Dr. Julia Roll
Research Assistant

Bauhaus-Universitaet Weimar
Faculty of Media
Chair of Marketing and Media Research
Albrecht-Duerer-Str. 2
99425 Weimar
Germany

Phone: +49 (0) 36 43 / 58 37 93
E-Mail: julia.roll@uni-weimar.de
www.uni-weimar.de/medien/marketing

Prof. Dr. Jutta Emes
Chair of Marketing and Media Research

Bauhaus-Universitaet Weimar
Faculty of Media
Albrecht-Duerer-Str. 2
99425 Weimar
Germany

Phone: +49 (0) 36 43 / 58 38 22
E-Mail: jutta.emes@uni-weimar.de
www.uni-weimar.de/medien/marketing

Dr. Sven-Ove Horst
Visiting Professor for International Management and Media

Bauhaus-Universitaet Weimar
Faculty of Media
Media Management
Albrecht-Duerer-Str. 2
99425 Weimar
Germany

Phone: +49 (0) 36 43 / 58 39 08
E-Mail: sven-ove.horst@uni-weimar.de
www.uni-weimar.de/de/medien/professuren/internationales-management-medien/

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Cultural Marketing in the Digital Age:

The Influence of Place and Media on the Brand Image of Live-Operas

Abstract

Music theatres are challenged by digitization and the emergence of new media. New media enables people to stay outside the opera house while attending a live-opera, e. g. via live-streamed opera shows in the cinema. Moreover, opera houses are confronted with declining public funds and are increasingly forced to account for an efficient allocation of resources. Against this background, market orientation and branding are of growing relevance to opera houses. Based on Keller´s (1993) brand image approach, we use an explorative qualitative study in order to investigate similarities and differences between the brand image of live-operas experienced in an opera house versus those shown in a cinema. As a result, we found that audiences distinguish between the respective brand images in detail. Furthermore, classic live-operas of an opera house are perceived as an original, positive, holistic, and unique experience. Music theatres can use the results of this study in order to develop targeted brand management strategies.

Key words: consumer behavior, brand image, live-opera, cultural marketing, marketing strategy

1   The Detachment of the Live-Opera from Place through Digitalization

The German music theatre respective opera landscape shows a substantial bandwidth that is contrary to the centralized systems in Paris, New York or London (Lutz, 2013, p. 49). Audiences make use of these offers substantially: Taken together, the musical genres of the opera, operetta, musical, dance and concerts have about 10 million spectators, which is nearly as much as the teams of the German Football Bundesliga have (Bollmann 2012, p. 13). Opera performances[1] reach nearly 4 million spectators per year (Deutscher Buehnenverein 2015, pp. table 3).

The ongoing digitalization and a growing network of media facilitate new patterns of media consumption that, in turn, bring about new forms of marketing and business models for the music theatre. In particular, the possibilities for live-transmission create new challenges for opera houses. Even though live-opera transmissions are not new, as shown by established TV-offerings by Arte and 3Sat in Germany, public viewing and live-streaming gain relevance and attractiveness for audiences of opera performances. Nevertheless, only large international houses, such as the Metropolitan Opera (MET) in New York currently offer regular transmissions (Reuband 2013b, pp. 223). Additionally, it can be seen that budget constraints of the public, growing costs for the operations of music theatres (with opera performances creating the highest costs) and declining numbers of audiences lead to questions of legitimacy of German public music theatres (e.g. Abfalter 2010, pp. 127; Lutz 2013, pp.65).

These changing circumstances make a targeted cultural marketing necessary, so that opera houses have a chance to survive in the market. A strategic identity-based brand management approach, which is targeted towards all internal and external stakeholders, has the potential for creating successful competitive differentiation and building customer relationships in the cultural sphere (e.g. Aaker 2014; Burmann, Schleusener and Weers 2005; Esch 2014; Guenter

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[1] An opera performance can be defined as a dramatic work, in which the text is entirely or mostly sung and in which music is used to leverage the effect of the performance (Abfalter 2010, p. 97).

and Hausmann 2012, pp. 45). A necessary foundation for this is a comprehensive research of cultural audiences (Abfalter 2010, pp. 99).

It becomes evident that current approaches to cultural audience research are often ad hoc and seldom built systematically from the ground up (see also Glogner-Pilz and Foehl 2010). Additionally, integrated approaches for brand management in cultural institutions are scarce (for an overview see Buensch 2011, 2015). Moreover, existing research does not take into account the influence of different geographical locations and contexts, in which live-operas are being offered (for an exception see Reuband 2015).

This study closes this gap, because it includes the location as well as the type of an opera performance under the banner of the brand. In parallel to the example of contrasting live-streamed operas of the MET in the cinema and live-opera performances in the opera house, the current study focuses on the perception of the audience and aims to answer the following research question:

Which similarities and differences does the brand image of live-opera performances show, if the performance is given in an opera house or transmitted in a movie theatre, and which concrete management implications can be drawn from these findings?

Following this line of argumentation, the research paper addresses not only management issues, but also culturally- and socio-politically relevant questions. The aim is an interdisciplinary analysis of the context of live-operas, and on this basis, to find out how the context can be used for branding purposes of the 'classical' live-opera in the opera house.

2   Determinants of the Brand Image

Because of the special circumstances surrounding the service-character of operas, customer-related uncertainties arise. A strong and well-defined brand can create a promise of quality, which can remedy these uncertainties. A brand can be defined as a bundle of benefits that has

specific characteristics in terms of identification and differentiation for the relevant target groups (Meffert 2012, p. 270).

In the last years, we have seen an evolution of our understanding of brand management towards an identity-based strategic brand management (for an overview see Meffert 2012, pp. 269). With such an understanding, we differentiate between the managerially-intended brand identity (inside view) and the specific brand image (outside view), which reflects the entirety of the impressions about a brand by its stakeholders. The brand image, then, is a subjective, multi-dimensional construct of different semantically-linked associations (Radtke 2014, p. 2).

In the following, the focus will be on the visitors of live-operas. The determinants of the brand image will be analyzed in terms of a behavioral science approach. By presuming that brands have characteristics with different abstraction-levels within a semantic network (e.g. Keller 2005, pp. 1318), we do not concentrate on a single event or a specific location. Rather, the focus will be on the contexts of the music theatre and movie theater in order to derive abstract brand-characteristics. Therefore, the concept of Keller (1993) seems to be ideal. Under the condition of a brand awareness and compared to other approaches (e.g. Aaker 1991) it highlights the attitude towards a brand as a significant success factor. Following Keller (2005), the brand image is the major determinant for the preferences and choices of a customer and consists of unique, advantageous and strong associations (pp. 1318). Based on a rising level of abstraction, he (1993) differentiates between three levels of brand associations.

First, the focus is on attributes. It centers on "what a consumer thinks the product or service is or has and what is involved with its purchase or consumption" (p. 4). Moreover, Keller (ibid.) differentiates those in product-related and non-product-related characteristics, such as price, conceptions of the user of the benefits, the use of the benefits, and the packaging. Since a live-opera in an opera house or movie theatre is a service, the packaging will not be included in the analysis. According to Keller (ibid.), the idea of the brand personality derives from a combination of user- and usage-impressions. The brand personality concept itself is based on

the socio-psychological assumption that people attribute a personality to objects and services. In this context, a brand personality is defined as „the human characteristics of a brand" (Aaker and Fournier 1995, p. 391). Specifically, research has shown that a strong brand personality has positive effects on buyer behavior (Biel 1993) and should be considered when analyzing emotional services such as live-operas. Therefore, it is included as a separate determinant.

Second, the focus is on the benefits that arises through the satisfaction of functional (intrinsic aspects), experiential and symbolic (rather extrinsic aspects) needs through the consumption (Keller 1993, p. 4).

Third, there is an attitudinal dimension of the brand image, because brands are meant to generate preferences of the consumers (ibid. 2005, pp. 1309).

The concept of brand management in public theaters has gained rather little attention to date, and usually focuses on specific opera performances and opera houses (for a review of existing studies see Buensch 2011, 2015). Research on the audience perception of German opera performances centers on sociodemographic and motivational aspects, which do not focus on the brand image (Abfalter 2010; Jobst and Boerner 2011; Lutz 2013; Reuband 2015). In addition, the studies that attend to the place of opera performances, e.g. in a warehouse (Roll and Hoeflich 2014), or approach live-opera transmissions in the context of open-air public viewing (for Austria, see Josch 2010) or cinemas (especially Reuband 2013a, 2013b, 2015) do not integrate any branding aspects.

3   Qualitative Methodology

This study chooses a qualitative methodology to generate the relevant aspects of the brand image, because the brand image of live-operas in different contexts has not yet been studied, and, therefore, no scientific data currently exists. Using a qualitative approach, focus group interviews are a suitable method for different reasons. In this method, a moderator leads a discussion with several people. The benefit is that the group dynamics in the interview may

lead to multi-faceted and spontaneous answers (Iacobucci and Churchill 2010, pp. 64). When selecting the participants, it is important that the group includes people that have at least once experienced a live-streamed opera in a cinema and/or a live opera performance in an opera house, as well as people that have previously not had any experience with it. This heterogeneity may further create a greater bandwidth of responses (Esch 2014, p. 666). Moreover, the focus is on younger adults (18-30 years old), because this target group increasingly has lower demand for music theatres (Lutz 2013, pp. 59). The potential participants are approached by a snowball sampling (Berg, 1988). The qualitative interview guide includes open and broad questions, to give the participants a preferably large space for associations regarding live-opera transmissions in movie theaters and live-opera performances in opera houses. Furthermore, the information sharing is supported by trusted methods for revealing and structuring information such as the repertory-grid-method (Sampson 1972) and the laddering-technique (Olson and Reynolds 1983; Reynolds and Gutman 2009).

After the interview, the discussed characteristics for the brand image "opera house" and "cinema" are shared with the participants. They should select those aspects from the list, which they see as relevant and further name the opposite of the respective term. The result is a brand profile of semantic differentials, which the interviewees rate on a five-step-scale individually for both contexts. The interviews are recorded audio-visually and transcribed with customary standards. Afterwards, using a computer-aided qualitative research software (ATLAS.ti), a grounded theoretical content analysis that is oriented on the theoretical coding approach (Glaser and Strauss 2010) is conducted.

In addition to the interview, a questionnaire frames the focus-group interviews. In this case, the questionnaire focuses on sociodemographic aspects and global attitudes towards opera events in movie theaters and opera houses (see e.g. Keller 2005, p. 1321), actual visits and the likelihood of a visit in the next half a year, as well as the clarity of the image of the contexts

(oriented on Ruge 1988, p. 100). An overview of the research design can be found in the appendix (see Figure 1).

4   Results of the Brand Image Contrast

The conception of research and two pretests of the focus group interviews were completed in April 2016. Afterwards, in the beginning of May 2016, two interviews with five to six people were conducted that lasted about one and a half hours.

The distribution of gender and experience with live-operas was satisfactory heterogeneous in both groups (see appendix, Table 1). The interviewees are 23 to 27 years old, predominantly well-educated (at least German Abitur), and come from the immediate surroundings of the meeting point for the focus group interview in Weimar (Germany). With one exception (P1w, employed), all participants are students and have rather little income. Three people (P6w, P9w, P7m) live in a relationship, the rest is single.

Nearly half of the 11 participants attends the opera at least several times per year. Only four people visit cinemas less frequently. Six people also visit other events, such as local opera festivals.

In regards to the general attitude, both groups rated the "opera house" (M=1.821[2]; SD=1.168; n=11) most positively, followed by "other places" (M=2.10; SD= .838; n=10) and "movie theater" (M= 3.00; SD= .775; n=11). It is significant that all participants of focus group 1 rated the "opera house" as very positive, whereas focus group 2 only had a positive attitude. This impression corresponds with the answers to rating the clarity of their understanding: Most interviewees could understand better what it means to visit an opera performance in an opera house (M=1.452[3]; SD= .688; n=11) than in a cinema (M=3.45; SD=1.036; n=11); the clarity of

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[2] scale: 1=very positive, 2=rather positive, 3=neutral, 4=rather negative, 5=very negative
[3] scale: 1=very clear, 2=rather clear, 3=neither nor, 4=rather unclear, 5= very unclear

the image is also rated less by focus group 2. The likelihood of a visit in the next six months[4] is structured similarly, since focus group 1 has slightly higher ratings. Overall, a visit of an opera house is regarded as more likely (M=1.64; SD=1.120; n=11), the visit of other places of live-opera events is regarded as neutral, and the visit of a live-opera transmission in a movie theater is rated as rather unlikely (M=4.09; SD= .944; n=11).

While the first focus group has generated 13 associations for the characterization of the brand image overall, the second focus group named 18 aspects.

In comparison, we can see many intersections. Both groups named the aspects of camerawork, high culture, complexity, live-character, experience, cognitive effort, and exclusivity. It is remarkable that the interviewees do not explicitly distinguish between the attribute and benefit dimension. For example, "complexity" is associated with the contrasting pair of "elaborate – simple", while the aspect of boredom is connected with a lower complexity. Moreover, focus group 1 mentioned three additional associations (vividness, authenticity, foreseeability), whereas focus group 2 supplements four very different associations (degree of experience with operas, acoustics, distance to travel, opportunity to see celebrities).

In comparison with the systematic of Keller (1993), the focus groups name both product-related and non-product-related brand attributes and all three benefit dimensions; where, however, a clear separation cannot be made. It is notable that the price is not rated as relevant, even though the interviewees have a lower income. This could be explained by the relatively high level of education and the context of Weimar, which could instigate a high esteem for the opera in general.

A first hint towards a differentiated perception is offered by the polarity profiles of the associations to characterize both brand images of the "opera house" and the "cinema". These have very little intersections. The five pairs, which are being rated as very similar for both brand images (red marker: long-lasting-diverting, surprising-foreseeable/uncreative, familiar setting–

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[4] scale: 1=very likely, 2=rather likely, 3=neutral, 4=rather unlikely, 5=very unlikely

unpleasant setting, predefined perspective–one's own gaze, stimulates thinking-does not stimulate thinking) indicate that these are aspects which are inherent to a live-opera performance and independent of the place and nature of transmission. Overall, the profiles of both focus groups show that the opera event in an opera house may be more formal, but also more holistic than the visit of a live-stream in the cinema (see appendix, Figure 2).

Comparing the individual evaluation of both contexts for each focus group separately reveals that the "opera house" is regarded more heterogeneous than the "cinema", even though the group dynamic of the interview may have suggested that the profiles would have been more uniform. This could be related to the fact that all participants state to have a clearer image of the "opera house" which may be more personal. It is also remarkable that focus group 1 characterizes the "opera house" as especially heterogeneous. This may mean that group 1 may have more faceted attitudes and opinions from previous opera visits. Furthermore, it can be concluded that the opera house may possibly have more segments or target groups than a cinema, due to its more differentiated characteristics.

A second hint towards differences is shown by the responses of the interviewees in regards to the brand personality. Both describe an opera personality as "formal, enduring and dignified" (P2m, p. 118), wearing "formal clothes" (P6w, p. 191). At the same time, the opera house is regarded as multi-faceted and productive, as one participant explains: "One evening, he is wearing a monocle and the next, he has pink hair and a golden sweat suit [laughing]. The third day, he is naked." (P11m, p. 170). P1w sees this versatility as something "between genius and madness" (P1w, p. 54). On the contrary, P5m sees this as "quite frightening" (p. 50), even though he regards the character of the opera house as positive. Focus group 2 complements this picture by seeing an older, appealing man, "who sometimes may take himself a bit too seriously" (P10m, p. 166) and who is with a "high intellect […], monocle and […] a walking stick" (P8m, p. 169).

While focus group 2 sees the character of the cinema as younger, fashionable and more up-to-date, but with similar characteristics to the opera house personality, focus group 1 differentiates more strongly: The participants describe a man with "holes in the pants […] entirely informal, and quite enjoyable" (P2m, p. 113), as well as rather reserved and indifferent towards others. According to the interviewees, such an unapproachability in the means of being not understandable and too opportunistic leads to the fact that the cinema personality cannot be exactly evaluated.

5 Discussion and Conclusion

The research shows that people strongly, easily and holistically differentiate between the brand image of the opera and the cinema. This is shown in the following striking statement of a participant: "in the movie theater it is a movie, and in the opera, it is opera" (P2m p. 63). This indicates that place and media of live-operas are clearly perceived and have a significant influence on the brand image. At the same time, we find associations that show similarities between the opera house and the cinema, which means that there are some aspects which can be regarded as detached from place and transmission of an opera performance.

The brand image profiles suggest two things: First, the opera in the classical opera house is regarded by both groups as an original, positive, holistic, and unique experience, for which it is necessary to make an effort to prepare (e.g. clothes, cognitive efforts for its reception). It is striking that focus group 2 expects a more opera-inexperienced audience in the real opera house, whereas the "copy" (P8m, p. 46) may attract predominantly an opera-experienced audience. Second, opera houses are advised to compare their brand identity with the generated scale to survey their brand image. On this basis, they can analyze which aspects should be how communicated. Finally, by manipulating the brand image accordingly to the desired brand identity means to manipulate the preferences of the customers (Keller 2005, p. 1318).

Even though both focus group interviews were, as preferred, heterogeneous in respect to opera experience and gender, they share an equal background of their life-world (students, and rather opera-friendly). Moreover, the results are only meaningful for this respective sample. However, it can be assumed that there are differences in the perception of the brand images based on segmentation variables. Based on our qualitative research, further studies can explore the following questions with a quantitative approach: Do these relevant brand-image associations also count for a larger group? Are there actually different clusters of opera house visitors? Which brand image structures can be identified as preferable, unique and strong (ibid., p. 1321)? Subsequent research may help us to advance the discussions around cultural marketing and create a greater understanding for how to manage the brand identity of life-operas in the digital age.

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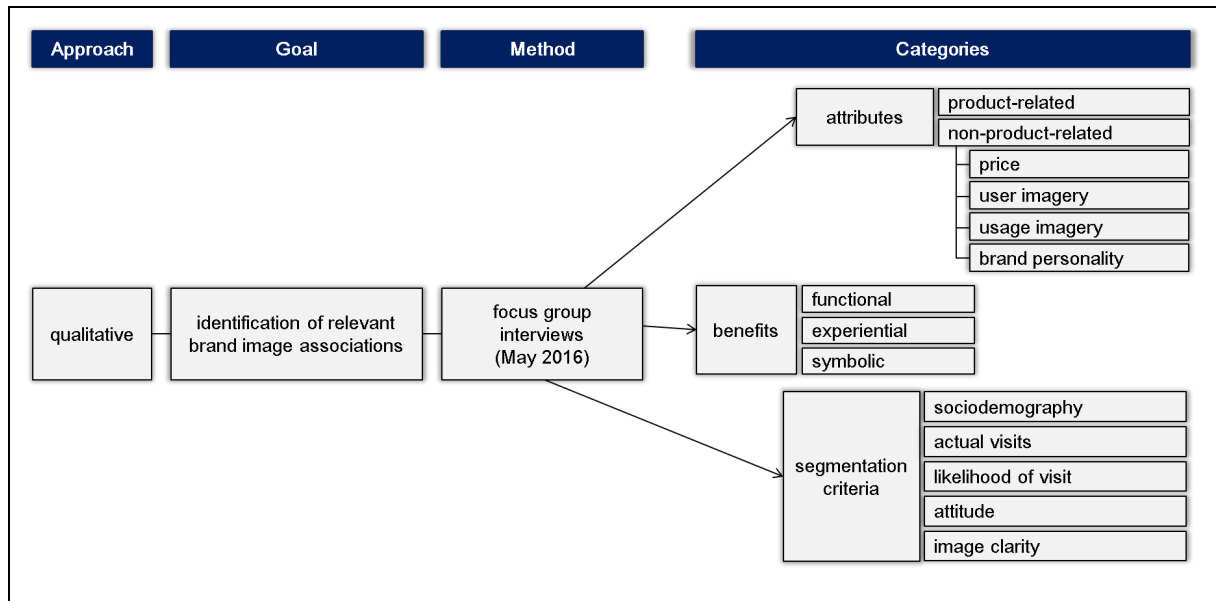
Appendix

Figure 1: Research Design (own research)

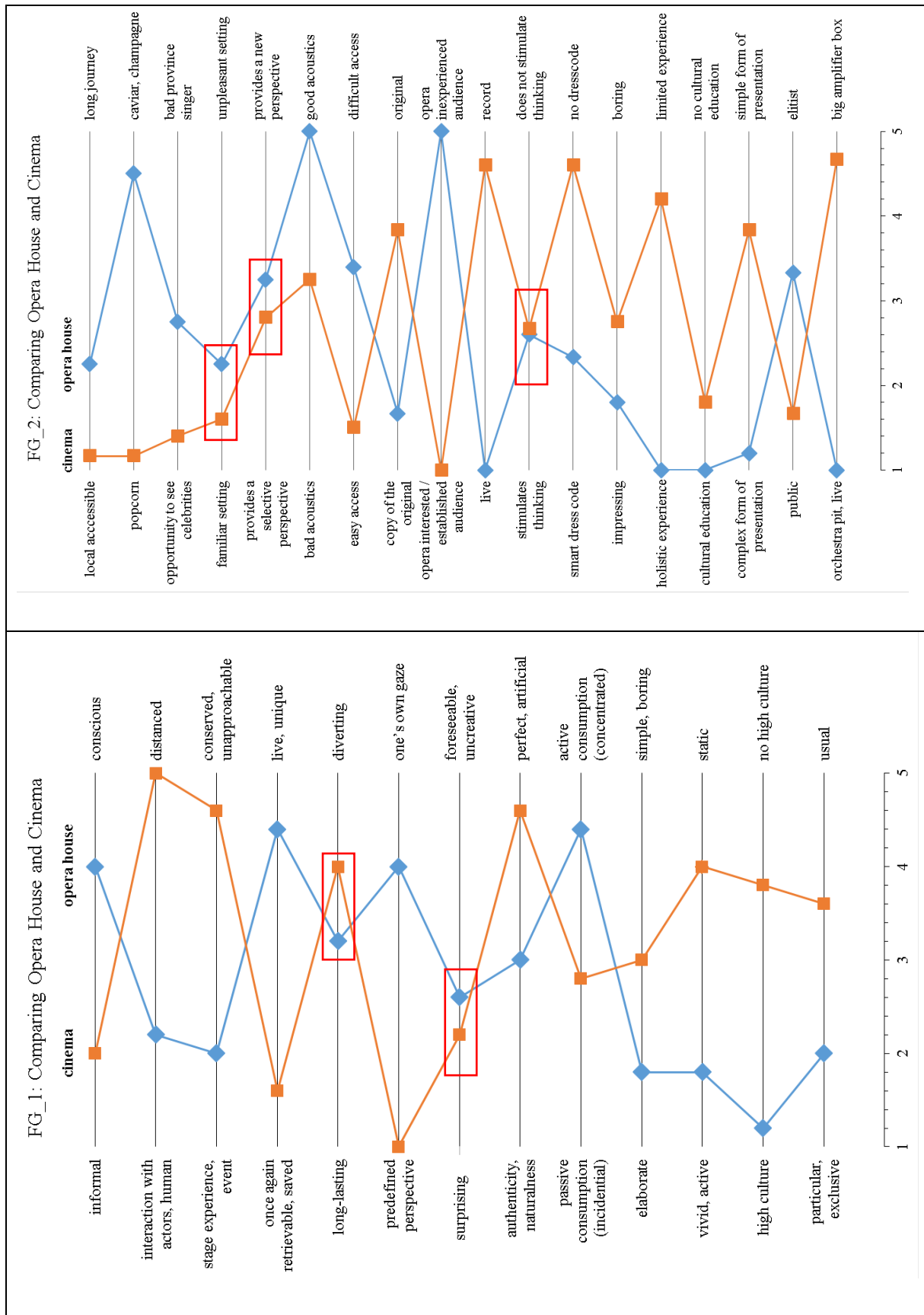| Person	Focus Group	Gender	Age	Experience
P1f	1	female	27	opera house
P2m	1	male	24	no experience
P3f	1	female	25	opera house
P4f	1	female	25	opera house
P5m	1	male	23	both
P6f	2	female	26	opera house
P7m	2	male	26	no experience
P8m	2	male	23	both
P9f	2	female	24	opera house
P10m	2	male	27	cinema
P11m	2	male	23	opera house

Table 1: Participant Overview (own research)

Figure 2: Polarity Profiles (FG_1: n=5; FG_2: n=6; own research)