



CONNECT

KNOWLEDGE ALLIANCE
FOR AUDIENCE DEVELOPMENT

WP2 – DETAILED NEEDS ANALYSIS OF THE SELECTED TARGET GROUPS

Detailed needs analysis on practitioners in the cultural sector



Co-funded by the
Erasmus+ Programme
of the European Union



Report curated by: Fondazione Fitzcarraldo
Researchers: Luisella Carnelli, Alessandra Gariboldi, Emanuela Gasca, Simone Seregni

October 2017

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Co-funded by the
Erasmus+ Programme
of the European Union



1. Methodological premise.....	2
2. The main evidences	5
2.1 Professionals' profile.....	5
2.2 perception of AD	9
2.3 AD in professionals' practice	11
2.4 Required skills and training	15
3. Main findings and reflections: towards the CONNECT TTP	19

1. Methodological premise

The main objectives of the research are:

- analysing the profile of practitioners working in cultural sector;
- analysing cultural practitioners' attitude towards AD;
- investigating *if* and *how* AD policies are implemented in cultural organizations they work for;
- identifying professionals needs to build a specific programme on AD.

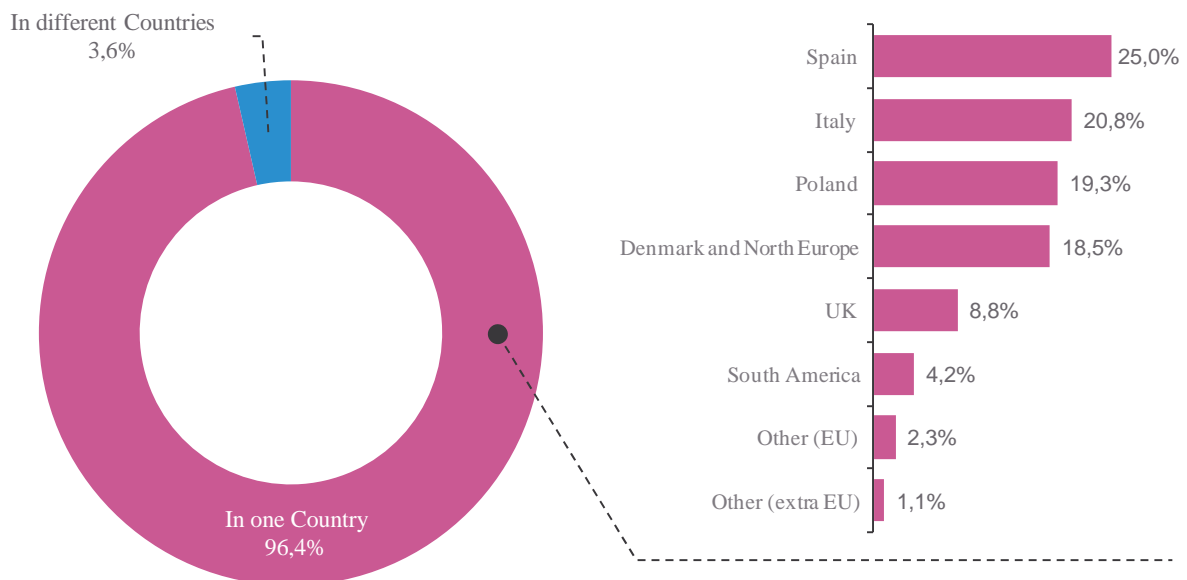
The research - developed in May and June 2017 – was conducted using the [CAWI \(Computer Assisted Web Interview\)](#) methodology.

The questionnaire has been translated in the [four languages](#) of the project - (Italian, Spanish, Polish, and English – Nordic Countries answered in English) corresponding to the five national hubs - to facilitate the comprehension.

[The total number of practitioners involved in the survey is 628](#). Looking at this sample from a country point of view (*Picture 1*), Spain (154), Italy (128), Poland (119), Denmark and Scandinavian countries (114), are all well balanced, while UK (54), is the only under represented country.

The few professionals (47) who don't come from the CONNECT countries were excluded by elaborations focused on countries' comparisons.

Picture 1 – What is the Country do you mainly work in?

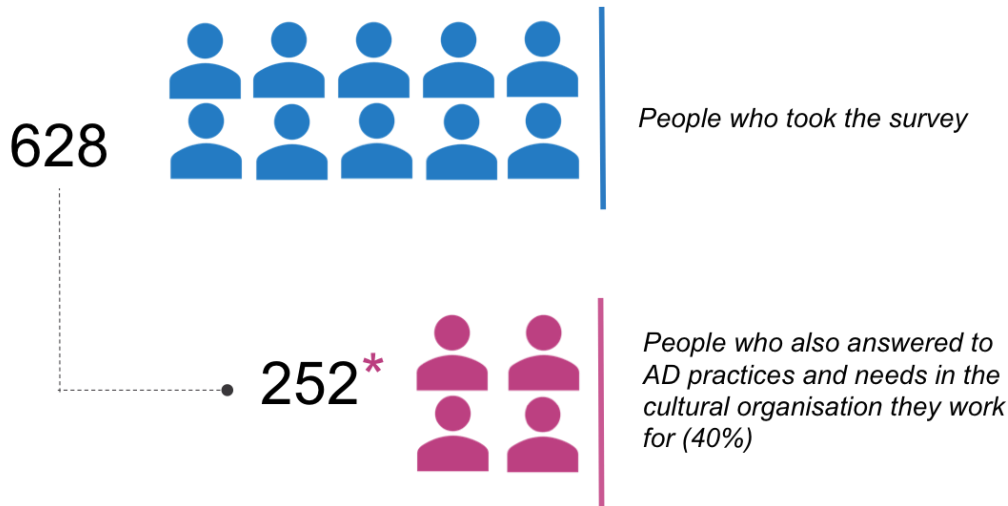


N = 616

The questionnaire is structured in **three modules** that invited practitioners to answer to **24 specific questions**:

- *Module 1: Audience Development and you.* This part analyses the practitioners' profile (in terms of education, type of organization they work for and area of work) and their view on AD;
- *Module 2: Competences in Audience Development* that aims to study competences in terms of skills and methodologies that are useful to work on AD according to practitioners;
- *Module 3: Audience Development in the organization you work for* that would like to analyse the attitude and strategies that practitioners' cultural organizations applied in terms of AD.

The **third module** of the questionnaire was addressed only to operators working mainly in one cultural organisation on a regular basis (no matter if as employees or external collaborators). **252 practitioners** also answered this section. Graphs related to data given by this reduced sample are marked in the present report with *****.

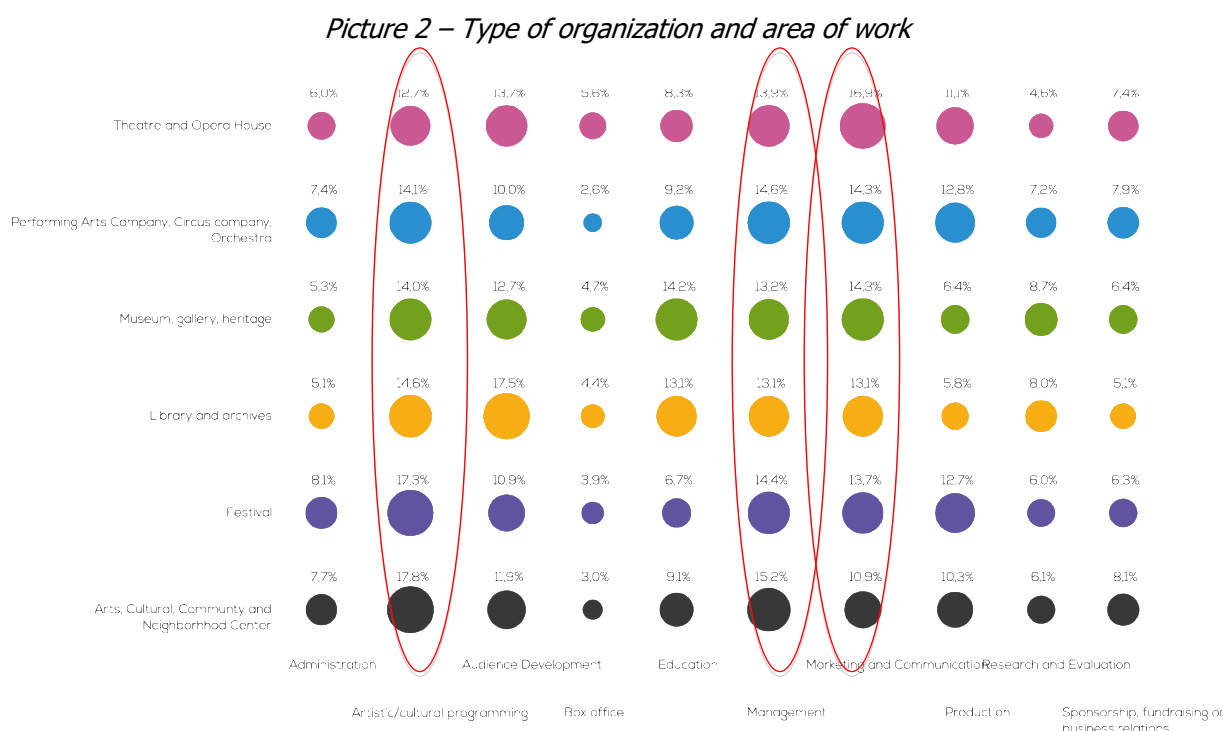


2. The main evidences

2.1 Professionals' profile

As a premise, it's worth underlining that the sample is not representative of all cultural practitioners population, but of those who accepted to participate in a survey about Audience Development, thus *professionals already interested in the topic* (more than 97% considered AD important or very important and 83% expressed their interest in the future CONNECT training).

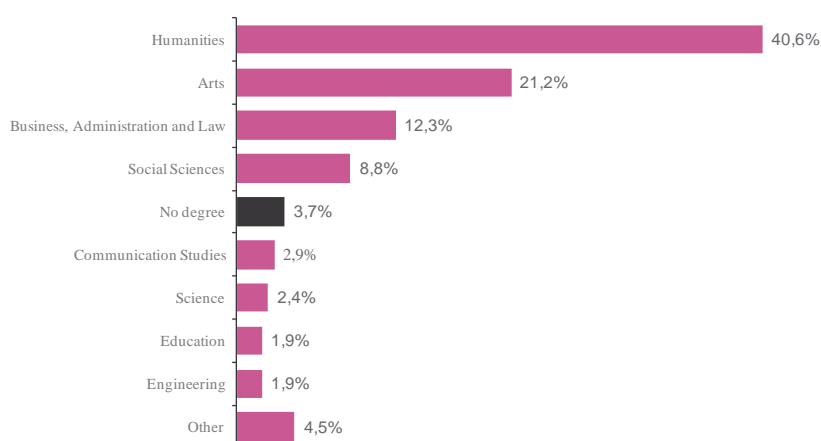
Nevertheless, the sample overall covers all cultural organisations' typology and all areas of work, although a stronger presence of people working in marketing and communication, management, and artistic and cultural programming can be recorded (see Picture 2, where selected biggest dots show the prominent and cross cutting presence of these areas of work in different sectors).



Gender composition, age e and working experience also confirm a well distributed sample: a prevalence of women (68,5%), and of respondents born before 1980 (65,7%). The core of respondents has been **working in the field from 6 till 15 years** (43,9%). The spectrum of the respondents shows many of them are **senior or intermediate**, while 21% are junior or at the beginning of their career.

Humanities and Arts are the most represented backgrounds, 40,6% and 21,2% respectively.

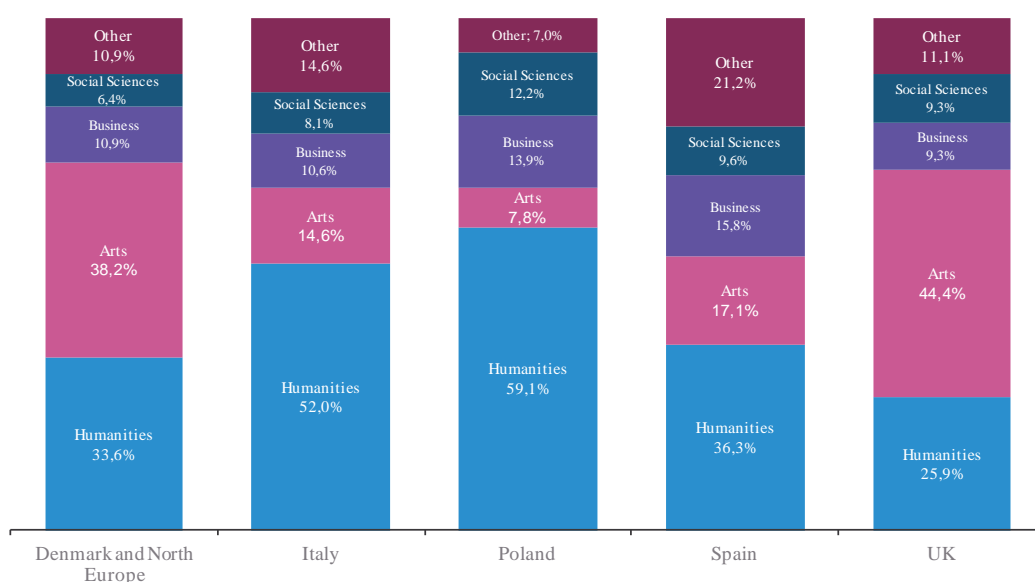
Picture 3 – What's the subject area of your degree?



N = 628

Considering geographical differences (Picture 4), in Italy and Poland more than half of the respondents has a background in Humanities; in UK and Denmark/North Europe, the majority has a background in Arts; in Spain, the majority has a background in Humanities, but there is a more equal distribution among study fields. This might reflect cultural differences of the Educational system of these countries – having Italy and Poland stronger traditions in humanities and social studies, while UK and the Nordics have a stronger educational offer focused on arts and production.

Picture 4 – Degree sector per Country



* Other includes: Communication Studies, Science, Education and Engineering

N = 578

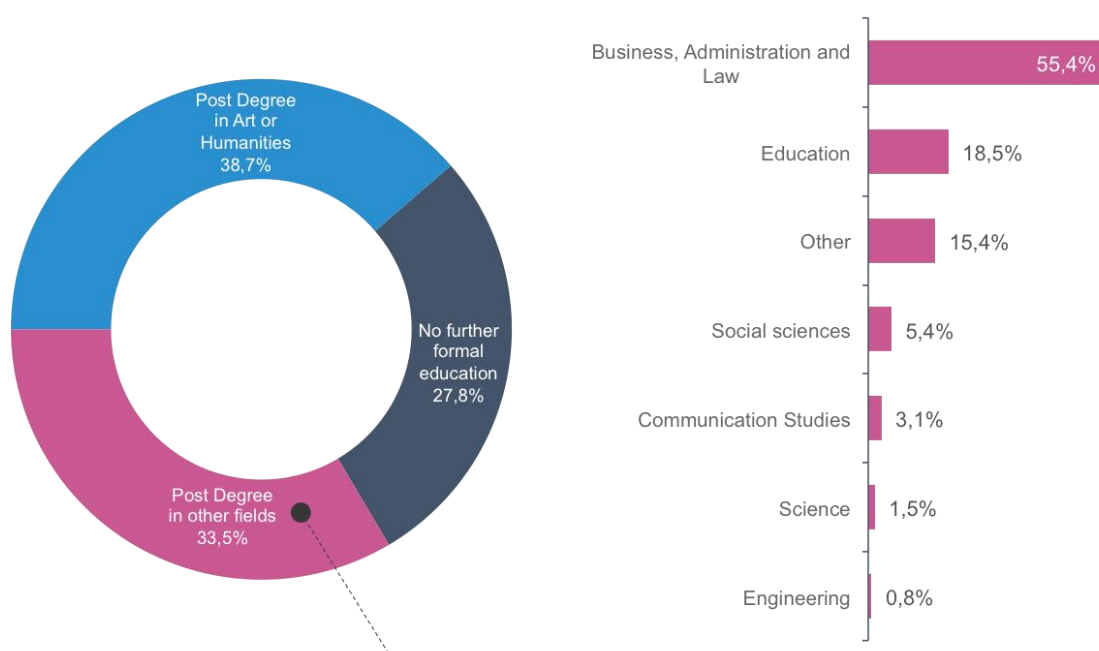
Cultural operators are very qualified: more than 70% has a post degree: 32% has their post degree in Business, Administration and Law; 22% in Humanities and 20% in Arts.

Considering respondents who have a **degree in Humanities and in Arts (more than 60% of our sample as a whole)**, it's worth noticing that 28% does not have any further formal

education, 32% has a post-degree in the same area, while almost 40% has a post-degree in other fields, diversifying and integrating with other competences their disciplinary background - mainly business studies – see Picture 5.

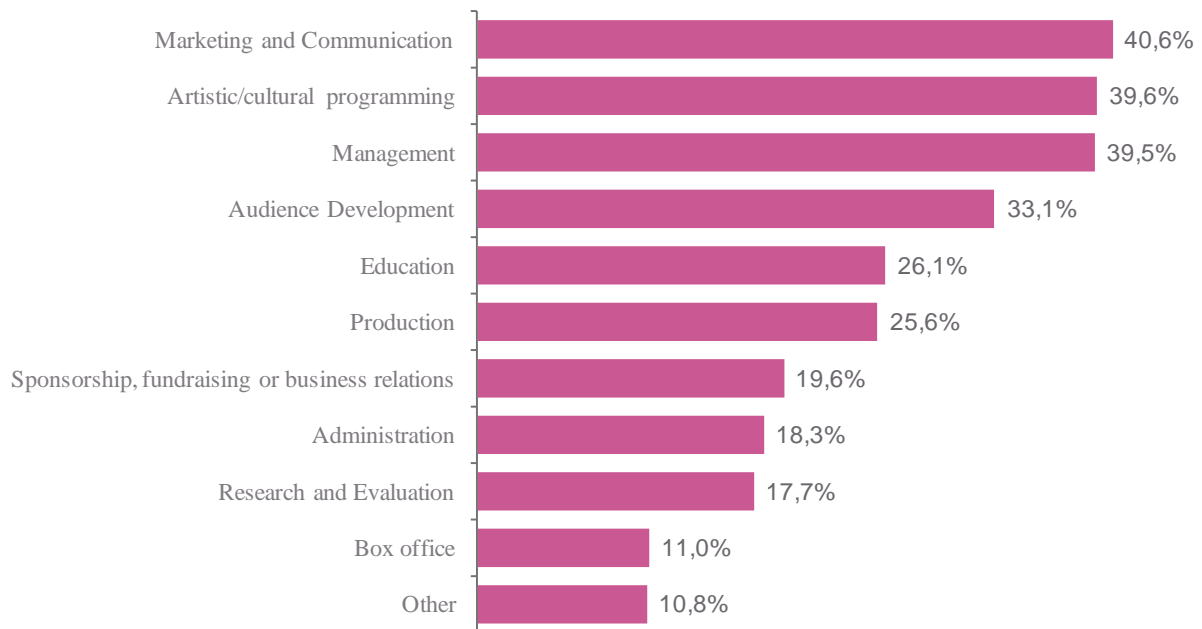
Nevertheless, while designing a training programme, this implies that the majority of culture professionals educated in arts and humanities interested in AD have a quite homogenous knowledge background, and supposedly lack of marketing and managerial basic skills that are typically part of the overall professional profile of Audience Developers (see *ADESTE* www.adesteproject.eu).

Picture 5 – Professional educated in Humanities and Arts and post degree



Marketing and communication, Artistic/Cultural Programming and Management are the most represented areas of work of the sample (Picture 6). Differences from sector to sector are minimal: who works in Artistical/Cultural Programming comes mostly from Festivals and Arts Cultural / Community and Neighbourhood Centres; Theatres and Opera Houses have a higher percentage of respondents who work in Marketing and Communication; production involves specially Festivals, Theatres and Opera Houses, Arts Cultural Community and Neighbourhood Centres.

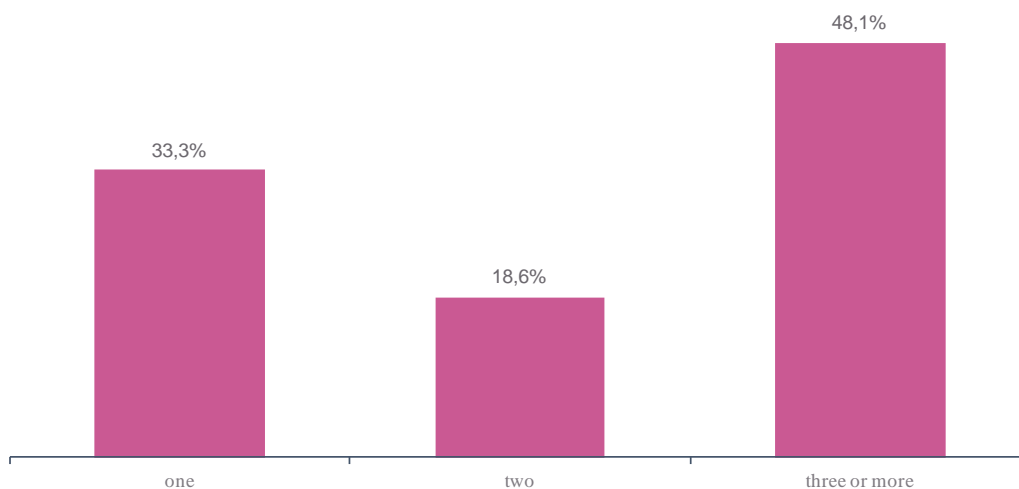
Picture 6 – In which area do you mainly work?



N = 628

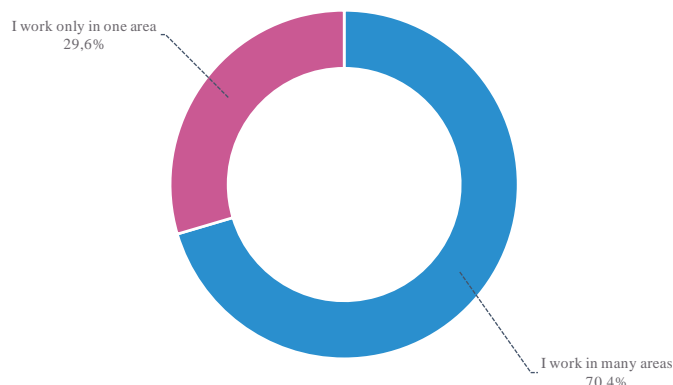
An interesting result is that nearly half of professionals declare to work in 3 or more different areas (Picture 7) and marketing & communication and management overall are the areas indicated by 80% of respondents (consider it is a multiple-choice question).

Picture 7 – In how many areas do you work?



70% of professionals declaring AD is the core of his work, does work in more than one area (Picture 8).

Picture 8 – Audience Development is the core of my job

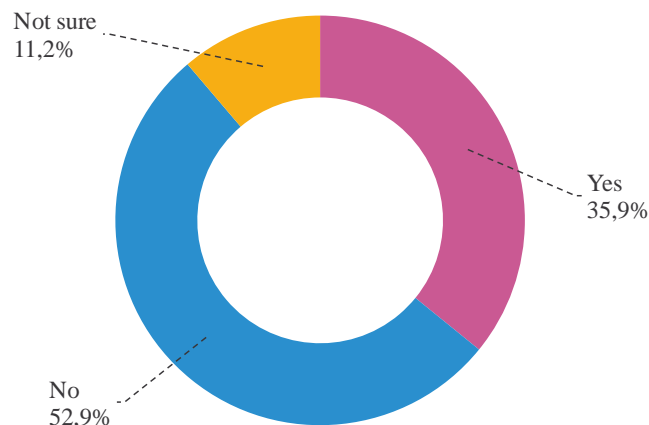


2.2 perception of AD

36% of the respondents declare they had a specific training in Audience Development (Picture 9). This data is surprising when compared to research findings on educational programmes of CONNECT (see R 2.4. Survey on programmes), and to previous research,¹ that report a substantial lack of specific training and educational offer in the field of AD. We might have a better interpretation of this apparently incoherent data if we consider also the answer to the question “AD in your opinion is...” (Pictures 10 and 11): 36% of our sample believe “AD is mainly about marketing”. We dare to suppose that, since many professionals state AD is mainly about marketing, they actually consider “training in AD” as training in marketing.

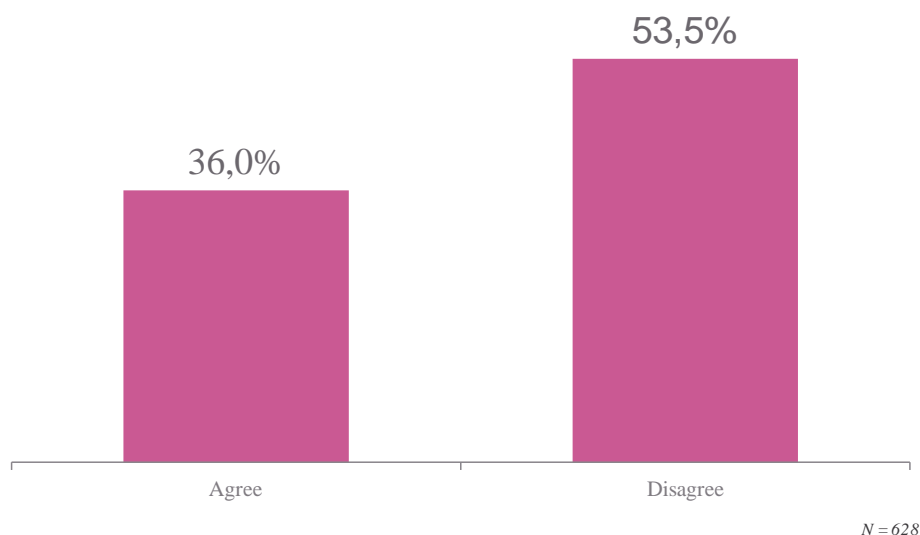
Picture 9 – Have you ever had any specific training in Audience Development?

¹ See the ADESTE Report on [Training Paths, Skills, and Competences for Audience Development](#)



N = 580

Picture 10 –Audience Development is mainly about marketing?



N = 628

This is a crucial point in the light of the CONNECT framework, whose aim is developing a training programme to build capacity in AD and related entrepreneurial skills, within the wider purpose of systemic growth of AD awareness and capacity. The consortium premise - based both on extensive literature and previous research – states AD as the complex “process that involves a wide range of audiences and takes into account their needs in shaping arts and cultural vision and activities”,² but this extensive and “process” interpretation of AD seems still far from being largely assumed by cultural practitioners (although 53% seem more aware that AD is not *just* about marketing). In future decisions, CONNECT shall consider that the interpretation of AD mainly as “extensive marketing” that has been largely overcome in literature,³ is still well settled also among those practitioners who show sincere interest towards the topic (almost 60% declare AD is the core of their

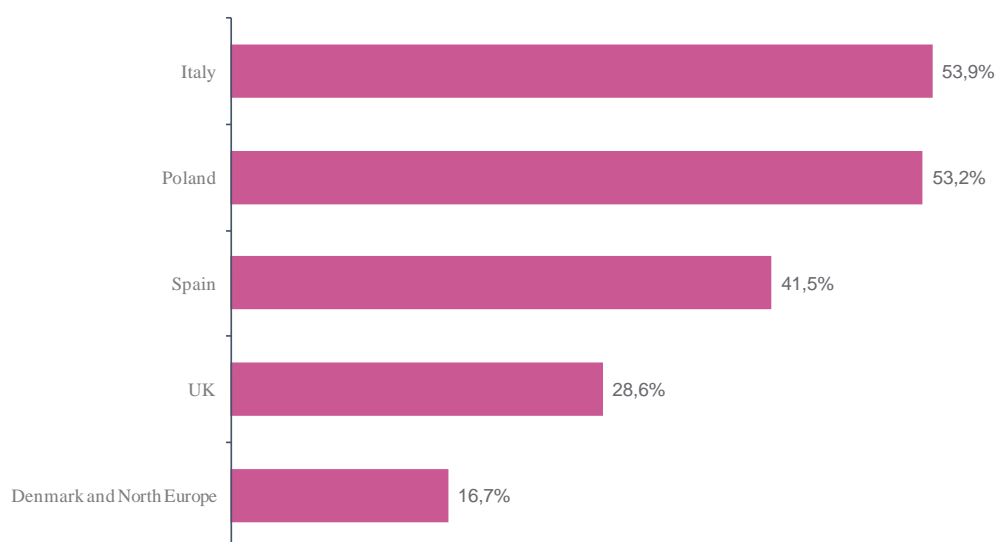
² See Engageaudiences Study - Glossary, p.54

³ see Engageaudiences Study selected [Literature Review](#)

job), and also among those who are not 'marketing people' (half of those declaring AD is mainly marketing do not work in this area).

Once again, in this narrower interpretation of AD there are important differences among countries: in Italy and Poland more than half of respondents relate AD to marketing; the percentage decreases in Spain (41,5%), UK (28,6%) and Denmark/North Europe (16,7%). This point also requires some interpretation in the light of both the research on Educational programmes and the one on student's needs and expectations. In those countries where arts marketing is well settled and the discourse about AD counts on a longer story and a wider debate (as UK) professionals seem more aware of the extensive interpretation of AD as an organisational and cross sectorial issue. For different reasons – more related to the wider debate about participation as a democratic issue – professionals of the Nordics see the topic in wider terms and have a stronger perception of AD as a process aiming to achieve wider cultural participation.

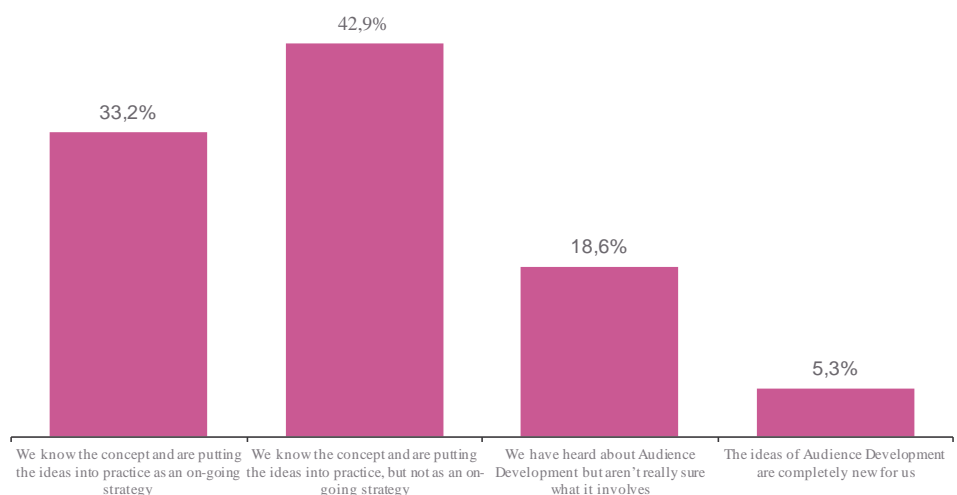
Picture 11 – Is Audience Development mainly about marketing? Per Country



2.3 AD in professionals' practice

Module 3 of the questionnaire was about AD in practice. The majority (43%) of respondents to this section (whose total number is 252) declare that [the organisation they work for knows the AD concept and puts the ideas into practice, but not as on-going strategy](#). On the other hand, [33% declare that organisations knows the AD concept and puts the ideas into practice as an on-going strategy](#). Once again, the answer shows relevant differences from country to country.

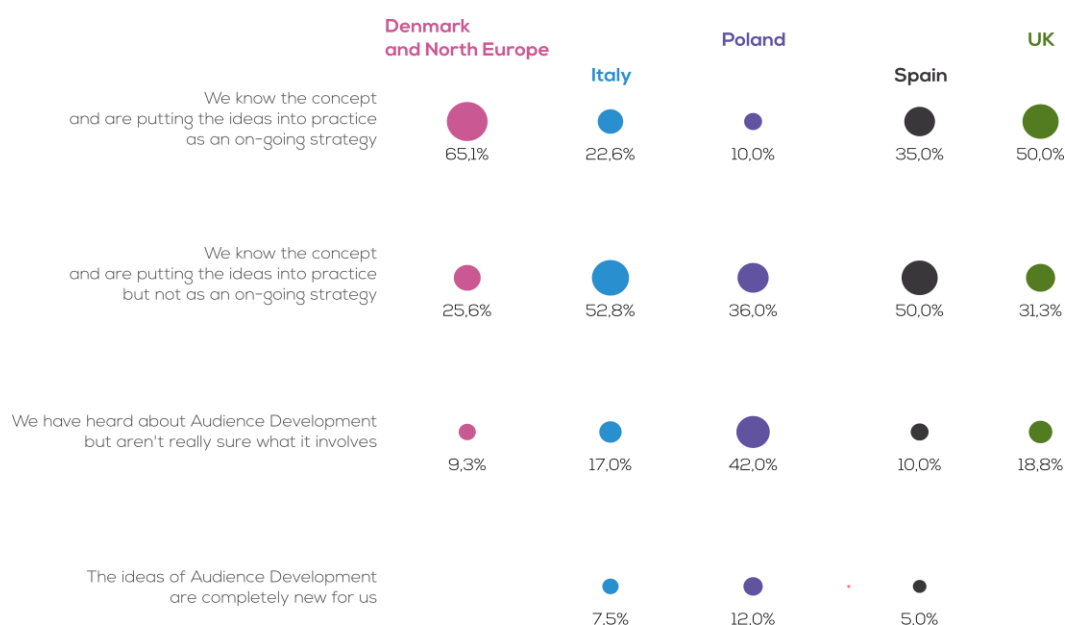
*Picture 12 – Audience Development and my organisation**



N = 247

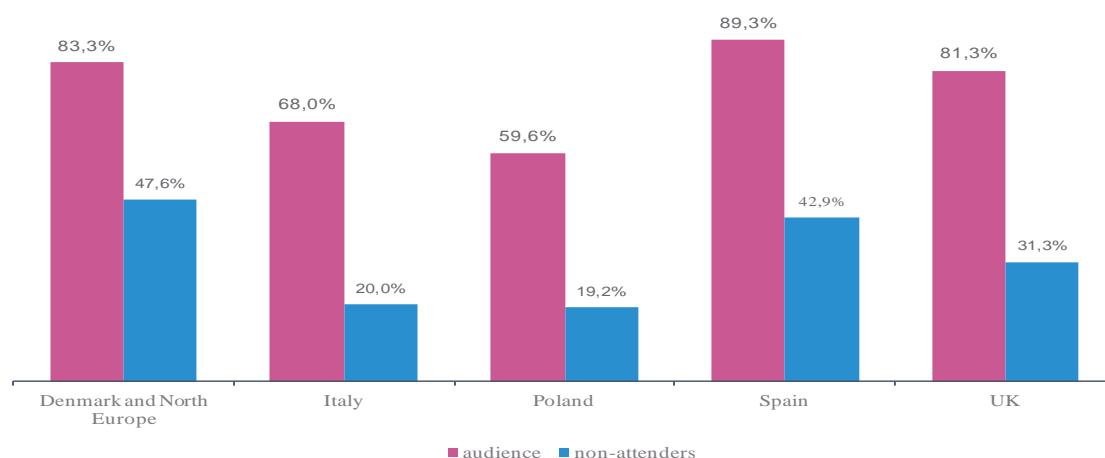
A strategic and long term approach to AD is mostly developed in Denmark/North Europe and UK; the instrumental approach to AD characterizes Italy and Spain; Poland seems to be the country where AD principles are less scattered.

Picture 13 – Audience Development and my organisation *



75% of respondents declare his/her organisation gathers and analyses information about its audience, but just 32,6% researches non-attenders. The practice of collecting and analysing data about current audience and non-attenders is a practice shared in Spain, Denmark/North Europe and UK (respectively 89%, 83%, 81%); in Italy and Poland just 68% and 60% of respondents' organisations gather audience data (once again, the countries where marketing has a weaker tradition in the cultural sector).

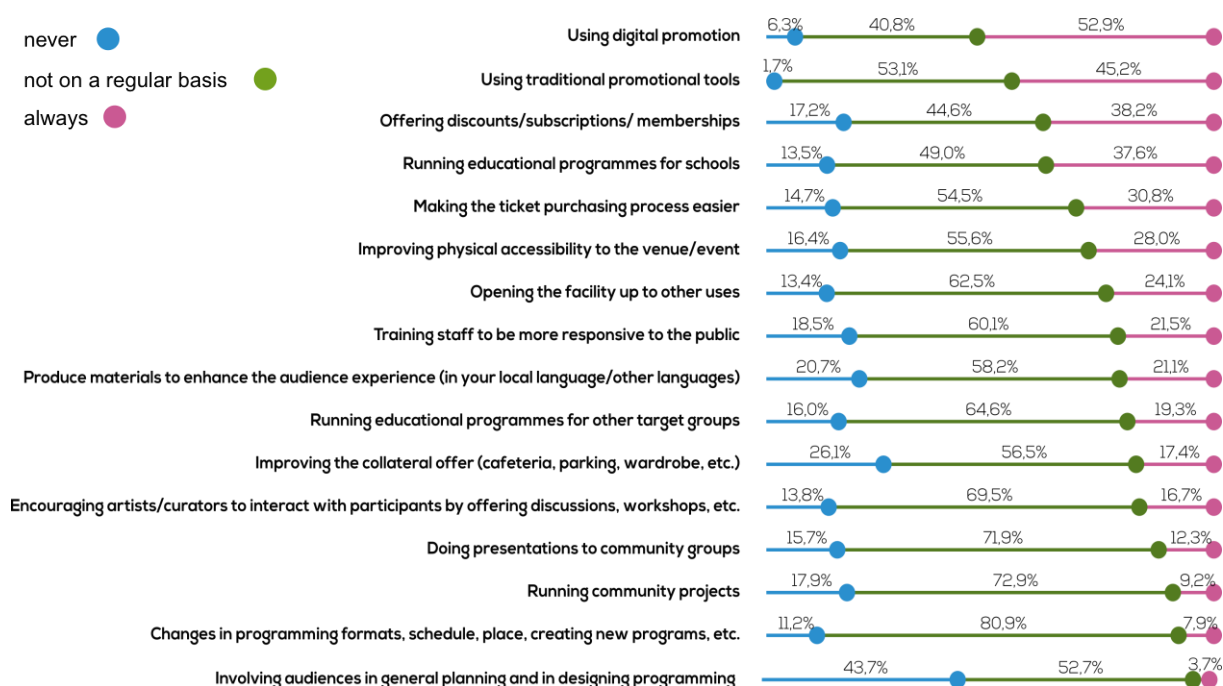
Picture 14 – Does your organisation gather and analyse information about its audience and non-attenders (by countries)? *



When it comes to strategies, the most used are related to the marketing sphere. Respondents declare to use mostly the following AD strategies:

- Using digital promotion (52%)
- Using traditional promotional tools (45%)
- Offering discounts/subscriptions/membership (38%)
- Running educational programmes for schools (38%)

Picture 15 – How frequently does your organisation use the following audience development strategies? *



Involving audiences in general planning (43% never does it) is the strategy less used; 26% never improved the collateral offer and 20% to never produced materials to enhance the audience experience.

Also, these data show how the idea related to AD and its strategies for respondents are strictly related to marketing and its tools. They have an “extensive” interpretation of marketing, but they seem not enough aware of the complexity of strategies and actions that an AD approach needs in order to be effective.

Coming to the [barriers for an effective AD](#), respondents report an interesting set of answers to the open questions, that we clustered as follows (Picture 16).

Picture 16 – What do you think are the main barriers (if any) within your organisation to approach Audeince Development effectively?



N=324

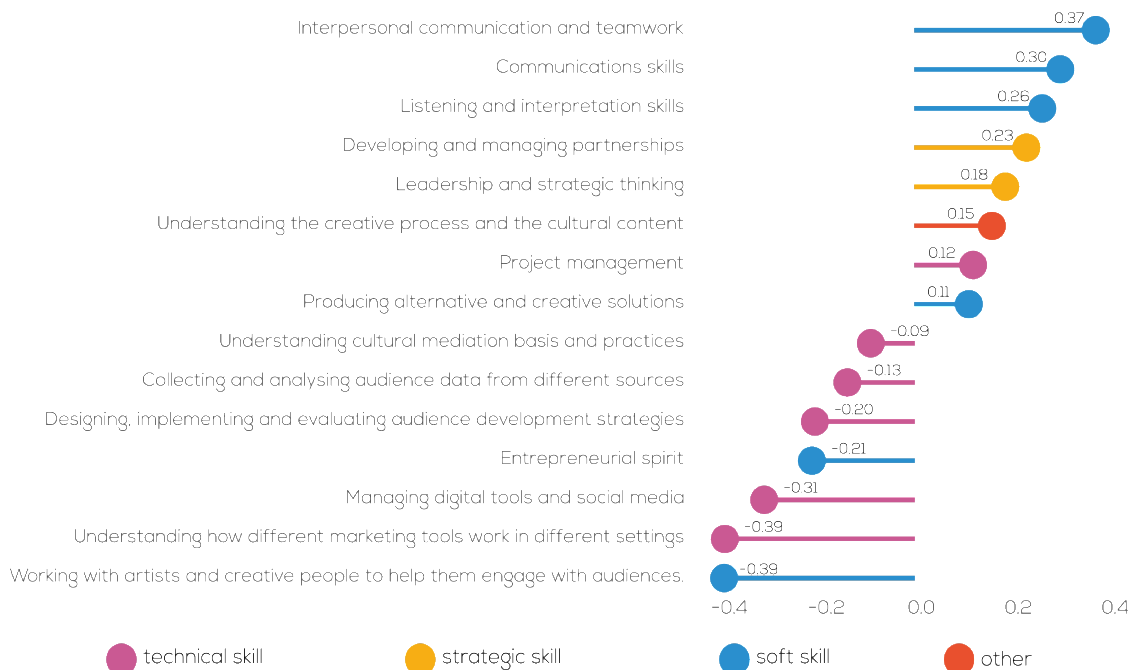
If the most frequent barrier (32%) is the [lack of interest/awareness](#) by directors and management (the cluster also includes lack of strategic vision), is worth noting that [25% considers the lack of knowledge and competences the main barrier](#) for an effective AD in their organisations. Still, 21% considers is a matter of financial resources. 8% think that although the organisation is aware of AD, the organisational structure with its out of date

way of working is not able to change accordingly (lack of communication among departments, hierarchical approach to programming, change adverse, etc.).

2.4 Required skills and training

When asked about the most important skills *for their job* (Picture 17), professionals firstly report **soft skills** (interpersonal communication and team work; communication skills; listening and interpretation skills); **strategic skills** immediately follow (developing and managing partnership; leadership and strategic thinking), while **cultural skills** (understanding the creative process and the cultural content) and **technical skills** (project management) are the lasts.

Picture 17 – How important are the following skills in your job?



Picture 18 – Which are the main competences your Organisation would need⁴

Most cited		Most valued	
1.	Understanding the audience experience	1.	Strategic vision
2.	Planning strategies and actions	2.	Collecting and analysing audience data
3.	Strategic vision	3.	Planning strategies and actions

Other mentions:

Building partnerships | Cultural mediation and education | Marketing strategies and tools | Communications strategies and tools

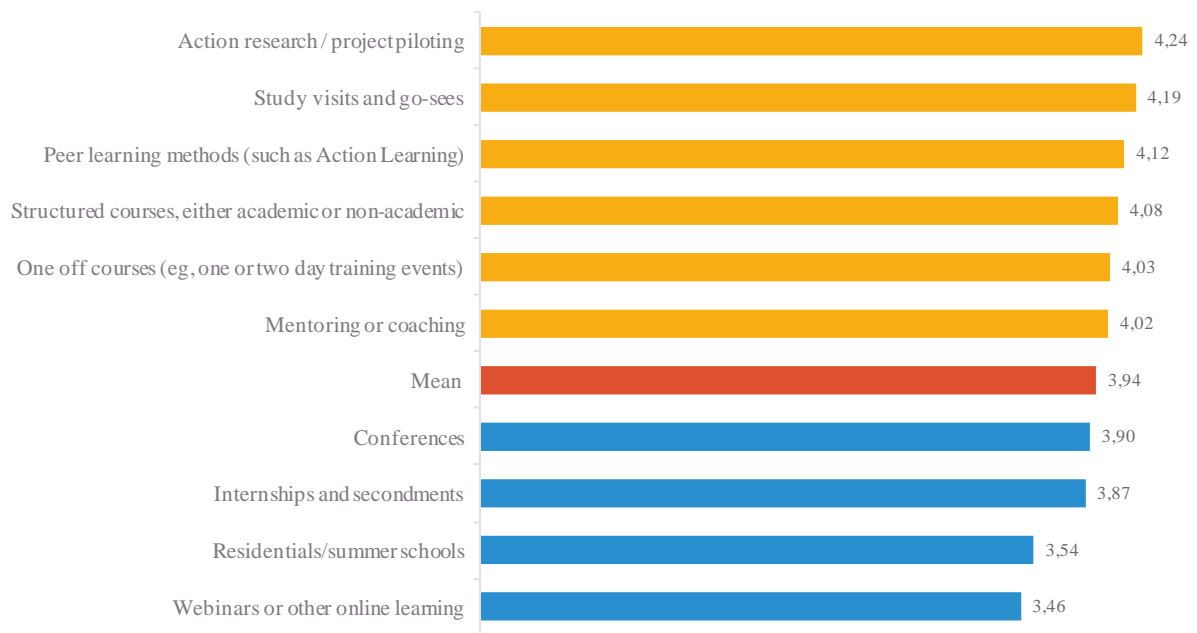
Nevertheless, when asked about the competences their organisations should develop in order to be more effective in AD (Picture 18), respondents remark more often Strategic skills (*Strategic vision, planning strategies and actions*) and technical ones (*Collecting and analysing audience data* and *Understanding the audience experience*), in coherence with what stated about the identified barriers – as 25% of professionals report the lack of technical competences is a main barrier.

These data, took as a whole, definitely suggest that a training in this filed should be focused on developing and balancing the three levels of skills and competences: soft skills, strategic and technical ones.

About [training methodology](#), respondents [value more informal training](#) (as [Action research/project piloting](#); [Study visiting and go sees](#); [Peer learning methods](#)) as well as to mentoring and coaching.

Picture 19 – Training methodology: average rating

⁴ Professionals were asked to rate the most important skills and competences chosen from a list (blue column on the right side of the picture). Beyond this, the analysis also took into account which are the competences most frequently cited by respondents (pink column on the left), showing that although not rated at the highest level, *understanding the audience experience* was the most cited competence among the proposed ones.



Finally, accreditation is important for most respondents (especially in Italy, Poland and Spain, where labour market is less dynamic and more linked to the public sector). In all countries, the percentage of is higher for youngest professionals.

Picture 20 – How important is accreditation for you in your training and professional development (by Country)?



3. Main findings and reflections: towards the CONNECT TTP

1. Overall, there is a **great interest among professionals** towards AD practice
2. Only half of professionals potentially interested in a AD training **are aware that it is not just about marketing**
3. About half of professionals potentially interested in a AD training **lack the management and marketing basic skills** required
4. Many professionals do **work in three or more areas**
5. Training design should balance **soft skills, strategic and technical** ones.
6. **Innovative methodologies** based on active learning are much more appreciated than traditional ones based on lectures
7. **Practice based approach** is recommended
8. **Leadership is an issue** that should be addressed properly (the greatest reported barriers to effective AD are related to lack of awareness)
9. **Formal accreditation** is valued by the majority of professionals
10. Training should take into account the **perspectives and cultural backgrounds related to different national contexts.**