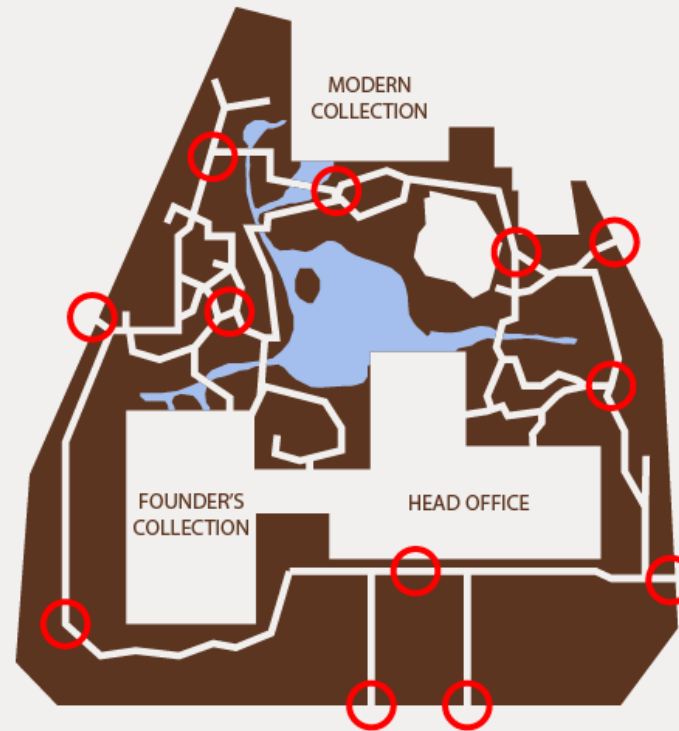


Fig. 51: Hotspots for signage



Fig. 52: Signage example



BEFORE THE CONCERT & DURING THE BREAK

STAFF TRAINING & CAFETERIA SERVICE IMPROVEMENT

The **staff training** is a recommended initiative that would indirectly increase the efficiency of all services which operate during a GM's concert, having as main objective to **guarantee an experience of excellence**.

Regular training sessions and briefings would be given to employees of the cafeteria, cloakroom, box office, and also room assistants and security guards, in which they would be oriented not only on how to perform the technical details of their role but more importantly, on how to interact and serve the publics in order to deliver an experience that goes in line with the publics' expectations when they attend a renowned foundation such as FCG. The Human Resources department would motivate and engage employees into FCG's culture so that they would feel they belong to the Foundation and are actively contributing to the ongoing deliver of an experience of excellence, being part of it.

Concerning the efficiency of the cafeteria, it is intended that this service is able to attend the requests of all spectators during the moments of highest movement - the moments before the concert starts and the concert break.

For this to be possible, several specifications are recommended. First, all cafeteria cash registers at the counter should be working and each having its own assigned employee, who should be present at all times, at least 1h30 before the concert starts as well as during the entire concert break. This would allow for more lines and thus a quicker and more efficient service. Next, it is recommended to have specific service lines for different payments methods. This involves a service line designated for payments in cash, a line for credit card payments and a line for payments with the Membership Program's Ambassador card (further explained on page 88).

Finally, there would be additional high tables present at the cafeteria, where spectators would be able to take their coffee, tea or snack.

Both these initiatives would affect the publics in the Enjoy stage of the CDJ and the KPIs to take into account are the feedback received from staff (through periodical sessions), the publics' feedback (through satisfaction surveys) and the number of cafeteria attendees per minute (during the break and before the concert).



Fig. 53: Head Office Cafeteria



THE CONCERT

“CONCERTO DE HOJE” PAGE

A new webpage incorporated in FCG’s website would be designed for the moment that precedes a concert at FCG. On the day of the concert, an email would be sent to each person who had purchased a ticket for that concert with a link to access this page.

Through "gulbenkian.pt/música/concertodehoje" the spectator would get to know the musicians playing in that day, the story of the concert and meaning of each part, and even get some advices/best practices in what concerns the concert’s structure, the moment for clapping, the silence required, etc. After the concert, the page would still be open as publics would have the opportunity to give feedback on the concert itself, as also have access to a wrap-up section with some pictures, interviews and recap of special moments – that can be shared on social media. This link would also be communicated at the *Grande Auditório* entrance incentivizing people to navigate and discover this page, at their smartphones, while waiting for the concert.

This initiative would **give the opportunity for everyone to feel welcome** in the context and to become closer to the connoisseurs group who know a lot about classical music. Moreover, it would incentivize people to visit more frequently GM’s website and eventually gain interest in other concerts to attend. The main KPIs of this initiative would be the number of visitors of this website’s page and the number of interactions with it (shares and feedback given).

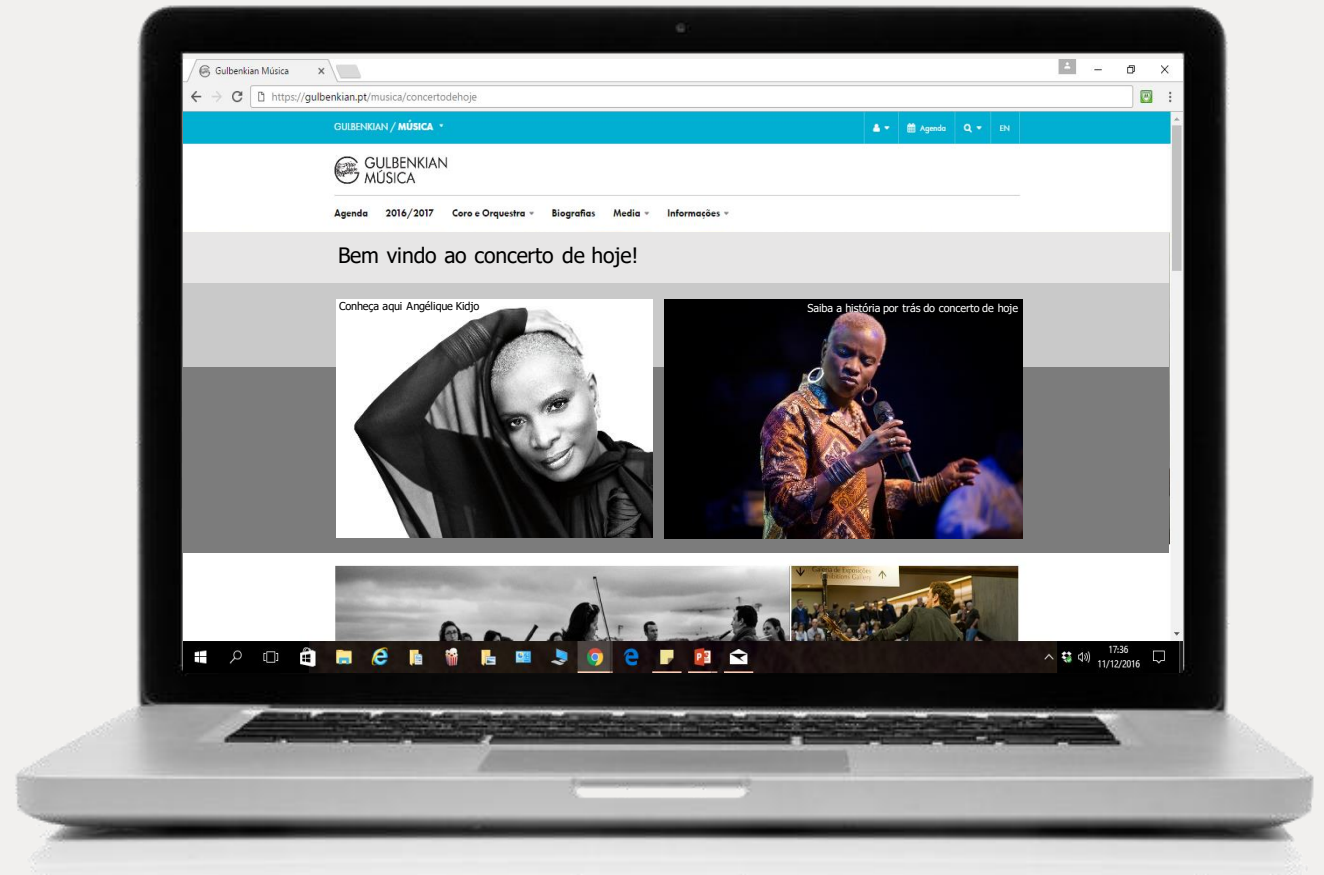


Fig. 54: Example of the page suggested



RELATIONSHIP

CRM SYSTEM

The **implementation of a GM's CRM system** is recommended to allow the music department to recognize its publics, group them, and communicate directly with them in order to address their individual and specific preferences and needs.

This CRM system would be developed by a software development specialist and would efficiently collect data from the audience on every touching point, such as purchases and every existing communication between individuals and GM. This allows the creation of a detailed database that contains individual information of every single spectator. With this information, GM would be able to define the profile of its spectators, knowing them and **being able to address and communicate with them in an efficient way -such as directing customized offers and promotions**. This CRM system would serve as basis of further initiatives to be implemented in the medium and long run, allowing for the creation of specific offers and campaigns by targeting publics more effectively.

This initiative and the initiatives that will derive from it would affect the publics in the Enjoy stage of the CDJ. The KPIs to

measure the success of this initiative would be the number of individuals registered in the database and the amount and quality of data collected for each of them.

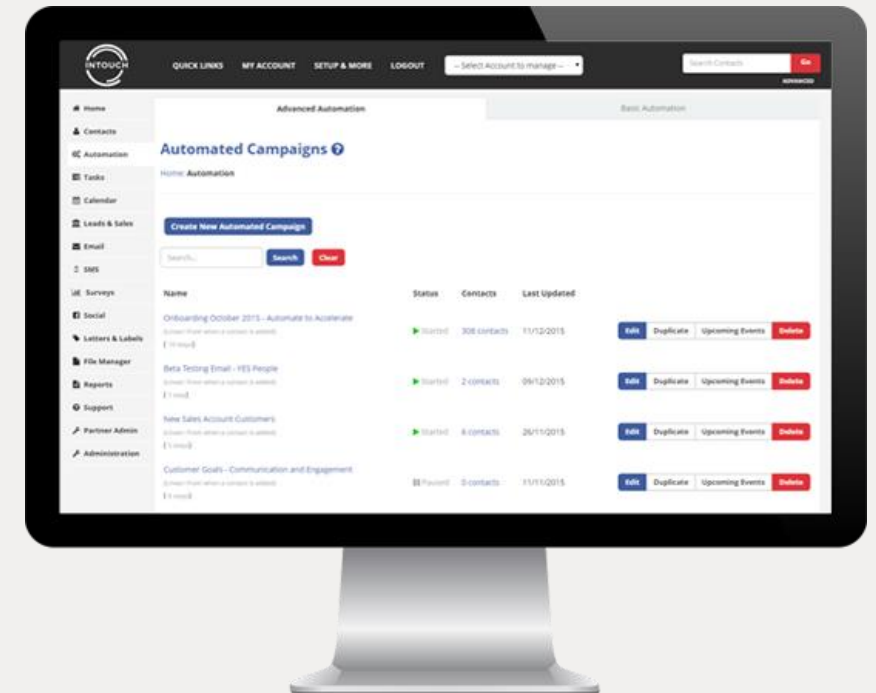


Fig. 55: CRM system's interface example



MEDIUM TERM INITIATIVES

This set of initiatives will have as objective the improvement of three main points:

Co-Experience & Affiliation

Communication

Purchasing



MEMBERSHIP PROGRAM (1/3)



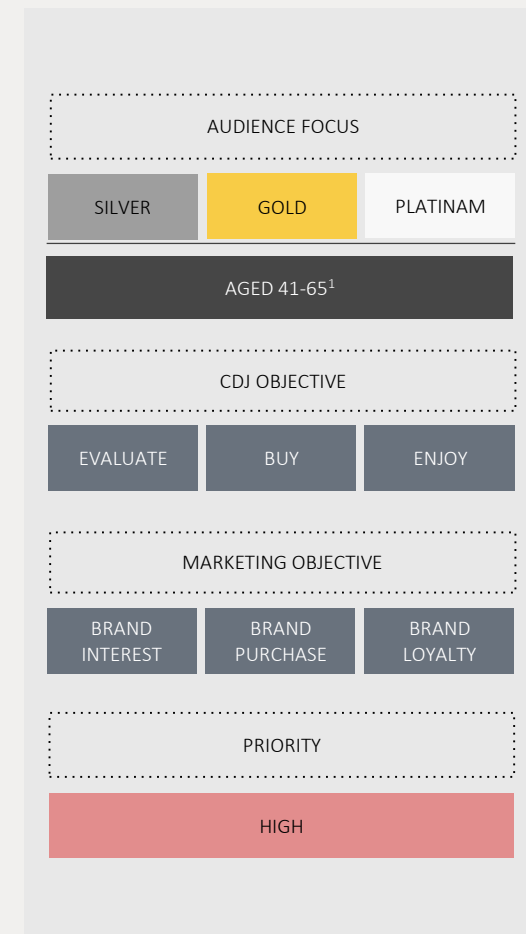
A **membership program** would be created in order to make the publics feel special and valued and enhance their relationship with GM. This initiative would focus on the improvement of this relationship to encourage the publics to attend even more GM’s concerts by rewarding/recognizing their attendance and loyalty and showing GM cares about them. Therefore, this program targets all the publics who attend concerts more than once (repeated purchases) giving several benefits according to the regularity and frequency of each public towards GM’s events. By reaching the **Silver public** on the **Evaluation** phase, this initiative goal is to increase its **Brand Interest**. Secondly, as known by the Diagnostic phase, the **Platinum public** desires a stronger/closer relationship with GM and aspires to be rewarded by their loyalty, this membership program aims to improve **Brand Loyalty** (encouraging a better

Enjoy phase) what can by consequence increase their **Brand Purchase** as well. However, the main goal of this initiative relies on the **Gold public** whose attendance is already frequent but whose loyalty should grow. With that in mind, the objective for this public is to increase **Brand Purchase** and to improve **Brand Loyalty** reaching them on the **Buy** phase.

This reasoning would allow GM to divide its publics in three different levels to have three cards (fig. 56) with a specific set of benefits to each segment: **Enthusiast, Connoisseur and Ambassador**. Also, each level would have different requirements of belonging, being the objective to have ‘Enthusiast’ mainly targeting Silver public, ‘Connoisseurs’ targeting Gold and ‘Ambassador’ targeting Platinum. These requirements may consequently be the individuals’ regularity, the spending made by each person and/or the longevity of one’s relationship with GM

and FCG – the present suggestion lays on the first option, although it has to be confirmed and would depend on the CRM system and data collected.

The set of features and benefits of each card would vary by level (Appendix 36). The benefits mutual to all the levels would be: 1) Discount at FCG stores, which percentage would depend on the level - for them to increase purchase at other FCG services; 2) Discount to bring two friends to concerts twice a year, which percentage would depend on the level - this would allow to attract new publics using their publics as advocates and also acquire more contacts to future marketing initiatives by asking for those friends’ data; 3) Discounts for some concerts chosen based on the concerts each individual likes the most (history of purchases), which percentage would depend on the level – FCG would send occasional emails warning there are



¹ Remember that the Platinum public behaves in a similar way regarding all ages and thus, for this public, there is not a focus on a specific age range.



MEMBERSHIP PROGRAM (2/3)

CO-EXPERIENCE &
AFFILIATION

available seats at concerts they may be interested in, to incentivize one's purchases and fill their seats; 4) Special price for *Parque de Berna* – the partnership created set the price on 3€ but for the members of this program the parking would cost only 2€, incentivizing its usage; and 5) Other exclusive offers and special promotions. The upper level (Ambassadors) would have more benefits since the objective is to attract more publics to this segment by increasing their purchases/ regularity/ loyalty, converging them to Platinum in the long run.

Those **benefits** would be: 1) Music Seasonal Brochure sent home for free – for what a partnership with a delivery service is required; 2) Birthday gift that may be one merchandising article; 3) Invitation to the Christmas and FCG Anniversary cocktail as part of the exclusive events created thinking on these individuals who enjoy the exclusivity

and recognition; 4) Possibility to use the card as payment method at FCG services by connecting it to one's' credit card.

The membership design and the benefits distribution, imply that the Connoisseur level serve as a bridge between the Enthusiast and the Ambassador. Since only two concerts/year separate this level from the Ambassador, and given the great benefits offered to the upper level comparing to the other two, belonging to the middle level is seen as an incentive to attend more and become part of the Platinum audience. This would easier lead to a **conversion of the Gold public into Platinum** what influences the diluting of the "elitism" of the current Platinum public. This program's card would look the same for all three levels, with the exception of a sticker in the back of the card that indicates to the staff which level the person belongs to. It **increases the sense of an equal "community"**

at Gulbenkian and reduces the possibility to seem an elitist program.

Through a benchmarking analysis other membership programs for cultural institutions were studied, such as the CCB and *Casa da Música* which are paid options. However, the free option seemed to be more effective for GM's publics: Even the publics who are more loyal and devoted to the concerts would find it more attractive to be rewarded with less benefits than having to pay an extra to become part of the group who have greater benefits.

With this design FCG would keep its strategy of showing GM as an inclusive experience by having **a program that rewards and includes everyone**. Hence, this initiative followed the inspiration of the Nespresso and TAP loyalty programs on what regarded the features but always taking in consideration the non-elitist characteristic needed. The publics would be invited to participate by letter

"Quanto a uma relação mais «próxima» com a Gulbenkian, claro que gostaria de ser premiada pela regularidade. A questão é com o quê! Acho que há uma sala mais especial para aqueles «patron» e acho simpático por exemplo não ter de estar imenso tempo na fila para comprar um café. Também gostava de receber mais informação claro." (F, 43, Platinum)



MEMBERSHIP PROGRAM (3/3)

CO-EXPERIENCE &
AFFILIATION

or email (when accomplishing the requirements of at least one category), in which FCG would explain the program features and benefits. The interested individuals would have to **register online or at the box office** in order to receive their card. Cards would be renovated every two years in order to have an updated account to each member and to keep track on each one's level. This program requires registration what implies that people can give up of it. Upgrades and downgrades would also be a reality every two years. In order to ensure the **performance and success** of this initiative GM would have to keep control on the number of invitations sent

and the actual registrations. Also, it is important to understand the members' ratio between the three levels, track their card benefits' usage and account the number of inactive members. The numbers of members added and dropped (either by not filling any of the levels requirement or by unregister on the program) every two years would also be a measure of success.

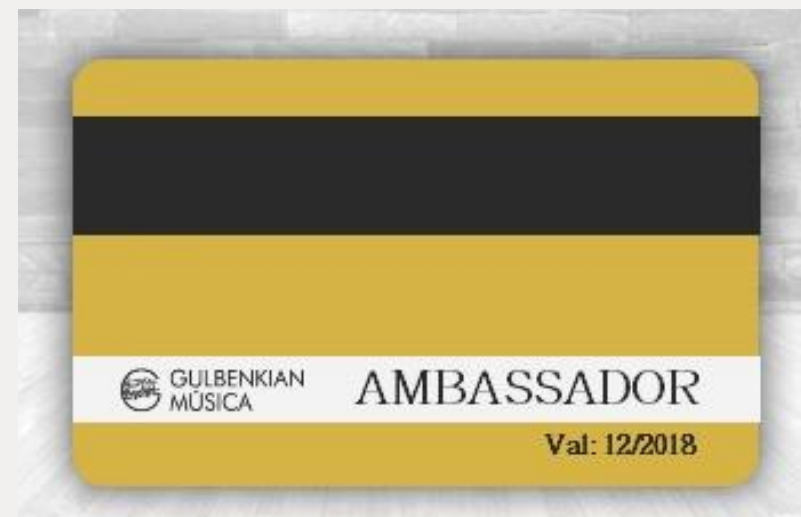


Fig. 56: Prototype of a membership program card



ARTISTIC CONTEST

CO-EXPERIENCE &
AFFILIATION

It was already explained that the publics who attend more frequently GM's concerts are the ones who actively search about it. To keep informed on what is happening at the Foundation they use in greater proportion the GM's owned media mostly its digital platforms (social media pages, newsletter, website, etc.). With this in mind, and with the objective of encouraging **Gold public** to share GM's media with their network, a contest would be created. The main objective is to get new publics to know GM and interact with their social media pages. At the same time, knowing that people are now more influenced by their network and peers than by traditional media, this initiative would allow **GM to reach the Silver public** on the Evaluation phase and thus increase **Brand Interest** among them.

The **contest would be artistic based** and to participate each individual would be invited to **share a sentence** about music with the

subject: **"Os bons momentos são sempre acompanhados por música"**. The person whose sentence would have the highest number of votes would win. Since this contest would take place in a special tab inside GM's Facebook page, to vote it would be needed to like the Facebook page and put a "like" in the sentence. Thus, the number of **likes and followers on the page would increase** by having the participants sending their sentences links to friends and family in order to have a higher number of votes. The initiative would occur during two weeks and the winner's prize would be a **double ticket to a concert at FCG** jointly with the possibility to visit the backstage in that specific concert, which would attract the desired participants who belong to the Gold public. Also, this initiative would be communicated not only on the newly created GM's Facebook page through a promoted post, but also on the other FCG's social media channels and on the website.

In order to understand if this initiative is working a set of KPI should be previously defined. Hence, it is important to understand the reach of the announcement post and the number of interactions (likes, shares and comments) it would have in the several platforms. The number of participants and the number of new Facebook followers would also be a very important measure of success.



Fig. 57: Idea of the contest announcement post





AUDITORIUM VISITS

CO-EXPERIENCE & AFFILIATION

Two distinct **free auditorium visits** would be created in order to address two distinct publics. The first visit, **“Uncovered Auditorium”** - for the **Platinum and Gold** publics - aims to offer a new perspective on the concerts, making attendees more involved with the technicalities of the concerts. The other type of visit, **“Discover the Magic”** - that targets the **Silver public** - wants to demystify classical music, making this public more enthusiastic with the dynamics of concerts at FCG. Hence, when targeting the Silver public this visit would make them include GM’s concerts on their Evaluation set by increasing their **Brand Interest**. On the other hand, the visit for Gold and Platinum publics aims to target the Bond phase and enhancing the publics **Brand Loyalty** by creating a stronger relationship with GM.

Both these visits would happen every six months and would be subject to online

registration since they have limited vacancies (groups of 20 people). Both visits would be communicated on social media, although the CRM system would allow to communicate the visits directly by email, too.

The agenda of these visits would include a **backstage tour, and a entrance to a rehearsal may be considered**. This would imply the presence of a guide, which may be a member of the orchestra or choir. Besides having the same tour, both visits would be very different since the content and agenda would target completely different publics. “Uncovered Auditorium”, for the connoisseurs, would have more explanations regarding **infrastructures’ details and the logistics behind each concert**. For the non-connoisseurs, “Discover the Magic” would include a **small workshop to teach the etiquette and formalities** involved when attending a classical music concert -

creating a sense of confidence when attending those concerts.

Keeping track of the registrations and actual attendees’ numbers for both visits would help to understand if the initiative is being successful. It would also be important to account the registration attempts and the amount of people who would start going more frequently to the concerts after attending the visits.

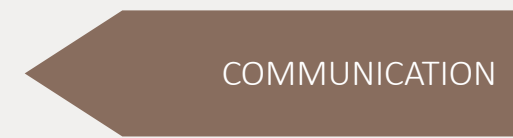
"As pessoas têm de ser ensinadas e incentivadas a ir a este tipo de coisas. Eles podiam ter pequenos eventos abertos do tipo «Venha descobrir a música clássica», onde ensinavam às pessoas as regras de etiqueta básica de um concerto, como se comportar, como se vestir, etc. Isto tudo de uma forma amigável e descontraída." (M,53, Bronze)

¹ Remember that the Platinum public behaves in a similar way regarding all ages and thus, for this public, there is not a focus on a specific age range.





CHRISTMAS BOX



From the diagnostic phase, it was inferred that one of the main goals of GM will be the attempt to turn the **Gold** public into **advocates** of the brand, since they are less elitist than the Platinum and, thus, more likely to **attract other publics, namely the Silver** public, to the experience.

With this objective in mind, a Christmas Box would be developed by GM, allowing individuals to **purchase tickets within a stylish but classic packaging** with two concert tickets and a FCG's Agenda (currently retailed at 3€). These tickets would be chosen by the buyer according to concerts' availability at the time of purchase and, thus, the box's price would vary according to its content. As for the agenda, it would be free. The idea would be to turn GM into a stylish Christmas gift, which would stimulate **Brand Purchase** in the buyer and **Brand Interest** in the receiver.

This initiative would start around November 1st each year and end on December 31st. As for its communication, by November 1st there would be posts on GM's social media pages and newsletter, informing its followers that the Christmas Box sale has begun. Also, in the FCG's box office there would be a small stand on the counter reminding people to purchase the box, since it would be directed to those who regularly attend and therefore are very likely to go to the box office, for example on concert days to purchase the programme.

This initiative is expected to have a high impact the way the brand would be advocated, increasing purchase without incurring into many costs, as FCG would only have the additional cost of producing the boxes. The KPI for this initiative would be the number of Christmas Boxes sold.



Fig. 58: Prototype of the Christmas Box



Fig. 59: Prototype of Facebook post advertising the Christmas Box





EXPERIENTIAL MARKETING

COMMUNICATION

It was suggested from the diagnostic phase that the current advertisements of GM are directed towards those who already are classical music connoisseurs. Thus, it would be interesting to have also a special type of communication for those who are more willing to attend GM's events for the **experience and not for the specific artists playing**.

The initiative would be to display ads that would invite people to GM's concerts by appealing to it being such a memorable and rich experience. The main target would be the **Silver public** since it is the one that already shows an interest in the events but is most likely to be attracted by the experience itself. It would be a way of increasing **Brand Interest** by appealing to this public's memories of attending GM's concerts as something satisfying and to be repeated – including GM on the public's **Evaluation set**. This new communication

would be presented online - such as through social media or ads - and offline through mupis.

As for the targeted concerts, these ads would be developed for the **lowest affluence cycles** (namely *Música de Câmara*, *Músicas do Mundo* and *Música Antiga*) or for specific concert, not being developed for the blockbusters of the season. However, it is important to understand that this initiative does not go against the advertising of the season's blockbusters – it is a complement in order to attract a diverse public that would not be reached through these ads. More general campaigns with this idea may be considered, not communicating a specific concert/cycle but the overall experience (benchmark example on fig. 61).

The KPI for this initiative would be the variation of tickets sold for lower affluence cycles after the initiative is put to practice.



Fig. 60: Prototype of advertisement



Fig. 61: Example from Royal Opera House





INFLUENCERS' STRATEGY

COMMUNICATION

In order to stimulate **Brand Interest** and desire for the **Silver public** to increase their consumption of GM's concerts, an influencers' strategy was thought as a way of generating brand buzz.

The initiative would consist in **associating certain Portuguese "cultural" personalities to GM**. Names such as Domingos Amaral, Laurinda Alves or Miguel Sousa Tavares would speak about the brand either on their social media pages or on television channels and generate desire amongst their fans and followers regarding the concerts. They would mention they had gone to a concert and talk about their experience and their feelings regarding what they saw/listened. For this initiative to target the Silver public, it is important that the **influencers are not very elitist and directed to a niche but part of an "accessible culture"**, with a wide variety of followers and speaking in ways that are easy to understand to a general audience.

When looking at the CDJ, this would have an high impact in the **Evaluation phase** of the Silver public, who might choose GM over other entertainment options with this trigger. This would not only increase the Silver public's attendance but also make going to GM as something trendy and modern.

As for the influencers, they would be remunerated in concert tickets of their choice. The **KPI** to measure this initiative's success would be the number of interactions (likes, shares and comments) on influencers' posts concerning GM.



Fig. 62: Domingos Amaral



Fig. 63: Domingos Amaral's blog

AUDIENCE FOCUS

SILVER

AGED 41-65

CDJ OBJECTIVE

EVALUATE

MARKETING OBJECTIVE

BRAND INTEREST

PRIORITY

MEDIUM



50% DISCOUNT TO MUSIC PROFESSIONALS

PURCHASING

Many music professionals (mainly from **Platinum and Gold publics**), including high school music teachers, university students - even entire classes - often go to concerts at FCG. However, many of these people already have a close relationship with the Foundation, allowing them to have access to free tickets, even when there is a **willingness to pay, at least a symbolic price**. This initiative would act on the **Buying phase** of the CDJ since the goal is to encourage more publics, who are well connected to music, to attend more GM's concerts, stimulating **Brand Purchase**. At the same time, this would reduce the number of invitations given by GM and therefore help FCG on the goal of capitalize more on its concerts. The initiative consists of a **new discount policy** (not based on age), that gives music professionals and music students a 50% discount in all GM's concerts.

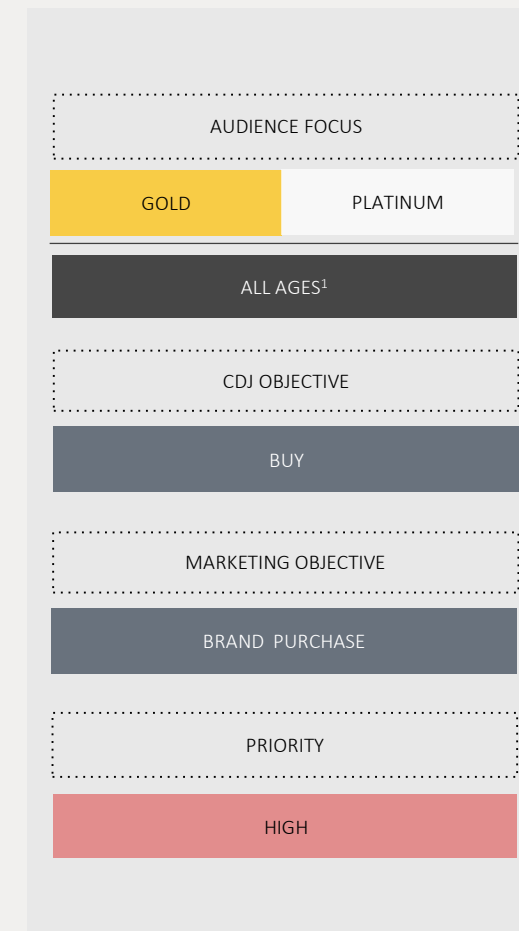
Since the goal is to address more frequent spectators of GM, the FCG box office (both physical and online) would be the main **channels to communicate** this initiative. As music professionals are also connected in their majority to GM's digital media, this initiative would not only be communicated through the Music Seasonal Brochure (section *Compra de Bilhetes*) but also in GM's social networks and website.

"Não tenho assinatura. Por vezes oferecem-me, senão compro em avulso. Costumo ir semanalmente à Gulbenkian, até 2 vezes/semana." (F, 58, Platinum)

"Um potencial público da música erudita é jovem e por isso é complicado com estes preços. Mesmo para mim que estou dentro da área, vou muito porque normalmente recebo bilhetes gratuitos." (M, 47, Platinum)

Bearing in mind that the number of tickets given by the Foundation is reasonably high and there is a willingness of those publics to pay for the experience at GM, this initiative would be one with high priority to implement. The revenues created with this initiative, although not estimated as not being the main focus of the Foundation, could help support other initiatives that require a greater investment by FCG.

Some KPIS for this initiative should be determined. The number of 50% discount tickets sold to music professionals would be immediately measured as also the invitation tickets variation between periods - before and after the initiative being implemented. It would be important to understand if the recommendation has indeed decrease the "Invitations" given by GM, as also if music professionals continue to attend (or attend even more) to GM's events.



¹ Despite the medium term initiatives being focused on individuals aged 41-65, this particular initiative would inevitably target all ages since it is impossible to restrict a discount to music professionals for those aged above 41 only.



NEW POINTS OF SALE

PURCHASING

The only mean of purchasing tickets for GM's concerts is at FCG itself, both physically and online. The main goal of **having new points of sale for GM's events** is to facilitate the purchasing process and make it more comfortable by **increasing the options** through which interested buyers can purchase their tickets.

Since the public that frequent FCG already know how to buy a ticket and is "aligned" with the current system, this initiative focuses mainly on those who do not attend much of GM's events, namely the **Silver public**. By creating new partnerships to sell FCG's concert tickets, **Fnac, Ticketline and Bilheteira Online (BOL)** would be the firsts channels to think of, as these are the ones attracting more people that wants to purchase concerts' tickets. This would help **new potential publics to have the opportunity of knowing GM's agenda and to buy tickets to the concerts**, as they are not

familiar with FCG's website and the way tickets are sold. The initiative would also be communicated through FCG's website and the Music Seasonal Brochure (section *Compra de Bilhetes*). As the goal is to **address mainly people from outside the core of the GM's audience**, social networks would be a strong bet to communicate this initiative public are very used to get to know about events through this way.

Since GM is not being currently able to reach out the public who does not directly seek the agenda, the implementation on this initiative would be an urgent matter. The Silver public, who has already gone to FCG may be not returning more because they end up looking at how to fill their time through other channels without going directly to the Music Seasonal Brochure of FCG or the official website.

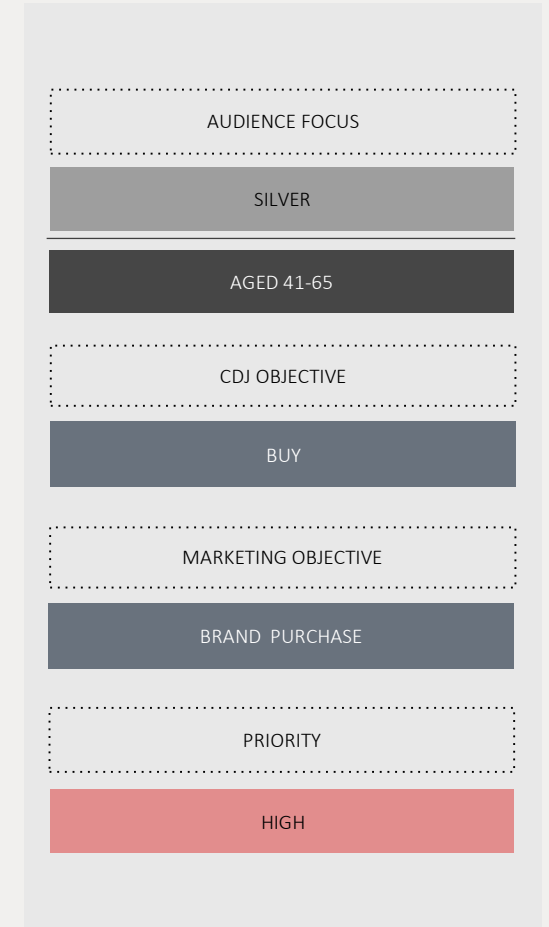
In order to measure the success of the

present initiative, number of tickets sold via Fnac, Ticketline and BOL, as also the percentage of tickets sold through the FCG's current methods vs. the new channels would be immediately verified.

Since FCG'S presence in these channels implies a set of counterparts, it would be essential to verify if the ROI compensates the selling of tickets in other entities.



Fig. 64: Fnac's flyer





SUBSCRIPTION 50/50 PAYMENT

PURCHASING

The fact that subscriptions are fully paid at the beginning of the season makes **Platinum public**, not always available to buy more than one subscription or even add to their purchase some loose tickets. This may also be inhibiting the Gold public to buy subscriptions at all. This initiative has the main goal of combating this problem, by **increasing purchase through the split of the subscription payment into two phases**: pay half when the subscription is requested and the other half in the middle of the season. By having a huge impact on the **Buying phase** of the CDJ, this would make the consumers more willing to acquire (more) subscriptions and purchase additional loose tickets in advance since it would allow them to have more financial flexibility at the beginning of the season.

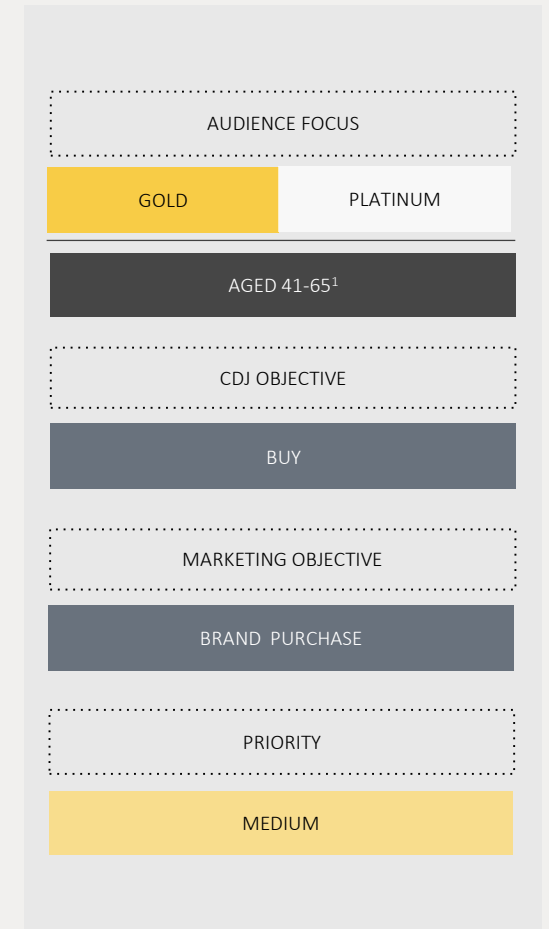
The initiative would be mainly **communicated** in FCG's box office (physical and online), Music Seasonal Brochure

(section *Compra de Bilhetes*) and FCG's website.

In what concerns the **measurement of its success**, some indicators would have to be calculated after its implementation. The number of subscriptions sold with the 50/50 payment method would be firstly measured as also the total number of subscriptions bought before and after the initiative's implementation. Moreover, the number of loose tickets bought at the beginning of the season would also be measured, as this would show if the fact that the payment has been split has allowed more people to add tickets to their purchase – the previously recommended CRM system would be fundamental to help on this step.



Fig. 65: FCG's Music Seasonal Brochure (2016/17)



¹ Remember that the Platinum public behaves in a similar way regarding all ages and thus, for this public, there is not a focus on a specific age range.



NEW SUBSCRIPTION OPTIONS

PURCHASING

Although the **Gold public's individuals** frequently attend GM's concerts, they often buy loose tickets rather than subscriptions. This may be explained due to them not being interested on buying subscriptions that focus on a single musical genre or type of show (e.g.: *Piano* or *Met Opera*).

Thus, a **diversification on GM's subscription options**, may increase the Gold public's willingness to purchase subscriptions. Bearing this in mind, this initiative acts on the **Buying phase** in order to stimulate **Brand Purchase** as it consists on the development of a **varied set of concerts** from all cycles, balancing between **low affluence concerts and high affluence ones** - the set of concerts would be chosen by FCG in the beginning of the season following the previous years' trends. Since this initiative is mainly addressing the Gold public, who is

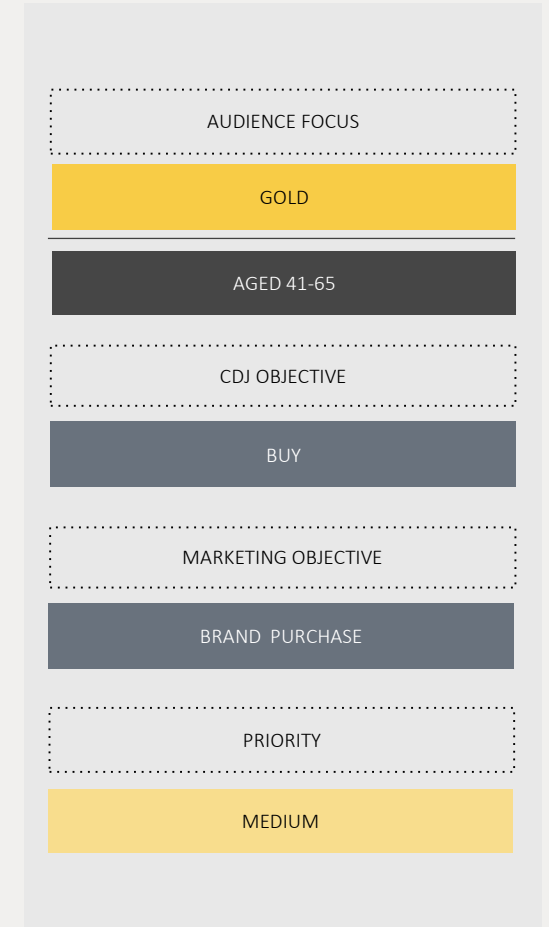
already familiar with FCG's communication channels, it would be communicated in FCG's box office (physical and online), website and the Music Seasonal Brochure (section *Compra de Bilhetes*).

"Eu nunca compro subscrição porque não gosto de ter de comprar só para Piano ou só para Orquestra. Gosto de ver coisas diferentes ao longo da temporada" (56, F, Gold)

In order to evaluate this initiative's success the number of subscriptions sold after the implementation of the initiative would be the main KPI. It would also be important to understand if this subscription option had an impact in sales, and also if the occupation rate for low affluence concerts has increased.



Fig. 66: Grande Auditório





LONG TERM INITIATIVES

This set of initiatives will have as objective the improvement of three main points:

Co-Experience & Affiliation

Communication

Family Involvement



MENTORING PROGRAM

CO-EXPERIENCE & AFFILIATION

The Gold public is composed by GM's frequent attendees that however are not as loyal as the Platinum public. Therefore, it is important to **enhance their relationship** with GM in order to encourage their loyalty, reaching them in the **Bond phase** of the CDJ. Thus, it is suggested the **development of a mentoring program** especially suitable for this public that is already very enthusiastic about classical music and familiarized with concerts at FCG. This initiative would have as marketing objective the stimulation of **Brand Loyalty**.

Since it is known that the majority of this group values the interaction between the artists and the audience, GM would take advantage of it. Thus, the major **goal** of this initiative is to engage with the audience and deepen its relationship with GM (and FCG).

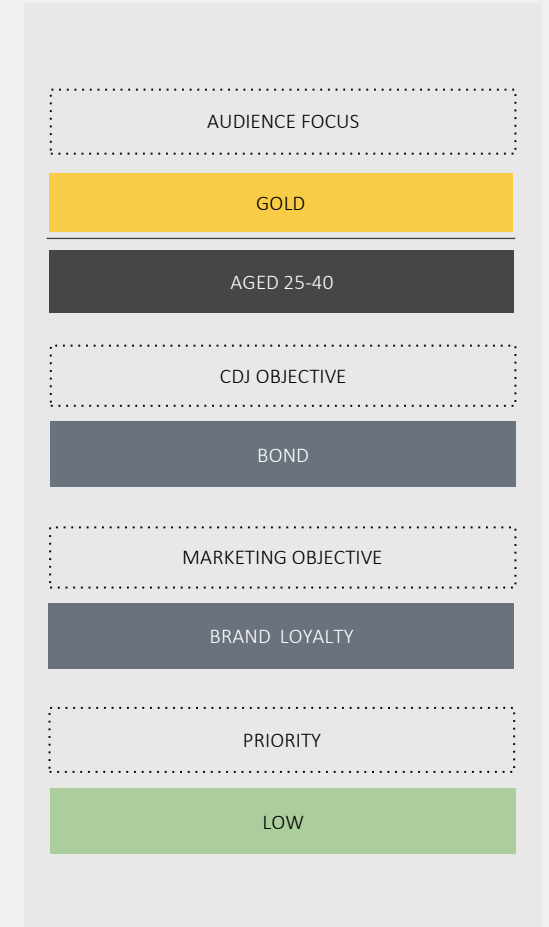
The idea is to create a mentoring program in which each person of the audience would

be able to register (online at FCG's website or face-to-face at the reception) to have a **"musical mentor"** that could be, for example, a musical artist from the choir. This "musical mentor" would be the face of GM towards this public and would be supposed to discuss about classical music related subjects. By being organised some meetings, from time to time, between both mentors and participants, this would be a great opportunity for the Gold public to strengthen its relationship with classical music and to have a deeper comprehension on the matter (taking advantage of the experience and knowledge of the mentors). Moreover, this program would include **bi-annual events** for all the participants to be together and share experiences, as also encourage additional and regular meetings in other circumstances.

Furthermore, since the Gold public is very likely to search actively for information

about this type of concert and uses GM's social media and digital communication as source of information (among other vehicles), this initiative would be communicated through FCG's website and GM's newsletter. In this sense, the information would reach particularly the individuals that search actively for information about GM's concerts.

The number of both registrations and retained individuals in the program would be the adequate KPI for this initiative.





VIDEO: PRESENTING CLASSICAL MUSIC

CO-EXPERIENCE & AFFILIATION

Taking into consideration the importance of music connection when deciding to attend a concert at GM, it is important to encourage this habit on children and try to stimulate their exposure to classical music, namely through their parents.

The majority of the **Gold** public (and some from the **Silver**) acknowledge to have had a friend/family who has influenced them to attend to classical music concerts when they were children. This strengthens the idea that it must be a mentor having this important influencer role. Following this thought, this **initiative aims to encourage parents to take their young children to FCG** and to stimulate their interest towards the concerts.

Considering as an inspiration the idea promoted by Banco Itaú, from Brazil, GM would prepare a **special music event to 10 special little attendees**. The invitation to participate in this initiative would be sent to

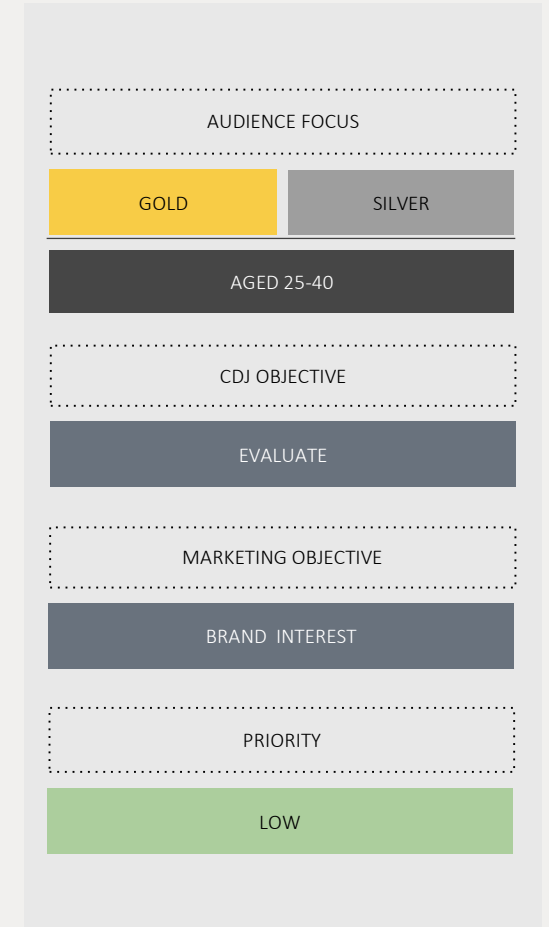
the main GM sponsor BPI in order to gather 10 children aged 4-8 to play a role. The idea would be to film their experience at a classical music concert performed by the orchestra at *Grande Auditório* and **understand children's feelings and thoughts about it**. Each of the children would give their sincere and spontaneous testimony by comparing the idea that they had before actually assisting the classical music concert and their perception after having done it.

In order to present GM as a classical music reference transversal to all generations and to demystify classical music for young generations, an **YouTube video** called "Presenting Classical Music" would be developed and spread through social media with the message **"A educação faz maravilhas na formação de uma criança. E a música também"**. This video would be shared through GM's YouTube page and also on GM's Facebook page, website and

newsletter. By showing a real experience, the objective would be to "touch" other people, stimulate children's curiosity and make **parents consider and evaluate concerts at FCG as an educative activity** to have their children's involved in (increasing **Brand Interest for the children**). Hence, in order to evaluate the performance of this initiative, some KPIs would have to be taken into consideration, such as the number of views and interactions (shares and comments) of the video, the comments related to the video, the bounce rate and watch time and the traffic source data.



Fig. 67: Musician with two children





NEW BROCHURES

COMMUNICATION

This initiative involves the creation of a new music brochure with the intent of making GM's **music program simpler/easier to read and interpret for the publics who are not familiar with it** (whose that are not used to check the Music Seasonal Brochure). This new brochure is not intended by all means to replace the existing Music Seasonal Brochure but to complement it.

Similar to the already existing monthly pamphlet which promotes all FCG's events, this **new brochure would be relatively smaller and less costly** to produce and distribute. Moreover it would be **exclusive to GM's events**, containing only essential information regarding the month's music events. Thereby, the less frequent publics would be able to quickly read it and assimilate the most important information that would encourage them, in the end, to purchase tickets. This communication would include basic information such as a small

description of the concert, price of loose tickets and a list of sold out concerts.

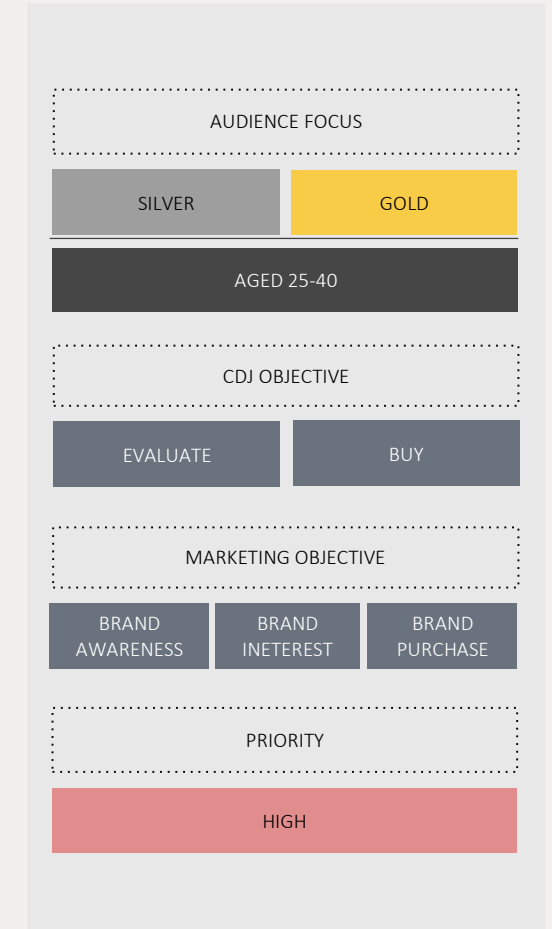
By being smaller, affordable and convenient, this new brochure would be **distributed in various places for a better Brand Awareness/Interest and exposure**, such as in FCG's main entrance, shops and cafeterias, as well as in various Lisbon information centres, museums and cultural spots. It would also be distributed to visitors on study trips or guided tours at FCG.

This initiative is intended to capture and influence the Silver and Gold publics mainly at the **Evaluation and Buy stage** of the CDJ as it would make them understand the agenda and therefore facilitate purchases. The KPI to measure the success of this initiative would be the number of brochures distributed.



Fig. 68: Existing FCG's monthly calendar that would be the basis of the new brochure

“As coisas não são bem comunicadas. Eu não tenho um conhecimento tão grande por causa disso. Deveriam ter um livrinho com os espetáculos, como o CCB e a Casa da Música, e pô-lo em locais estratégicos: à porta do museu, que é o espaço mais visitado, na cafeteria, na loja como oferta na caixa, etc. Podiam dar também às crianças que vão lá em visitas de estudo, elas levariam para casa para dar aos pais e assim sempre estava um dos livros em cada casa.” (F, 55, Bronze)





SPOTIFY AD & PLAYLIST



As seen in the results of the diagnostic phase, despite the Silver and Bronze publics not being regular attendees of GM’s events, **a considerable part of these publics enjoys listening to classical music.** The placement of advertisements and communication on Spotify would thus serve the purpose of reaching those who already listen to music genres played at FCG, through content targeting.

Ads would be directed to users who listen or have listened recently to any music genre that is related to GM’s offer, such as Piano or Symphonic. By clicking on the advertisement the user would then be redirected to GM’s website, where the purchase of tickets would be possible.

This initiative would be further explored with the **creation of a GM’s Spotify playlist** which would contain various music genres that are related to GM. Examples of music themes would include several *Coro e*

Orquestra Gulbenkian, old classics, invited artists repertoire and “best of’s” each season. Another type of Spotify advertisement would be created to redirect users to the playlist.

This initiative would be communicated through a **sponsored Facebook post**, an article on FCG’s website and a dedicated space on the bottom of each GM’s newsletter. It would be directed to the Silver public, affecting their experience on the Evaluation stage of the CDJ. For this initiative, the KPIs would be the number of impressions, the click-through rate (CTR), the conversion rate and the number of playlist followers.

“Nunca fui a um concerto de música clássica na Gulbenkian nem noutro lado qualquer, simplesmente porque nunca fui educado a ir a um concerto de música clássica. Como disse, ouço bastante deste tipo de música em casa, mas ir a um concerto é bastante diferente, não é como ir ao teatro ou ao cinema.” (M, 54, Bronze)

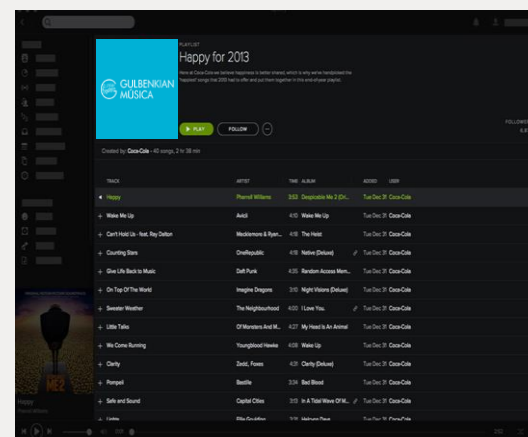
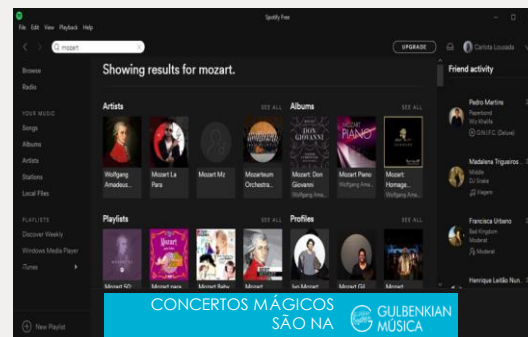


Fig. 69: Examples of recommended Spotify communication and playlist





SPONTANEOUS CONCERT & VIDEO

COMMUNICATION

This initiative has the purpose of **encouraging more disconnected publics to attend more concerts at FCG**. It consists of a spontaneous concert that would occur at FCG's garden and would be followed by its communication via video.

As seen in the diagnostic phase, publics who are non-regular attendees of GM's events, in general do not frequent other FCG's spaces or activities with the exception of the **garden, which is the space of FCG they visit the most**. GM would then capture these publics on this space at the days when concerts with free attendance would happen. The proposed concert would be **started spontaneously by a member of Orquestra Gulbenkian**, who would play a musical instrument, being joined moments later by other orchestra musicians and thus creating a symphony all together. After the show, the musicians would walk through the garden, **inviting spectators** to come to

the concert that would happen later that day.

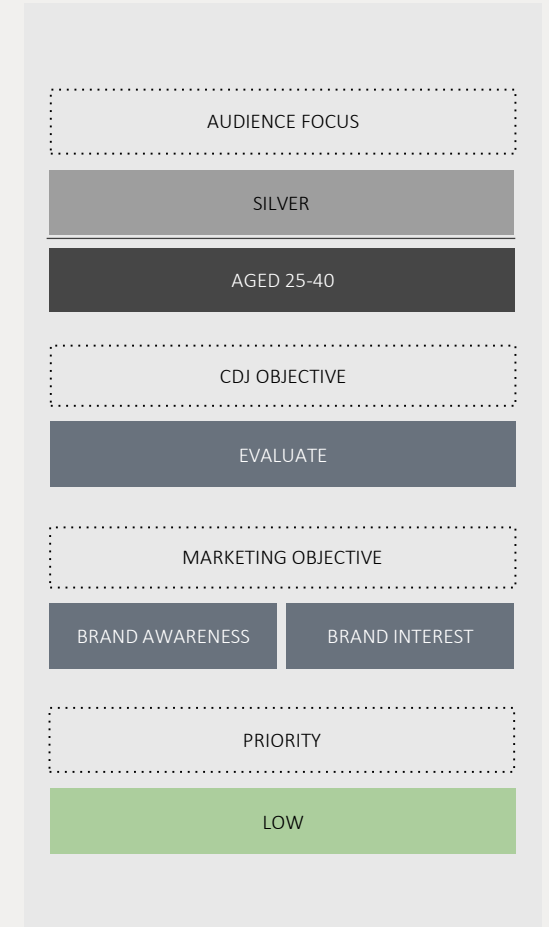
To further explore this initiative, **the moment would be recorded and used to make an advertising video** that would then be communicated on YouTube and Facebook.

This initiative aims mainly to capture the Silver public at the Evaluation stage of the CDJ. In order to assess the performance of this initiative it would be important to measure the number of the concert attendees and the number of video interactions on social media (likes, shares and comments).

"Poderia ir lá a um concerto eventualmente mas iria mais provavelmente ao jardim ou beber um café. Eu nem sei que tipos de espetáculos é que eles têm sequer."
(F,29,Bronze)



Fig. 70: Example of a musician at the spontaneous concert





FAMILY BRUNCH

As it was seen, the *Concertos de Domingo* attract a very **different audience compared to the other concerts of GM** (being more directed to families). They are thus the perfect opportunity to increase consumption of the **Silver public**, as the Sunday concerts themselves involve less formal dynamics and are more directed towards those who are not classical music connoisseurs. Also, since a lot of individuals from the lower age range of our study (**25-40 years old**) have children and/or enjoy the trend of having a brunch on Sundays, it would be interesting to integrate this in GM's concert experience.

The initiative would be based on the possibility to **upgrade the Sunday concert ticket with a brunch in a buffet format**. This would happen before the 4pm concert, on the cafeteria of the museum or the *Foyer*, where participants could even go to the tables outside in order to enjoy their food

when the weather is favourable. The price of a ticket to the Sunday concerts is set at 10€. The brunch would cost an additional 14€ for adults and 8€ for children (based on benchmarking analysis).

When looking at the CDJ, it is possible to see that this initiative would increase GM's odds in the **Evaluation phase**, since it would offer a completely different experience than most of the available entertainment options.

This initiative would be communicated mostly through GM's website and social media. Also, it would be a great opportunity to leverage food-based apps such as Zomato. By being listed as a brunch option, it could also serve as an **open door to completely new publics** and, since the Sunday concerts are a very different product comparing to the core music cycles, there would be no fear of deviating

from the nature of GM and FCG.

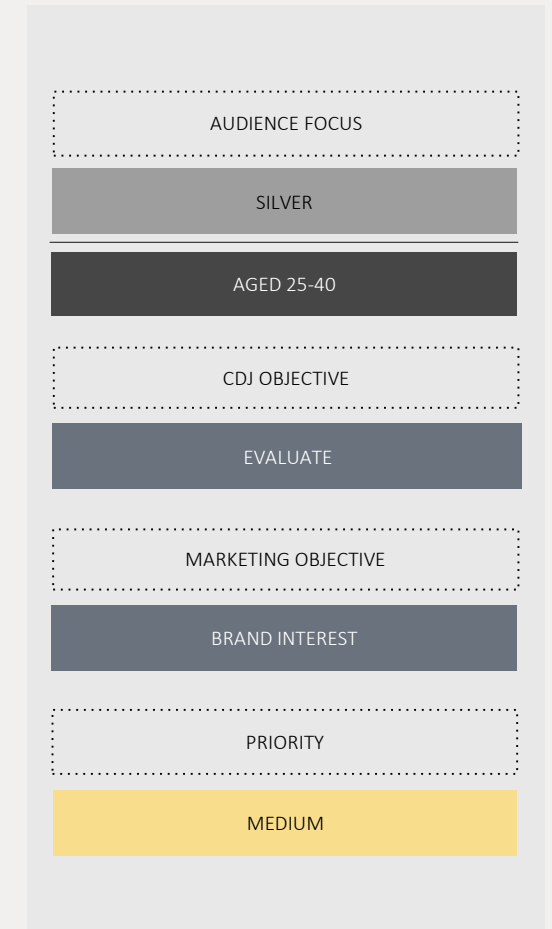
Also, when communicating this initiative, the process of acquiring tickets should be very well explained as families value easy processes that do not involve a lot of effort.

The KPIs for this initiative would be the Sunday concerts occupation rate variation, the number of brunch attendees (as well as return rates) and the number of acquisition attempts (to check whether the demand would exceed offer).



Fig. 71: Brunch aesthetics

FAMILY INVOLVEMENT





“LITTLE MUSIC WORKSHOPS”



The publics from the younger age range (25-40 years old) who might have small children may be more prone to come to GM if they know their children will have an educational activity while they are at the concert since they enjoy to do activities along with their children.

This initiative would be based on the **creation of a new service that would replace the conventional babysitting one. While parents would be enjoying a classical music concert**, their children would be at the "Little Music Workshops" having fun together with other children, while having the opportunity to **experiment playing some musical instruments and learn about classical music**. The children would be divided in two groups, since different ages have very different needs and the activities would be handled in different ways.

The two groups would be composed by:

- **Children aged 2-4:** To become familiar with some musical instruments and be able to try them.
- **Children aged 5-10:** Musical workshop for them to learn about classical music and create a melody in group.

These workshops would be held by responsible young professionals, in collaboration with *Conservatório de Lisboa* and *Escola Superior de Educação de Lisboa*.

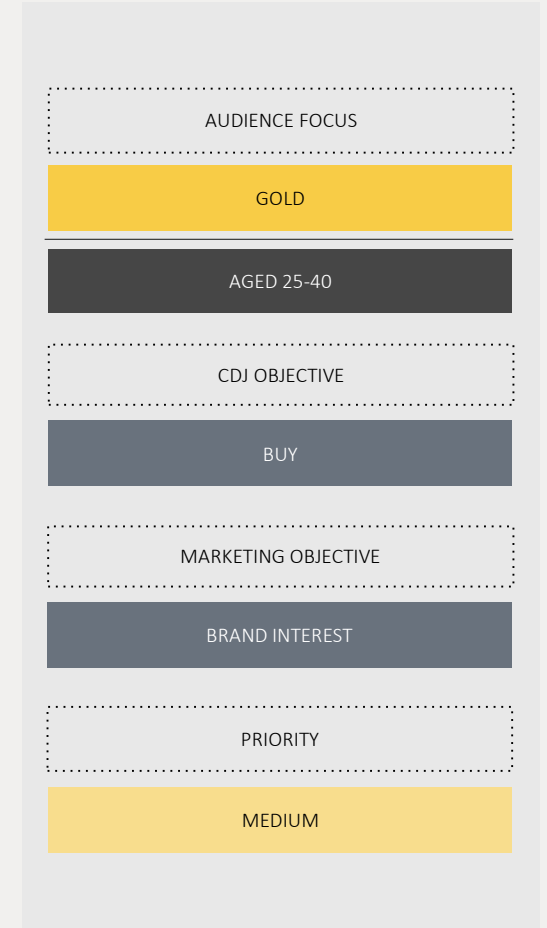
The activity would be available at **Thursdays, Fridays and Sundays**, during the concerts and would be limited to the space available, with a recommended price of 5€ per child. Also, it would be communicated on the *Descobrir* agenda, by email and on the GM’s newsletter and brochures. The KPIs for this initiative would be the number of attendees per workshops and the number of attempted workshops “ticket” purchases (to verify if demand is higher than supply) .



Fig. 72: Example of a 2-4 years old workshops participating



Fig. 73: Example of a 5--10 years old workshops participating





“MOZART E O SEU BEBÉ”

FAMILY INVOLVEMENT

The “**mozart effect**” is the outcome of a research that indicates that babies allegedly turn out more intelligent when exposed to classical music during gestation. Also, there are many other known and proved benefits of listening to music during pregnancy. For publics aged 25-40 years old, who might be going through this stage of life, this would be the perfect opportunity of **leveraging these benefits and increase the Silver publics’ relationship with GM.**

This initiative would involve some members of the *Orquestra Gulbenkian* **playing in the garden** while a **professional physicist** would guide pregnant women in several activities to the sound of classical music. The activities would **include breathing exercises, yoga, pilates, muscular stretching and functional training** and would be conducted in the Spring, when the weather is favourable.

Upon the creation of this bond, the soon-to-be mothers may want to take it to the next level by **attending concerts at FCG** or, if not, they would at least generate good memories surrounding the experience lived. This may make them come back later on, as they will associate GM to positive feelings. This initiative is about generating **Brand Interest** and positioning GM as an **unforgettable brand**, that is present in the most important stages of the life of its publics.

The initiative would be communicated in GM’s online channels (such as social media and website), as well as in the *Descobrir* agenda. The KPI to measure the initiative’s success would be the number of participants and the number of tickets to other GM events sold to participants.



Fig. 74: Example of ctivities performed in the garden



Fig. 75: Example of musicians playing in the garden

AUDIENCE FOCUS

SILVER

AGED 25-40

CDJ OBJECTIVE

EVALUATE

MARKETING OBJECTIVE

BRAND INTEREST

PRIORITY

LOW



4. FINAL REMARKS



4. FINAL REMARKS

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RECOMMENDED KEY PERFORMANCE INDICATORS

A set of KPIs have been presented in what concerns each initiative individually but other KPIs should also be present for each of the strategies as a whole.

Regarding the **short run**, we focused mainly on solving the issues identified during the experience delivered by GM. From the moment of implementation of the recommended initiatives, the audience satisfaction should be measured through satisfaction surveys. The service efficiency should also be measured using mystery clients, who would act as regular consumers and be able to identify possible flaws. Considering the main goal of the short run strategy, public conversion rates (mainly Silver to Gold and Gold to Platinum) should be verified, as also the concert's attendance variation in order to verify how the different publics were impacted by the initiatives set. The ROI and the revenues variation would also be KPIs that would be transversal to all initiatives in the short run and would put GM on track.

It is **only when the short run strategy is measured and its success is confirmed** that it is recommended for GM to implement both medium and long term strategies presented in this report.

Similarly to what happened before, KPIs will guarantee the successful implementation of each **medium and long run** set of initiatives. Transversal to both, and following the short run strategy, the audience satisfaction, the public conversion, the concert's attendance variation and the ROI & revenues variation should be analysed. Moreover, the Net Promoter Score (NPS), the Customer Lifetime Value (CLV), the brand equity, the Share of Voice (SOV), the number of brand mentions across social media and their content as also the search interest on Google Trends would also be measures that would show a great relevance on verifying the impact of both term strategies.



LIMITATIONS & CAVEATS

This section aims to highlight the limitations and caveats that we found during the development of this project. Some transversal limitations were discovered during the project. For example the very little knowledge we had about FCG’s dynamics and the generally low expertise about classical music leading to a constant learning process throughout the duration of the project. Moreover, regarding specific steps of the project, some key aspects are important to point out.

As for the **qualitative research**, we already had some experience conducting in-depth interviews due to other academic projects. However, being students with none or limited professional experience on marketing research, we do not have full expertise on the subject. On the other side, concerning **quantitative research**, it was very difficult to find people belonging to the Platinum public who were willing to answer the questionnaire at FCG – we have tried, for two days, to conduct questionnaires there before the concerts and verified that people aged 25-65 either arrived late or went directly to the cafeteria, making difficult the approach. This led to the data collected for this public not being statistically relevant.

Furthermore, it was verified when analysing the 5-point likert-scale questions that there was a high number of individuals,

particularly from the Bronze public, who selected point 3 (“Indiferente”). This suggests a **general indifference of the population towards culture and FCG in particular**.

Another assumption made for the project was that individuals from **social classes C2 and D** do not have the means, resources or interest to develop a connection with music, strong enough to influence them to attend GM’s concerts. Hence, this group of people was excluded from our target from the very beginning.

Given that the **Platinum public** is mostly composed of individuals older than the project’s focus age range, the findings from the conducted research may not be representative of the majority of the current core public of GM. However, these findings were applied to the generality of this public. Also, the study previously performed by GM that we used for better understanding the Platinum public may not include only this public’s individuals as it was conducted with all the publics attending concerts. However, we already saw that the majority of GM’s current attendees is very aged and loyal and have been attending the concerts for many years. Hence, we made the assumption that the respondents to the study belong to the Platinum public.

Lastly, we would like to reinforce the idea that addressing the

Bronze public would require a more generous time scope, a bigger financial investment and changes on the offer and/or FCG’s identity. For those reasons, recommendations to this segment are not contemplated on this report although they are going to be influenced by some of them.

Another limitation is related to the **time scope** given to the development of this project. Given the essence and relevance of the problem at hand, as well as the limited timeframe that was given, we focused on the essential subjects that should be given top priority, ending up not addressing other segments or groups of people who could have revealed to be potential GM’s attendees. For all of that, it is recommended that GM addresses the following segments with **further research** in a future opportunity:

1. **Bronze public:** How to attract this segment without making drastic changes to FCG’s identity and offer.
2. **Tourists:** How to attract this segment given the outstanding number of entertainment opportunities in Lisbon for foreigners.
3. **Portuguese non- Lisbon residents:** How to attract people living outside Lisbon to come to the capital city to attend concerts at FCG.



FINAL NOTE

This report is constituted by recommendations that answer to the project challenge of **“How to attract new potential publics to *Gulbenkian Música* without losing the current ones?”**, in order to help FCG’s decision makers.

As a final remark it is important to understand that the recommendations presented in this project were developed taking into consideration the ROI and changes on FCG’s identity and/or offer.

This implies a **prioritization upon the conversion of the publics**, targeting firstly the **publics already closer to GM** as they represent **lower conversion costs** – cheaper and easier to attract efficiently. Therefore, the initiatives proposed represent a fast ROI without the necessity of big changes on Brand Identity and GM’s offer - according with the identified segments, different Brand Positioning(s) were developed in order to target each group with a specific goal.

With these recommendations being applied, FCG itself would change, modifying as well the way the brand is seen by the audience (**Brand Image**) – regarding FCG and GM specifically.

Another aspect of great importance is that the Platinum public is mainly composed by aged individuals. Following the “normal” path of life, they will be replaced by the young Platinum (music students) and Gold public individuals (as proposed by us). Since both groups of spectators are less rigid, more curious, more passion-driven and more digital-oriented, this will “force” some expected changes on GM’s offer and FCG’s identity.

Hence, GM’s image would also change, making slighter the gap between the current and the potential publics (generally speaking) and therefore **making easier the approach to attract new potential publics**.



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