The branding potential for the digital transmission of live-operas to the cinema: An international comparison of Estonia and Germany

Abstract

Today, opera houses are confronted by new (global) digital media offers that enable people to stay outside the opera house while attending a live-opera, e. g. via live-streamed opera shows in the cinema. This is a challenge for media managers in these areas because they need to find new ways to work with these new opportunities. Within a cultural marketing context, branding is of high relevance. Based on the brand image approach by Keller (1993), we use a complex qualitative-quantitative study in order to investigate if and how the brand images of live-opera performances and live-streamed operas differ between countries and cultural contexts. By comparing Estonia and Germany, we found that the perception of the live-opera is rather a global phenomenon with only slight differences. Furthermore, the 'classical' opera performance in the opera house is still preferred with a corresponding willingness to pay while the live-streamed opera offer may give a modern touch. The study may support media managers in adapting their brand management to include new digital product offers and in finding targeted differentiation strategies for increasingly competitive markets.

Managing live-operas in the context of digitization

In an era of increasing digitization of culture, we are currently seeing a wide array of changes in cultural practices and the way in which organizations create cultural products (Gere 2009; Mottart *et al.* 2004; Reed 2014). Specifically, digital media has altered the way we think of ourselves, the way we consume cultural products, the way we work, and the way we conceive the social in general (Creeber, Martin 2009: 5). Digitization, here, refers to software-driven processes, such as datafication, computation, prediction, display, communication or action, which impact all aspects of culture, work and society (Olleros, Zhegu 2016).

As part of this growing digitization of culture and the social sphere, the impact on music theatres and opera houses is significant. Digitization and digital media enable people to stay outside the opera house for attending a live-opera event, e.g. through watching digital live-streams shown in a cinema (Reuband 2013b; Steichen 2013). This is both a challenge and an opportunity for media managers because – on the one hand – they need to develop and make sense of new approaches for branding their new digital goods, concepts and services, and – on the other hand – have to evaluate how this can influence the consumption and marketability of their existing products and services (Baumann 2013; McDowell 2011; Mierzejewska, Shaver 2014). This is a complex marketing challenge, because it is difficult to understand and to judge how this will create opportunities for branding new media products (Weinacht 2015; Wirtz *et al.* 2011). Meanwhile, sources show that digital live-streams already have an audience. For example, the pioneer of live-streamed operas which has the most transmissions worldwide, the Metropolitan Opera (MET) of New York, has started turning a profit with tickets costing about 20$ (Woolfe 2012). Moreover, the company has generated an intangible benefit to its brand perception, adding a touch of innovation to its current service portfolio (Woolfe 2012) and expanding its reach towards larger audiences and at a higher frequency (Viagas 2017). Overall, live-streamed operas have a growing relevance (Steichen 2013), in particular, because they are representative for the transformational potential of digitization among cultural products and services (Creeber, Martin 2009; Reed 2014) and for how they are being presented, consumed and managed as part of an ongoing digitization process in organizations today (see e.g. PwC 2016).

Managing this digitization becomes even more difficult through increasing production costs for opera performances and declining normal revenues, as less people attend regular performances (Abfalter 2010; Lutz 2013; Steichen 2013; Viagas 2017). This trend may be explained by new media usage patterns which influence communication behavior (Pavlik, McIntosh 2013), media reception (Manovich 2009) and media preferences (expectations), and that places new demands on the media industry (Küng 2017). Ultimately, they make the management of digitization a complex strategic problem for media organizations today (Horst, Järventie-Thesleff 2016; Horst, Moisander 2015).

The opera can be defined as a distinct form of theatre, focusing on music. It is a form of "publicity" that is created in front of a reactive audience and remains self-sufficient (Schäfer 1967: 208). In this sense, it is a medium. Media, here, means an institutionalized system around an organized communication channel that has distinct effects with societal implications (Faulstich 2004: 22). Managing these impacts successfully is the hallmark of modern media management (Lowe 2016; Mierzejewska, Shaver 2014). Against this background, the music theatre management is increasingly forced to allocate its resources effectively and efficiently to meet their customers' needs – even though opera performances are often valued as an important cultural factor, for which it is possible to receive some additional public funding (Abfalter 2010: 127; Lutz 2013: 65). Therefore, a market orientation and especially an identity-based brand management (Aaker 2014; Burmann *et al.* 2005; Esch 2014) are important approaches that cultural institutions can use for differentiating themselves clearly from their competitors and for building strong customer relationships. Within such an approach, one distinguishes between a *brand identity*, which are all distinct associations an organization wants their customers to remember, and a *brand image*, which are all general associations and impressions customers have of an organization and its offers. Brand images have a strong influence on buying behavior, because they create positive emotions and values that the organization is seen to symbolize, and are therefore key elements of differentiation strategies (Hatch, Schultz 2003; Keller 1993: 4).

Even though identity-based brand management provides important tools for managing new digital opportunities for operas, it is surprising to find a current paucity of studies addressing this research topic. Moreover, the identity-based brand management research widely neglects cultural institutions like the opera house. Most research is focused on specific opera performances or opera houses (Bünsch 2011;

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2015) and deals with either socio-demographic or motivational factors (Abfalter 2010; Föhl, Lutz 2011; Jobst, Boerner 2011; Lutz 2013; Reuband 2015). So far, existing studies that focus on the type of the opera performance (live-consumed vs. live-streamed) do not take a branding-perspective (Josch 2010; Reuband 2015). Internationally, research has focused on the marketing of opera singers (Jones 2016), but not on the branding of digital live-streams.

The exception are two papers (Emes, Roll 2016; Roll *et al.* 2017), which conducted a multi-method study to uncover context-based and cross-contextual brand associations between an actual live-performance in an opera house and a digital live-stream shown in a cinema. They find that audiences distinguish between the respective brand images in detail. By using multivariate data analysis, they extracted five distinctive brand association factors for each context. However, this cannot provide any information about the relevance of the unique brand association factors or their relevance within the buying process (e.g. the willingness to pay (WTP) for a live-consumed or a live-streamed opera). Based on a German sample, a second crucial limitation is that cultural differences are neglected, although scientific research has shown that culture is an influencing factor on human perception and behavior (for example Fetscherin, Usunier 2012; Souiden *et al.* 2006).

Therefore, the objective of this paper is to find out how digitization influences the branding opportunities for live-operas in the music theater. Our goal is to detect important brand image factors and to give management recommendations concerning communication, product development and pricing. This is achieved through a comparative international study, conducted in Estonia and Germany. Overall, we contribute by showing that the integration of the buying behavior relevance provides more realistic information than only referencing the buying intention (c.f. Emes, Roll 2016). More broadly, this study highlights that economic and cultural factors can be met simultaneously.

Theoretical grounding

The paper draws on theories and concepts of identity-based strategic brand management (Balmer 2008; Burmann *et al.* 2009; Meffert 2012; Phillips *et al.* 2014b; Voyer *et al.* 2017). This body of knowledge enables a differentiation between a managerially-intended brand identity (inside view) and the specific brand image (outside view), which reflects all stakeholders' impressions of a brand (Radtke 2013: 2). In the context of increasing competition and digitization, brands and brand perceptions play a critical

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role for cultural organizations, because they are crucial drivers for the choice of consumers (Burmann *et al.* 2009). In addition, brand-identities are important assets because they provide a tangible, but yet abstract representation of the service or product to the customers (Cornelissen *et al.* 2007; Phillips *et al.* 2014a; Voyer *et al.* 2017).

Within this approach, a brand-image can be defined as the shared meaning of the public associations that related stakeholders have towards the conceptualization and consumption of the product or service of the cultural organization (c.f. Cornelissen *et al.* 2007: S3). This view enables us to see the product or service as something that is produced in combination with the stakeholders (Hatch, Schultz 2002; 2003) in a larger socio-cultural context (Järventie-Thesleff *et al.* 2011).

Media branding is unique because of the normative, market and product level aspects (Siegert *et al.* 2015) and the respective functions regarding the organization, advertisers and recipients (Baumann 2015). Therefore, to construct an understanding of the brand image of an opera, we need to consider the specific qualities of operas as an important cultural product. Operas are service goods, because of their immateriality of the dramatic music and vocal performance, and because they integrate the external factor of consumption through the audience (Abfalter 2010; Burmann *et al.* 2005). The audience consumes a media product in both cases – in the opera house and in live-opera transmissions. Moreover, the opera has experience- and trust-good characteristics, which means that it can only be evaluated during or after the consumption, and not before (up to the fact, that some characteristics can never be evaluated at all). However, the individualization of an opera is more limited than other service goods, because the performance transmission is offered to a restricted or distinct audience. Generally, the opera is a form of high culture, which not only needs a degree of involvement and knowledge, but also a relatively high emotionality for the consumer (Abfalter 2010: 64).

Many customer-related uncertainties arise because of this service-character. Therefore, targeted branding activities can be used to create a promise of quality and distinction, which can help to reduce consumers uncertainties and manage consumption (Malmelin, Moisander 2014). We define a brand as a bundle of benefits that has specific characteristics in terms of identification and differentiation for the relevant target groups (Meffert 2012: 270).

To better understand the brand image, we will now focus on the visitors of live-operas. We analyze the determinants of the brand image with a behavioral science approach. Furthermore, we presume that brands have characteristics with different abstraction-levels that are part of a larger "semantic network" (Keller 2005: 1318). Therefore, we will not address a specific event or location. Instead, our focus is on the general contexts of music theaters to derive abstract brand-characteristics. The conception of Keller (2005) is ideal, because it focuses on the brand awareness as well as the brand image and highlights the attitude towards a brand as significant success factor. The brand image is the core determinant for customers' preferences and choices and includes unique, advantageous and strong associations (Keller 2005). More specifically, Keller (1993) differentiates between three levels of brand association that have a rising level of abstraction:

1. *Attributes*. This includes consumer perceptions of the product or service, what it is or has, and what is involved with the purchase (Keller 1993: 4). They can be differentiated in product-related and non-product-related characteristics, such as price, user conceptions of the benefits, the utility of the benefits, and the packaging (Keller 1993). We exclude the packaging from our analysis, because a live-opera in an opera house or as digital live-stream in a movie theater is a service good. For Keller (1993), a brand personality is based on a combination of user- and usage-impressions. More specifically, the concept of a brand personality is based on socio-psychological assumptions of peoples' attribution to objects and services. It is "what makes the brand human" (Aaker, Fournier 1995). This is important, because research has shown that strong brand personalities influence buying behavior positively (Biel 1993), and, therefore, need to be considered when analyzing emotionally-laden services such as live-operas. Our study includes this as a separate determinant.

2. *Benefits from needs' satisfaction*. The benefits arise from the satisfaction of functional (intrinsic), experiential and symbolic (extrinsic) needs through the consumption (Keller 1993: 4).

3. *Attitudinal dimension*. Brands create consumer preferences. Those preferences are represented by attitudes towards brands (Keller 2005: 1309). Attitudes themselves "are defined as consumers' overall evaluations of a brand" (Keller 1993: 4).

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Overall, the approaches and conceptions of identity-based brand management in public theaters have received little attention in academic research. Current studies focus on specific opera performances and particular opera houses (for a review see e.g. Bünsch 2011; 2015; Föhl, Lutz 2011). Research on the perception of audiences of German opera performances addresses sociodemographic or motivational aspects, and not the brand image (Abfalter 2010; Jobst, Boerner 2011; Lutz 2013; Reuband 2015). Other studies that focus on the place of opera performances, e.g. in a warehouse (Roll, Höflich 2014), or approach live-opera-transmissions in the context of open-air public viewing (for Austria, see Josch 2010) or cinemas (especially Reuband 2013a; Reuband 2013b; 2015), do not integrate any branding aspects.

This paper closes a research gap, because it analyzes the place and the type of opera performances through contrasting live-operas with live-opera transmissions. Based on the socio-psychological concept that knowledge is structured within a semantic network (e.g. Keller 1993), as a brand we do not focus on a specific opera house or performance, but on the abstract context, by distinguishing the type of a live-opera as performance in the opera house and live-stream in the cinema. This conceptual move makes it possible to create insights into aspects that can be used more widely (generalizability) than results of a specific context (particularity), and allows creating a general understanding of brands. Furthermore, concerning the five brand image factors (explained in the next chapter), we introduce the conceptual framework of the "brand image flower" (based on Emes, Roll 2016), which allows us to operationalize the branding opportunities in terms of user preferences.

Current research in this area has several limitations, which this study will be able to surpass. To date, most research is often unpublished, in terms of master or PhD theses, often not based on theory, unsystematic, too focused (for a review see e.g. Bünsch 2011; 2015), and not international (e.g. Emes, Roll 2016; Roll *et al.* 2017). Moving beyond these limitations, the study draws on exciting international data and cross-country collaboration, and is firmly rooted in literature on media management and general branding. Furthermore, the study considers the context of live-operas, which allows creating novel insights that can enrich a growing discussions and fuel other international research in this area.

To analyze the relevance of the brand image factors within the buying process itself, the study continues with the following research question: *What is the brand image of live-operas in the opera house and live-streamed operas in the cinema and how should this brand image be managed?* This question includes the following three sub-questions:

(1)   What are important brand image factors for live-operas and relating live-streams?

(2)   Can we identify customer segments relating to buying behavior based on the perception of live-streamed operas in the respondents' data?

(3)   What is the willingness to pay (WTP) concerning live-consumed and digital-live-consumed opera performances?

Based on the results of Emes, Roll (2016), we assume that classic live-operas of an opera house are perceived as an original, positive, holistic, and unique experience. Concordantly, we propose that the opera performance in an opera house will be preferred by the customers. Furthermore, the perception of a high complexity and low accessibility of the opera house context would be beneficial to the customers respective the audience. Compared to the cinema, the WTP is supposed to be higher.

Conceptual framework: The brand-image flower

Based on the identity-based brand conception (Balmer 2008; Burmann *et al.* 2009; Phillips *et al.* 2014b; Voyer *et al.* 2017) and how a brand image can be conceptualized within a semantic network (Keller 1993; 2005), we introduce the model of the brand-image flower which we specifically developed for live-operas (Roll *et al.* 2017). From this theoretical framework, the brand-image can be conceptualized as an image and meaning of the brand, relating to five elements of the product/service.

The first evaluation category, the *vividness of impressions*, expresses how far the live-opera is seen as a stage experience with vivid and complex impressions. *Cultural claim* refers to the amount of an expression of a high culture or a cultural education. *Peculiarity* means in which way the live-opera is seen as special, inspiring to think about and authentic. The *demand of attention* describes the feeling of an always retrievable, passive consumption (alongside) within an informal habit. That means that out of a subjective perspective, the necessary level of attention is seen as lower. *Accessibility* shows how easily accessible, public and familiar the live-opera is evaluated (Figure 1).
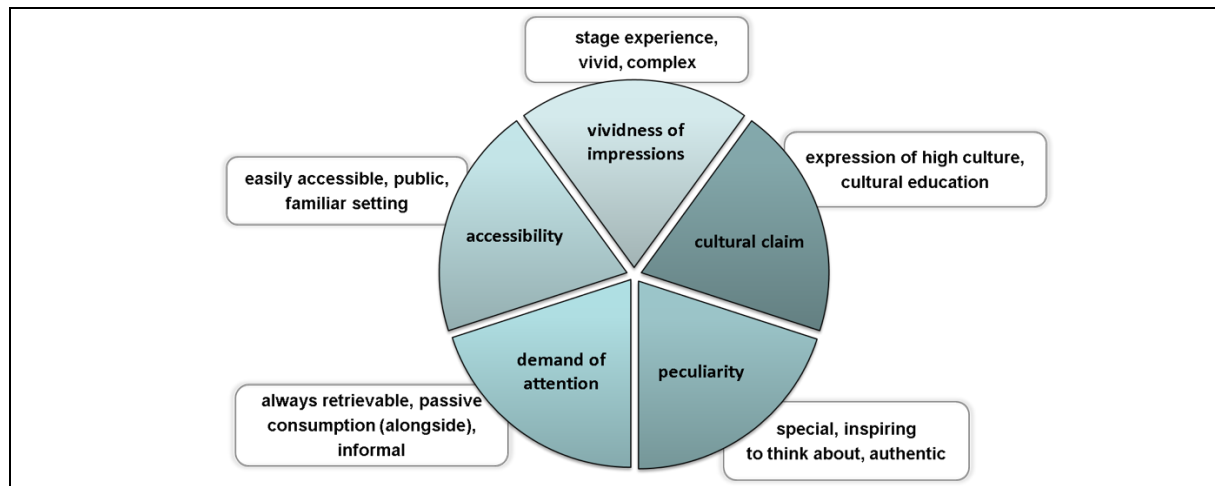
Figure 1: Cross-context brand image flower [orienting on (Emes, Roll 2016)]

Methodology

The methodological approach contains two steps. First, it is necessary to find out if the brand image flower which is derived from the German´s perception is also suitable for investigating the perception of audiences in other countries, in our study of Estonians'. Guided interviews enable to develop deep insights into the Estonian´s view of live-operas and to test the brand image flower, because an interviewer can intensively focus on a single interviewee (Alvesson 2003).

Step 1: Qualitative analysis of the research

Drawing on previous research (Emes, Roll 2016; Roll *et al.* 2017) and using focus group interviews to reveal brand image associations, the respective guideline was adapted to a 30-minute guided interview in English. It contains both questions concerning free associations and structuring techniques like laddering (Reynolds, Gutman 1988; Reynolds, Phillips 2009), repertory grid (Sampson 1972) and brand personality (Aaker, Fournier 1995; Keller 1993). A supplemental questionnaire contains information about sociodemografics (e. g. age, gender), actual visits and the likelihood of visit. In the beginning of February 2017 and to receive a variety of answers, the adult participants were acquired through a snowball sampling (Biernacki, Waldorf 1981), differentiating between gender, education, and experience with live-operas. Based on a theoretical coding (Glaser, Strauss 2008), the records of the interviews were transcribed and later analyzed by a QDA software (Atlas.ti).

After completing two pretests of the guided interviews in the beginning of February 2017, the interviews took place until mid-February 2017. On average, they lasted about 35 minutes. The participants all lived

in Tallinn (Estonia). While it was possible to interview people with differences in gender (two female, three male), age (span 25 – 64 years, average 38 years) and education (one person with a junior high school certificate, the others are higher educated with a university degree), the experience with live-operas is focused on that of opera houses (rarely visits) and other contexts (4 persons attend such events at least rarely).

In sum, all participants are employed with a middle level income (1.001-2.000 € monthly net income per household), whereby the main is married (3 persons), the rest is single. While the likelihood to visit an opera house in the next six months is rather seen as neutral (3 persons) or rather unlikely (2 persons), it is remarkable that the cinema is rated as at least rather likely by three persons. Also, other contexts will be visited more or less by two persons.

Surprisingly, the Estonian interviewees mentioned all aspects of brand associations which Keller (1993) describes. Moreover, every attendee describes the opera house and cinema context by using items of all brand image factors, which proofs the relevance of the brand image factors for buying live-opera tickets at the same time. This means that the brand image flower can be used as an instrument to investigate similarities and differences between Germany and Estonia.

Compared to Germany, the contexts are quite similar. However, slight cultural differences to the German sample in the study of Emes, Roll (2016) can be detected by the answers of the participants concerning how an opera house or cinema would be as a human being (ibid.: 4). The Estonian attendees do not only characterize the opera house or the cinema as an adult male but rather as a female, as both or as a couple (the latter belongs only to the cinema). A formal dressing plays an important role for both. Compared to the opera house, the cinema is described as younger, more fashionable and casual. But referring to the opera house, the Estonian participants highlight that this character is highly dressed up. Furthermore, they emphasize the importance of a good look when describing the cinema as "handsome" (P3w). While being well-educated and having good manners show no international differences, the Estonian cinema is seen as more approachable and described as "more interesting to me" (P5m). But at the same time, the experience from cinema is (like in the German sample) not profound as the participants claim by "2D" (P1m), "video-like" (P2w), "wants not to get older" (P3w) or "sitting right before the people and

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looking forward" (P4m). This refers to an understanding of the cinema as a copy-like performance without the feeling of becoming really involved/sensually stimulated as it is possible in the opera house. Overall, this suggested that the cinema is more positive rated by Estonians and therefore a competitor to the opera house. Furthermore, this step proposed that there are more segments in Estonia because they make finer distinctions between both contexts.

Step 2: In-depth quantitative analysis of the survey data

In the second step, an online survey meant to reveal the buying behavior and to enable a segmentation if necessary. For the quantitative data analysis of the online survey, the paper adopts common multivariate analytical procedures to make sense of the data, but also a choice based conjoint analysis of the brand image factors (Orme 2014). Our methodological setup provides a unique opportunity to explore those factors which are most relevant for deciding between attending a live-opera performance or a live-streamed opera performance.

In accordance to Keller (1993), we asked for the strength, uniqueness and favorability of the factors of the brand image flower to gain deeper insights into the evaluation of the brand image. While for the strength and uniqueness the existing questions of a former study of Emes, Roll (2016) have been proved as suitable, we decided to investigate the favorability by using a choice based conjoint design (CBC). This approach is similar to realistic choice situations, because "respondents are shown a set of products in full profile and asked to indicate which they would purchase" (Orme 2014: 45). Full profile means that those offers are characterized by different attributes with various levels. With a multivariate conjoint analysis, one can reveal the utility values of the levels as well as the importance of attributes for the decision (Rao 2014: 9). Under the presumption of a trade-off between the levels and attributes this method is widely used for product development, pricing or segmentation (Orme 2014: 22). In our study, the important, independent, realistic and influenceable attributes with their levels are type (live-opera performance vs. live-streamed opera), price (15€ / 25€ / 35€ / 45€), and the brand image flower aspects (high / middle / low). Concerning the CBC design, participants are repeatedly asked to choose one of three offers with varying levels of all attributes or the no purchase option which is offered at the same time. One of the six choice sets of our study is defined as a holdout task. Such a holdout task enables to check the predictive validity of the estimated utility values and is not used for the estimation of

consumers' preferences (Orme 2014: 16). In addition, variables like attitude, sociodemography (e. g. age, gender) and actual visits have been proven suitable for describing the sample. Even if the questions of the online questionnaires for both countries are the same, they are each in the mother language to prevent distortions. After developing the online questionnaire with the Sawtooth Software, online platforms, social media (e. g. facebook), mailing lists, and self-selection on websites were used to get participants in February and March 2017. An incentive (10,- € for a popular online purchaser) was used to attract participants. Figure 2 delineates the methodological approach.
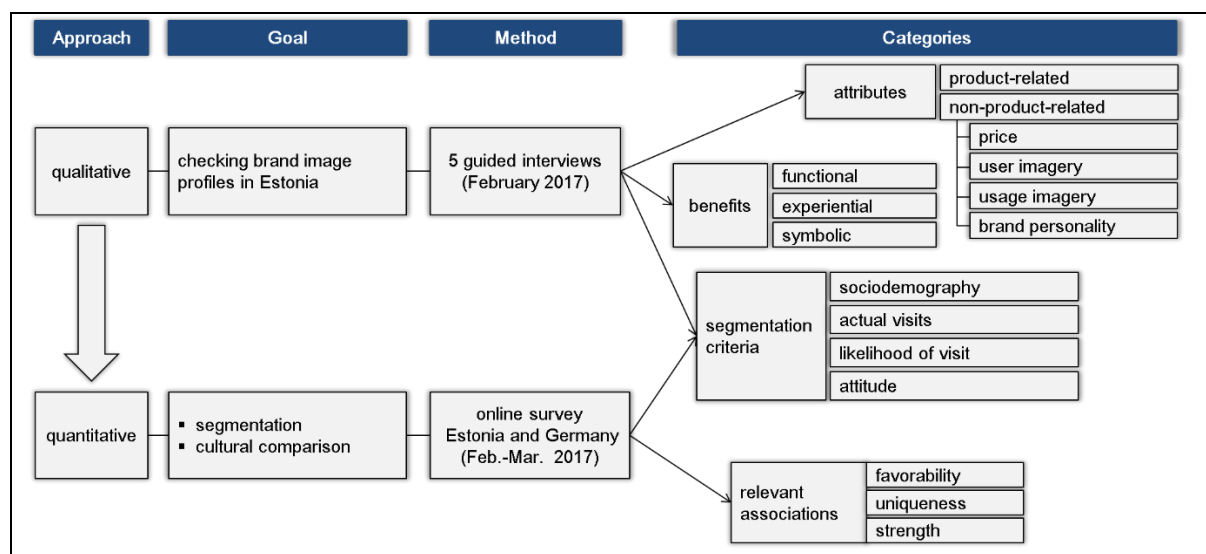

Figure2: Research Design (own research)

Based on the results of the guided interviews and after five pretests of the online questionnaire, we collected 118 Estonian and 99 German usable datasets in February and March 2017. Both samples contain more females (EE 83 %, GE 61.6%), are higher educated with at least a university degree (EE 81.4%, GE 69.7%), have balanced income levels and are mostly employed (EE 72%, GE 67.7%) or studying (EE 22%, GE 26%). Furthermore, it is quite a young sample (EE: M= 39.7, SD=13.76, range from 20 to 76 years; GE M=34.57, SD=11.12, range from 21 to 73 years).

It is remarkable that within the Estonian sample 95.1% attended at least one time[1] a live-opera in the opera house, 44.9% a live-streamed opera in the cinema and 83.1% a live-opera in other places. In contrast, the German participants have experience concerning the opera house (88.9%), but lesser concerning the cinema (17.2%) or other places (38.4%). Looking at the intention to visit within the next

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[1] scale: 1=several times a month, 2=monthly, 3=several times a year, 4=rarely, 5=almost never, 6=never.

six months[2] reveals that the Estonian participants rate their opera house visit as more likely (M=2.61, SD=1.301, n=118) than the German sample who saw it more neutral (M=2.8, SD=1.400, n=99). Similarly, the Estonian sample evaluates the visit of the cinema and other places as neutral (M=3.46, SD=1.363 vs. M=3.27, SD=1.432, n=118), while the German participants' visits of those contexts is rather unlikely (M=4.2, SD= .937 vs. M=4.02, SD=1.010). It is remarkable that the visit of other places is slightly more likely than to go to the cinema in both samples. Referring to the attitude, the opera houses most positively ranked (EE: M=1.95, SD= .601, n=118; GE: M=1.87, SD= .750, n=99). Interestingly, the Estonians rank the cinema as rather positive (M=2.43; SD= .743, n=118), whereas the German participants have a neutral opinion (M=3.03, SD= .706, n=99).

Results

Brand image profiles

Concerning the perceived strength of the opera house brand image, it is striking that the profiles are quite similar. While being almost congruent with high values for the *vividness of impressions*, *cultural claim* and *peculiarity*, the *demand of attention* and the *accessibility* differ a little bit. The German sample values both brand image factors as slightly less and mid-leveled than the Estonian participants. The Estonian interviewees see the *demand of attention* as mid-leveled, but the *accessibility* as high. In contrast, the cinema perception is more mid-leveled while the Estonian sample reveals marginally higher values (Figure 3).

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[2] scale: 1=very likely, 2=rather likely, 3=neutral, 4=rather unlikely, 5=very unlikely.
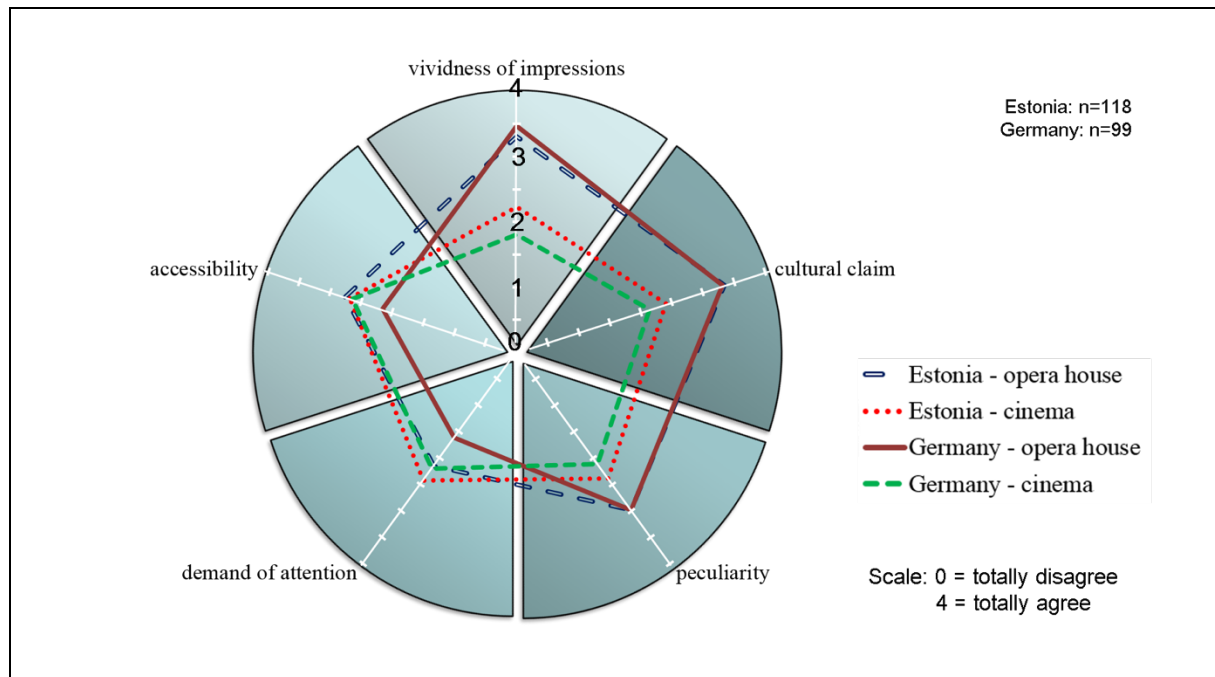
Figure 3: Perceived strength of the brand image factors (own research)

However, the Estonian´s and German´s perception of the uniqueness does not differ. Presuming that at least 50% of the respective sample mention the brand image factor as unique, the opera house is characterized by *vividness of impressions*, *cultural claim* and *peculiarity*. The unique factor of the cinema is the *accessibility*.

Customer segmentation

The preference respective favorability of the brand image flower in combination with the type and price of a live-opera ticket was conducted via a CBC analysis. The assumption, that there are significant differences in the preference profiles and that a segmentation is necessary could be proofed for both countries. A latent class analysis[3] "for segmenting respondents into relatively homogeneous groups, based on preferences" (Orme 2014: 35) revealed a significant two-cluster-solution for both countries ($p < 0.05$).

In each country is a larger (EE cluster 1: n=79, GE cluster 1: n=67) and a smaller cluster (EE cluster 2: n=39; GE cluster 2: n=32). While the age in the German sample is at the same level (average age of

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[3] The latent class analysis uses a multinominal logit algorithm to estimate the part worth utilities. With exception of the price (it came up that a linear model delivers better values), all utility parameters were estimated by using a part worth utility model. Furthermore, neither the Estonian nor the German sample contains relevant interaction effects between attributes and levels ($p < 0.05$). Therefore, the results are based on the main effects.

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cluster 1 is 34.48 years, of cluster 2 it is 34.75 years), the Estonian cluster 1 is slightly older (40.59 years vs. 38.0 years).

At this point, the question arises: Apart from differing preference profiles, are there significant differences[4] concerning variables like actual visits, likelihood of visits, attitude and sociodemografics (e. g. age, gender)? It is striking that in the Estonian sample only actual visits of the opera house and cinema (cluster 1 attends both contexts more often) as well as the likelihood to attend a live-opera at the opera house or cinema within the next six months (cluster 1 is more likely to visit) differ significantly ($p < 0.05$). Similarly, within the German sample, the actual visits of an opera house and other places (cluster 1 attends the opera house less frequently than other places) as well as the likelihood for the visit of a cinema or other places (cluster 1 is more likely to go) produces significant values ($p < 0.05$).

Impact on buying behavior

An overview of the importance of the brand image factors reveals many similarities. Cluster 1 of both the Estonian and German sample sees the *vividness of impressions* (25.2% vs. 28.5%), followed by the *cultural claim* (21.4% vs.20.1%) as most important factor for their decision to buy tickets for an opera house or a cinema visit. While the Estonian participants focus on the third place the *peculiarity* (16.3%), the German attendees look at the *type* (15.5%). The *price* of opera tickets plays only a minor role which stays in a sharp contrast to cluster 2 in each country (32.3% vs. 25.8%). Estonian interviewees of cluster 2 consider next the *demand of attention* (19.5%), for German participants it is the *type* (21.1%). The third one is the *type* (14.3%) for the Estonian, for the German sample it is the *peculiarity* (16.9%).

A crucial finding is that the ideal opera-house- respective cinema-offer, which is defined by the level of each attribute with the highest utility value (Orme, 2014: 81), does not differ. All clusters of the countries prefer the opera house ticket with a lower *price*, and high values concerning the brand image factors *vividness of impressions*, *cultural claim*, *peculiarity* and *demand of attention*. Only the *accessibility* is evaluated differently: With the exception of the Estonian cluster 1 which prefers a high value, all other clusters see a middle level as most preferable (Figure 4).

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[4] Depending from the scale level, the variables were checked by using Pearson´s-chi-square-test, likelihood-test, or an ANOVA.
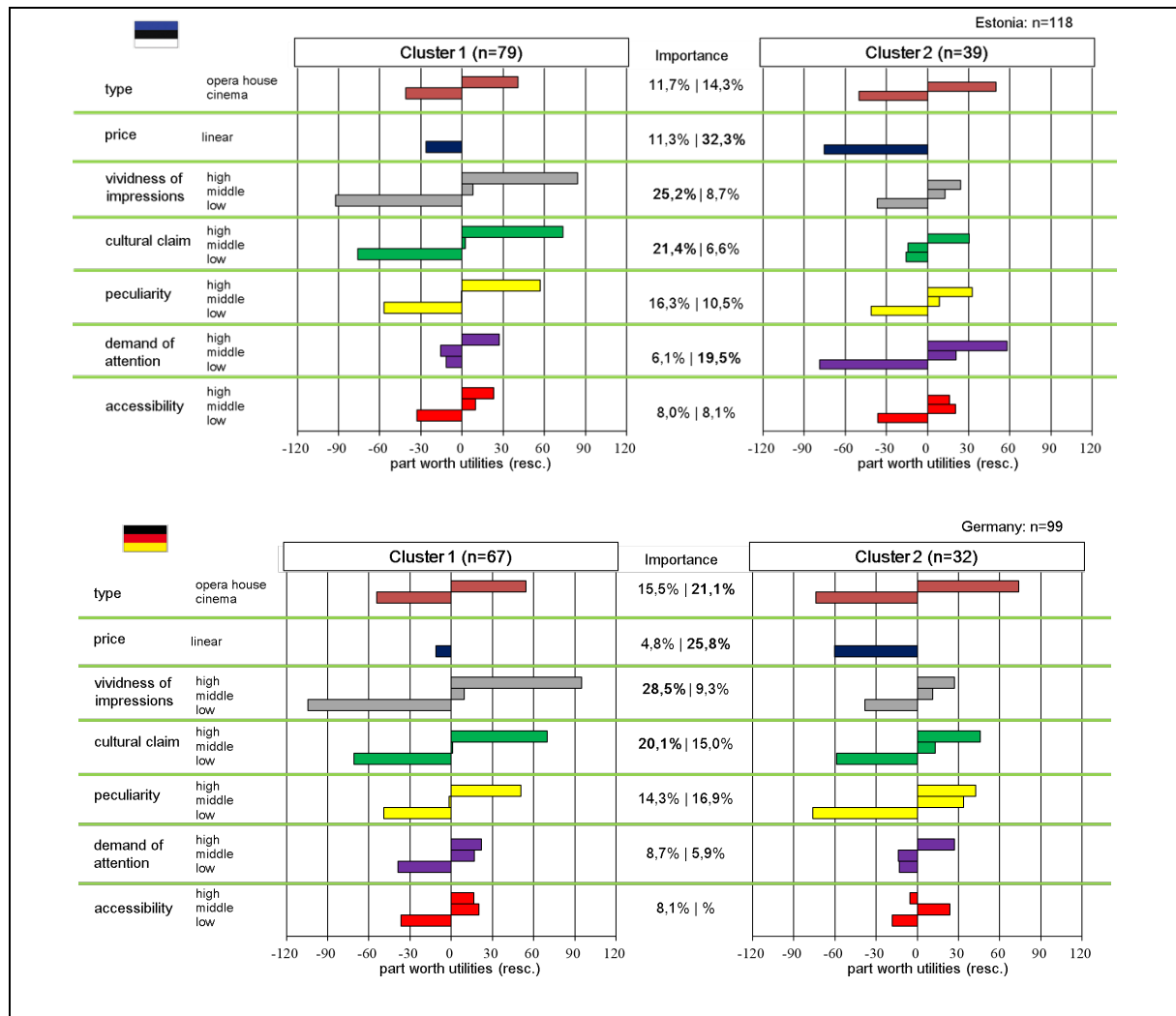
Figure 4: Part worth utilities and attribute importance

Concerning the perceived strength of the brand image flower, there are rare significant differences (p < 0.05). While the Estonian clusters can be differentiated by the perception of the *vividness of impressions* and the *accessibility* of the opera house (cluster 2 has slight lesser values), the German clusters are characterized by the evaluation of the *cultural claim* of the cinema (also cluster 2 has lesser values). The uniqueness of the brand image factors has no significant differences within the German sample. The cluster of the Estonian participants has a significant result concerning the *cultural claim* of the cinema. However, by presuming that at least 50% of the participants should rate the factor as unique, the *cultural claim* of the cinema with values about 40% is not relevant.

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Willingness to pay

In order to investigate the WTP for a live-opera in a competitive environment, we use a market simulation on the basis of a price response function. The price response function indicates the share of preference[5] as the selection probability of a specific offer when the prices of this specific offer are varied while the competitive offers are hold constantly (Backhaus *et al.* 2015: 250; Orme 2014: 88). Such an approach offers two main advantages: On the one hand, it is possible to derive monetary utility values, on the other hand, we can analyze price effects in a relative realistic scenario (Backhaus *et al.* 2015: 250).

We define the relevant market for our simulation as following: First, we use the values of the current perception of the live-opera performance and the live-streamed opera (Figure 3) and assign them to the three levels (low – middle – high) which are already used for the CBC design. This enables us to take the corresponding utility values of Figure 4. Furthermore, we estimate the part worth utility value of the price by using the realistic average price for live-opera-tickets (for Estonia 20€, for Germany 30€) like in the CBC design. Second, we integrate a no purchase option with a utility value and price (respective WTP) of zero as an alternative reference (see also Backhaus et al. 2015: 251). A separate simulation is run for each cluster.

Assuming that only positive benefits lead to a specific WTP level (Gensler *et al.* 2012: 372), both the Estonian and German clusters 2 do not have any WTP because the benefit values for opera house and cinema tickets are negative. In contrast, cluster 1 of both countries show partly positive benefits. The monetary gross benefit respective WTP for opera tickets of the Estonian cluster 1 is 19.97€ (intersection point of the opera house and no purchase function, Figure 5). However, the monetary net benefit as difference between the monetary gross benefit and the typical price (for Estonia 20€) reveals a negative value of -0.03€. That means that opera tickets are at least 0.03€ too expensive. Comparing opera house to cinema tickets, there is a positive monetary benefit difference of 10.84€ (the difference between the value of the intersection point of the opera house and cinema tickets and the determined price of 20€ for cinema tickets), i.e. opera house tickets are preferred. Moreover, the share of preference for the no

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[5] The share of preference is based on a logit model. The values of all alternatives sum up to 100%.

purchase option is always higher than that of cinema tickets. This is an indication that cinema tickets are also too expensive. Furthermore, the Estonian cluster 1 seems to be quite price sensitive, because the gradient of the opera house function is quite high. Referring to this, by increasing the price, the share of preference decreases fast (Figure 5).
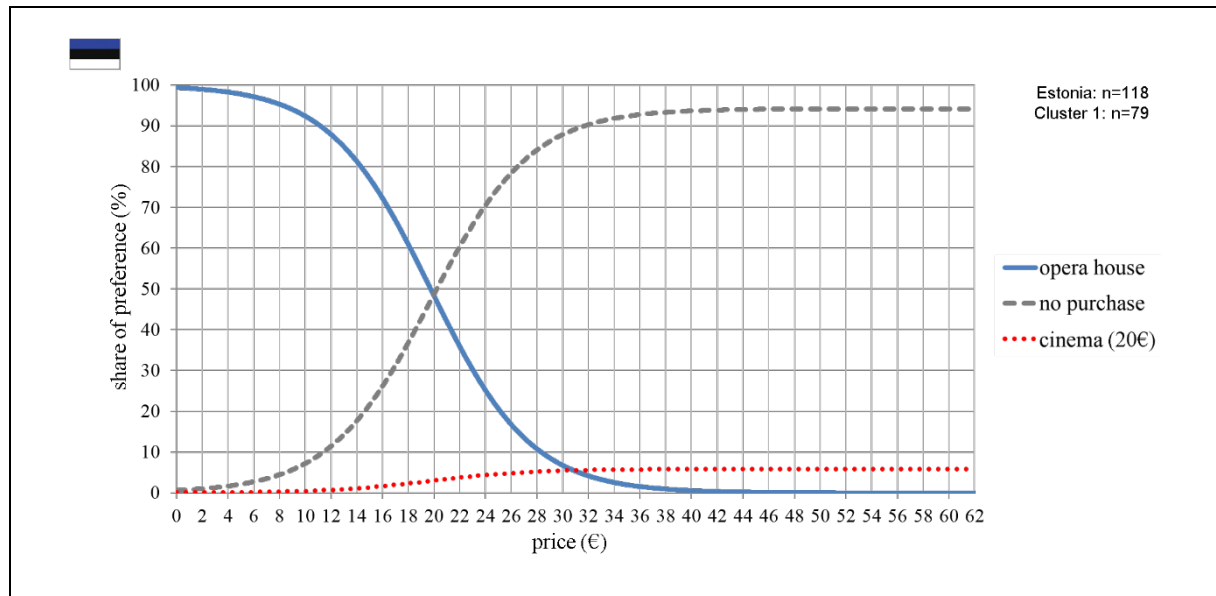

Figure 5: Price response functions for live-opera tickets of the Estonian cluster 1 (own research)

Looking at the price response functions of the German cluster 1, there is a quite similar result. While being less price sensitive than the Estonian cluster 1, the WTP for opera tickets is 45.27€. Based on a typical price offer of 30€ per opera house ticket, the net monetary benefit is positive, so that the participants would additionally spend 15.27 €. Here too the opera house tickets are preferred to cinema tickets and result in a positive monetary benefit difference of 28.80€. However, cinema tickets are still too expensive because the share of preference for the no purchase alternative is higher at all price levels (Figure 6).
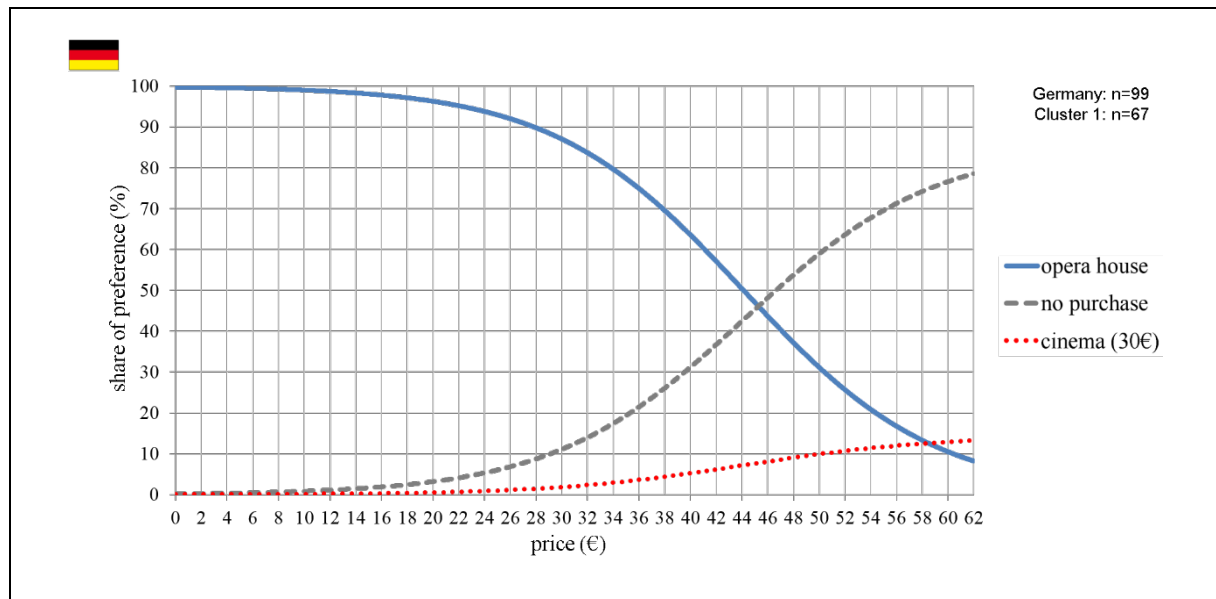
Figure 6: Price response functions for live-opera tickets of the German cluster 1 (own research)

As outlined above, we revealed slight differences between the current perception and the ideal respective most preferred opera house brand image. In detail, it is only the *demand of attention* which is ranked as middle level, but preferred as high level – this means, a live-opera performance is more preferred when it is seen as a more passive consumption (alongside) within a more informal habit (Figure 7).

Opera House: current vs. ideal level	Cluster 1 (n=79)	Cluster 2 (n=39)	Cluster 1 (n=67)	Cluster 2 (n=32)
vividness of impressions	high / high	high / high	high / high	high / high
cultural claim	high / high	high / high	high / high	high / high
peculiarity	high / high	high / high	high / high	high / high
demand of attention	middle / high (importance: 6,1%)	middle / high (importance: 19.5%)	middle / high (importance: 8.7%)	middle / high (importance: 5.9%)
accessibility	high / high	middle / middle	middle / middle	middle / middle

Figure 7: Comparing the current and ideal brand images (own research)

In this context, the question arises: What happens when an opera house is able to change the perception of the *demand of attention* to the ideal level (that consuming a live-opera is not a challenge for information processing) and to increase the benefit? Concerning cluster 1 of Estonia, we can see a slight improvement of the WTP to 21.59€. This means a positive monetary net benefit of 1.59€ (based on a 20€ ticket), but only a minor increase of 0.44€ of the monetary benefit difference to the current

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perception of the opera house and the cinema. However, because of the positive net benefit, the participants of cluster 1 would now buy opera house tickets for 20€.

With 45.71€, the increase of the WTP of German cluster 1 is also quite low. With a positive net benefit difference gain of 1.62€ for opera house tickets compared to the current perception of the opera house and cinema, the attendees would still pay opera house tickets.

Looking at cluster 2 of both countries reveal that the negative benefits are a little bit decreased by the ideal opera house brand image, but they still have negative values. Therefore, both clusters do not have any WTP.

At this point, it is not only important to consider the (in our case quite low) gains in WTP. It is rather necessary to relate those results to the relative importance the brand image factor *demand of attention* has. Similarly, with exception of the Estonian cluster 2, there is a quite low importance of about 7% for *demand of attention*. That means that this factor is only of minor importance for the decision to buy live-opera tickets.

Discussion and Conclusion

We contribute by showing that the integration of the buying behavior relevance provides more realistic and deeper information than only referencing the buying intention. The management of the opera house can use these results to develop targeted brand management strategies for communication, product development and pricing. In a broader sense, this study highlights that economic and cultural factors can be met simultaneously.

Concerning the brand image profiles, we can confirm the results of Emes, Roll (2016). Moreover, we found that the perception of the live-opera is a global phenomenon with only slight differences between countries. While there are similar profiles for the perceived uniqueness and strength (Keller 1993) of the brand image flower, significant differences can be detected in favorability (ibid.) respective part worth utilities. Based on part worth utilities, two clusters were extracted in each country. This is contrary to the suggestion that the Estonian sample has more clusters because of the heterogeneity of the characterization of the opera house and cinema context in the guided interviews. Another surprising finding is that –concerning sociodemographics, attitudes, actual visits or the visit intention–, there are

only rare significant differences between the clusters. Only actual visits and the visit intention show some significant differences.

Furthermore, it is remarkable that the price is – at least for the Estonian and German cluster 1– not the most important factor within the decision process to buy tickets. This suggests that the live-opera performance in the opera house is valued as an important cultural good. In accordance to Emes, Roll (2016), a high accessibility is less preferred. That means that it is appreciated when a live-opera visit is not entirely public or a familiar setting but rather with a touch of distance. However, the Estonian cluster 1 prefers a high leveled accessibility while the other clusters appreciate a middle level. This could be related with the experience in opera house performances, because 95.1% of the participants attended at least one time, 31.4% attend several times a year.

It is a surprising finding that the digitization does not substitute opera performances, and instead creates a complementary media service through live-streams in other places like the cinema. The ideal respective preferred brand image is almost the same to the current perception of the opera house in both countries. This indicates that the classic perception of the opera house allows attracting people of both countries. Additionally, the importance of the factor *demand of attention* is with an exception to cluster 2 in Estonia not really high. Therefore, activities to change the perception of the demand of attention should be considered carefully by looking at the trade-off-relationship. Apart from this, it could be useful for an opera house to change the perception of the demand of attention to a high level (that consuming a live-opera is not a challenge for information processing), when it achieves to connect this perception to itself. This enables differentiation from other opera houses and a higher benefit increases in the share of preference – customers are more likely to use this specific offer.

That the opera house performance is preferred, is surprising because in other areas of media, the digitization has huge effects which often lead to transformational changes in work practices, organizational strategies and business models (Baumann 2013; Doyle 2013; Evens 2010; Küng 2017; Vukanovic 2016). Moreover, we suppose that digitization effects opera houses through generating positive effects in terms of widening the spectrum of possible opera customers and creating a "modern touch" in an otherwise rather classical medium (Steichen 2013; Woolfe 2012). Against the background that not many people currently know about the possibilities of attending live-opera streams (Steichen

2013; Viagas 2017) and that such operas are a service which has to be experienced for evaluating the quality, we assume that even if the WTP for cinema tickets are zero in our study, it is still too early to foresee possible positive or negative consequences. Rather, the live-opera streams exemplify a valuable diversification in the business model (Vukanovic 2016). With this strategic move, the opera providers can innovate their services (Baumann 2013) and market their strengths effectively.

However, several limitations restrict the informative value of our study. First, it is based on small samples. Moreover, influencing factors like the performance, specific opera houses, or motives are not considered. For further investigation, we recommend to integrate the detailed context and to check other countries for similarities and differences. Another limitation is inherent in the CBC itself. It only allows to collect data about part worth utilities on an aggregated level. To investigate preferences in greater detail, a traditional conjoint analysis provides data on an individual level (Orme 2014: 30). Furthermore, a common problem of online surveys is a self-selection effect (Bethlehem 2009: 277). Additionally, opera visits are connected with strong emotions as the guided interviews and the comment field of the online questionnaire suggest. Therefore, we suppose that our samples predominantly contain opera fans. Other methodological approaches like paper-and-pencil questionnaires would enable to examine further groups. Finally, some participants do not currently know about live-streams of operas in the cinema. Based on the fact that live-operas are a service good, the quite low utility values of live-streamed operas in the cinema could be grounded on having no experience with this context. It would be valuable to contrast people with and without experience in order to get deeper insights.

Overall, the study opens new ground because it analyzed how digitization can impact the consumption of opera performances in new ways. Because operas are a central element of our culture and heritage, it is an exceptional finding that live-opera performances are generally preferred to live-streams. This is significant because it means that some customer groups are always willing to pay (high) prices for attending operas. In terms of management opportunities, the study shows that opera houses can benefit from diversification into new product offerings, which may help them gain new customer segments. In turn, this may create significant opportunities for new marketing campaigns and media service branding, and may – at least for now – reduce the fear of classical operas against the threats of digitization and instead focus on the possibilities to build even stronger brands and reach new audiences in society.

Acknowledgements

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