UNIVERSIDADE CATÓLICA PORTUGUESA

Positioning of the Casa da Música brand in the non-Classical North of Portugal music market

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Católica Porto Business School
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Presented to *Universidade Católica Portuguesa*
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by

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Abstract

In an increasingly competitive market, the role of brands in influencing consumer perceptions, impacting purchasing decisions, and fostering long-term brand loyalty is of paramount importance. This study explores the positioning of the *CdM* brand on consumers perception. The research methodology combines theoretical frameworks and empirical data to investigate how communication strategies shaped consumer perceptions of the brand offerings, specifically non-Erudite music offerings.

A mixed-method approach is employed in this study, integrating qualitative and quantitative methodologies to obtain a comprehensive understanding of branding's role on consumer perceptions. Primary data collection involves the administration of surveys to ascertain brand positioning, comparing the brand with relevant attributes and its competitors. Secondary data analysis incorporates internal data reports, highlighting successful practices and potential areas for improvement.

A salient finding of this research is the pivotal role of communication strategies in shaping *CdM*'s brand perception. The study reveals that digital marketing, particularly social media engagement, plays a vital role in shaping perceptions.

The practical implications of this study extend to marketing professionals, especially in the performing arts sector, seeking to optimise branding strategies for enhanced consumer engagement and strong market positioning. By comprehending the pivotal elements influencing consumer perception, brands can customise their methodologies to cultivate stronger relationships, enhance brand loyalty, and attain long-term success.

Key-words: Performing Arts Sector; Market Positioning; Perceptual Mapping; Digital Marketing Campaigns; Segmentation, Targeting and Positioning (STP)

Number of Words: 9882

Resumo

Num mercado cada vez mais competitivo, o papel das marcas na influência das perceções dos consumidores, no impacto das decisões de compra e na promoção da lealdade à marca a longo prazo é de extrema importância. Este estudo explora o posicionamento da marca *CdM* na perceção dos consumidores. A metodologia de investigação combina quadros teóricos e dados empíricos para investigar como as estratégias de comunicação moldaram as perceções dos consumidores sobre as ofertas da marca, especificamente as ofertas de música não erudita.

Neste estudo é utilizada uma abordagem de método misto, integrando metodologias qualitativas e quantitativas para obter uma compreensão abrangente do papel da marca nas perceções dos consumidores. A recolha de dados primários envolve a partilha de inquéritos para determinar o posicionamento da marca, comparando-a com atributos relevantes e com os seus concorrentes. A análise de dados secundários incorpora relatórios internos, destacando práticas bem sucedidas e potenciais áreas de melhoria.

Um dos principais resultados desta investigação é o papel central das estratégias de comunicação na formação da perceção da marca *CdM*. O estudo revela que o marketing digital, e, em particular, o envolvimento nas redes sociais, desempenha um papel vital nas perceções.

As implicações práticas deste estudo estendem-se a profissionais na área de marketing, especialmente do sector das artes de espetáculo, que procuram otimizar as estratégias de marca para um maior envolvimento do consumidor e um forte posicionamento no mercado. Ao compreender os elementos fundamentais que influenciam a perceção do consumidor, as marcas podem

personalizar as suas metodologias para cultivar relações mais fortes, aumentar a lealdade à marca e alcançar sucesso a longo prazo.

Palavras-Chave: Sector das Artes Performativas; Posicionamento de Mercado; Mapa Percetual; Campanhas de Marketing Digital; Segmentação, Alvo e Posicionamento (STP)

Número de Palavras: 9882

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Table of Abbreviations

ASP – Average Selling Price

BPM – Brazilian Popular Music

CCDM – Coro Casa da Música

CdM – Casa da Música

CICDM – Coro Infantil Casa da Música

CPC – Cost Per Click

CRM – Customer Relationship Management

CTA – Call-To-Action

EP – External Programming

INE – Instituto Nacional de Estatística

IPC – Index of Consumer Prices

OBCDM – Orquestra Barroca Casa da Música

OP – Own Programming

OSPCDM – Orquestra Sinfónica Porto Casa da Música

PM – Perceptual Mapping

PPM – Portuguese Popular Music

R&I – Reach and Impressions

RECDM – Remix Essemble Casa da Música

STP – Segmentation, Targeting and Positioning

Introduction

In recent years, there have been significant shifts in the perceived value of leisure time that have had a profound impact on attendance at live music performances. The cultural and artistic industries have faced a rapidly evolving landscape marked by numerous challenges. These changes have compelled organisations within the performing arts sector to reassess their strategies for attracting and retaining audiences.

A confluence of factors has contributed to this shift, including but not limited to: a decline in public funding, difficulties in securing resources to sustain artistic missions, and an overall decline in audience, with audiences increasingly drawn to more accessible forms of entertainment. Competition from these alternative entertainment sources, coupled with changing consumer behaviour and preferences, has further reshaped the industry.

This has had consequences not only for audience engagement but also for the operational and strategic approaches of organisations in the performing arts sector. This evolving environment underscores the importance of innovation and adaptability in maintaining relevance and fulfilling cultural missions.

Inaugurated in 2005 in Porto, Portugal, the *Casa da Música (CdM)* is a landmark of cultural innovation and architectural distinction. Designed by Rem Koolhaas, it quickly became a reference for musical excellence, hosting a wide range of Erudite and non-Erudite performances and attracting audiences from around the world. As the first building in Portugal dedicated exclusively to music, *CdM* has established five resident groups - *Orquestra Sinfónica do Porto Casa da Música* (Symphony Orchestra), *Remix Ensemble Casa da Música*, *Orquestra Barroca Casa da Música* (Baroque Orchestra), *Coro Casa da Música* (Choir), and *Coro Infantil Casa da Música* (Children's Choir) - ensuring stability and coherence in the programme. The Education Service further enhances accessibility, particularly for children. This integrated artistic management model has positioned *CdM* as a unique global institution. The year-round, multi-genre concert programme remains essential for audience development and international engagement.

The misperception of *CdM*'s offerings and mission remains a major barrier. The distinction between high and popular art, which emerged in Europe in the mid-19th to early-20th centuries, has long been criticised for its elitism (Hudson, 1975). High art is often perceived as an exclusive privilege, lacking wider educational or recreational value (Nantel & Colbert, 1992).

Historically rooted in aristocratic patronage, high art was accessible primarily to the upper classes who could afford to support and engage with it. This legacy of exclusivity has persisted, reinforced by factors such as high cost, formal dress codes and prestigious venues. Even where affordable options exist, the perception of expense and the cultural literacy often required to engage with high art can put off. In addition, high art events are sometimes seen as opportunities for social signalling, which can alienate individuals who feel they don't belong or wish to avoid such associations.

This paper was developed during an internship at *CdM* in response to the persistent perception that the institution is primarily associated with Classical music and high art. The investigation explores the endeavours of *CdM* to reposition its brand in order reach new audiences. The central research question guiding this study is: "How is *CdM* positioned within the non-Erudite music market?". To address this, three supporting questions were explored: "How do consumers perceive the *CdM* brand and its offerings?"; "How extensive and diverse is *CdM*'s non-Erudite music programme?"; and "How does *CdM* communicate its offerings to the public?".

To address this challenge, the study undertook first a comprehensive and systematic literature review, exploring key topics such as the dynamics of offerings and demand in the performing arts sector, segmentation, targeting, and positioning (STP), as well as the critical role of perceptual maps (PM) in enhancing brand positioning strategies (Chapter 1).

Next, we examine how *CdM*'s communication strategies and event offerings influence public perceptions of its brand, with a particular focus on non-Erudite music. By employing a mixed-methods approach (Chapter 2), including a survey distributed via social media, and quantitative data analysis,we seek to provide insights into how *CdM* is positioned within the non-Erudite music market and to evaluate the effectiveness of its strategies in connecting with diverse audiences.

Summarizing here the research, in order to examine *CdM*'s positioning in the non-Erudite music market, we first conducted a study to assess public perception of the brand (Chapter 3). Next, we analysed the existing non-Erudite programming to determine the extent of *CdM*'s presence in this sector (Chapter 4.1). Finally, we evaluated the communication strategies used and assessed their impact on the perceived image of the brand in the non-Erudite music market (Chapter 4.2).

Chapter 1
1. Literature Review

1.1 Offerings in the performing arts sector

The performing arts sector encompasses theater, music, opera, and dance, ranging from high to popular arts. These include both live and non-live performances delivered through various forms of mass media such as radio, social media, television, and the internet. A key distinction between performing and visual arts lies in the mode of presentation and the audience's interaction with the artistic product. Performing arts, as defined by Spranzi (1996), involve arts that are interpreted and represented, such as dance, theater, and opera. In this context, the artists message reaches the audience through the mediation of performers (Scheff & Kotler, 1996). By contrast, in the visual arts (painting, sculpture, and photography) the interpretation of the work relies entirely on the viewers sensitivity and personal experience.

High art, as described by Holbrook (1995) and Bourdieu (1979), includes painting, sculpture, and classical music and represents art in its purest, most original form. In this realm, artists pursue their craft as an end in itself, without explicit consideration of market demands. Conversely, popular art (Bourdieu, 1979; Holbrook, 1995), encompassing genres such as rock music, cinema, and fashion design, is created by professionals seeking commercial success and financial returns. Popular art caters to broader audiences, often through the serial reproduction of artistic creations.

There is also a distinction that needs to be taken into consideration between the profit and non-profit organizations in this sector. Non-profit organizations benefit greatly from contributions of volunteer/subsidized labor, they also depend heavily on philanthropic contributions, or “unearned” income, as well as on earnings from ticket receipts and other sources. In contrast to the profits that drive commercial organizations, non-profit institutions are “mission-driven”.

The live performing arts market is predominantly non-profit, with objectives such as artistic excellence, innovation, audience diversity and community participation. Sources of income include earned income from box office sales, touring and ancillary activities, and unearned income from grants and contributions from governments, foundations, corporations and individuals. In Europe, public funding of the arts is a core policy (Schuster, 1994).

Non-profit organisations often fill niches abandoned by larger companies due to insufficient profitability. However, reduced demand, rising costs and declining funding have forced many to either scale up to gain prestige, adapt to smaller community-based models, or close down. Baumol and Bowen's (1966) analysis highlighted the inherent financial challenges of the live performing arts and underscored the need for public and private subsidies.

1.2 Demand in the performing arts sector

Following the Second World War, there has been a steady increase in demand for artistic and cultural products, driven by population expansion. However, as this growth decelerates, the competitive landscape among cultural institutions has become more intense, often focusing on the same audience segments, resulting in market crises. In order to maintain competitiveness, performing arts organisations must address declining domestic interest, limited government and private sector support, and budget constraints that hinder effective promotion. Globally, younger generations are less inclined to attend live performances, favouring digital entertainment and emerging technologies.

It is reasonable to expect that higher income levels would stimulate demand for arts, as rising income enables individuals to allocate more resources to cultural consumption. However, the net effects of increased incomes may be partially mitigated by the fact that higher wage rates increase the value of individuals' time, making them more conscious of how leisure activities align with their schedules and available free time.

The opportunity costs associated with attending live performances may outweigh those of engaging with the same program via mass media for several reasons. Firstly, attending a live event typically involves additional time commitments, such as preparation and travel, which are not required for recorded performances. Secondly, recorded performances allow individuals the flexibility to engage in multiple seats, providing greater adaptability to their schedules. Finally, and perhaps most importantly, recorded performances offer the advantage of being experienced at a time and place of the individual's choosing, unlike live events. The perception of reduced leisure time and the increasingly home centered focus of leisure activities have no doubt increased the competition that live performances face from other leisure-time pursuits (Putnam, 2000). There is no shortage of opportunities for entertainment and leisure in our modern society; art, sports, television, travel, volunteer work and part-time studies are just a few examples of the myriads of activities available.

Consumer demographics differ significantly between high and popular arts. High art audiences tend to be highly educated, whereas popular arts attract audiences that mirror the general population's characteristics (Colbert, 2003). Historically, education has proven to be the single best predictor of participation in the high arts, but studies have demonstrated that a variety of other attributes are also correlated with arts involvement (McCarthy et al., 2001). Moreover, the very high participation rates for television viewing and going to movies reflect the fact that the commercial performing-arts market is substantially larger than the high-arts market.

More highly educated individuals are more likely than others to have been exposed to the arts by family members during their childhood and to have taken courses in the arts during their schooling. This early exposure to the arts is important because familiarity and knowledge of the arts are directly related to participation rates (Orend and Keegan, 1996), as they are to most other types of leisure activity (Kelly and Freysinger, 2000). Indeed, Orend and Keegan (1996) find that arts appreciation classes taken during college have an even stronger effect on subsequent participation than those taken earlier.

The economics literature, for example, suggests that the more knowledgeable people are about the arts, the more likely they are to participate, because they gain more satisfaction from a given level of consumption than do people who are less knowledgeable (Stigler and Becker, 1977). The leisure literature, on the other hand, tends to view this phenomenon more in psychological terms: a small fraction of the participants in leisure activities become serious "amateurs" for whom the activity becomes an end in itself (Stebbins, 1992).

1.3 STP

Market segmentation refers to "dividing a market into smaller segments of buyers with distinct need, characteristics, or behaviors that might require separate marketing strategies or mixes". Targeting is defined as "evaluating each market segment's attractiveness and selecting one or more segments to enter". Positioning is arranging for a marketing offering to occupy a clear, distinctive, and desirable place relative to competing products in the minds of target consumers". (Kotler & Armstrong, 2014)

There are a lot of variables that can be used to segmentate consumer markets such as: geographic region, age, gender, income, education, etc. In this sense, for the cultural sector there are some conclusions that have already been presented such as: female tend to go more for cultural events same as people with higher education levels.

A segmentation that might be relevant for this specific case is psychographic segmentation which uses psychology and demographics to better understand market consumers. In psychographic segmentation, buyers are divided into different groups based on psychological/personality traits, lifestyles, or values. People within the same demographic group can exhibit very different psychographic profiles and thus display different lifestyles.

Given that the segment of highly educated individuals (traditionally the core audience for high art) is unlikely to grow significantly, the expansion of the art market will depend on attracting audiences beyond traditional demographics. This means attracting people who may not have been exposed to or developed an appreciation of high art during their formative years.

To reach less educated audiences, arts organisations need to adopt strategies that increase engagement and accessibility. This includes adapting offerings to appeal to broader demographics, providing complementary products, broadening socio-demographic appeal, improving customer service, and using digital tools such as the internet and marketing systems. These initiatives increase inclusivity and accessibility, helping organisations to attract and retain a more diverse and sustainable audience.

Marketing positioning involves analyzing the market structure through three key elements: the advantages a product offers to consumers, the existing market segments, and the relative strength of competitors (Colbert et al., 2008).

This process defines how a product is perceived by consumers in comparison to competing offerings, requiring marketing strategies to align with the intended brand position. For instance, in high arts, such as symphonic music, marketing strategies are typically product-oriented, focusing on the intrinsic value of the artistic offering. Conversely, in profit-driven cultural enterprises, strategies are market-oriented and align more closely with practices seen in other economic sectors (Colbert, 2014).

The value of a product lies not only in its intrinsic qualities but also in the benefits that consumers attribute to it, driving brand comparisons and fostering loyalty (Gainer, 1995). In competitive markets, exceptional quality alone is not sufficient for success; it must be coupled with effective communication strategies that cut through the noise of alternative options and appeal to consumers' information filters. Unlike traditional marketing, which focuses on satisfying consumer demand, cultural marketing seeks to connect with audiences who are naturally drawn to artistic offerings. Arts managers play a crucial role in identifying and engaging these audiences, emphasising the intrinsic value of the artistic product rather than tailoring it to pre-existing preferences (Colbert et al., 2001).

1.4 Importance of Perceptual Mapping

An essential aspect of arts marketing is the development of a diversified market. To achieve this, arts organizations should actively engage with the community by fostering a positive image and cultivating a sense of ownership among its members. However, such efforts are unlikely to succeed without a clear understanding of the organization's position in the minds of potential consumers and the specific benefits these consumers seek.

PM serves as a valuable graphical tool to represent the perceptions of potential customers. According to Nigam and Kaushik (2011), PM enables market researchers to visually display consumer perceptions of products, attributes, brands, promotions, or services, while also helping organizations adapt to changing market conditions.

In today's competitive landscape, product positioning is a critical component for success. As Najafizadeh et al. (2012) emphasize, understanding the principles of product positioning is vital for the survival of companies in competitive environments, such as the performing arts sector. Product positioning encompasses the strategies undertaken by marketers to communicate the features, benefits, and brand image to both current and potential customers (Johansson, 2006). Consequently, it plays a crucial role in shaping competitive marketing strategies, with PM techniques frequently employed to support managerial decision-making (Kohli & Leuthesser, 1993).

To effectively position a brand, marketing managers must identify and prioritize attributes that matter most to their target markets. PM facilitates this process by highlighting the key factors influencing consumer decision-making. These insights can then inform critical aspects of product design, branding, and advertising strategies. Furthermore, PM provides a comparative analysis of a company’s brand and competing brands, as perceived by consumers. This allows organizations to refine their positioning strategies and determine the most effective competitive tactics.

To thrive in such challenging conditions, cultural enterprises must establish a clear and compelling positioning that reinforces positive perceptions of the brand, grounded in the unquestionable quality of their work. Additionally, prioritizing customer satisfaction through a service-oriented approach and leveraging technological systems to integrate information and optimize data management are critical strategies. These elements collectively enable cultural organizations to navigate a highly competitive market and maintain a sustainable advantage.

Holbrook and Hirschman (1982) describe cultural products as experiential, with consumption involving both the artwork and its surrounding elements. Studies by Johnson and Garbarino (2001), McLean (1998), and Rentschler et al. (2002) emphasize the importance of service quality in the performing arts sectors, establishing this as a key focus for arts marketing research.

Schneider and Bowen (1999) highlight the need to "delight" consumers, as strong emotional connections foster loyalty to organizations. Their research identifies factors influencing word-of-mouth recommendations, re-patronage intentions, and donations. In a study on live performances, Davis and Swanson (2009) found that the performance itself, followed by staff quality, aesthetics, accessibility, and ancillary services, were critical to audience satisfaction. Interestingly, while satisfaction strongly influenced recommendations, it had a weaker link to repeat attendance, reflecting the unique consumption patterns in the cultural sector.

Harrison and Shaw (2004) observed similar trends in museums, where satisfaction strongly correlated with recommendations but not necessarily with return visits. These findings underscore the importance of offering high-quality experience and service delivery to drive customer loyalty and advocacy.

Chapter 2
2. Methodology

2.1 Research Design

This study adopts a mixed-methods approach, integrating a survey conducted through social media platforms with a quantitative data analysis from *CdM* internal database. The primary objective of this study is to explore the market position of *CdM*, with a particular focus on the influence of its event offerings and communication strategies on public perception of the brand.

Chapter 3
3. Perceptual Mapping Exercise

3.1 Data Collection

To gather insights into customer perceptions of the brand, a structured questionnaire was developed. The analysis of the questionnaire results and the creation of perceptual maps was approached using two established methods: the attribute rating method and the overall similarity method (Dolan, 1990; Rekettye & Liu, 2001).

The attributed rating method used in the survey involves the identification of attributes that might influence purchasing decisions. Respondents are asked to evaluate the importance of each attribute in the questionnaire. For this purpose, a Likert scale is employed, ranging from 1 to 5, to rate the importance of each attribute. Subsequently, the perceptual map is designed based on the survey results, with the objective of visualizing the positioning of each attribute.

In the context of comparing the overall similarity of brands, respondents are presented with brand pairs and are prompted to judge them according to their preferences.

Consumers were instructed to respond according to their own criteria and that no right or wrong answers exist. The survey received 58 responses and it was distributed on Instagram, LinkedIn, and other social platforms to maximize outreach.

3.2 Data Analysis

The PM was constructed using multidimensional scaling (MDS), a statistical method highlighted by Rekettye and Liu (2001). Research by Blake et al. (2003) emphasised the widespread use of MDS among market researchers, documenting its application alongside classical and weighted multidimensional scaling techniques. MDS produces a spatial representation of data, where objects are depicted as points in an n-dimensional space, with distances reflecting perceived dissimilarities.

In addition to MDS, techniques such as Principal Component Analysis (PCA), Correspondence Analysis (CA), and Discriminant Analysis (DA) were utilised to refine perceptual maps, thereby identifying key dimensions of consumer perceptions and their alignment with branding attributes. The analysis of survey data was conducted using SPSS, thereby ensuring the rigour of the statistical analysis. The Scree Plot was used to determine the optimal solution, which was found to be a two-dimensiona solution, as indicated by a clear elbow. This value was subsequently utilised to configure the PROXCAL syntax model's dimensional parameters.

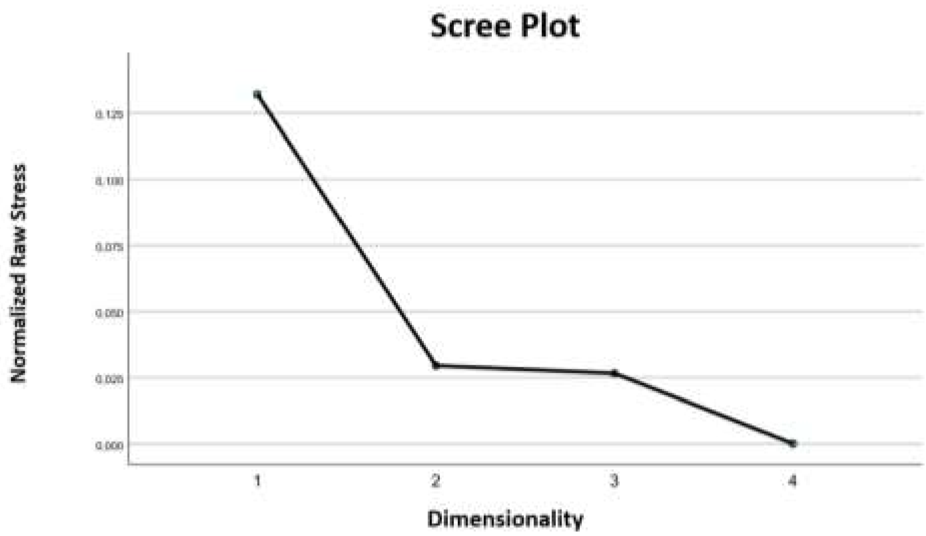

Figure 1: Scree Plot

To facilitate a more profound comprehension of the manner in which the selected measures align with the model, the results of the model fit are presented.

Initially, the Normalized Raw Stress demonstrates an extremely low value, with a proximity to 0 (equivalent to 0.00007) signifying an exceptional fit, as the reconstructed distances in the lower-dimensional space nearly perfectly correspond to the original ones.

The Stress-I and Stress-II values are also notably low, indicating that the data structure is adequately represented. The D.A.F. is found to be close to 1, indicating that the model explains the majority of the data variability. These favourable outcomes signify an ideal fit to the model, ensuring the accuracy of the results and their strong representation of the data.

Stress and Fit Measurers

Normalized Raw Stress	0,00007
Stress-I	0,00856[a]
Stress-II	0,01699[a]
S-Stress	0,00023[a]
Dispersion Accounted For (D.A.F.)	0,99993
Tucker's Coefficient Congruence	0,99996

PROXCAL minimizes Normalized Raw Stress

a. Optimal scaling factor = 1,000

Table 1: Stress and fit measurers

Decomposition of Normalized Raw Stress

		Source Prox	Mean
Object	CdM	0,001	0,001
	Serralves	0,001	0,001
	Coliseu	0,000	0,000
	Rivoli	0,001	0,001
	Sjoao	0,001	0,001
Mean		0,001	0,001

Table 2: Decomposition of Normalized Raw Stress

3.3 Results

As previously discussed in the literature review on PM, the aim of this study is to analyse the positioning of *CdM* in comparison to other selected brands. In order to achieve this objective, a comparison has been made between spaces for performing arts: *CdM, Serralves, Rivoli, Coliseu do Porto*, and *Teatro S. João*. The first graph presented illustrates how respondents perceive these brands based on their similarities and differences.

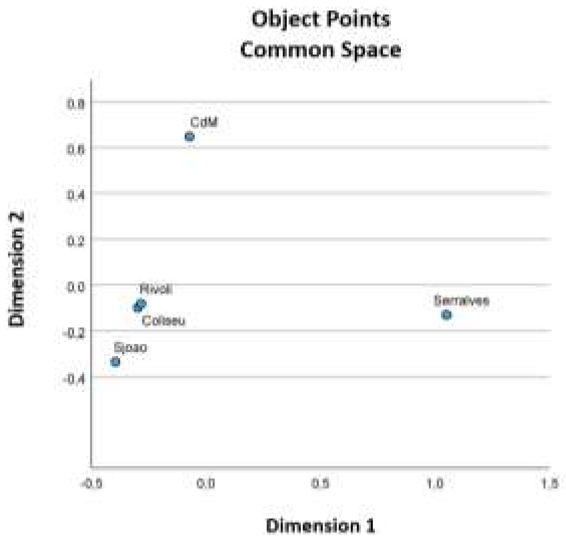

Figure 2: Object points

CdM is positioned at a considerable distance from the other entities along Dimension 2, while *Serralves* is positioned in a distinct area along Dimension 1. *Rivoli* and *Coliseu* are positioned in close proximity, indicating that respondents perceive them as similar. *Teatro S. João*, although not as closely associated as *Rivoli* and *Coliseu*, is still perceived as more similar to them compared to *CdM* and *Serralves*.

These results suggest that respondents categorize these five brands into three distinct groups: one group consisting of *Coliseu*, *Rivoli*, and *Teatro S. João*, which are perceived as similar; and two separate groups, each are represented by a single brand - *CdM* and *Serralves*.

The following graph will illustrate the positioning of different attributes, highlighting how consumers perceive their correlations or lack thereof.

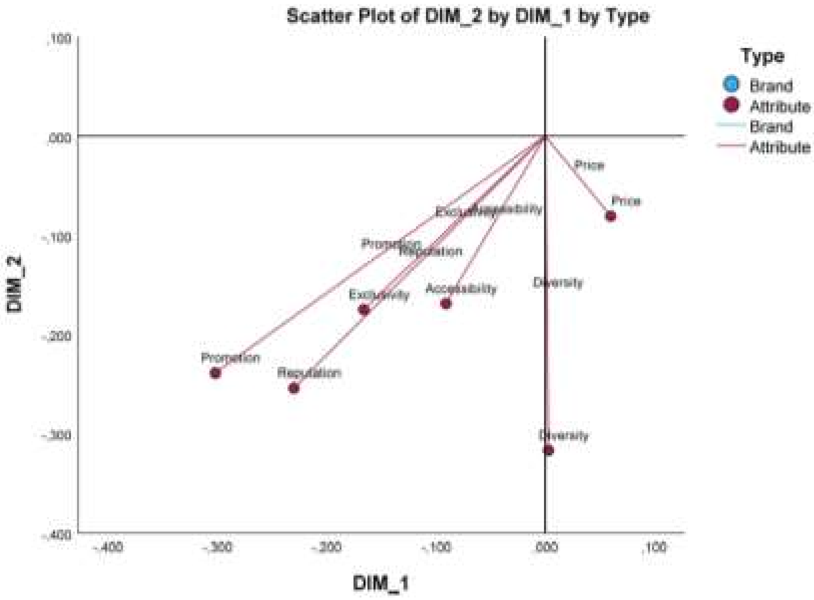

Figure 3: Scatter Plot - Attributes

It appears that price and promotion are the only two attributes that are uncorrelated, with the remaining attributes exhibiting a certain degree of correlation. Notably, reputation and exclusivity demonstrate a high degree of correlation. Furthermore, promotion, reputation, exclusivity, and accessibility form a cluster of attributes that are strongly interrelated.

No attributes demonstrate a negative correlation with one another. Additionally, price is positioned closest to the centre of the graph, indicating that it has the least relevance in the interpretation of the perceptual map.

The final graph will combine the two analyses previously mentioned. This will facilitate understanding of the correlation between the various attributes and brands.

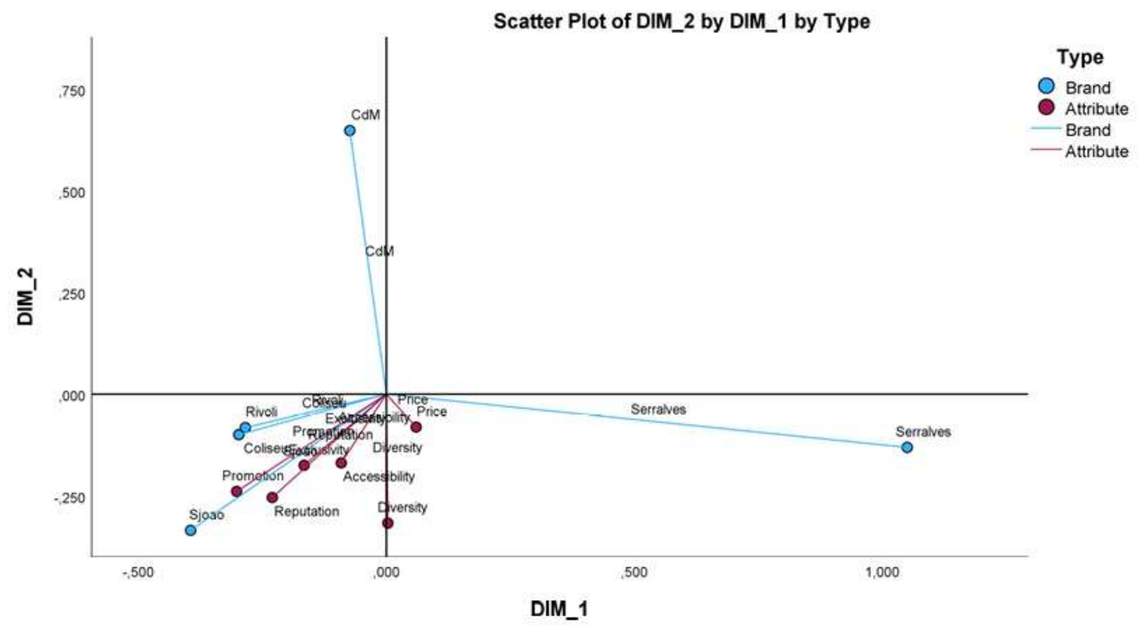

Figure 4: Scatter Plot - Brands and Attributes

As previously mentioned, *Rivoli, Coliseu*, and *Teatro S. João* form a cluster, indicating that they share similar brand perceptions and are associated with overlapping attributes. Specifically, these venues are closely linked to promotion, reputation, and accessibility, and they are perceived as more affordable, well-promoted, and easily accessible.

Serralves appears to be highly correlated with price, which may be attributed to its perception as a more expensive venue. Its distinct positioning on the map is likely influenced by the diverse range of services it offers, including guided tours, garden walks, elevated walkways, concerts, and a museum. This variety of offerings may contribute to a unique perception that differentiates *Serralves*.

CdM, on the other hand, appears uncorrelated with any of the presented attributes. This lack of association may stem from two key factors. First, *CdM* may possess distinctive characteristics that set it apart from the other venues, leading to a unique positioning in consumers' perceptions. Its clear separation from the other brands suggests that respondents do not perceive it as sharing the same attributes as its competitors.

Alternatively, this result could indicate a challenge in *CdM*'s communication strategy. If respondents did not associate the brand with any specific attribute, it may suggest that *CdM* struggles to effectively convey its value proposition. A lack of clear messaging regarding its key strengths and differentiating factors could result in lower brand recognition and weaker associations in the minds of consumers.

This finding is of considerable significance, as it has the capacity to inform the development of marketing strategies for these brands. In accordance with predictions, *CdM* is positioned at a greater distance from its competitors on account of its distinct characteristics. DIM_2 likely represents a spectrum ranging from a more specialised venue to a more generalist one. This finding highlights a key challenge for *CdM*: despite being a well-known brand, it struggles to effectively reach its target audience.

DIM_1 may represent a spectrum of inclusivity versus exclusivity. On the left side of the axis, venues are perceived as more accessible, strongly promoted, and offering a wider variety of experiences. On the right, Serralves stands out as being strongly associated with price, which may contribute to its perception as a more exclusive, less promoted, and higher-priced venue compared to the others.

Although *CdM* does not occupy a position as distant from the other venues along DIM_1 as *Serralves*, its position suggests a closer association with a more exclusive space rather than with the highly accessible venues. However, it remains noticeably separate from *Serralves*, indicating that while it may be perceived as somewhat exclusive, it does not reach the same level of exclusivity as *Serralves*.

It is crucial to acknowledge that this study is predicated on the perceived characteristics of each brand, as opposed to their objective reality. Consequently, a pivotal question emerges: does *CdM* genuinely constitute a more specialized venue than its competitors? The attribute price is at the center of the graphic suggesting that it can hold less relevance in differentiation of the brands, can it be that price is not one of the most important factor when choosing a venue? These questions will be further explored in the subsequent section.

Chapter 4

4.1 Offerings of non-Erudite music at Casa da Música from 2005 to 2024

Quantitative data was obtained directly from *CdM*'s internal reports and social media analytics, enabling a comprehensive examination of the non-Erudite concert offering from 2005 to 2024 and a comparative assessment of digital engagement with concerts in 2024. This analysis collated quantitative metrics to identify trends in non-Erudite programming since the venue's opening, examined audience behaviour and engagement, and compared the effectiveness of communication strategies.

From the beginning of 2005 to the end of 2024, the *CdM* hosted 2,065 non-Erudite music concerts, which represented a box office revenue of approximately 10,364,808€ and a total number of spectators of 872,821.

Of the total number of non-Erudite concerts, it is noteworthy that the number of artists who have performed at the venue is particularly high. Over the span of 20 years, a total of 2,563 artists have taken the stage.

The range of concerts on offer has been classified according to the following genres: Pop/Rock, Jazz, World, Fado, Portuguese Popular Music (PPM), Brazilian Popular Music (BPM) and Electronic Music. The data indicates that 30% of the offer was accounted for by Pop/Rock concerts, with 612 concerts included in this category. In second place, with 29% of the offer, were Jazz concerts, followed by World concerts, which accounted for 17%.

The concerts offered can be classified as either Own programming (OP) or External programming (EP). In this sense, 1,378 concerts were in in-house programming. A total of 1,464 paid concerts and 601 free-entry concerts were held.

4.1.1 Concerts

The provision of concerts of non-Erudite music remained stable between 2005 and 2016, reaching a peak between 2017 and 2019. However, with the onset of the pandemic in 2020, there was a significant decline, and the levels prior to the pandemic were only regained in 2022. In 2024, 129 non-Erudite concerts were documented, representing a significant increase when compared with previous years.

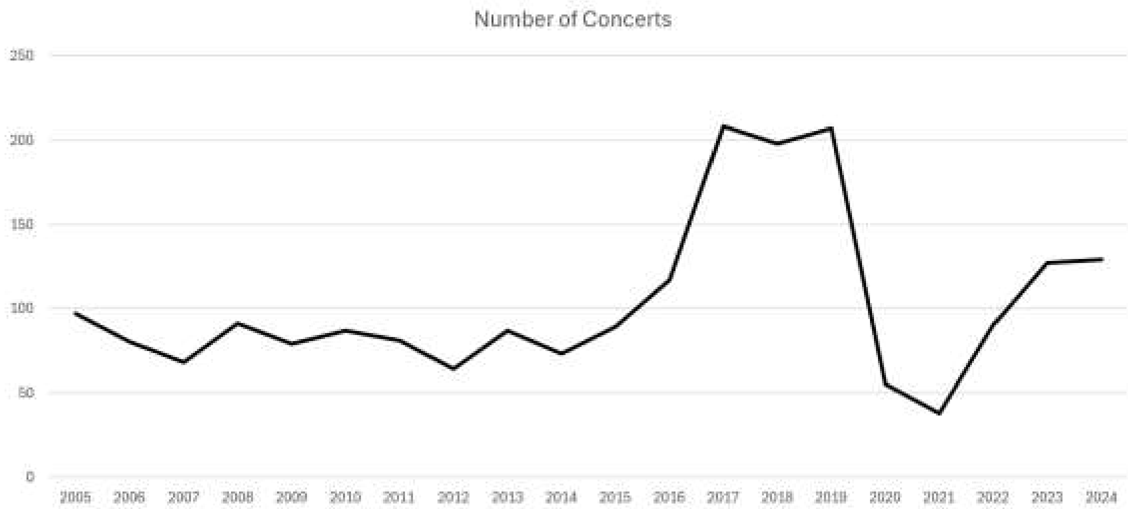

Figure 5: No. concerts

A detailed analysis of the number of concerts by programming reveals that OP was the most prolific, over the 20 years, with a significantly higher number of concerts, constituting almost 67% of the non-Erudite programme. After the pandemic, there has been an increase in the number of EP concerts, which led to a situation in 2024 where there were more concerts than owned ones.

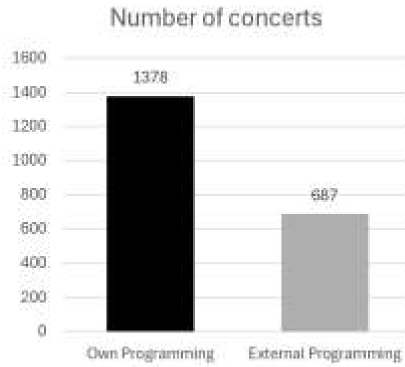

Figure 6: No. concerts by programming

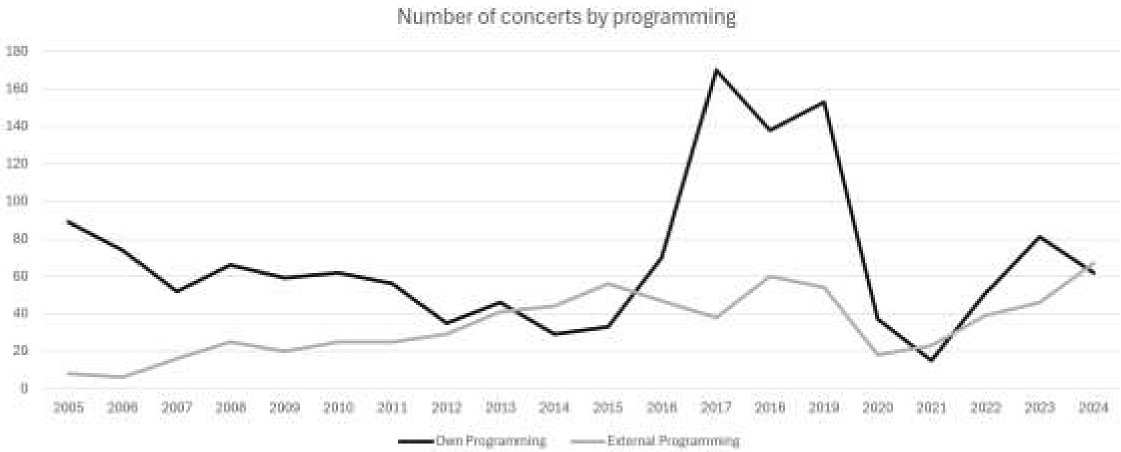

Figure 7: No. concerts by programming

Moreover, a total of 601 free-entry concerts were held during the observed period, with a significant increase occurring between 2017 and 2019. This growth can be attributed to the introduction of new performance spaces at *CdM*: the café began hosting concerts in 2016, followed by the terrace in 2017. These venues provided a platform for emerging artists and created accessible cultural experiences for a broader audience. The notable rise in free concerts during this time can be attributed primarily to the programming in these informal and inclusive spaces.

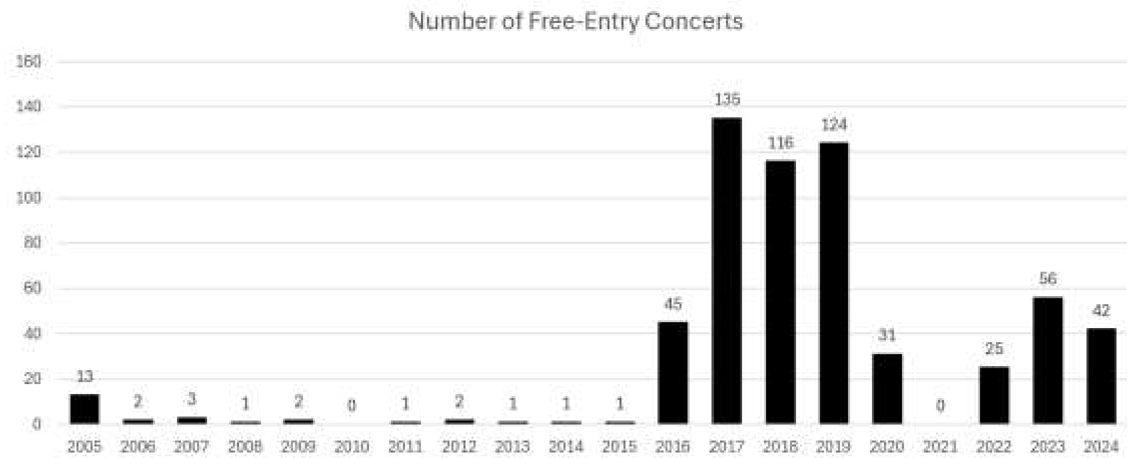

Figure 8: No. Free-entry concerts

4.1.2 Spectators

The total number of spectators is not solely dependent on the number of concerts, but this could be a plausible explanation. In 2019, the number of spectators reached its zenith, with 63,122 individuals in attendance, a figure that corresponds to the second year with the highest number of concerts.

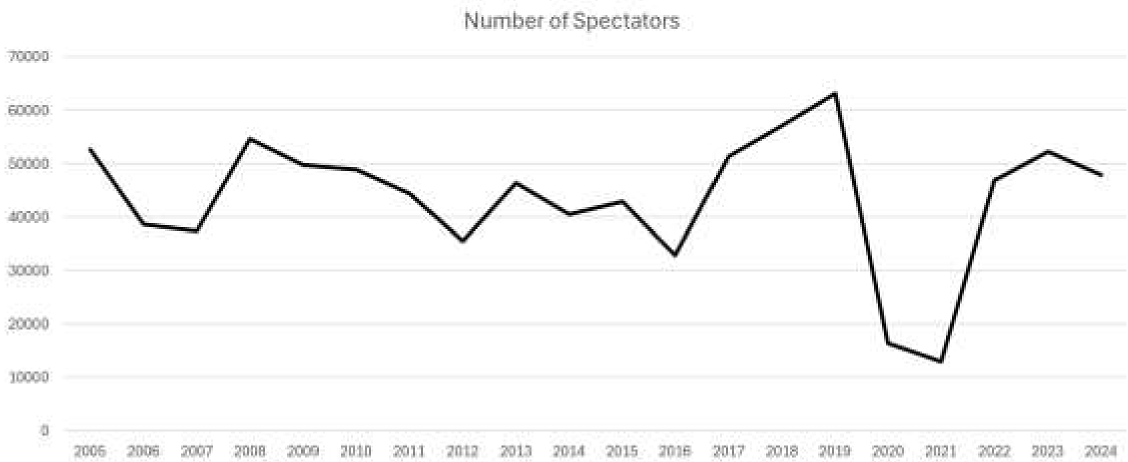

Figure 9: No. spectators

However, when the average number of spectators per concert is calculated, it is evident that this year exhibits one of the lowest average audiences per concert.

A higher average number of spectators per concert was observed between 2005 and 2015 in comparison to subsequent years. The average number of spectators per concert over the 20-year period was 423.

This data reveals a downward trend in the number of spectators per non-Erudite music concerts, which can be attributed to the fact that there are various concerts held in the café and terrace, which do not have the same capacity as other larger venues.

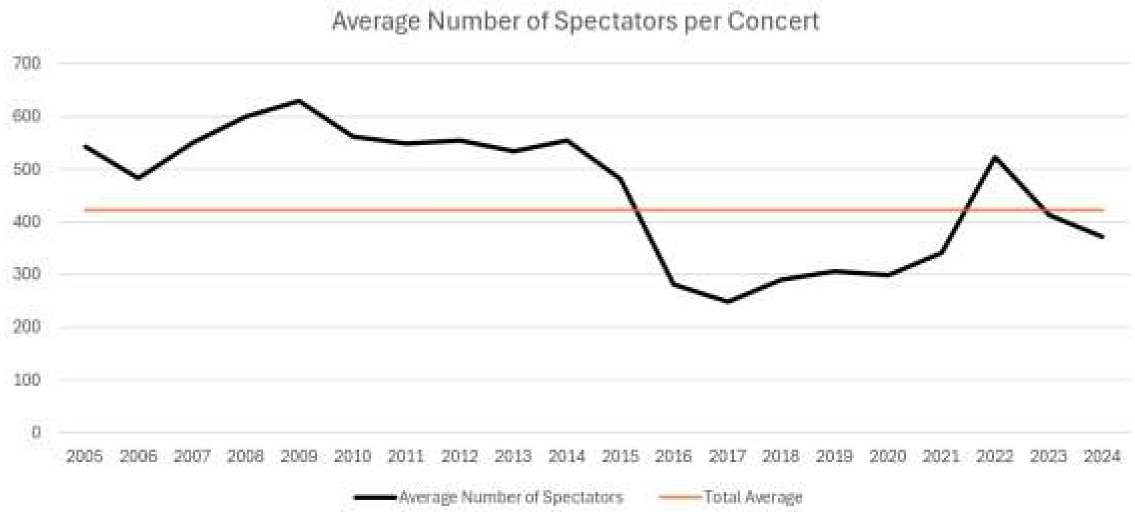

Figure 10: Average no. spectators

4.1.3 Box office revenue

Following the decline in box office receipts during the pandemic, a period of growth has ensued, with revenue figures now exceeding pre-pandemic levels. The most recent triennium has witnessed the attainment of the highest revenue figures to date. In 2024, the total box office revenue was 833,943€.

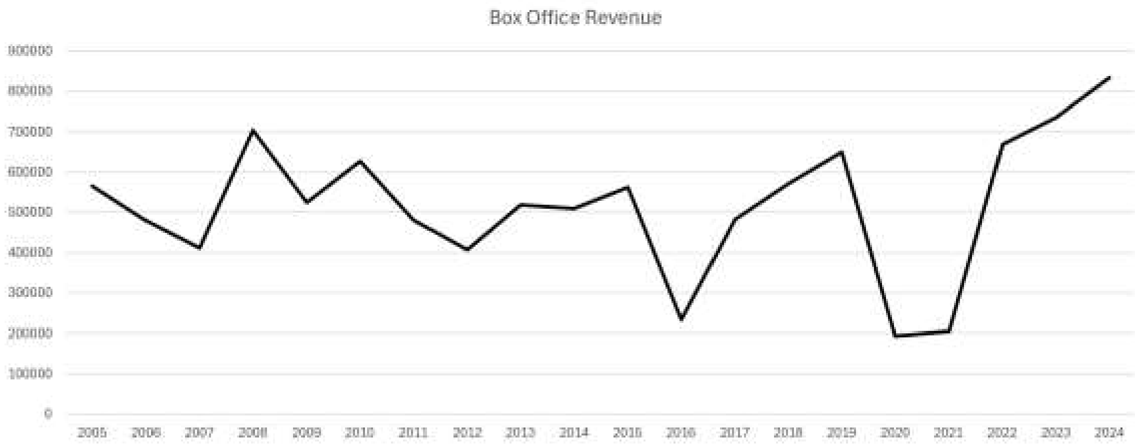

Figure 11: Box office revenue

The box office revenue from OP since opening was almost 4,074,410€, whereas the revenue from the rest of the programme was 6,290,398€. This relatively modest figure can be attributed to the numerous free admission concerts that took place, which were exclusively OP.

Despite OP constituting almost 67% of the total of concerts, it is responsible for only 39% of box office revenue from non-Erudite concerts. This trend has worsened in recent years. In 2024, the OP contributed a mere 9% to the year's total non-Erudite box office revenue. It is noteworthy that *CdM* organised 42 free-entry concerts in the past year.

It is imperative to acknowledge a prevailing trend that has emerged: a discernible shift in the number of OP non-Erudite concerts, accompanied by an increase in the number of EP concerts. Since 2012, EP has consistently generated higher income than the OP.

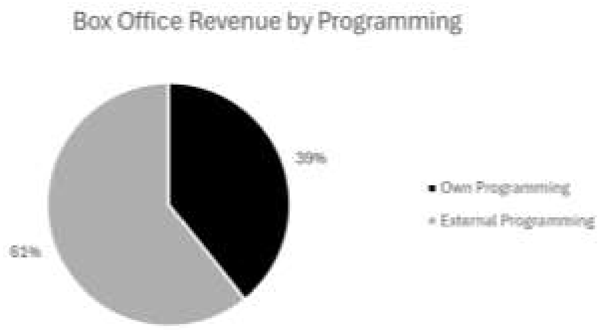

Figure 12: Box office revenue by programming

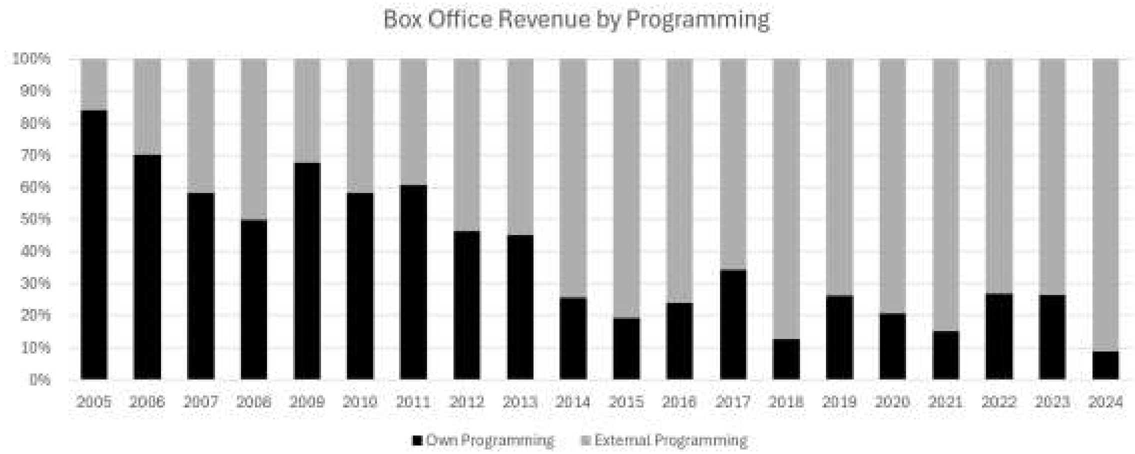

Figure 13: Box office revenue by programming

These graphic highlights *CdM*'s significant reliance on external partners for non-Erudite concerts, which poses strategic risks to its long-term sustainability and programming autonomy. A significant proportion of box office revenue is controlled by external promoters, making *CdM* highly dependent on third parties to maintain this revenue stream.

One of the most critical risks associated with this dependency is the potential loss of revenue if promoters decide to move to other venues. As these external partners have full control over artist selection and event logistics, they are not contractually bound to hold their concerts at *CdM*. If they decide to move their events to alternative venues that offer better financial incentives, lower costs or more favourable conditions, *CdM* could face a sudden drop in non-Erudite concert revenues.

Beyond financial concerns, this reliance also presents a programming risk, as external promoters largely determine the content presented at *CdM*. If they prioritise commercially driven acts over artistic diversity, *CdM* may struggle to maintain a balanced and culturally rich programme. Additionally, any shifts in external partnerships – such as withdrawals or reduced investment in *CdM*'s offerings – could lead to programming disruptions, lower attendance, and weakened audience engagement.

4.1.4 Tickets sold

The observed discrepancy between the number of tickets sold and the number of spectators can be attributed to two primary factors. Firstly, a considerable number of attendees receive invitations to attend concerts. Secondly, as previously mentioned, non-OP concerts sometimes have tickets sold through external platforms, making it difficult to track the exact number of paying spectators. The subsequent graphic, therefore, accounts solely for tickets sold by *CdM* via the website or the physical box office.

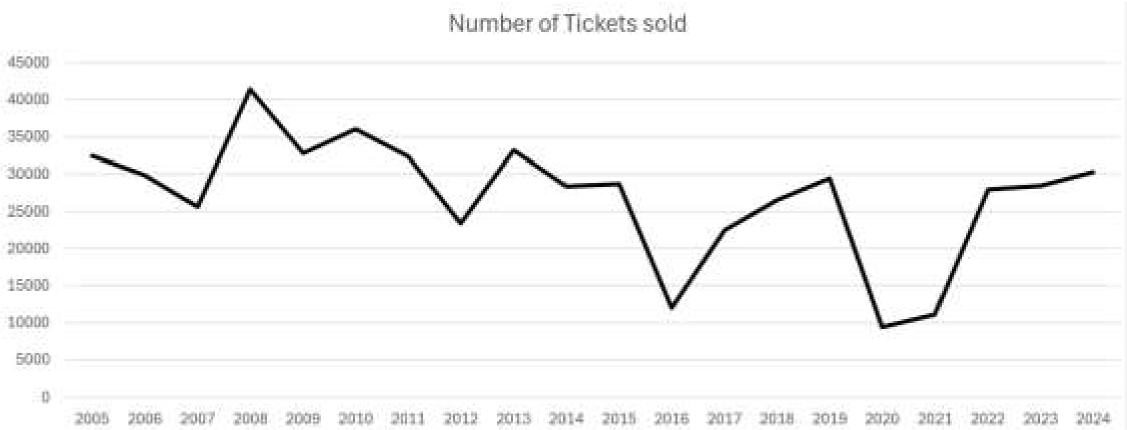

Figure 14: No. tickets sold

4.1.5 Average Selling Price (ASP) per ticket

The calculation of the ASP is only possible when the concert is OP, since when the concert is done in partnership, the partner is at liberty to sell tickets at any price. To ensure the validity of the data, it is necessary to exclude concerts that are EP and those for which tickets were not sold. The calculation of the average price per ticket is based on the number of tickets sold, rather than the number of spectators.

The ASP over the 20-year period was 13.82€, with a peak of 21.32€ recorded in 2023. Conversely, the lowest ASP was documented in 2021, standing at 9.26€. In 2024, the average price was 16.06€, a figure slightly above the average.

The observed rise in ticket prices can be attributed to broader economic factors, including the general rise in prices of products and services, driven by inflation.

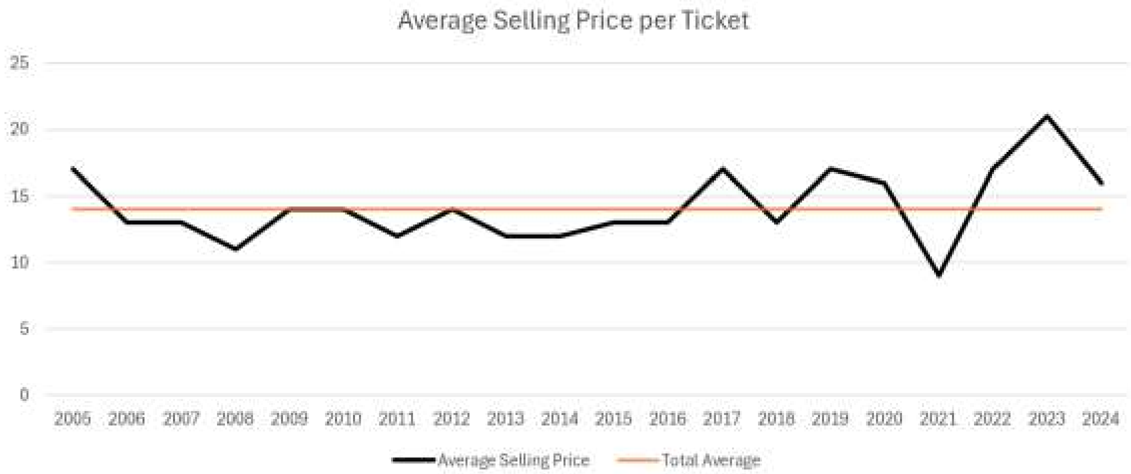

Figure 15: ASP

A study of the ASP across different musical genres reveals that Fado exhibits the lowest average price, while BPM demonstrates the highest. This pricing disparity underscores the distinct market positioning and perceived value of these genres.

	ASP
POP/ROCK	13.61€
JAZZ	14.18€
PPM	12.78€
BPM	18.92€
WORLD	13.25€
ELETRONIC MUSIC	13.18€
FADO	12.55€

Table 3: ASP per genre

It is also noteworthy that the ASP for Pop/Rock concerts adheres closely to the prevailing ASP trend. This alignment can be attributed to the higher volume of Pop/Rock concerts, which exerts a significant influence on the aggregate pricing patterns.

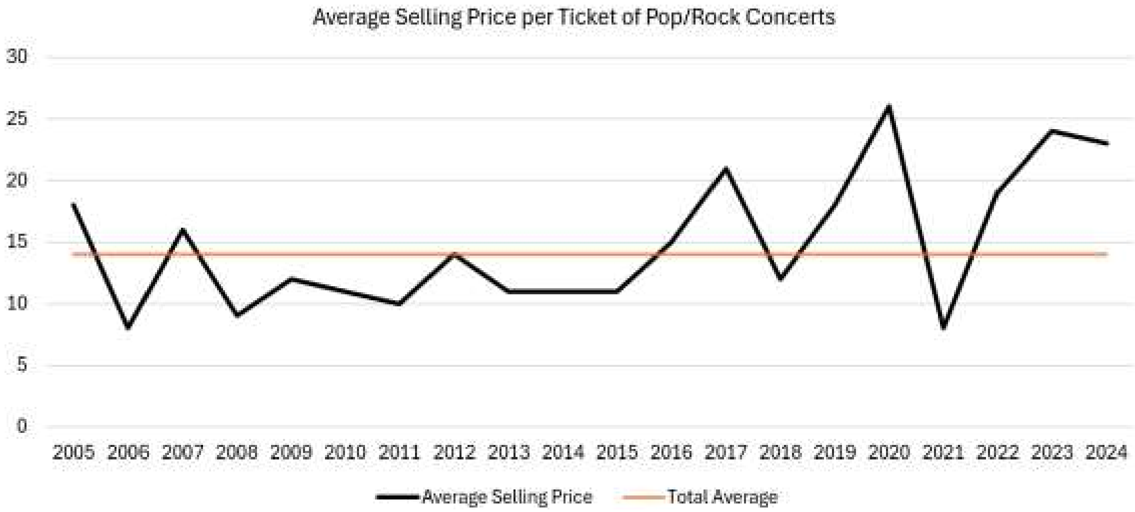

Figure 16: ASP Pop/Rock concerts

Analyzing ticket sales, concert attendance, and the evolution of the ASP reveals no direct correlation between price and demand. This suggests that other factors play a more significant role in influencing ticket sales than price alone.

This finding is of particular significance, as it reinforces the notion that price is not the primary determinant of demand for cultural products such as music concerts. This finding is consistent with extant literature on the subject, which posits that other factors, such as artistic quality, artist recognition, event exclusivity, and audience engagement, exert a more substantial influence on purchasing behaviour. Consequently, pricing strategies for cultural events should be considered within a broader framework that considers these qualitative aspects, rather than relying solely on conventional supply-and-demand principles.

Box office revenues are directly influenced by ticket price trends and play a key role in the financial sustainability of *CdM*. While price fluctuations do not appear to have a significant impact on demand, they remain a key driver of revenue generation.

This highlights an important strategic insight: demand for cultural events is driven more by artist recognition, exclusivity and audience engagement than by price alone. However, pricing decisions still have an impact on overall revenue, meaning that increasing ticket prices - if justified by perceived value - can increase revenue without reducing attendance. This highlights the need for a dynamic pricing strategy that balances affordability with financial sustainability.

4.1.6 Musical Genres

Pop/Rock concerts have historically constituted a substantial proportion of non-Erudite music concerts. Indeed, in 2024, these events constituted almost 30% of all non-Erudite performances. This figure was slightly higher in 2023, at 43%. Since 2016, Pop/Rock concerts have consistently constituted more than 25% of the non-Erudite offer.

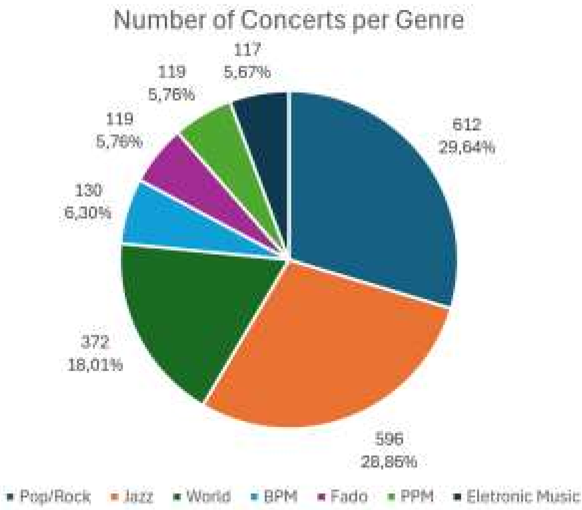

Figure 17: No. concerts per genre

Jazz concerts represented a significant proportion of the total programme, with 596 performances, closely following the number of Pop/Rock concerts, which totalled 612. Conversely, electronic music concerts are experiencing a decline.

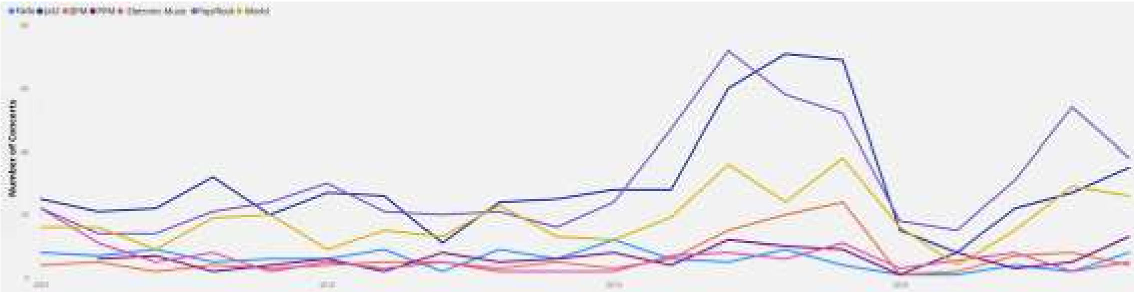

Figure 18: Evolution no. concerts per genre

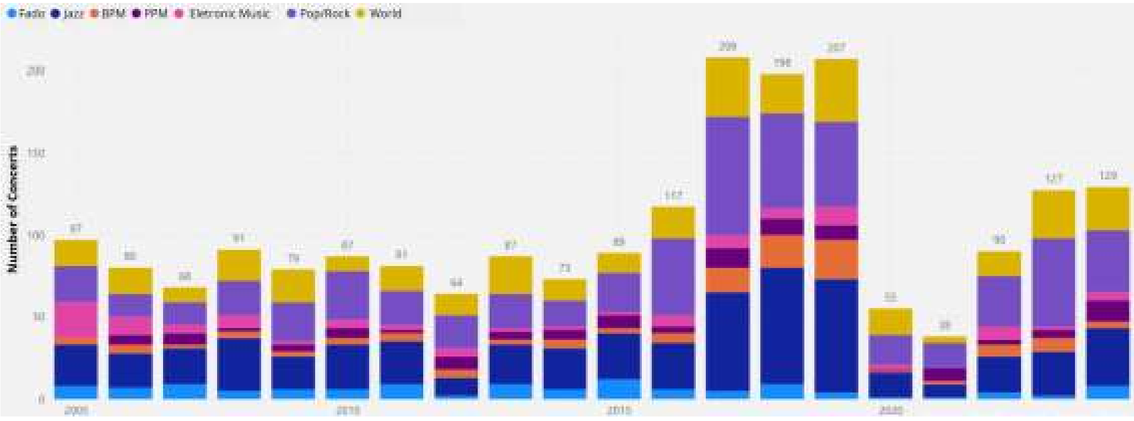

Figure 19: No. concerts per genre

With regard to the mean number of spectators per concert, PPM is in the lead, with an average of 513 attendees, while Jazz concerts have the lowest mean, with an average of 342 spectators. This discrepancy can be attributed largely to the venues in which the concerts are held. A substantial proportion (84%) of PPM concerts are hosted in the two largest venues, *Sala 2* and *Sala Suggia*. While 71% of Jazz concerts are also hosted in these venues, the difference lies in the distribution: *Sala Suggia*, the biggest venue, hosts 55% of PPM concerts, but only 36% of Jazz concerts.

In the context of non-Erudite concert offerings, *CdM* emerges as a culturally diverse. Its programming is characterised by diversity, providing audiences with a wide range of genres to choose from. Which seems to be contrary to the image that the consumers have of the brand.

4.1.7 Venues

Over the observed 20-year period, *Sala Suggia* accounted for 35% of non-Erudite concerts, *Sala 2* received 33%, the café accounted for 18%, and the terrace 9%. Since 2016, the café and terrace have been utilised as venues for free-entry concerts. This fact is of great significance in understanding the importance of these two spaces in the present day. The café and terrace have been selected to host nearly 32% of the concerts in 2024, a trend that has been observed since 2016.

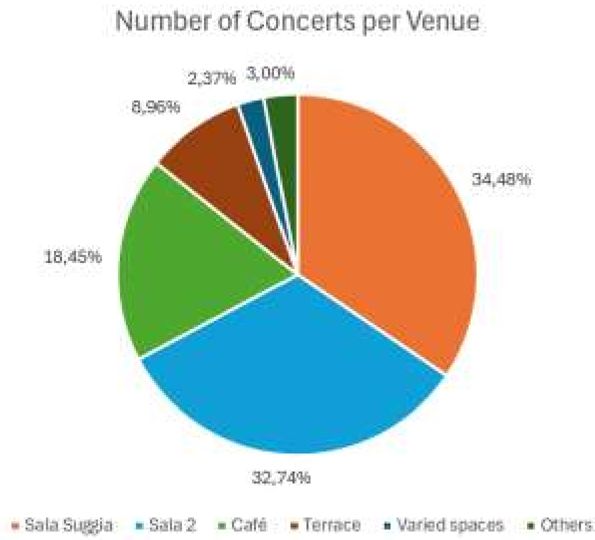

Figure 20: No. concerts per venue [1]

[1] Others refers to the combined total of the following spaces: Praça, Parking Lot, Foyer Nascente, Restaurant, Bar 1 and Bar 2, Cargo dock, Cibermúsica and Sala Ensaio 1

In 2024, *Sala 2* recorded a high number of concerts, with a total of 45 events, second only to the 53 concerts held in the opening year. Conversely, the café and terrace have experienced a decline in their role within the programme, deviating from the observed trend since the inception of their utilisation. Collectively, these spaces accounted for a mere 22% of the total concert events in 2024, marking a substantial decline compared to previous years: 2017: 44%; 2018: 59%; 2019: 60%; 2020: 55%.

In the post-pandemic period, there has been less participation of the café and terrace in the concert programme, reinforcing the weight of the main venues in the total number of events held.

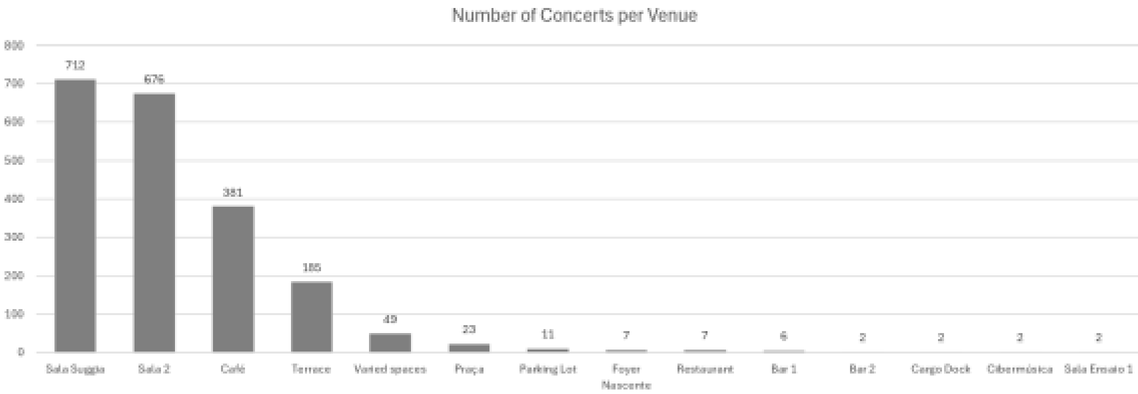

Figure 21: No. concerts by venue

Despite accounting for 67% of the concert spaces, the two large venues accounted for 82% of the audience that visited *CdM* for non-Erudite music concerts. *Sala Suggia* is particularly noteworthy in this context, having received almost 61% of spectators, a predictable result given its role as one of the most emblematic and largest-capacity spaces in *CdM.*

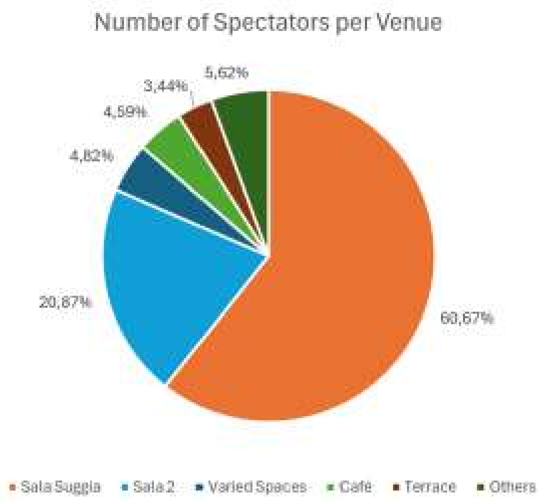

Figure 22: No. spectators per venue

The institution's larger venues, *Sala Suggia* and *Sala 2*, play a critical role in sustaining high attendance figures by accommodating larger audiences and hosting major events. Conversely, smaller spaces such as the café and terrace contribute to audience development in a different yet equally valuable manner. These areas are utilised for free-entry concerts, which have the capacity to attract new audiences and serve as an entry point for those who may be hesitant to purchase tickets. This strategy enhances accessibility and introduces potential customers to *CdM*'s broader offerings.

4.1.8 Artists

Since its inauguration, *CdM* has hosted a total of 2,563 artists, 73% of whom performed as part of OP and 44% were Portuguese. 2019 saw the highest number of guest artists, with a total of 223, which coincides with the year that saw the second highest number of concerts.

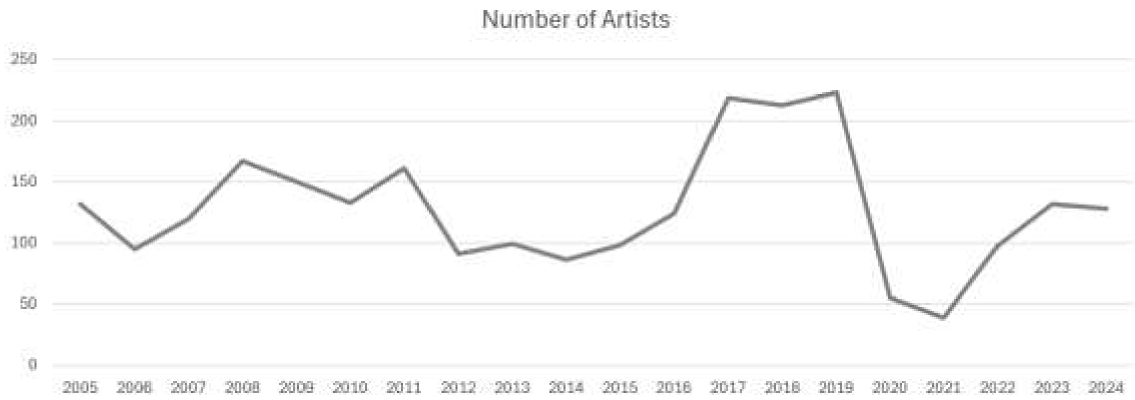

Figure 23: No. artists

In total, 1,128 Portuguese artists took to the stage at *CdM*. In 2024, 65 portuguese artists performed at *CdM*. The predominant genre among them was Pop/Rock, with 31% of the total. Jazz ranked second, with 27% of the artists, while the 413 World music artists accounted for 16% of the total.

4.2 Casa da Música´s Recent Digital Marketing Campaigns

Understanding what *CdM* has to offer is important in order to draw conclusions about the brand's position in this market, but we need to go one step further and look at how *CdM* communicates its offering to both erudite and non-erudite audiences in order to understand what works and what can be done better.

This study will evaluate *CdM*'s digital marketing campaigns for the year 2024 for ticketed concerts, with the exclusion of free-entry events, educational service activities, guided tours and cycles with multiple concerts. Publications that focus solely on community engagement were also excluded from the study.

In 2024, *CdM* published a total of 864 posts, promoting 258 events, with Facebook receiving 434 posts and Instagram receiving 430. The aggregate outcome of these actions was a total organic reach of 5,675,454 individuals and 6,621,450 impressions. Facebook demonstrated a significantly higher reach (3,429,952) in comparison to Instagram (2,245,502).

The month of October was particularly noteworthy for the number of posts made, with a total of 126 publications recorded. This high volume was driven, in part, by the organisation of 32 events, the second highest number of the season.

The month of August shows a low level of both reach and impressions (R&I), which can be attributed to the low number of concerts (14) and consequently social media posts.

Figure 24: R&I

It is important to note that a significant proportion of the posts, amounting to more than 73%, were dedicated to promoting OP events. This is despite the fact that the total paid programme is divided equally between 50% OP and 50% EP. These figures demonstrate a communication effort focused on the promotion of OP concerts.

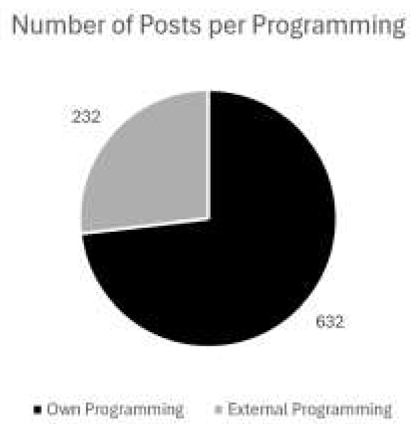

Figure 25: No. posts per programming

CdM launches a monthly newsletter that provides a comprehensive overview of the upcoming programme. However, due to its broad scope, it is impossible to associate it with specific concerts, which has resulted in its exclusion from this study. Furthermore, a series of newsletters were distributed to promote concert series; however, these have also been excluded from the study for the aforementioned reason. Furthermore, the number of emails actually sent varies considerably; therefore, the focus will be on newsletters with over 35,000 recipients.

The study revealed that *CdM* disseminated a total of 12 newsletters, which reached 1,365,680 individuals, were opened 477,515 times and generated 16,496 clicks. The month of October experienced the highest number of opens, a phenomenon that can be attributed to the intense programme. A total of 42% of the newsletters pertained to Classical music concerts, with a particular emphasis on the resident ensemble OSPCDM, which registered four of this five newsletters.

4.2.1 Reach and Impressions

Facebook was found to have the highest organic reach, accounting for around 60% of the total. A total of 58% of organic impressions were recorded on Facebook, with the remainder recorded on Instagram. This result shows that Facebook tends to attract a larger audience than Instagram.

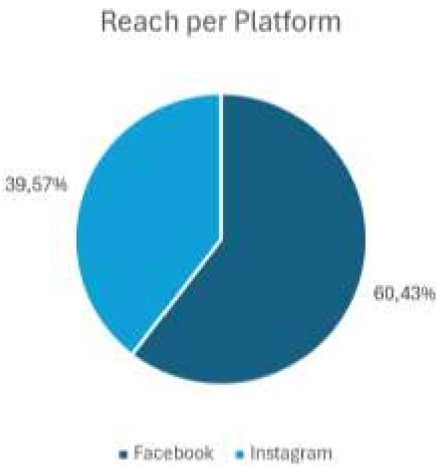

Figure 26: Reach per platform

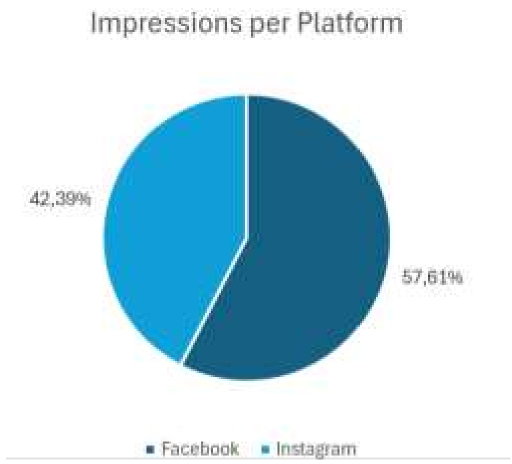

Figure 27: Impressions per platform

However, in the final months of the year, Instagram achieved engagement levels close to those of Facebook, with R&I on Instagram surpassing those on Facebook in November and December. This reverses a long-time trend in which Facebook was the more engaged of the two.

Figure 28: Reach by platform

Facebook achieved a significantly higher reach than Instagram in January, June, July and August (76%, 67%, 69% and 68% respectively), aligning with the number of Classical concerts. This finding suggests that platform demographics may play a role in the choice of promotional platforms, with Facebook's older audience demonstrating a preference for Classical music.

Despite the relatively low number of Classical concerts in August (only one), the analysis found that the eight Fado concerts in this month contributed to Facebook's higher reach. The findings reveal that Fado posts on Facebook achieved more than double the reach of Instagram, thereby providing a plausible explanation for the observed platform differences during that particular month.

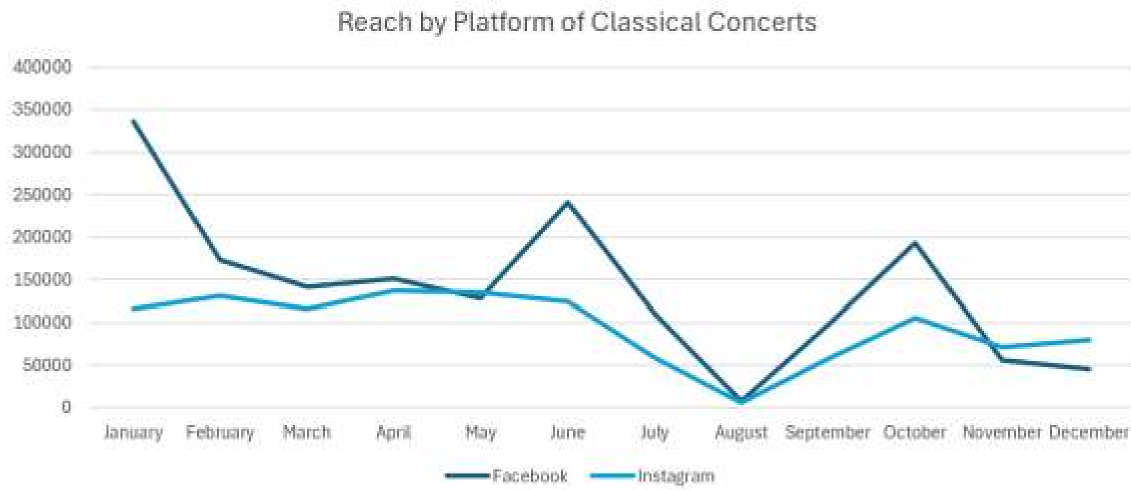

Figure 29: Reach by platform of Classical concerts

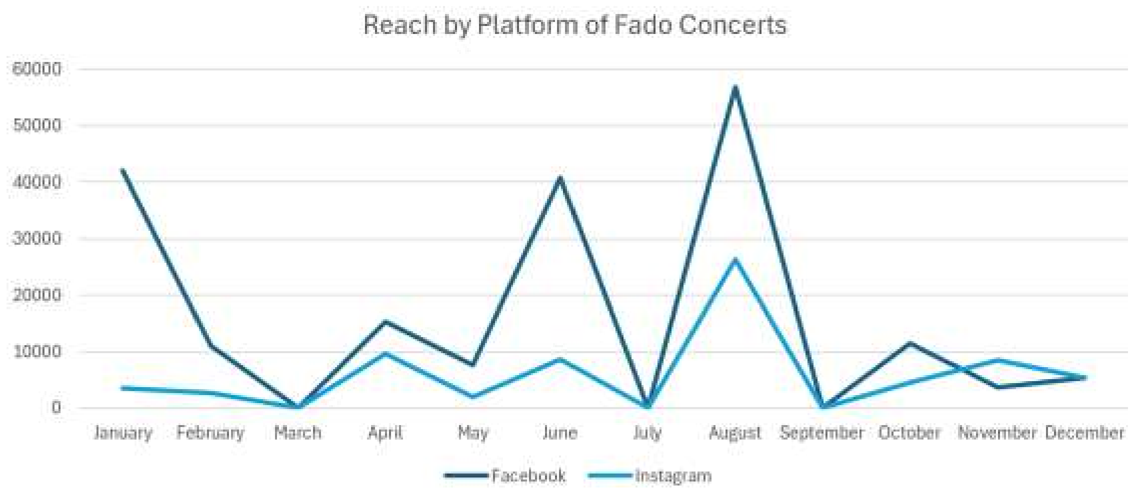

Figure 30: Reach by platform of Fado concerts

4.2.2 Genres

The genre with the highest number of posts on both Facebook and Instagram was Classic, with a total of 392 publications. This phenomenon is also reflected in R&I: almost 50% of the total reach and 49% of the impressions are attributed to concerts of this genre.

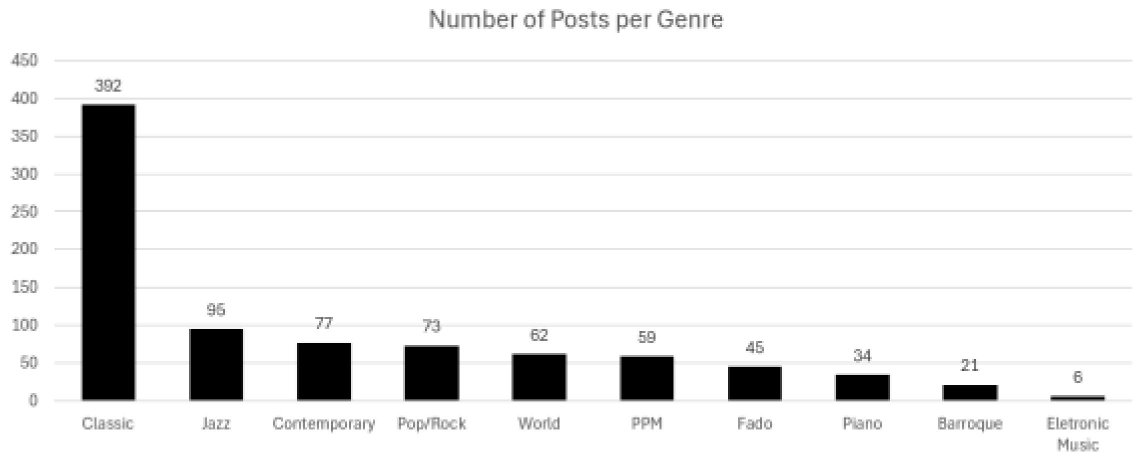

Figure 31: No. posts per genre

The number of posts by genre does not necessarily correspond to the same order in terms of R&I. Classical music remains the leader in both R&I. However, Pop/Rock takes the second place, followed by Contemporary in third. In terms of absolute numbers of R&I, Pop/Rock concerts are second only to Classical ones.

However, a marked discrepancy emerges when juxtaposing these figures with those of Classical concerts. Specifically, on Facebook, a Classical music post garners an average of 582,969 views, whereas a Pop/Rock post attracts a mere 151,466 views. This disparity is also evident on Instagram, as well as in terms of the number of impressions.

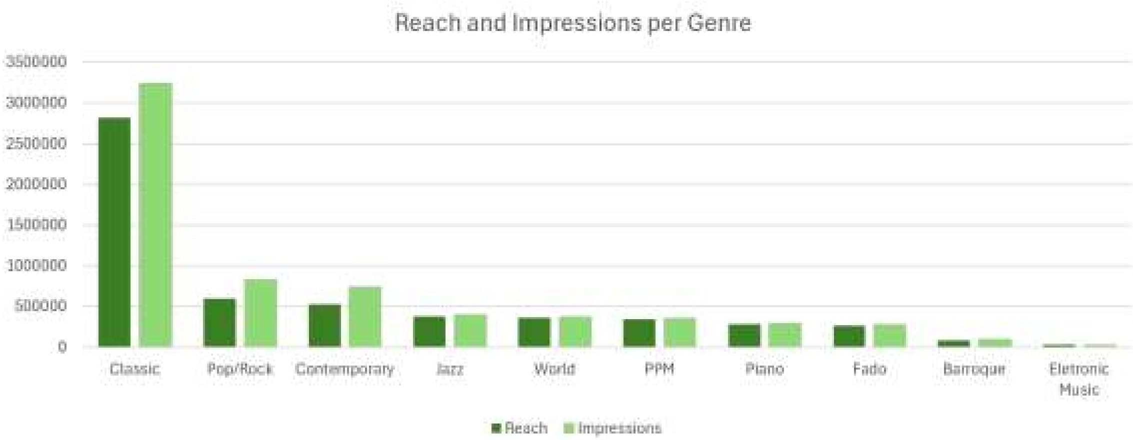

Figure 32: R&I per genre

Nevertheless, it is imperative to analyse the averages of engagement per post, as a high volume of posts per concert does not necessarily equate to proportional performance. For instance, Contemporary music, despite ranking third in terms of total R&I, exhibits one of the lowest averages in terms of R&I per post. This is partly due to the 77 total posts associated with this genre, which translates into an average of 6 posts dedicated to each Contemporary concert.

Conversely, Classical music emerges as a notable exception, achieving the highest R&I, propelled by the volume of its content. On average, Classical music events generate an impressive 4 posts each, a figure that stands in stark contrast to the higher averages of posts per concert observed in other genres.

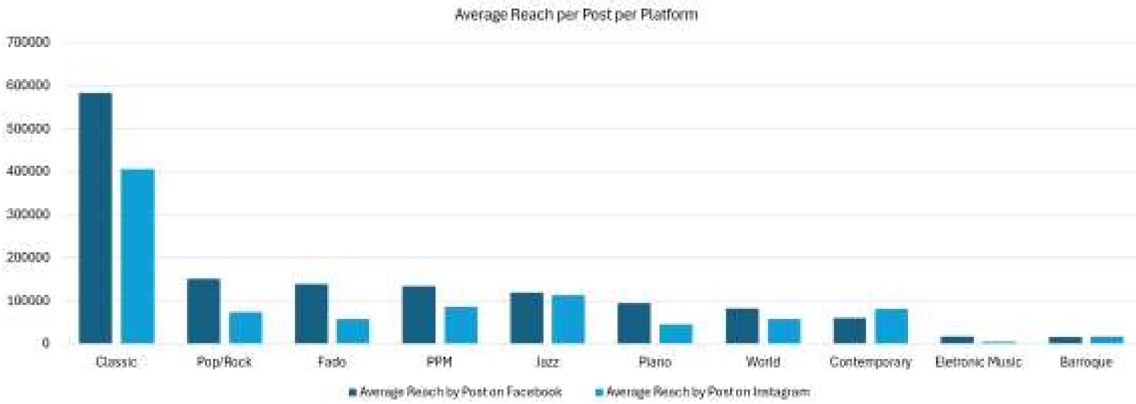

Figure 33: Average reach per post

One possible explanation for the discrepancy between Classical and other genres is the use of distinctive content, such as videos, to promote this kind of events. Of the total of events promoted with videos, almost 60% were classical music events, demonstrating the importance of these materials in extending engagement.

4.2.3 Special content

In the context of a promotional campaign for 77 concerts, which incorporated special content, a total of 227 videos were utilised, with a balanced distribution across both social platforms. Of these, 133 videos, representing more than 58% of the total, were dedicated to promoting Classical music concerts. This was followed by promotional videos for Jazz and Contemporary concerts, which accounted for 13% and 12% respectively.

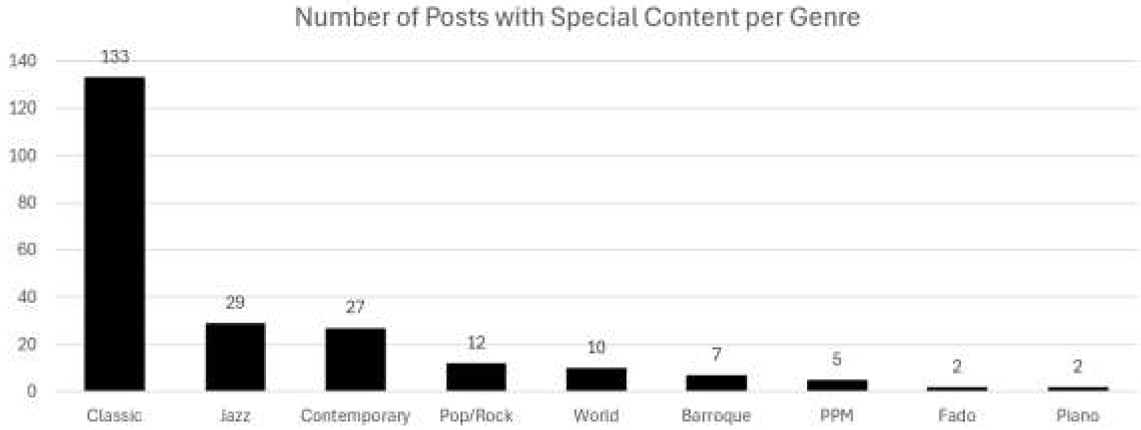

Figure 34: No. Posts with special content

Events containing special content demonstrated a superior number of R&I in comparison to events devoid of such features. It is estimated that approximately 61% of the total organic reach was attributable to videos, and almost 64% of the impressions were also associated with this type of content.

The use of video content has had a highly positive impact on R&I; however, its influence on ticket sales remains ambiguous and will be explored in more detail later. *CdM*'s video strategy primarily focuses on educational and informative content and often lacks clear calls-to-action (CTAs) that could directly encourage ticket purchases. This gap suggests an opportunity to align video content more strategically with sales objectives.

In order to enhance its effectiveness, it is recommended that *CdM* integrates compelling CTAs, such as ticket booking prompts and event highlights, alongside limited-time offers, artist testimonials, and audience reactions, in order to create urgency and exclusivity. A hybrid approach, balancing educational and promotional elements, would allow *CdM* to maintain its cultural integrity while improving sales performance. Furthermore, aligning video content with specific objectives, such as brand positioning, audience engagement, and sales conversion, would maximise its impact and broaden its audience reach.

The adoption of a compelling emotional storytelling strategy could be instrumental in strengthening audience loyalty. As discussed in the literature review, one of the key challenges within the cultural sector is the difficulty in converting consumers into loyal brand advocates. This industry-wide trend is reflected at *CdM*, where the majority of visitors attend only one concert per year. Addressing this issue requires a shift in communication strategy, particularly across social media, towards the use of emotionally resonant narratives. Storytelling has the potential to humanise the institution, making it more relatable and appealing to a broader audience. By moving beyond purely promotional content and embracing stories that evoke emotion and foster personal connection, *CdM* can deepen audience engagement and encourage repeat visits.

4.2.4 Newsletters

A total of 42% of the 12 newsletters distributed were dedicated to Classical concerts. It is noteworthy that merely two newsletters pertained to non-erudite music concerts, specifically one for each a Jazz and a Pop/Rock concert. This further highlights the prioritisation of Erudite concerts in *CdM*'s communication strategy.

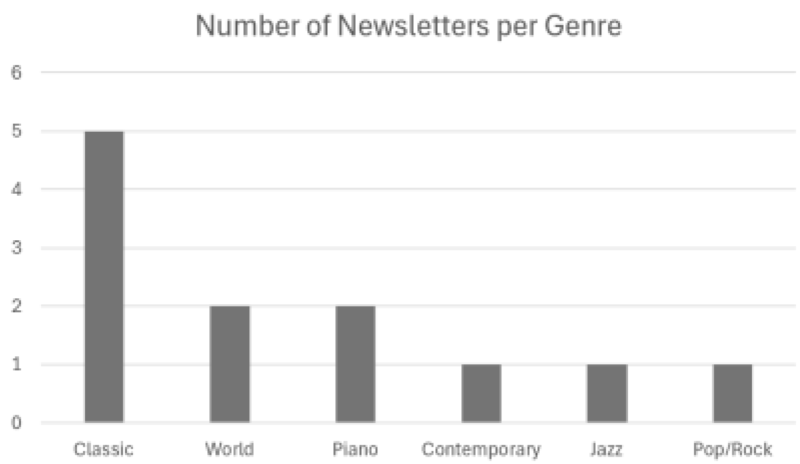

Figure 35: No. Newsletters per Genre

A total of four newsletters were published, with a focus on the *OSPCDM*, and one dedicated to the *OBCDM* and one to the *RECDM*. Resident Ensembles occupy a pivotal position within the public mission of CdM, a fact that is reflected in the institution's communication strategy. The emphasis placed on these groups is indicative of their strategic importance and the significant communication efforts dedicated to promoting their concerts.

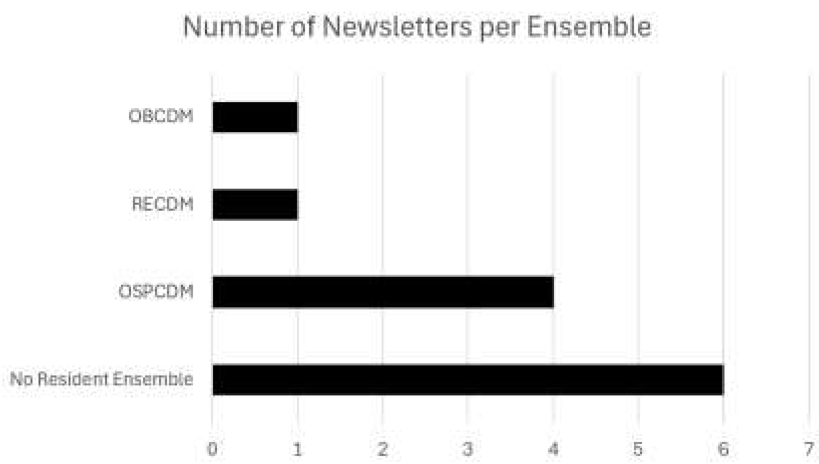

Figure 36: No. newsletters per ensemble

A close analysis of the relationship between concert page website views and presence in newsletters reveals certain patterns. The concert that garnered the highest number of views and was featured in a newsletter was that of

Anoushka Shankar, which received 12,018 views. It is noteworthy that this concert ranked as the second most viewed event on the website page.

Of the concerts with a newsletter, only two are not among the 35% of events with the largest number of page views. This finding suggests that newsletters play a meaningful role in driving traffic to the website, even if this engagement does not immediately result in a ticket purchase. This finding underscores the potential of newsletters as a valuable touchpoint in the user journey, contributing to brand awareness.

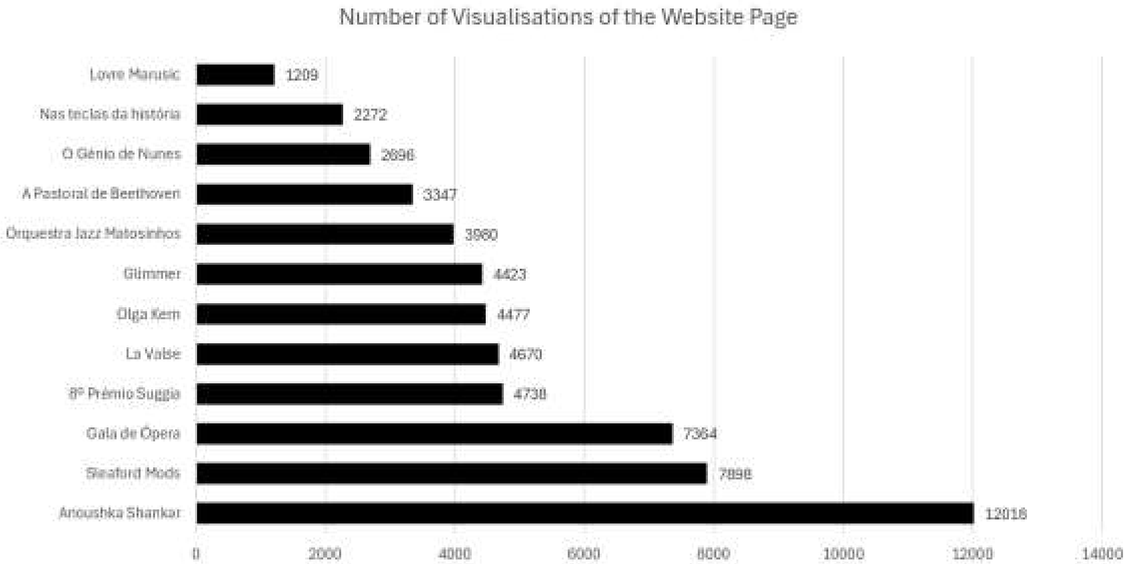

Figure 37: No. visualisations website page

4.2.5 Occupancy Rates

A thorough analysis of the impact of digital marketing campaigns on attendance rates and consumer perception of *CdM* reveals several key insights. While an initial examination of the data suggests that non-Erudite concerts achieve higher average occupancy rates (60%) compared to Erudite concerts (56%), a more profound analysis unveils a counterintuitive trend: the absence of communication efforts appears to be associated with higher occupancy rates for non-Erudite concerts.

Indeed, in the absence of social media promotion, the average occupancy rate for non-Erudite concerts exhibits a significant increase to 79%. There is also an increase, but of lower size, in occupancy rates is also observed for Erudite concerts, with the rate rising to 60%.

However, when *CdM* actively promotes non-Erudite concerts on its platforms, the average occupancy rate drops to 56%, aligning with the occupancy of 54% in Erudite concerts. This fact shows us that the posts of non-Erudite events have less impact on sales when compared to posts promoting an Erudite one.

A further analysis of the concerts that had a sell-out rate of over 70% revealed that these represented only 37% of all concerts. It is worth noting that 32 of 96 concerts with occupancy rates above 70% had no social media posts, representing 33% of the total. These events can be classified as high demand concerts that require minimal communication efforts to sell tickets, likely due to the popularity of the artist, the repertoire, or the specific target audience.

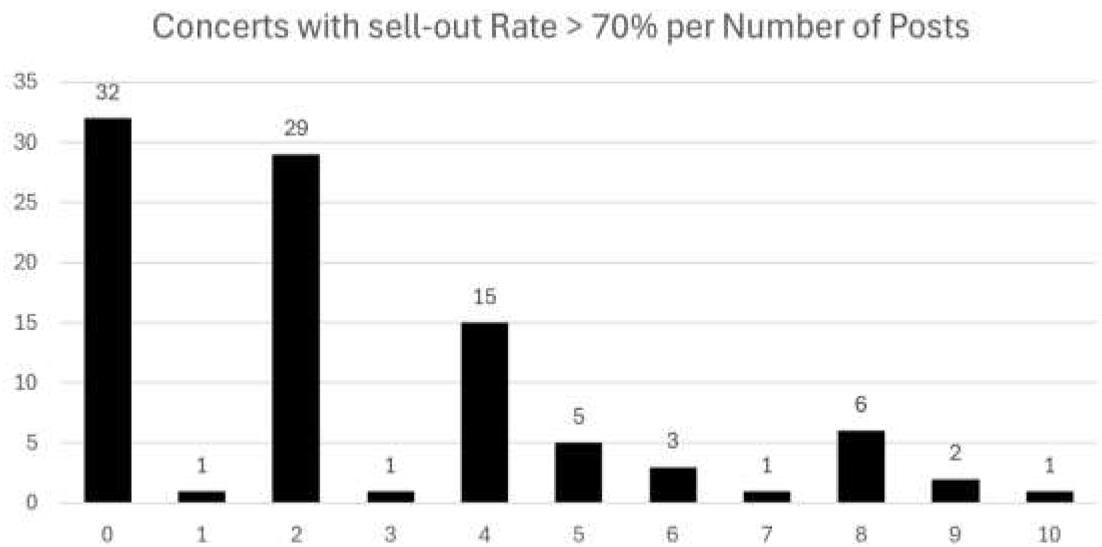

Figure 38: No. concerts occupancy rate>70% per no. posts

Looking at concerts that required additional promotional efforts to achieve high attendance, the following patterns emerge: 30% of these events were promoted with 2 posts (one on each meta-platform), 16% were promoted with 4 posts, 6% had 8 posts. This suggests again that some high-attendance concerts were successful with minimal posts, while others required a greater investment in content to attract audiences.

The total number of videos associated with concerts achieving higher occupancy rates was 52, a figure significantly lower than the total of 227 videos published. Of the 96 concerts with occupancy rates above 70%, the vast majority (76%) had no videos associated with their promotion. The use of video content has proven effective in increasing R&I, but it has not had the same impact on ticket sales conversion. This suggests that while videos are engaging, they may not be fostering a strong enough emotional connection with the audience to motivate purchases. It is, therefore, essential to identify which types of videos are most valued and which create a stronger sentimental connection. Emotional appeal could be decisive in improving conversion rates.

The analysis of the events' occupancy rates in relation to the respective communication efforts demonstrates that the communication strategy employed for non-erudite concerts may not be effectively aligned with the appropriate audience segments. If *CdM*'s core audience primarily consists of Classical music enthusiasts, its digital marketing efforts may fail to engage or attract non-Erudite music fans. Furthermore, if *CdM* is widely perceived as a Classical music venue, promotional efforts for non-Erudite concerts may be overlooked by their intended audience, who may instead rely on communication directly from artists, record labels, or external promoters.

A significant proportion of non-Erudite concerts at *CdM* are externally programmed, implying that their promotion is frequently managed by third parties with a more profound understanding of the specific audience. The observation that these concerts frequently achieve high occupancy rates without *CdM*'s direct promotional efforts suggests that external marketing strategies may be more effective in reaching and engaging non-Erudite music fans.

This finding serves to build upon the previously identified exceptions and reinforces the central objective of this study, namely to assess *CdM*'s brand perception within the non-Erudite music market and its implications for future communication strategies.

Chapter 5

5.1 Conclusions

Contextualising *CdM*'s performance within the broader Portuguese live events sector offers valuable insights into its positioning and challenges. According to data from the INE, box office revenues from Pop/Rock concerts in Portugal reached approximately €84 million in 2023, reflecting strong demand for this genre - a trend that has also been observed at *CdM*. This raises important questions regarding the comparative appeal and revenue-generating potential of Classical music within this evolving market.

In the same year, the Consumer Price Index (CPI) for cultural goods and services decreased by 0.6%, yet concert ticket prices rose by 10%. This likely reflects increased production costs or heightened demand. For *CdM*, this underscores the importance of maintaining competitive, yet accessible pricing, while ensuring the value of the concert experience remains evident. Rising ticket prices also elevate audience expectations, creating an opportunity for *CdM* to further differentiate itself through high-quality performances, enhanced customer journeys, and its unique cultural offering. Monitoring price elasticity will be crucial for balancing revenue generation with inclusivity and diversity.

Despite the challenges posed by the pandemic, *CdM* has demonstrated resilience, with consistent growth in attendance and revenue since 2022. A key driver of this growth has been the diversification of its programming, particularly in Pop/Rock, Jazz, and World music - broadening its appeal beyond Classical music audiences. An analysis of its programming since its opening reveals a clear investment in fostering an inclusive space that caters to a wide range of musical tastes.

However, a 2019 study on attendance patterns at *CdM* highlighted a critical issue: 94% of visitors attend only one concert per year. More concerningly, 50% of these one-time attendees go to Externally Programmed (EP) concerts. While EP concerts appear successful in attracting first-time visitors, they are not fostering long-term engagement or brand loyalty. This raises strategic concerns about how *CdM* can convert these first-time visitors into recurring attendees.

To address this, efforts should focus on retaining EP audiences and strengthening their connection with the brand. Potential strategies include post-event follow-ups, personalised concert recommendations, exclusive offers, and membership programmes designed to incentivise repeat visits. Without such initiatives, *CdM* risks a cycle of continuously attracting new visitors without converting them into loyal audiences, ultimately limiting growth in the non-Classical music segment.

Digital marketing has played an essential role in extending *CdM*'s reach. However, its effectiveness in driving ticket sales varies by genre. Classical concerts benefit the most from current strategies, whereas non-Classical genres appear to require more tailored, audience-specific approaches. Enhanced segmentation, such as personalised newsletters based on musical preferences, could improve engagement. Requiring account creation for ticket purchases would also support the development of data-driven strategies and enable targeted re-engagement campaigns.

One of *CdM*'s key communication challenges is the enduring perception of elitism tied to Classical music, which contributes to the view, reinforced by the results of the perceptual map, that *CdM* is positioned as a more specialized venue compared to its competitors. This is compounded by a strategy that places considerable emphasis on this genre, while under-promoting non-Classical offerings. A more inclusive and diversified messaging approach, supported by targeted digital campaigns, influencer partnerships, and co-branded initiatives, could help reposition *CdM* as a more accessible and culturally diverse institution.

A significant imbalance has also been identified between the promotion of Own Programming (OP) and External Programming (EP) concerts. In 2024, OP concerts accounted for 73% of social media posts, resulting in 77% of total reach and 79% of impressions. Additionally, 96% of the CPC budget was allocated to OP events. In contrast, EP concerts, often featuring non-Classical genre, received limited visibility. This imbalance risks reinforcing the perception that *CdM* is primarily a Classical music venue and may limit the institution's ability to attract and retain more diverse audiences.

From a financial perspective, *CdM*'s reliance on external promoters for non-Classical EP concerts presents long-term sustainability risks, as it limits control over content, pricing, and promotional strategy. With non-Classical EP concerts comprising 32% of all ticketed events in 2024, a more balanced and autonomous approach to communication and programming is necessary to ensure both revenue stability and artistic diversity.

Finally, improving storytelling and community engagement could strengthen *CdM*'s public image and foster audience loyalty. Many of its initiatives and achievements remain under-communicated, limiting awareness of its broader cultural impact. Strategic storytelling - highlighting milestones, behind-the-scenes insights, and emotional narratives - can deepen audience connection and encourage repeat attendance, positioning *CdM* not just as an Erudite concert venue, but as a diverse cultural institution.

5.2 Limitations

Our analysis of *CdM*'s non-Erudite concerts faced significant limitations as it spanned 20 years of data. Lost or misclassified information contributed to potential gaps in the dataset, while a change in the CRM platform presented further challenges, affecting data consistency and completeness. The manual nature of the analysis, which involved reviewing over 2,000 concerts individually, was likely to have led to fatigue and increased the potential for error. In addition, the historical nature of many of the concerts presented a further barrier, as scarce and fragmented information further hampered the analysis.

The construction of the perceptual map has several limitations that should be taken into account when interpreting the results. One of the main limitations is the relatively small number of respondents, which may affect the statistical reliability and representativeness of the results. A larger sample size would provide more robust findings and reduce potential bias.

In addition, the age distribution within the sample is skewed, with a higher concentration of respondents in the 20-25 age group, while other age groups are under-represented. This imbalance may result in a perceptual map that primarily reflects the views of younger individuals, potentially overlooking the perspectives of older demographics who may have different levels of familiarity, expectations and preferences regarding these cultural venues.

However, one of the most significant limitations is the reliance on public perception as the basis for analysis. As the map is constructed from subjective opinions, respondents with limited knowledge or experience of certain brands may provide answers that are not based on concrete perceptions, but rather on assumptions or even a lack of awareness. This could lead to distortions in brand positioning as some responses may not reflect an informed assessment of the venues in question.

‘Declaration of Generative AI and AI-assisted technologies in the writing process’

During the development of my written dissertation, “Positioning of the Casa da Música brand in the non-classical North of Portugal music market”, ChatGPT was used for tasks such as reduce the number of words and improve writing with the prompts used listed at the end of the document in the section "List of Prompts." After using these tool(s)/service(s), I reviewed and edited the content as necessary and take full responsibility for the final work presented.

I also declare that I am aware of and adhere to the Artificial Intelligence Code of Conduct of Católica Porto Business School.

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List of Prompts

Refining Language and Word Reduction:

- "Improve the clarity and readability of this paragraph: [text]."
- "Make this section more formal and academic: [text]."
- "Rewrite this passage to enhance coherence while keeping the original meaning: [text]."
- "Reduce the word count of this section while maintaining key information: [text]."

Appendices

Appendice 1 – Questionaire Questions

Demographics:

- First name
- Age
- Genre
- Higher level of schooling completed

Similarities and Dissimilarities between brands:

1. Please tell how similar or dissimilar you think the following pairs of Performing Arts Spaces are, using for each pair the dissimilarity scale on the right (please choose only one of the 5 dissimilarity levels for each spaces pairs):

   1.1 CdM and Serralves

   1.2 CdM and Coliseu

   1.3 CdM and Rivoli

   1.4 CdM and Teatro S. João

   1.5 Serralves and Coliseu

   1.6 Serralves and Rivoli

   1.7 Serralves and Teatro S. João

   1.8 Coliseu and Rivoli

   1.9 Coliseu and Teatro S. João

   1.10 Rivoli and Teatro S. João

Comparing attributes:

2. Say how you perceive and compare each performing arts space listed using the scales provided (1 to 5 scale):

   2.1 Average Price in all the categories of live performances.

   2.2 Level of promotion/communication of the offerings.

   2.3 Level of exclusivity of the offerings.

   2.4 Level of reputation of the brand

   2.5 Level of diversity of offerings of musical genres.

   2.6 Level of accessibility of the spaces.