

**Does Digitalisation Democratiser Opera?
Audience Engagement and Diversity
at the Bavarian State Opera**

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Title Does Digitalisation Democratise Opera? Audience Engagement and Diversity at the Bavarian State Opera	Number of pages 89 + References
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Abstract <p>This thesis examines the impact of digitalisation on audience engagement at the Bavarian State Opera, a major publicly funded opera house that has actively developed digital initiatives since 2021. Drawing on four expert interviews with internal and external actors involved in the institution's digital development, complemented by document analysis and digital platform review, the study investigates how digital tools shape access, diversity, and audience engagement in a classical music institution. The research follows a qualitative, interpretive single-case study design, with data analysed through thematic coding across three analytical categories: institutional context, digital initiatives, and audience engagement.</p> <p>The findings show that digitalisation has expanded informational and opportunity access, reaching geographically distant and mobility-restricted audiences, and lowering barriers for younger visitors through subsidised digital platforms. However, the socio-economic and cultural composition of the physically attending audience has not changed significantly. The study identifies several structural conditions that constrain what digital transformation can achieve, including governance lag, capacity and infrastructure deficits, and the economic model of publicly funded opera. These conditions shape the processes of technology adoption, measurement, and strategy implementation, and ultimately determine the outcomes of the digital investment.</p> <p>The study further examines the technoideological positioning of the institution in relation to AI adoption, the structural loyalty crisis facing the whole sector, and the implications of digital leadership literacy for sustained institutional transformation. The BSO is analysed as a best-case scenario, and its findings are considered in relation to the broader performing arts sector.</p> <p>The thesis concludes that digitalisation is a necessary but insufficient condition for audience democratisation in opera. Structural change at the level of funding models, governance frameworks, and cultural policy, is required to address what digital strategy alone cannot deliver.</p>	
Keywords digitalisation, audience engagement, cultural access, performing arts, Bavarian State Opera, AI in the arts	

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Chapter 1. Introduction

1.1. Background of the Research

The relationship between cultural institutions and digital technology has become one of the central questions in contemporary arts management. Across the performing arts sector, opera houses and concert halls have invested significantly in digital platforms, streaming services, and audience-oriented applications, particularly since the COVID-19 pandemic accelerated the adoption of digital formats. However, the strategic implications of these investments, and their actual impact on who engages with these institutions, remain insufficiently understood.

Classical music and opera represent a specific case within this broader trend. The field is characterised by a long-established repertoire, strong institutional traditions, high production costs, and an audience profile that has remained relatively stable over decades. Whether digital tools can meaningfully shift this profile, or whether they primarily serve audiences already within the institution's cultural and socio-economic sphere, is a question that existing research has not yet addressed in sufficient depth. Studies on digital transformation in the arts tend to focus on museums and galleries, where the digitisation of collections provides a more straightforward entry point (Navarrete, 2020; Yap et al., 2024; Yuniana Cahyaningrum & Muhammad Ridwan Putra Wijaya, 2024). The live performing arts, where the core “product” is time-based and physically situated, present a different set of challenges. Verhoef et al. (2021) distinguish between digitalisation, the transformation of existing processes; and digital transformation as a holistic, organisation-wide shift in operational logic. This distinction is rarely applied to cultural institutions with the analytical precision it requires. Similarly, the conditions under which digital tools can contribute to audience development, as described by McCarthy & Jinnett (2001) and Kawashima (2006), have not been empirically examined in the opera context in a sustained way.

The economic dimension adds a further layer of complexity. Baumol & Bowen's cost disease (1965) identifies a structural productivity problem in the performing arts:

labour costs rise continuously while the core, a live performance, still cannot be made more efficient through technology. This places permanent pressure on ticket prices and limits the financial scope for subsidised access, regardless of how effectively digital tools expand informational reach. The tension between public funding obligations and selective economic accessibility, elaborated in the cultural rights frameworks of the Fribourg Declaration (2007) and UNESCO, makes the performing arts a particularly productive site for examining what digitalisation can and cannot achieve in relation to democratic cultural participation.

1.2. Research Questions

This thesis examines how digital initiatives shape audience engagement in a major publicly funded opera house, with the Bavarian State Opera as its case. The BSO is among the most active institutions in the German-speaking world in terms of digital development, having established a dedicated digital department in 2021 and launched a series of platforms and initiatives since. It represents a well-resourced, committed, and documented case, in which the possibilities and limits of digital transformation can be examined in detail.

More specifically, the thesis will analyse whether digital initiatives broaden access and diversify the audience, or whether they primarily deepen engagement with those already within the institution's cultural and socio-economic sphere. Therefore, the main research question of this thesis is:

How does digitalisation impact audience engagement, diversity, cultural access, and participation in classical music institutions?

This question is examined through several sub-questions, which also structure the analytical discussion in Chapter 6, including:

- (1) Does digitalisation expand access to opera?
- (2) Does digitalisation lead to more diverse audiences?
- (3) What are the limits of digital tools?

- (4) What structural conditions shape the pace of changes?
- (5) How do institutions balance elite identity with democratisation goals?
- (6) What does loyalty crisis reveal?
- (7) Should the institutions wait for further AI development, or act now?
- (8) What does digital leadership require in cultural institutions?
- (9) What can the Bavarian State Opera contribute to broader sector?

The study draws on four expert interviews with internal and external actors involved in the BSO's digital development, complemented by document analysis and platform review. The methodology is qualitative and interpretive, designed to understand institutional perspectives and strategic reasoning rather than to produce statistical generalisations.

The thesis proceeds as follows: Chapter 2 establishes the theoretical framework, covering audience engagement; digitalisation and digital transformation; and cultural rights, access and participation. Chapter 3 describes the methodology, whereas Chapter 4 provides institutional and digital context for the BSO. Chapter 5 presents the findings across three analytical categories: institutional context, digital initiatives, and audience engagement. Chapter 6 discusses the findings in relation to the research question and the broader field. Chapter 7 includes brief conclusion, and identifies recommendations and directions for further research.

Chapter 2. Theoretical Framework

This chapter reviews the theoretical concepts that directly inform the research questions, structured across three areas: audience engagement; digitalisation and digital transformation; and cultural rights, access and participation. These three areas are interconnected throughout the study, and are necessary for understanding who engages with cultural institutions, what digitalisation can realistically achieve within organisational and structural constraints, and what obligations publicly funded

institutions carry towards broader participation. Lastly, they form the analytical basis for the empirical findings and discussion in Chapters 5 and 6.

2.1. Audience Engagement

2.1.1. Definition

The term "Audience Engagement" has emerged as an umbrella concept encompassing a diverse set of activities, strategies, and methodologies concerned with the enhancement of interactions between organisations and their existing or prospective customer base. Within the specific context of the arts and cultural sector, this concept structures the relationship between cultural institutions and their constituent audiences.

Among the most frequently cited and widely recognised definitions within the scholarly literature, audience engagement has been characterised as "a guiding philosophy in the creation and delivery of arts experiences in which the paramount concern is maximising impact on the participant" (Brown & Ratzkin, 2011). The concept of audience engagement includes several closely related theoretical frameworks, including participation-building (McCarthy & Jinnett, 2001), audience experience (Yang & Lu, 2024), audience-building (Harlow, 2015), and arts marketing approaches (Wlazel, 2021), among others.

From a historical perspective, the theoretical and practical foundations of audience engagement can be traced to the early 1960s, when Philip Chamberlin (1960) first employed the terminology in his examination of the film industry and its relationship with cinema audiences.

2.1.2. Stages and Types of Audience Engagement

There are multiple understandings of types and stages of audience engagement in the arts field, with various scholars proposing different frameworks of how audiences interact with cultural experiences over time. One of the most common visualisations or

explanations comes from the same authors of the definition still commonly used in contemporary arts management literature and practice.

The Arc of Engagement (2011) by Brown and Ratzkin explains the engagement through five distinct and sequential stages: (1) Build-up, the anticipatory phase before the artistic encounter; (2) Intense Preparation, involving the immediate readiness and expectations leading up to the experience; (3) Artistic Exchange, representing the actual moment of engagement with the artistic work or performance; (4) Post-processing, consisting of the reflective period immediately following the experience; and (5) Impact Echo, capturing the long-term effects of the engagement. This 5-stage process is also being defined as a “total experience” (Brown & Ratzkin, 2011).

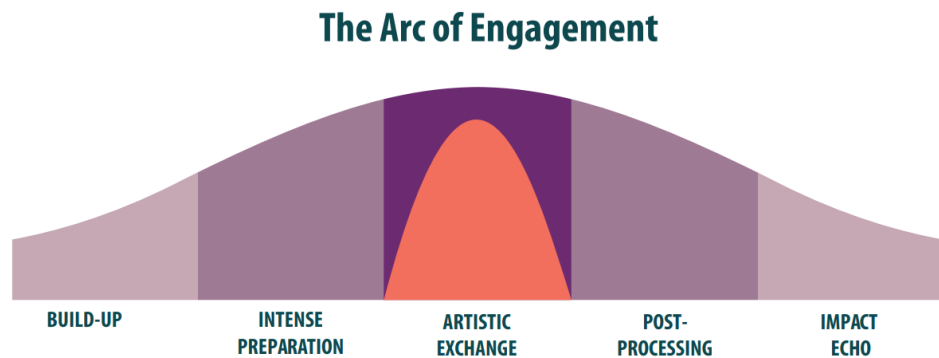


Figure 1

The Arc of Engagement, (Brown & Ratzkin, 2011)

Another theory by McCarthy & Jinnett (2001) suggests that the audience participation, as they are naming this concept, can be influenced by multiple socio-economic factors, besides the individuals ones; whereas the engagement is split into three phases (perceptual, practical, experience), coming after the influence of the

background factors. This model can also be compared to the previously mentioned Brown-Ratzkin-Model.

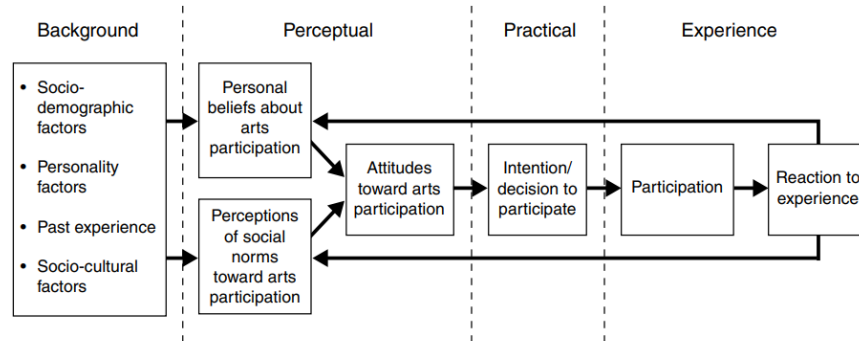


Figure 2

Participation model (McCarthy & Jinnett, 2001)

Additionally, McCarthy & Jinnett (2001) argue that the audience participation can be increased by three following methods:

- (1) Broadening the participation: increasing the number of people from current target groups, who are not participating at particular moment. In practice, that would mean that the institution would aim to attract the people who are interested in their main activity, yet do not attend it on a regular basis.
- (2) Deepening the participation: increasing the level of involvement of the current target groups. In practice, this means that the institution would aim to have their regular audience members attend more performances in a certain time (e.g. month).
- (3) Diversifying the participation: increasing the number of their target groups. In practice, this would mean that the institution aims to establish new target groups and attract people who previously would not be their regular audience members.

Kawashima (2006), on the other hand, analyses the process of audience engagement (or as it is being referred to in this case, the audience development) through four distinct types, categorised according to their target groups and purposes. These include: (1) Extended Marketing, targeting potential and lapsed attendees with improved products for financial and artistic purposes; (2) Taste Cultivation, introducing existing audiences to different art forms and genres for artistic, financial, and educational purposes; (3) Audience Education, offering existing audiences the same product with extensive education for educational and financial purposes; and (4) Outreach, bringing participatory arts projects to people unlikely to attend, such as those in deprived communities, for social purposes. Further explanations and details can be found in the table below.

TABLE 1
Different types of audience development.

	Target	Form	Purpose^a
Extended Marketing	Potential attendee, Lapsed attendee	The same product offered, but with improvement to cater for the target	Financial, artistic
Taste Cultivation	Existing audience	Introduction to different art forms and genres	Artistic, financial (and educational)
Audience Education	Existing audience	The same product offered with extensive education	Educational (and financial)
Outreach	People unlikely to attend (e.g., in deprived communities)	Bringing arts projects (often participatory) outside	Social

Figure 3

Kawashima's 4 types of audience development (2006)

2.1.3. Audience Engagement in Opera Houses

While audience engagement has emerged as a critical concept across the cultural and creative industries, its practical application and strategic objectives vary significantly depending on the artistic sector. In classical music and opera, specific characteristics of these art forms require a custom approach to engagement. The report of Lost Music (2024), a comprehensive study led by Forlì Musica in partnership with the Association Européenne des Conservatoires (AEC) and other European cultural organisations, has recognized following aims of the audience engagement in the field of classical music:

- (1) Ensuring the sustainability of the art form
- (2) Promoting accessibility and inclusivity
- (3) Fostering a sense of community
- (4) Encouraging creativity and innovation
- (5) Contributing to the broader cultural landscape

Beyond these institutional goals, scholars have identified emotional and experiential factors that significantly influence audience relationships with music performances. Shirzadian (2016) defines two main aspects concerning the audience engagement:

- (1) Immersion - an aspect present in arts exhibitions, movies, gaming, which can also be one of the crucial for the level of audience engagement in the music industry as well. Immersion is commonly being characterised by lack of awareness of time, loss of awareness of the real world, and involvement and sense of being in the task environment (Jennett et al., 2008).

Also emphasised as of high importance for collective experience, or what Shirzadian defines as the

- (2) Togetherness - simply described as the feeling of being part of a shared group experience.

Additional study on the emotional experience of the audience in opera houses by O'Neill et al. (2016), mentions following qualitative parameters as defining: (1) History of Attendance, (2) Other People, (3) Emotion, (4) Character, Narrative, Truth, (5) Production, (6) Performer Charisma, (7) Other Art Forms, (8) Live/Non-Live, (9) Repertoire, (10) Beautiful Singing, (11) Affordability, (12) The New, (13) Combination of Art Forms, (14) Response to Music, (15) Respondent Making Music, (16) Having to Work Hard/Challenge.

Some of the major challenges noticed by researchers include fragmentation of the music market, demographic shifts, changes of the music taste, and the audience becoming increasingly older (Lost Music, n.d.). Similarly, Harlow (2015) mentions unfamiliarity with the expensive art forms including opera, and attracting younger audience to their auditoriums. Interestingly, both studies mention digital or technological developments as both a major challenge, but equally as an opportunity for increasing the audience engagement in the classical music and opera houses (Harlow, 2015; Lost Music, n.d.).

2.2. Digitalisation and Digital Transformation

2.2.1. General Definitions

Although digitalisation is present in the majority of spheres of our life, there is no concrete unified academic definition regarding this concept. In the common language, there are cases where it is also being mixed with terms *digitisation* - transferring analogue information into a digital format (Verhoef et al., 2021), and *digital transformation*. In order to get to the core of the question, after a literature review on aforementioned concepts, the term of *digitalisation* mainly refers to the increase of digital technology implementation, with the goal of creating the value, or creating the revenue (Martín-Peña et al., 2019). Similarly, Verhoef et al. (2021), perceive the digitalisation as a transformation of existing processes, enabling the new business possibilities. It is however, defined only as a pre-stage to digital transformation.

Digital transformation, on the other hand, can be understood as a holistic, overall process, which affects the whole organisation, by rearranging the business processes, in order to change the complete logic of the particular company or institution. It also provokes fundamental shifts, and allows the organisation to enter the new markets and exit the current ones (Verhoef et al., 2021). In contrast to previous definition of digitalisation by Martín-Peña et al. (2019), this theory perceives the initiation of new value-creating processes, only in the phase of digital transformation, respectively only when the whole organisation is participating in it. Brief overview of the mentioned phases, in addition to their prerequisites and strategic conditions can be found on the figure below.

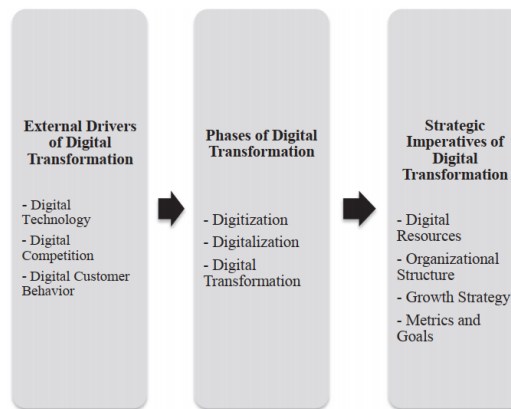


Figure 4
Digital Transformation (Verhoef et al., 2021)

2.2.2. Latest Development in the Digitalisation Efforts of the Opera Houses

Especially during and after the pandemic of COVID-19, the majority of opera houses have increasingly started to implement wider solutions in the digitalisation of their institutions, mainly in regards to the audience engagement. According to the definitions mentioned in the previous chapter, it remains unclear whether we could understand these efforts as *digital transformations*, or solely as *digitalisation* in the majority of the houses. Especially in Germany, there has been a number of cases where major opera houses around the country have started to implement digital solutions, or

even wider digital strategies, including the ones in Berlin, Leipzig, Düsseldorf, and Nuremberg, among others.

One of the most media-followed cases, the Bavarian State Opera, also serving as a case study for the thesis, has been repeatedly reporting on the development of their digital efforts. These have been increasing since 2021, with the arrival of their new general director, and subsequent establishing of the separate digital department within the house (Bayerische Staatsoper, n.d.-a). Their most current development has taken place in 2025, developing the *digital twin* of their grand hall, in cooperation with Siemens (Siemens, 2025). Nevertheless, many details of the digitalisation in this field are, due to the rapid developments and unpredictability of our societies in general, not clear and established enough; which is one of the reasons why this represents a research gap. Further analysis of the audience engagement of Bavarian State Opera in connection with digitalisation is the core question of this thesis, and will be elaborated more in detail below.

2.2.3. AI in Arts and Culture Sector

The rapid rise of artificial intelligence has also emphasised the importance of understanding, analysing, and potential integrating of technological advancements into the arts and culture. In this context, exploring how technology can initiate a change (or even digital transformation) and contribute to cultural and creative fields, particularly classical music, becomes necessary. While I recognise the enduring traditionalism or scepticism regarding the rapid changes in the classical music field, notable potential and increasing need for progress in understanding and collaboration across disciplines can be perceived, nevertheless.

The United Nations Conference on Trade and Development (UNCTAD) highlights the growing importance of digital platforms in the creative economy, particularly in the music industry. The report notes that streaming services have seen a year-on-year major increases, accounting for 67.3% of global music revenue in 2023. This illustrates the transformative role of digital platforms, both in distributing content, as well as in

revenue generation (UN Trade and Development (UNCTAD), 2024). According to this report, by utilizing similar digital channels, arts organisations can extend their reach, engage audiences, and secure funding, enhancing their financial sustainability in a rapidly evolving digital landscape.

In the field of German opera houses, there have been a few examples of implementing the AI, with various approaches and outcomes. The Alten Oper Frankfurt has been using AI for the improvements of the acoustics for their small “Mozart” hall, and is developed with the Fraunhofer Institute for Digital Media Technology IDMT, having the aim of controlling the room acoustics with the artificial intelligence (Fraunhofer-Institut für Digitale Medientechnologie IDMT, 2025). Another example of AI implementation in the opera field in Germany has taken place in Oper Leipzig, creating an AI-powered choreography and generating synthetic voices (Peters, n.d.). The last, and definitely the most eye- (and ear-)catching examples comes from Augsburg State Theatre. They have presented the AI-written libretto, accompanied by the melodies of Mozart’s arias, instrumentally performed traditionally by the orchestra, but sang by the 3D-printed sheep (Schäufele, 2025). Optimistically, this is certainly an example that the experimentation with the new technologies can provide an element of a surprise, or even humorous elements.



Figure 5
Singing Sheep (Schäufele, 2025)

Despite the clear benefits, the reliance on AI tools especially in public or non-for-profit organisation management, also raises concerns regarding the overemphasis on quantitative metrics. An overreliance on numerical data can lead to a reductionist view of success, where artistic and cultural values could potentially be overshadowed by financial or engagement metrics (Ball, 2018)

2.2.4. Technoideologies

Although there has been little research and very few definitions regarding current strategies or ideologies of incorporating the technology in the arts, culture, and mainly classical music field, certain trends are developing in this area. However, to understand and distinguish the principles framing the current state, it is essential to consider the definitions, approaches, and techno-ideologies, including technoliberalism, technoproggressivism, XAI, and HCAI, among others.

While there is still a wide scale of understanding technoliberalism (Fish, 2023), it is certain that this principle, or technoideology, is the one the present ones in the sphere of AI development and its connection to the cultural and creative industries. According to the review of Fish (2023), numerous scholars interpret technoliberalism as the principle which prioritises technological factors over human rights and needs, even affirming the social discrimination ('Introduction: The Surrogate Human Effects of Technoliberalism', 2019).

In contrast to previously mentioned principle, technoproggressivism represents a technoideology which assumes that the technological development must be aligned with the human needs and freedoms, measuring the overall progress and success with instruments regarding the social justice, ethics, democracy levels, etc. (Carrico, 2006). This framework could also cover the specific needs of arts and cultural field, prioritising the artistic quality, aesthetics, and ethics; over the consumption, and non-strategic adaptation to the needs of the society. It can also be closely linked to transhumanism or even technoproggressive transhumanism (Wood, 2018). Within this framework, there are two main subcategories of AI, which could be considered: XAI (eXplainable Artificial

Intelligence), and HCAI (Human-Centred Artificial Intelligence). XAI emphasises traceability and transparency, resp. the type of AI where each step made by the machine can be traced and explained (IBM, n.d.), while HCAI is defined as the technology prioritising human needs, values and capabilities (IxDF - Interaction Design Foundation, 2024), closely aligning with technoprogressive principles.

2.3. Cultural Rights, Access, and Participation

2.3.1. Definitions and Understandings

According to the International Covenant on Economic, Social and Cultural Rights by the United Nations (1966), Article 15, everyone has the right to participate in cultural life. Cultural rights include the right of everyone to access, create, participate in, and enjoy culture. Furthermore, they are described as *essential for dignity, personal fulfilment, and social cohesion* (UNESCO, n.d.). Moreover, cultural rights regarding the access and participation in cultural life are defined in the Fribourg Declaration on Cultural Rights (2007), Article 5:

“Everyone, alone or in community with others, has the right to access and participate freely in cultural life through the activities of one’s choice, regardless of frontiers.” (Cultural Rights, Fribourg Declaration, 2007, p. 6)

In the same document, the role of the public sector in this matter is defined as well, as following (Article 12):

“States and other actors in the public sector must, within the framework of their specific mandates and responsibilities: (a.) Integrate the rights recognised in the present Declaration into their national legislation and practice; (b.) Respect, protect and fulfil the rights enunciated in the present Declaration in conditions of equality and dedicate the maximum amount of their available resources to ensure their full exercise.” (Cultural Rights, Fribourg Declaration, 2007, p. 10)

2.3.2. Socio-economic Factors

As it has been described in the chapter regarding the audience engagement, the participation cannot be split from general societal trends, due to numerous personal, and socio-economic factors (McCarthy & Jinnett, 2001). Additionally, latest trends also show notable influence of political factors on the cultural rights and participation, even in the countries of Western democracies.

The statistical data proves these statements. In the report on Culture statistics and Cultural Participation conducted by Eurostat (2024), the results show significantly higher level of participation in countries with higher income, including Luxembourg (77,6% of the whole population), Denmark (77,3%), Norway (70,3%); whereas countries with lower income show notably lower cultural participation: Romania (22%), Bulgaria (19,6%), Türkiye (19,4%). It should be also noted, however, that this research has been conducted during the COVID-19 pandemic, with each country having specific rules regarding the public gatherings.

People participating in cultural activities at least once in the previous 12 months, by type of activity 2015 and 2022
(% of population aged 16 and over)

	Cultural activities (cinema, live performances, cultural sites)		Cinema		Live performances (theatre, concerts, ballet)		Cultural sites (historical monuments, museums, art galleries or archaeological sites)	
	2015	2022	2015	2022	2015	2022	2015	2022
Belgium	68.1	59.0	50.3	32.6	45.1	38.0	43.0	38.8
Bulgaria	28.6	19.7	21.7	13.0	19.4	10.7	14.6	11.2
Czechia	70.2	58.0	47.8	39.5	48.0	33.2	52.1	42.0
Denmark	85.4	77.3	66.5	52.4	59.3	45.7	61.4	54.1
Germany (*)	73.5	:	46.6	:	48.6	:	49.8	:
Estonia	69.8	60.7	48.2	41.4	56.2	39.8	44.2	39.5
Ireland (*)	69.3	60.9	49.3	42.1	45.4	33.0	39.8	36.3
Greece	46.9	36.6	32.8	26.4	33.8	28.1	16.9	17.9
Spain	58.5	58.5	45.9	36.8	32.7	32.6	34.2	39.2
France	77.9	54.4	58.0	40.5	54.8	22.2	53.7	32.4
Croatia	36.6	32.4	24.9	20.7	26.3	22.3	19.2	18.9
Italy	46.9	36.8	37.5	27.5	25.3	19.1	26.1	18.0
Cyprus	52.6	35.9	30.5	18.5	43.2	26.9	20.5	14.7
Latvia	63.3	40.1	31.8	14.4	52.4	23.1	44.2	31.3
Lithuania	62.0	47.6	34.9	28.3	56.7	35.1	31.2	29.7
Luxembourg	79.3	77.7	55.5	49.2	57.9	48.5	55.6	63.3
Hungary	50.0	39.4	30.8	25.7	31.0	21.8	34.8	22.0
Malta	50.5	37.9	34.2	24.3	29.1	22.4	26.0	17.6
Netherlands	83.8	69.0	59.0	44.5	60.5	37.7	61.4	43.8
Austria	73.6	55.3	47.6	32.4	52.8	30.8	44.1	32.0
Poland (*)	53.7	50.9	41.1	38.1	25.9	18.7	37.8	31.6
Portugal	62.8	51.2	31.8	26.4	48.0	30.8	37.5	36.2
Romania	27.4	22.2	19.3	14.5	21.4	10.4	18.3	13.6
Slovenia	70.1	56.6	36.7	22.0	56.8	32.7	43.8	41.4
Slovakia	59.4	35.9	35.1	22.8	40.3	14.4	33.7	22.9
Finland	83.8	65.7	55.2	35.7	66.7	33.4	61.4	45.5
Sweden	85.2	62.8	61.1	35.4	57.3	30.4	67.2	41.8
Norway	85.9	70.3	62.3	45.8	62.5	41.8	54.9	36.7
Switzerland	86.5	74.0	62.1	43.0	68.1	46.6	62.1	53.7
Montenegro	31.8	24.4	25.4	17.5	24.1	13.1	18.3	8.3
Serbia	29.8	31.0	20.1	22.7	21.1	20.5	12.6	12.8
Türkiye	:	19.4	:	14.3	:	6.2	:	7.9

(*) 2022: data not available due to high item non-response rate.

(*) 2015: low reliability.

Source: Eurostat (online data code: ilc_scp03)



Table 1
Culture Statistics and Cultural Participation (Eurostat, 2024)

2.3.3. Digitalising the Access, Participation, and Engagement

In the process of digitalising the cultural and creative industries, it is necessary to mention the digitalisation of the access, participation and engagement themselves. One of the contributors to the digital strategy of Sydney Opera House, have defined this concept as the *digital engagement* (Visser & Richardson, 2013). They align this process with the definitions of digital transformation (previously mentioned), describing the

digital engagement as a strategy which touches every aspect of the modern organisation. According to this concept, it is structured in four consecutive levels:

- (1) The organisational basis
- (2) Assets and audiences
- (3) Reach and Engagement strategies
- (4) Technologies and Processes



Figure 6
Digital engagement (base)
(Visser & Richardson, 2013)

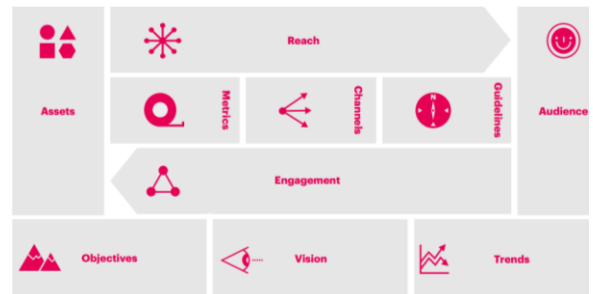


Figure 7
Digital engagement (extended view)
(Visser & Richardson, 2013)

Further scholars argue that the digitally engaged target-group-members could be defined as *digital audience* (Catalani & Borreani, 2023). They mainly refer to the museum field, which is on a notably higher level of digitalisation in comparison to the classical music field. Nevertheless, they also acknowledge the dynamic factors rapidly impacting the audience structures, such as societal changes, economical shifts, cultural dynamics, and disruptive technologies. Catalani & Borreani (2023) describe digital technologies in this field as an increasingly important and effective mean of facilitating the audience engagement, communicating their mission, educational segments, and programme, among others. It is necessary, however, to implement certain measures with the aim of understanding the digital behaviour of their audience, including KPIs (Key Performance Indicators), and connect it with the analogue data such as ticket counters, visitor experiences, etc.

This field, although crucially important, certainly remains one of the unused potentials for the research of the creative and cultural industries, due to the visible lack of established definitions, theories, literature, and collective methods from the practice. Concluded from the article on Digital Engagement and Audience Enrichment by Walmsley (2016), even after ten years, there is still a research gap, yet already then arguing about the potential of more relational and democratic engagement between actors in this field, including the artists, institutions, and their audiences.

2.3.4. Experience Economy and Baumol's cost disease

Experience Economy is one of the crucial terms regarding the cultural and creative industries, audience engagement, as well as the digitalisation, considering the latest developments and discussions which will be elaborated more in detail below. Experiences are described as a *fourth economic offering*, coming after the *commodities, goods, and services* (Pine & Gilmore, 2011). According to these scholars, experiences have always been central for the entertainment field, including the concerts, theatre performances, etc. The most visible and rapid increase in the experience economy is being linked to the Walt Disney, and The Walt Disney Company, most notably after opening of Disneyland across the globe.

The article published by World Economic Forum recognises the raising importance of the experience economy as well, noting that the consumer spending on the live events and experiences has increased by 70% since 1987 (Yafe & Moose, 2026). Especially remarkable is the projected impact of the artificial intelligence and digitalisation on human behaviour, and on this particular branch of economy. Yafe & Moose (2026) note the following:

The more digital our lives become, the more people crave concerts, tastings, festivals, activations and shared moments that feel unscalable and a little unpredictable. Live experiences are, by definition, scarce. There is a hard cap on seats and ticketing capacity and a premium on status, memory and emotion. Some people believe that as AI automates more of our work, we'll have even

more free time to spend chasing these experiences (Yafe & Moose, 2026, Article The experience economy is booming, especially in a world of AI).

Furthermore, there are few key pillars which define the experience economy. It is initiated by the aesthetic experience, followed simultaneously by the educational experience, entertainment experience, and escape experience (Chai et al., 2022; Tom Dieck et al., 2018). The aesthetic experience can be understood as a passive immersion in an environment, where individuals absorb sensory elements such as design, atmosphere, and ambiance without active participation. The educational experience requires active engagement in learning processes, where participants acquire new knowledge or skills through more direct involvement. The entertainment experience centres on passive absorption of pleasurable stimuli, where individuals enjoy performances or activities as spectators. Finally, the escapist experience demands both active participation and deep immersion, enabling individuals to temporarily disengage from everyday reality and fully engage in alternative activities or environments. This concept, the *escape*, can be linked to previously mentioned *immersion*, one of the defining aspects of audience engagement (Shirzadian, 2016).

The experience is being evaluated through overall satisfaction and effectiveness of the experience (i.e. the memory of the audience), which results in the respective level of the engagement itself (Tom Dieck et al., 2018).

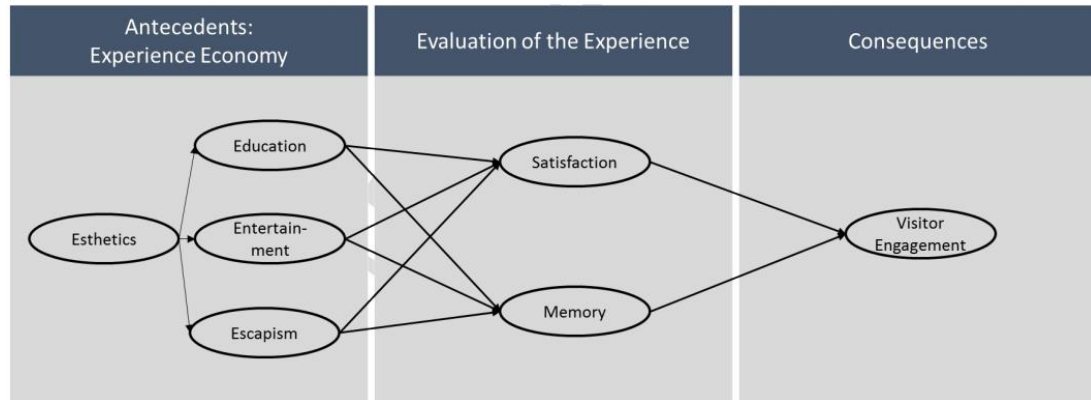


Figure 8

(Phases and consequences of experience economy, Tom Dieck et al., 2018)

An important economic phenomenon shaping the conditions under which the experience economy operates in the performing arts is Baumol's cost disease, first described by Baumol and Bowen in 1965. In labour-intensive sectors where productivity cannot meaningfully increase, wages nonetheless rise in line with high-productivity sectors of the overall economy. Since live opera performance requires the same number of performers, rehearsal hours, and production resources, it is one of the examples in which the core product still cannot be made more efficient through technology. Hartwig and Krämer (2023) confirm that this dynamic retains its pace today, noting that the rising cost of personal services, including arts and culture, disproportionately affects lower-income populations. The result is permanent upward pressure on ticket prices and financial instability in non-profit performing arts organisations, which results in conditions that directly constrain the access and participation in these institutions.

Chapter 3. Methodological Framework

3.1.1. Research Methodology and Data

This thesis is based on a qualitative single case study examining the strategic role of digital technologies in relation to audience engagement and cultural access at

the Bavarian State Opera. The research is designed to explore institutional interpretations, decision-making processes, and practical constraints surrounding digital transformation within a large, publicly funded opera house. The empirical material consists of semi-structured interviews with institutional representatives and their external partners, internal and public institutional documents, and an analysis of selected digital platforms and formats operated by the Bavarian State Opera. These materials are analysed through a data-source triangulation approach and interpreted in relation to established conceptual discussions on cultural policy, digital transformation in arts organisations, and audience engagement in the performing arts. The following sections describe the methodological framework in greater detail, elaborate on the choice of methods, and outline the analytical process. It will also include key considerations and limitations of the research design.

3.1.2. Single Case Study

The approach with one particular case study has been chosen due to several complex reasons, including the focus on one progressive example in the field of digitalisation in the classical music field (Feagin et al., 1993), in this case, the major European classical music organisation. It has also been described by one of the most common approaches when examining organisational processes and maturation of industries (Yin, 2007). According to Yin (2007), the case study research is, however, often questioned regarding its capacity for scientific generalisation, particularly when based on a single case. Rather than aiming at statistical generalisation to a broader population, case studies seek to contribute to theory through analytic generalisation, by relating empirical observations to existing theoretical concepts. In this respect, findings from a case study may inform or refine theoretical understanding, while remaining closely tied to the specific context in which they are produced.

The Bavarian State Opera was selected as the focus of this study since it represents a prominent example of a publicly funded, internationally recognised cultural institution that has actively developed digital initiatives in recent years, most notably since 2021,

with the establishment of a separate in-house digitalisation department (Bayerische Staatsoper, n.d.). Its combination of artistic reputation, complex organisational structure, and engagement with digital platforms makes it a theoretically relevant case for examining the intersection of strategy, technology adoption, and audience engagement. While the findings remain context-specific, studying this institution allows for insights into the ways similar large-scale performing arts organisations might approach digital transformation and cultural access.

3.1.3. Qualitative Research

This study follows a qualitative, interpretive research design, which focuses on understanding the perspectives, interpretations, and strategic reasoning of actors involved in digitalisation and audience engagement at the Bavarian State Opera. The research prioritizes examining how institutional actors perceive, justify, and implement digital strategies, rather than producing statistical generalisations.

According to Creswell (2007), in qualitative research, the design of a study is informed by the researcher's underlying philosophical assumptions and theoretical orientation. These assumptions influence how phenomena are understood, which questions are asked, and how data are collected and interpreted. Researchers inevitably bring their perspectives, disciplinary knowledge, and conceptual frameworks into the study, influencing both the focus and the analytical approach. Explicitly articulating these assumptions is crucial for situating the study within a coherent methodological and conceptual framework, providing transparency regarding the lens through which the data are examined. In addition, making the theoretical and interpretive orientation clear allows the findings to be related to existing research and broader scholarly debates, and ensures that conclusions are grounded in a consistent and well-defined approach.

One of important elements of this design is data-source triangulation, which will involve integrating multiple types of empirical material, including semi-structured interviews, institutional documents, and digital platforms. Triangulation is intended to serve two main purposes: confirmation, by identifying convergent patterns across

sources, and completeness, by capturing multiple aspects of the phenomenon (Fenech Adami & Kiger, 2005). However, the triangulation been also a subject to critique: some scholars argue that studies claiming a triangulated approach often provide insufficiently clear evidence that the combined sources achieve the aims of confirmation or completeness (Breitmayer et al., 1993). In this thesis, I chose to apply the approach of triangulation to contextualise the case, link different sources, and explore the digital strategies and audience engagement practices of the Bavarian State Opera, in relation to the broader field of the performing arts.

3.2. Data Collection

Data for this study were collected using multiple sources, consistent with the qualitative, interpretive, and triangulated approach outlined above. The primary empirical material consists of semi-structured interviews with internal and external actors involved in digitalisation and audience engagement at the Bavarian State Opera. These interviews were complemented by institutional documents, available academic literature, and the brief analysis of selected digital platforms, providing multiple perspectives on the strategic and operational practices of this opera house.

3.2.1. Semi-structured Interviews

Semi-structured interviews were conducted with participants selected purposefully to understand a range of perspectives on digitalisation and audience engagement. Internal participants included employees of the Bavarian State Opera, while external participants comprised partners involved in the design and implementation of institutional strategies and digital solutions. Interviewees were also chosen to reflect differences in professional role, educational background, and prior collaboration.

The interviews were guided by a set of prepared questions, adapted to the specific roles and experiences of each participant. While the questions covered similar thematic areas, their order and emphasis were adjusted to allow flexibility and to respond to the flow of each conversation. Interview topics focused on digitalisation efforts, audience

engagement and structure, leadership influence within the Bavarian State Opera, sectoral trends, and reflections on the future of the field. The flexible structure of the interviews encouraged participants to elaborate on topics of relevance, occasionally raising new issues that were subsequently incorporated into the analysis.

All interviews were conducted in English, chosen as the common language for practical reasons and to match the language of the thesis, despite the availability of German among some participants. Interviews took place in December 2025 and February 2026, with some conducted in person in Munich and others remotely via Microsoft Teams. Participants were informed in advance about the purpose of the study, the research questions, and the researcher’s academic background. Consent was obtained at the start of each interview, and participants were assured anonymity throughout the study. Interview duration averaged approximately 1 hour and 15 minutes.

All interview participants are referred to throughout the thesis using a numbered index. Full details of each interviewee are provided in table below.

Index	Role	Interview Date	Format
Interviewee 1	External IT partner of the BSO	December 9, 2025	Remote, Microsoft Teams
Interviewee 2	Digital Projects Manager of the BSO	December 17, 2025	In person, Munich
Interviewee 3	Sales and CRM Manager of the BSO	February 4, 2026	Remote, Microsoft Teams
Interviewee 4	Original Digital Strategy Author (2021-2022)	February 24, 2026	Remote, Microsoft Teams

Table 2
Interview participants details

3.2.2. Document and Policy Analysis

Analysis of institutional documents and policies presented certain challenges due to the limited public availability of materials such as digital strategies, audience data, and financial reports. This raises broader questions regarding transparency, accessibility, and the public accountability of cultural institutions. To address these limitations, the study drew on publicly available sources in both German and English, and additional materials requested directly from personnel at the Bavarian State Opera.

A brief audience structure report from 2021 was used as a reference point and served as a topic of discussion during interviews with institutional staff. While the Bavarian State Opera is a major public institution, with nearly two-thirds of its funding provided by the Free State of Bavaria, obtaining detailed financial or structural data proved difficult. Despite these constraints, the available documents provided important contextual information and were integrated with interview data to support the study's triangulated approach.

3.2.3. Digital Platforms

The research process included an analysis of the Bavarian State Opera's digital platforms, namely Staatsoper.tv, the "<30" app, Apollon, and the main website (staatsoper.de). These platforms were examined to understand how the institution presents content, engages audiences, and implements digital strategies.

The platforms were analysed from my perspective as a musician and an arts manager with prior experience in festival production and minor digitalisation initiatives within cultural institutions. While I do not have formal training in programming, app development, or digital accessibility, my background and experience provided a practical lens for assessing user experience, content strategy, and audience engagement. The analysis focused on observable features, functionality, and interaction opportunities, rather than technical performance, and was interpreted in connection with insights gained from interviews and available institutional documents.

3.3. Data Analysis and Coding

The analysis of empirical data followed a thematic approach, structured around the research objectives and the study's theoretical framework. Semi-structured interviews served as the primary data source, complemented by institutional documents and digital platform analysis consistent with the triangulation approach described in section 3.1.3.

All interviews were recorded and transcribed using digital transcription tools, specifically Adobe Podcast and Tactiq. Transcripts were subsequently manually reviewed before coding. Coding was primarily inductive, allowing patterns and themes to emerge directly from the interview data, while the theoretical framework provided a structure aligning with the research questions.

The coding process produced three overarching analytical categories with several sub-themes:

- I. **Institutional context** (structural and organisational conditions within which digital initiatives are developed):
 - Governance lag and strategic fragility
 - Personnel capacities
 - Internal culture and digital adoption
 - Elite positioning vs. inclusive mission
 - Public mission paradox

- II. **Digital initiatives** (operational and technical dimension of the BSO's digital transformation):
 - The (missing) digital strategy
 - staatsoper.tv
 - <30 app
 - Data measurement and its limits

- AI adoption
- Structural limits of digitalisation

III. **Audience engagement** (relationship between digital initiatives and the audiences they are intended to reach):

- Competition redefinition
- Access
- Diversity
- Loyalty and conversion

These three categories and their sub-themes directly shape the structure of the Findings chapter. The sub-chapter titles follow the same logic, with minor adjustments in wording to reflect the particular content and analytical focus of each section.

3.4. Limitations and Ethical Considerations

This study has several methodological and contextual limitations that should be acknowledged. As a single-case study, the research provides an in-depth examination of the Bavarian State Opera, but does not offer a detailed overview of the broader sector.

The availability of institutional documents presented a partial constraint. Key materials, including financial reports, remain publicly inaccessible, which restricted the ability to conduct quantitative or comparative analysis of institutional budgets, or sector-wide digital development. The BSO's digital strategy document, originally produced in 2021 but not publicly available, was obtained for this research through its original author. While this partially addresses the document availability limitation, it also introduces a specific contextual condition, since the document reflects the strategic vision at the time of its creation, and may not represent the institution's current formal position. Further details will be provided in the Findings chapter.

The research did not include direct audience research. The findings regarding audience composition, diversity, and engagement are therefore based exclusively on the perspectives of institutional actors and external partners directly involved in the BSO's digital and audience engagement work. This is an acknowledged limitation given the centrality of audience outcomes to the research questions, and is a consequence of the scope and timeframe of the study.

All interviews were conducted in English, which, while necessary for consistency with the language of the thesis, is not the native language of some participants. This may have affected the depth of expression and the articulation of nuanced cultural or institutional perspectives.

The positionality of the myself as a researcher also shapes this thesis. As a professional classical guitarist and managerial experience in the music sector across Europe, I bring both familiarity with the field and specific professional perspectives to the analysis. At the same time, I approach the BSO as an external observer rather than as a current or former staff member, which limits direct insight into the institution's internal dynamics. I was based in Munich during part of the research period, which provided certain contextual familiarity, although not immersive institutional knowledge.

Ethical considerations were central to the research design. All participants were informed in advance about the purpose of the study, the main research questions, and the researcher's academic background, and provided explicit consent to participate. All interviewees were offered full anonymity and are referred to throughout the thesis by their professional role rather than by name, and with neutral pronouns.

Chapter 4. Bavarian State Opera

4.1. Bavarian State Opera: The Overview

The Bavarian State Opera (Bayerische Staatsoper, BSO) is one of the leading opera institutions in Europe, with a history spanning over 350 years. It defines its

mission as enriching the cultural landscape of Bavaria and beyond through artistic excellence, exceptional productions, and socially relevant programming (Bayerische Staatsoper, n.d.b). The institution is described by the Bavarian Ministry of Science and the Arts as the cultural flagship of the Free State of Bavaria (Poppek, 2023).

The BSO operates as a three-division house, encompassing the opera company itself, the Bavarian State Orchestra (Bayerisches Staatsorchester, founded in 1523), and the Bavarian State Ballet (Bayerisches Staatsballett). Its primary performance venue is the National Theatre (Nationaltheater) in Munich, one of the largest opera houses in the world by stage and auditorium capacity. The institution employs approximately 1,500 staff across artistic, technical, and administrative functions, and delivers over 500 productions annually to an average of 2,400 seats per performance (Bayerische Staatsoper, n.d.b). The current General Director is Serge Dorny, who took the position in 2021.

4.2. Governance and Funding

The BSO is a state institution under the Free State of Bavaria, subject to legislative budgetary processes, public reporting requirements, and oversight by the Bavarian Ministry for Science and the Arts. Its legal and financial accountability is anchored in public governance structures, and its operations are subject to the planning and approval cycles of state administration.

In 2023, the institution had an annual budget of approximately €84 million, of which 85% was subsidised by the Free State of Bavaria (Poppek, 2023). The remaining funding comes from ticket revenues, corporate sponsorships, and other income sources. The BSO's principal corporate partner is BMW, with additional significant collaborators including HypoVereinsbank, Siemens, BR Klassik, and the Süddeutsche Zeitung (Bayerische Staatsoper, n.d.b).

The high proportion of public subsidy places the institution in a structurally constrained position: core financial stability is dependent on political will and public budgetary priorities, while at the same time the institution carries an implicit obligation to serve

the public interest broadly. This tension between public funding and selective accessibility is a recurring theme throughout this thesis and will be examined in detail in the findings and discussion chapters.

4.3. Audience Structure

The BSO has conducted internal audience surveys providing a profile of its attending public. The most recent available data comes from a visitor survey conducted in July 2023 (Bayerische Staatsoper, 2023), supplemented by additional segmentation analysis from the same period.

The average visitor is 59 years old. In terms of gender, 59.4% of respondents identified as female, 40.3% as male, and 0.3% as diverse. Geographically, 54.2% of visitors live in Munich, 24.3% in the surrounding Munich area (within approximately 50 km), 13.3% elsewhere in Bavaria, 10.2% in other parts of Germany, and 7% from other countries. In terms of professional status, 51.5% are full-time employed and 33.5% are retired or pensioners. Net household income data shows that approximately 48% of respondents earn between €2,001 and €6,000 per month, with 13.2% reporting income above €8,000. This can be interpreted as a profile consistent with the upper-middle- and upper-income segments of the population.

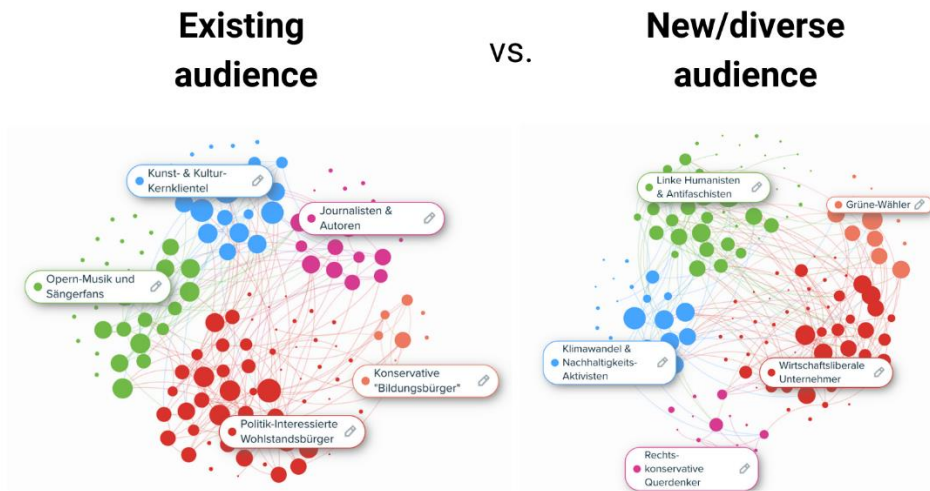


Figure 9
Existing vs. new/diverse audience segments at the BSO in 2021
(Audiense, 2021)

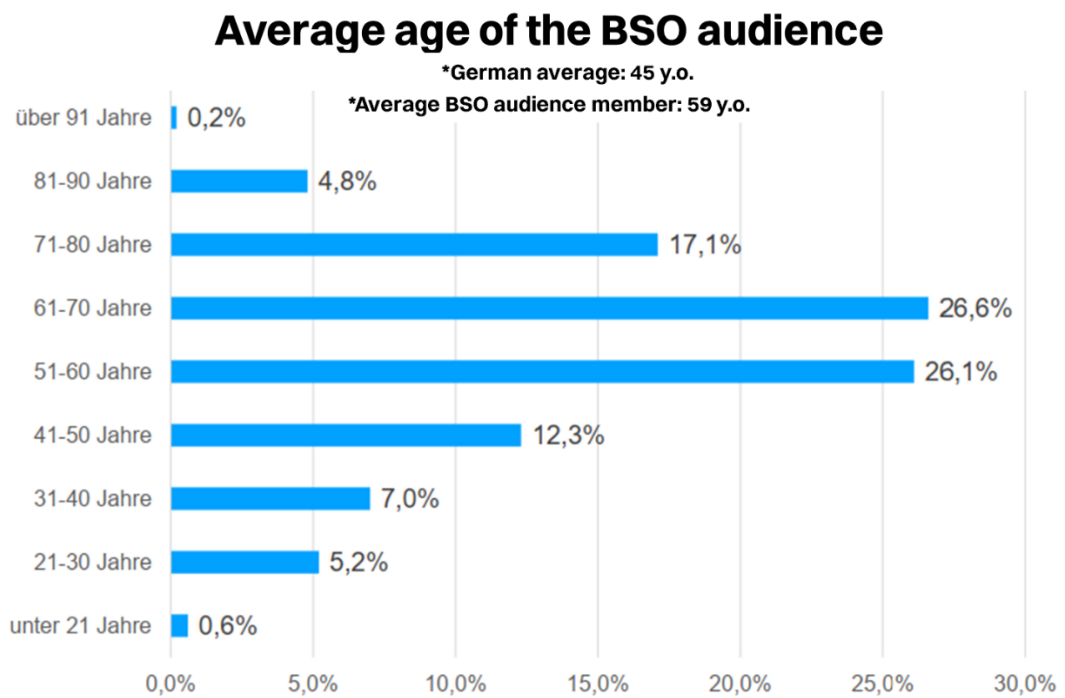


Figure 10
Average age of the BSO audience in 2023
(Bayerische Staatsoper, 2023)

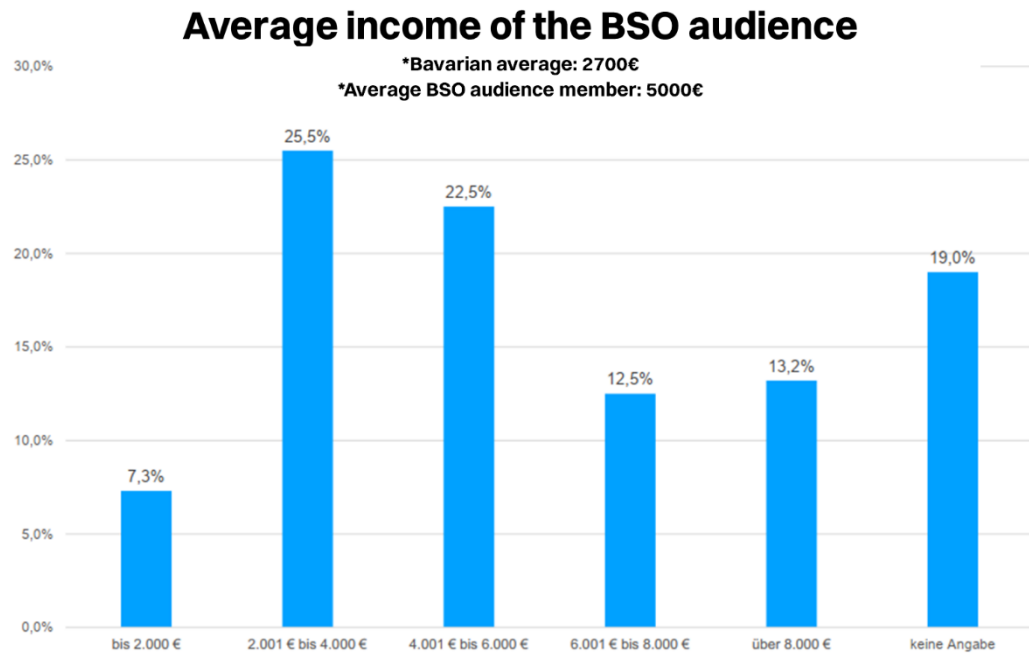


Figure 11
Average income of the BSO audience in 2023
(Bayerische Staatsoper, 2023)

The Sinus Milieus analysis used by the BSO for audience segmentation places its core audience primarily in the Konservativ-Gehobenes Milieu (conservative-elevated), Postmaterielles Milieu (post-material), and Milieu der Performer (performance-oriented) segments; all positioned in the upper and upper-middle social strata. The segmentation further identifies a spectrum of attitudes towards the opera among potential audiences: from Oper als wichtige Kunstform (opera as an important art form) among existing core audiences, to Oper als Event among younger and more lifestyle-oriented segments, to Oper als fremde Welt (opera as a foreign world) and Operndistanz (opera distance) among lower socio-economic layers (Bayerische Staatsoper, 2023). The last category, for whom opera is perceived as distant or irrelevant, represents a structural challenge for audience engagement, that the further chapters will examine more in detail.

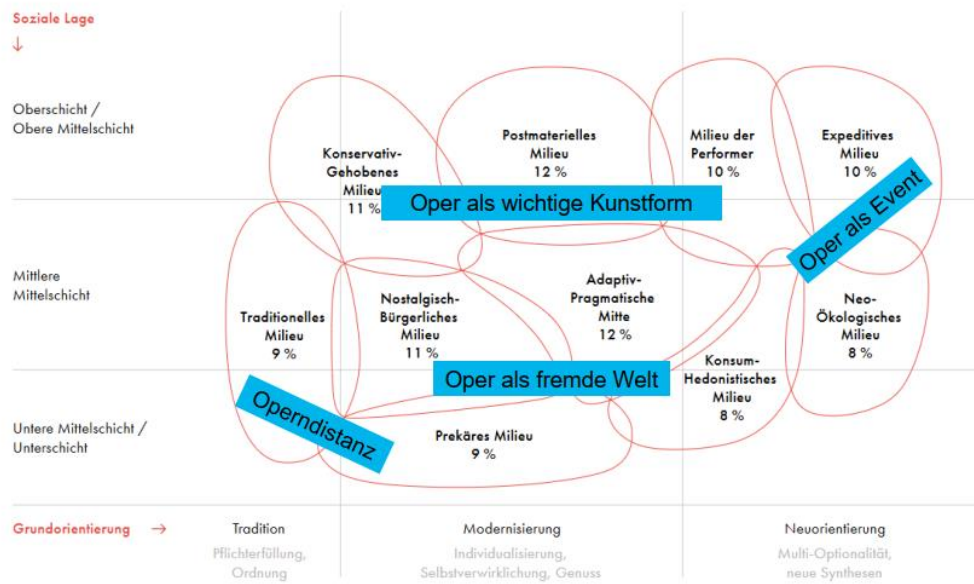


Figure 12
 Sinus Milieus analysis: the BSO audience segmentation
 (Bayerische Staatsoper, 2023)

Data from specific programming contexts provides further detail. For the *Münchner Opernfestspiele 2025*, 44% of ticket buyers were subscribers, 34% existing customers, and 22% new customers, with approximately 50% coming from Munich (Bayerische Staatsoper, 2025). For the *Ja, Mai* festival, 50% were regular customers, 30% occasional visitors, and 20% new customers, with 95% from Germany and 67% from Munich alone (Bayerische Staatsoper, 2025).

Taken together, the audience profile is predominantly local, older, and upper-middle class. This pattern aligns with broader trends in European opera attendance, and with the structural conditions of the institution's pricing and funding model.

4.4. Digital Infrastructure and Platforms

The BSO's current digital infrastructure developed significantly from 2021 onwards, following the appointment of Serge Dorny as General Director and the establishment of a dedicated in-house digital projects department. A digital strategy

was developed in the same year, defining the transformation across four action fields: online communication, the digital stage, internal communication processes, and technical infrastructure. The following platforms constitute the BSO's primary digital presence at the time of this research:

Staatsoper.tv: the BSO's dedicated streaming platform, developed in partnership with Vialma, a Brussels-based company specialising in classical music streaming. The platform operates on a subscription and free-access model and offers a combination of live streams, on-demand opera recordings, audio content, behind-the-scenes formats, and documentary series. Content is refreshed approximately every two weeks. The platform is accessible internationally and represents the BSO's most significant investment in digital content distribution.



Figure 13
Staatsoper.tv (screenshot, Bayerische Staatsoper, 2026)



Figure 14
<30 App
(screenshot, Bayerische Staatsoper, 2026)

<30: an app launched in November 2023, developed by EasyConnect. It provides users under the age of 30 with access to subsidised tickets, a dedicated community, and a simplified purchase experience. As of the time of the interviews, the app had recorded

23,192 downloads, 11,466 registered users under 30, and 2,189 paid <30 Circle members (Bayerische Staatsoper, 2026). The average age of under-30 customers is 26 years. Over 97% come from Germany, with 64% from Munich. 62% of under-30 users have a personal net income below €1,500 per month, and 35% are repeat visitors who attended at least two events in a single season (Bayerische Staatsoper, 2026).

The main website (*staatsoper.de*) serves as the primary information and ticketing portal, offering production information, editorial content, ticket purchase, and the Kartenbörse ticket exchange platform. A website relaunch was conducted in 2021 as part of the digital transformation.

Apollo is the BSO's editorial platform, functioning also as a digital magazine covering artistic and cultural topics related to the institution's programme.

Social media channels include the main BSO Instagram account (89,000 followers at the time of data collection), a dedicated <30 Instagram account (6,249 followers), and the Apollon account (6,850 followers). The main account's largest age group is 25–34 (26%) and is split 54.5% female and 45.5% male. The <30 account reaches a significantly big percentage of younger audience: 68% in the 25–34 bracket, and is predominantly female (66%) and concentrated in Munich (51%) (Bayerische Staatsoper, 2023).

Chapter 5. Findings

Introduction

This chapter presents the empirical findings of the study, organised across three analytical categories established through the coding process: institutional context, digital initiatives, and audience engagement. The findings are based primarily on the four semi-structured expert interviews, complemented by document analysis and platform review as described in the methodology chapter.

5.1. Institutional Context

5.1.1. Public Funds, Public Mission

The Bavarian State Opera (Bayerische Staatsoper) is a publicly funded institution by the Free State of Bavaria, as a federal state of Germany. According to the Poppek (2023), the 85 percent of their annual budget of approximately €84 million of this theatre is subsidized by the Bavarian taxpayers. However, the cultural and economic barriers block certain groups of the society to participate in this art form. Ticket prices ranging up to more than €140 per one ticket, as well as the form of the opera and elite reputation of this house, according to the interviews, could be one of the answers why the audience structure does not seem to radically change, in spite of the public mission, public funding, and more progressive approaches in the audience engagement strategies.

The marketing and sales manager of this opera house agrees with the approach that, if they are vastly funded by the public funds, the Bavarian State Opera should also serve public mission:

There are some opera houses who say, 'well, let's face it, we're never going to get them and maybe that's OK.' We don't agree totally with that. As long as we're funded by government, I think it's pretty important to also offer some things to people who will never ever visit this opera house... and that the Bayerische Staatsoper is taking over a role in their life. Maybe even if it's a tiny role.

-Interviewee 3

Another interviewee, the digital project manager of the BSO adds that that their public mission of preserving the opera as an art form, as well as promoting it to the wider audiences, must be prioritised over the short-term financial goals and reaching their “safe” target groups:

When the new director arrived, it was decided that we would like to sell the tickets via content and not selling tickets for the sake of selling tickets. So, we

want to emphasize that what kind of political or artistic process is behind all this and make its relevance for the society at the forefront... Do we always have to aim for somebody who's actually going to be a client of ours? Or do we also aim at preserving that art form, preserving that these houses exist, preserving that this is part of our culture, and making it accessible to people who've never had a look at that before?

-Interviewee 2

Nevertheless, the cuts in the public cultural field in Europe generally, but also in Germany threatens to affect the economic flexibility of renowned cultural institutions such as Bavarian State Opera. Therefore, it becomes evident from the interviews that certain financial goals have to be reached, affecting the audience structure, and consciously reducing the accessibility and diversity levels of their clientele.

When asked about the further development of digital projects with an aim of approaching more young and diverse audience, the digital projects manager of the BSO shortly responded the following:

The ministry won't finance... The costs of the productions are increasing.

-Interviewee 2

The marketing and sales manager adds that the quota of 5% for the reduced-price-tickets aimed at people aged under 30, has to be limited in order to gain financial objectives, set by the house budget. They also mention that this issue is not about the insufficient subscription base of under-30s, but strictly about the economic sustainability:

I think it could be a little bit more [than 5% of under-30-years-old-audience]. But we have this ticket policy that we can't sell that many tickets like reduced tickets, because we have to reach some financial goals. So, I think it wouldn't be a big effort to push that up to 7%, 8%. But 20% would be effortless.

-Interviewee 3

They also mention the importance of visibility and marketing of their opera house, in order to bypass the governmental cuts, or gain more public trust, comparing it to theatres in other German cities:

When fundings are cut, as we see in Berlin, for example, or in Leipzig, I think it's pretty important that people think that the institution has an effect on their life.

-Interviewee 3

The external IT developer working with BSO justifies the current situation. They also argue about the paradox of the economy of the opera as an art form, and compare it to other experience industry branches:

The arts have the extra layer of being - the most expensive thing to make that makes the least amount of money once you produce it. You might as well be making Formula One cars or something you know, so it feels like sometimes like you're building sports cars for 50 people. \$600,000 sports car... and you're only making six of them.

-Interviewee 1

5.1.2. Digital Strategy: Implementation over Documentation

When the Bavarian State Opera appointed its new General Director in 2021 and established a dedicated digital department, one of its early outputs was a formal digital strategy document (*Digitalstrategie*), intended to structure the institution's transformation. That document, dated January 2022 and covering the 2021/2022 season, was obtained for this research through its main author, who worked at the BSO during its creation. It has not been publicly available, and at the time of the interviews conducted for this study, its existence was not clearly acknowledged by current institutional staff.

The Digitalstrategie is a substantive document. It opens with a frank diagnosis of the institution's challenges: an average opera attendee age of 60 against a general population average of 44; 94% internet penetration against 3.9% theatre attendance; a TikTok user base averaging 23 years old; and the observation that the average age of an opera work performed in Germany is 139 years. Its stated ambition is to enable digital participation for all age groups and social layers (*in German: digitale Teilhabe für alle Alters- und Gesellschaftsschichten*), while simultaneously positioning the BSO as an innovation driver within the creative industries.

The framework organises the institution's digital transformation across four action fields, which the document calls digital genres: online communication, the digital stage (*Digitale Bühne*, covering artistic and content formats), internal communication and processes, and infrastructure. Each pillar contains both new projects (*Premieren*) and ongoing initiatives to be optimised (*Repertoire*), tracked on an agile project board with implementation status indicators across five stages: planning, conception, implementation, live, and optimisation. Snapshots of this board from January, March, May, October, and December 2021 show a rapidly expanding portfolio: from a small number of projects in planning to over thirty active initiatives by the end of the year, including the website relaunch, Staatsoper.tv streaming platform, podcast formats, persona analysis, data strategy, CRM development, and the early conception of what would eventually become the <30 app.

The methodological approach outlined in the document explicitly calls for agile, holistic development: short planning cycles, staged implementation, and continuous evaluation. The document also names a recurring challenge already visible by October 2021: capacity constraints, unclear responsibilities, and the slow pace of infrastructural change relative to communication projects. A December 2021 internal update notes the need for recalibration (*Neujustierung*) prioritising infrastructure after a strong initial phase of communication-focused work.

This document represents a working operational strategy, actively updated and applied throughout 2021. The original digital strategy architect confirmed that the strategic framework continued to shape the institution's digital communications well after their departure:

I guess it still works, when I look at the communication channels of the opera. There isn't a new direction. It's still based on this strategy we set up four years ago. It's almost the same team working on it.

-Interviewee 4

Against this background, the responses of current staff take on a different quality. The Digital Projects Manager of the BSO described the strategy's status as follows:

The digital strategy as such has not been communicated widely, also because it's still a work in progress, I suppose... I'm not even sure it was ever really set in stone... We're kind of preparing a new paper. But for the time it hasn't been set.

My predecessor has changed twice. There was a shift in how the communications department was built. In the beginning, when [the current General Director] arrived, he had three different departments: press, sales, and marketing... And in the end, there was one strategic director set on top, but in the beginning, there were three very hierarchically sort of similar positions, and now this is different.

-Interviewee 2

The Head of Sales and CRM offered a complementary explanation:

Nobody wrote it down. It's in our heads and we're working on it. Otherwise, we wouldn't have done the app [<30]. But it's just because no one had the time to write it down. We use the time to implement the stuff. And of course, there's still people taking care of all those projects. So, we still have digital.

-Interviewee 3

From outside the institution, the external IT partner of BSO observed a pattern they recognised across multiple clients:

I don't know what their overarching strategy is, and a lot of times the answer is they don't have one.

-Interviewee 1

The recovered *Digitalstrategie* is therefore analytically significant on two levels. First, it confirms that the BSO did develop a coherent, detailed, and operationally grounded digital strategy. It explicitly addressed audience diversification, data-driven communication, infrastructure development, and agile working methods. Second, the question of why the document is absent from current institutional accounts is difficult to answer conclusively. It may reflect genuine discontinuity, a working document that lost its anchor when the team configuration changed and was never formally transferred. It may also reflect a more deliberate distancing from a strategy associated with a particular period and personnel. What can be stated with confidence is that the document existed, was actively updated through at least December 2021, was formally presented in an internal works council meeting, and is not acknowledged by current staff, despite the fact that, according to its original author, the strategic direction it established continues to shape the institution's digital communications today.

5.1.3. Personnel Capacities

Personnel capacity represents one of the most consistent structural constraints on digital transformation at the BSO, and based on the interview data, across the performing arts sector more broadly. The core issue is a structural mismatch: the operational scope of digital work has expanded substantially, while the teams responsible for executing it have not scaled accordingly.

The Digital Projects Manager framed this as following:

We are not short-staffed in comparison to other houses, but still... We have more than 500 events per year. We have an average of 2,400 places to fill a night.

-Interviewee 2

The institution employs approximately 1,500 staff members, while the team directly responsible for digital projects numbers three people, in addition to the marketing team. Whether this constitutes being short-staffed depends on the reference point: compared to peer institutions, the BSO may indeed be better resourced. Compared to the operational demands of managing a full-scale streaming platform, a mobile app, social media strategy, CRM, and data infrastructure simultaneously, while supporting over 500 annual productions, the current size of this particular department raises a question about the workload placed on a very small team. The comparison to other houses may itself reflect a sector-wide level that is broadly insufficient, rather than a meaningful standard.

This is reinforced by the interviewed IT developer, who described a pattern across the sector that intensified significantly after COVID-19:

Budgets are declining, staffs are shrinking, a lot of people are not being replaced due to attrition... Teams are very small and they're expected to be doing the work of huge marketing teams with very little budget and maybe three or four resources.

-Interviewee 1

The <30 app was also mentioned, the BSO's most prominent recent digital initiative, which is typically driven by a single internal leader within that small team. This creates significant continuity risk: when particular individual changes role or leaves, the institutional knowledge and momentum built around the initiative are difficult to transfer. The Sales and CRM Manager captured the day-to-day experience of operating under these conditions concisely:

Sometimes we wish we had more time to do this.

-Interviewee 3

A further layer of this problem concerns the technical specialisation that current digital tools require. The interviews show that it is not sufficient to have staff who are broadly digitally literate, since each platform, analytics system, or communication infrastructure demands role-specific expertise to operate effectively. The IT developer made this concrete:

Understanding the way Google Analytics 4 works, that's a full-time job for a person. And not every arts organisation can have a person whose sole job it is.

-Interviewee 1

The practical consequence is visible in day-to-day operations. Digital tools are present and actively used, but their consistent integration into institutional workflows remains incomplete. The same interviewee described a recurring scenario:

[The clients] come to me and say, "Oh my gosh, we forgot we were doing this big Black Friday sale. We forgot that we needed to put it in the app"... It's still not quite habit yet.

-Interviewee 1

This issue, again, can be connected to a capacity. Having a small team that is managing both strategic development and high-volume operational demands simultaneously; coordination across departments seems to be one of the first processes unintentionally neglected.

The original digital strategy author identified a related structural issue: the systematic underfunding of infrastructure relative to high-visibility project outputs. Budget and leadership attention tend to concentrate on large, communicable initiatives (so-called *lighthouse projects*, in German: *Leuchtturmprojekte*), while the foundational technical layer receives comparatively little investment:

The financial thing is that there was money for big lighthouse projects, but not for the base. The Wi-Fi in the house was a big problem, and you can't think about digitalisation when you don't have Wi-Fi or mobile devices for the team.

-Interviewee 4

This reflects a governance logic in which digital progress is evaluated primarily through outputs that can be publicly communicated, rather than through the structural conditions that make digital work sustainable. It is a pattern the same interviewee observed across multiple institutions in their consulting work, not specific to the BSO, but characteristic of how cultural institutions tend to approach digital investment.

The combination of insufficient staff, limited specialisation, infrastructure underfunding, and slow decision-making cycles, creates a structural limitation on digital ambition that has little to do with commitment or intent. The BSO illustrates this clearly: if a team of three to four people is expected to lead and facilitate digital transformation (full process of organisational restructuring) at an institution of 1,500 employees and 500 annual productions, the resource allocation does not reflect the actual demands of the work. Moreover, if this is the situation at one of the best-resourced institutions in the sector, the implications for smaller organisations could be considerably more severe.

5.1.4. Internal Culture and Adoption

The interview data consistently points to a distinction that may be easy to overlook: the primary obstacle to digital adoption within performing arts institutions is not necessarily resistance to technology, but mainly specific working realities of different roles within the organisation, which subsequently influence the professional identity, artistic values, and eventually, their attitude towards technology implementation.

The Digital Projects Manager described the internal landscape of the BSO in terms of distinct professional worlds operating largely in parallel:

You've got people who mainly work with their hands, and people who are completely sort of in their own world that is very much apart from the world of digital.

-Interviewee 2

These "bubbles", as they were described, reflect the structural variety of a large opera house: backstage and production staff, performers, dramaturgical teams, and administrative departments each operate within different priorities and professional cultures, each of them having different needs and attitudes regarding the digital tools.

Getting artists comfortable with cameras and backstage recording took considerable time and effort. The Digital Projects Manager notes:

It took us two years, three years, to get everyone on board.

-Interviewee 2

The Sales and CRM Manager confirmed that this process is ongoing:

Inside the house it depends... We're still working on it to get those other people on stage, backstage, singers, musicians to get used to the camera.

-Interviewee 3

The IT developer offered a brief, general characterisation of performing arts organisations, concerning the digital adoption:

Incredibly conservative. Maybe not tech savvy. That's going to take a long time.

-Interviewee 1

The conservatism of arts organisations can be understood as a value-related issue, rather than a generational or technological issue. Staff in cultural institutions are usually more mission-driven rather than efficiency-driven, as their professional identity is organised around the art form, and not around operational optimisation. Digital tools, in this context, are evaluated on whether they are consistent with that mission.

The original digital strategy architect identified this tension as one of the defining challenges of the role, framing it as a permanent negotiation between two internal logics:

It's always the big issue... keeping the dialogue between the traditional understanding of artistic authority and a customer-centred thinking.

-Interviewee 4

They described needing to switch between institutional languages, referring to the same people as *audience* in artistic contexts and *customers* in strategic ones. The two frameworks are not easily linkable, and the tension between them shapes every decision about how digital tools are used, what content is produced, and how engagement is defined and measured.

At a more structural level, the same interviewee identified leadership mindset as the root variable determining digital transformation development:

Culture and the transformation are primarily a cultural and organisational challenge... If leadership remains really hierarchical and risk averse, and the long-term funding is not secured, then digital innovation cannot unfold its full potential.

-Interviewee 4

They were direct about the sector's position relative to other industries:

The cultural sector is years and years after the industry. They need new leaderships and new ideas.

-Interviewee 4

And when asked to identify the single most important factor:

Mindset. The key to solving the problem is mindset on the leadership.

-Interviewee 4

This aligns with what the other interviewees described from within the institution, even if framed differently. The BSO's leadership did commit to digital transformation, since it created a dedicated department, invested in platforms, and established external partnerships. Nevertheless, commitment at the level of vision does not have to automatically translate into the structural changes, including the governance tempo, risk tolerance, and cross-departmental coordination, that sustainable digital adoption requires. Internal culture changes are deployed more slowly than technology, and the gap between the two is where many digital initiatives may lose momentum.

5.1.5. Balance between Elite Institution and Inclusive Institution

The tension between the BSO's elite positioning and its public mission of broad access runs through every strategic decision the institution makes. The original digital strategy author described the institution's relationship to change that also frames this tension:

It's an old traditional institution. The DNA of this institution is looking backwards, not forward.

-Interviewee 4

The Sales and CRM Manager stated the obligation of public service directly, as noted earlier in section 5.1.1, describing also the economic constraints which define how far this commitment can extend in practice (ticket prices, revenue targets, the 5% under-30 ceiling). This section examines more in detail the identity dimension of the same tension: what kind of institution the BSO understands itself to be, and what means does it use for approaching new and diverse audiences.

The Digital Projects Manager described various audiences the institution simultaneously serves:

We cater to an audience that, on the one hand, really likes that part of being posh and being set apart... and a different group who would actually want to be included.

-Interviewee 2

The core audience, many of whom have attended the house for decades, expects certain communication register, which can represent a challenge in engaging with younger and more diverse target groups. When the current General Director arrived in 2021 with a public commitment to opening the institution to new audiences, the communication of that shift produced an unintended effect, resulting in long-standing patrons feeling no longer wanted.

The Sales and CRM Manager briefly noted that the institution had to recalibrate the messaging to reassure its core base while continuing to pursue diversification:

I can't write a really easy written long e-mail to our core audience. They will be like "do you think we're stupid?" But if we talk to people who never visited opera, we have to be really basic.

-Interviewee 3

Alternatively, the external IT partner offered a historically reframing context:

It's unfortunate that in the past, I don't know, 50 to 70 years, that the opera has become this place that is so sacred that it cannot be penetrated by a normal person.

-Interviewee 1

The elite associations of opera are a relatively recent construction, as this account suggests. Historically, opera was a popular entertainment form attended by the audience who treated the experience as a social occasion, rather than as a strict, elite event.

Additional factor for the elite-inclusive tension is the institutional scale, which can represent both a resource and a constraint. The BSO has the capacity to invest in initiatives that smaller houses cannot afford. However, the expectation of core

audience may be setting how far the institution can move toward inclusion without risking the revenue base that sustains it.

In spite of that, external IT partner of the BSO sees the solution mainly in the radical price reduction, in order to gain wider inclusivity:

Get your focus on getting your ticket prices down... Not have €300 tickets, €400 tickets. Even €50 is too expensive when you consider the total cost of the night... dinner, drinks, babysitter, transportation. In an ideal world, it would almost be better if tickets were all one price, or at least significantly lower.

-Interviewee 1

The potential solution of radical price reduction with the goal of genuine democratisation, is the one that institution cannot currently implement without a fundamentally different funding model. Digital tools fill the gap only partially: streaming provides access without requiring a seat, social media builds brand awareness among people who may never attend, and certain digital platforms offers a subsidised entry point for younger audiences. Current measures, however, address the symptom rather than the cause.

5.2. Digital Initiatives

5.2.1. Staatsoper.tv

Staatsoper.tv is the BSO's dedicated streaming platform, developed over several years and formally launched during the COVID-19 pandemic. It was designed as an independent content platform with its own logic, structure, and user experience. The platform was developed in partnership with Vialma, a French company, after the German market was found to lack providers with the necessary capability. Vialma also works with institutions including the Paris Opera and the London Philharmonic, which gave the BSO access to an already established technical infrastructure.

The content strategy is explicitly modelled on streaming platform logic rather than archive logic. The Digital Projects Manager reflected on what they learned from early user behaviour:

At the beginning, you can show them albums., VODs of whole operas... But it's kind of a media take... You don't really want to spend your free time diving into an archive.

-Interviewee 2

The response was to develop a content mix that uses familiar entry points: shorter formats, behind-the-scenes material, craftsmanship documentation, and collaborations with external creators, to draw users toward deeper engagement with the institution's work. For instance, a dedicated channel called *Hinter dem Vorhang* (Behind the Curtain) focuses on what it means to work at the BSO, such as casting, technical production, the daily life of the house, etc. Collaborations with figures including children's influencers and an LGBTQI+ content creator have extended the platform's reach into audiences that would not typically seek out opera content directly.

The Digital Projects Manager described the underlying logic:

What happens with Netflix or others is that they kind of, by the back door, get you interested in something very different.

-Interviewee 2

The key performance metric is the return rate. Around 80% of registered users come back to the platform after their first visit, a figure the Digital Projects Manager described as unusually high for this type of content. The Sales and CRM Manager described the platform's dual function:

A multimedia platform which works kind of like Netflix... On one hand for people who are already visiting us, but also for people all over the world who are not able to visit Munich because they're living very, very far or they don't have the money.

-Interviewee 3

Registered users come from the US, Japan, the UK, and France, among other countries. The platform has also become a meaningful channel for existing patrons with mobility restrictions, the audience members who attended the house for decades and can no longer do so regularly. The Digital Projects Manager cited direct feedback from this group:

We've had people who wrote to us and said, "well, at last I'm able"... who maybe have reached an age where they can't go out of the house very regularly... "That's the thing I've waited for a long time because now I can still be part of that house, but I don't have to go anywhere."

-Interviewee 2

A further function of the platform is the institutional communication. As press coverage of the cultural sector has declined, the BSO has used Staatsoper.tv to generate and control its own public image directly. The Digital Projects Manager noted:

The whole cultural sector is more and more neglected with regard to press... This is an opportunity to actually immediately generate our image ourselves.

-Interviewee 2

Staatsoper.tv is, by the available metrics, the BSO's most successful digital initiative. It has a demonstrable user base, high retention, international reach, and a clear content strategy. Its limitation is the infrastructural lack regarding the data measurement, which could prove whether the platform reaches new audiences or primarily serves existing ones more conveniently. This issue which will be described more broadly in the chapter 5.2.3. (*The Data: What can be measured and what cannot be*).

5.2.2. <30 App

The <30 app has been developed since late 2023 by EasyConnect, the BSO's IT partner. At the time of the interviews (approximately one year after the app launch), it represented the institution's most direct digital intervention targeting younger audiences. Its purpose, however, was understood differently by the three interviewees who discussed it in detail.

The Digital Projects Manager framed the app primarily as a community-building tool:

A circle of friends, like a museum membership, social connection for exchange students.

-Interviewee 2

The Sales and CRM Manager emphasised the transactional improvement it offers:

A more actual way of purchasing, because our web shop is not the easiest way.

-Interviewee 3

The external IT partner described it from a product perspective:

Literally a useless app if you're not a member of the Under 30 contingent... Maybe they felt like giving the wider audience access to the app would actually hinder the effort of making it something special for this particular group.

-Interviewee 1

These three framings: community, transaction, and exclusivity, do not have to be contradictory, as they describe different layers of an app that functions as a status marker for a specific audience segment, while also improving the purchase experience and creating a community infrastructure around it.

The app's launch was, however, not without friction. The Digital Projects Manager described the initial public reaction:

We had a backlash in the beginning because people didn't understand what the background was. They just thought, well, this is going to give me cheaper tickets.

-Interviewee 2

The expectation of purely cheaper access collided with the institution's intention to build longer-term cultural engagement. The Digital Projects Manager reflected on a broader cultural difference between opera and museum audiences in this respect: museum audiences are more accustomed to the idea that cultural institutions need to be supported and engaged with over time, while opera audiences in the entertainment framing are more likely to approach the experience as a single purchase.

One year after launch, the key quantitative result is a 20–30% increase in ticket purchases by under-30 audiences. The Sales and CRM Manager confirmed:

20 to 30% more people under 30 buying tickets than we had before, which is really nice.

-Interviewee 3

The external IT partner noted an additional network effect: app users bring an average of 1.5 people with them to performances, meaning the reach of the initiative multiplies beyond direct users. They also described a recently developed lifecycle communication strategy built around the app (registration reminders, monthly on-sale prompts, re-engagement messages for registered non-purchasers, renewal reminders for paid members, and a farewell message for users aging out of the under-30 bracket).

The external IT partner observed:

They're really starting to make sure that everyone on that particular journey with them is being communicated to in a specific way.

-Interviewee 1

The Sales and CRM Manager noted that physical events play an equally important role through which the institution builds relationships with younger audiences:

We're also trying to build this community... open nights where we invite them for a beer after the performance... Sometimes there are dancers or musicians or singers who join so they have the possibility to see the people behind this big thing.

-Interviewee 3

There is also an unexpected benefit in purchase behaviour: some under-30 users who download the app for the subsidised ticket option end up buying full-price tickets instead, simply because the app provides a better user experience than the main website. And some users who have aged out of the under-30 bracket continue to buy tickets through the app. These are positive early signals, but the Sales and CRM Manager was careful about drawing conclusions:

It's hard to tell what long-term effect it's going to have for the next years.

-Interviewee 3

The external IT partner identified the core unresolved question directly:

They want to get people in the door; they want to cultivate them and get them to start loving opera. And then once they age out, they then have another problem, which is how do they hang on to these people?

-Interviewee 1

Concluding from the interview data and the app logic, a three-stage model could be observed: acquisition, cultivation, and retention. The first and second stage seem to be functional, whereas the status of the third stage is yet to be defined, partly because the programme is too new to generate retention data, and partly because the loyalty crisis affecting the sector as a whole, which will be described in the sub-chapter 5.3.4. (*Loyalty*).

5.2.3. The Data: What Can Be Measured

The BSO has invested substantially in digital platforms and audience engagement tools since 2021. A recurring question across all interviews, however, is whether the impact of these investments can actually be measured. This can be understood as a consequence of fragmented data systems, methodological limitations, and the fact that audience behaviour is shaped by many variables at once, which makes it difficult to isolate the effect of one particular initiative.

The Sales and CRM Manager identified the most critical gap:

We don't have any tracking pixels implemented, so we don't have any conversion data.

-Interviewee 3

This means the institution cannot track whether social media engagement leads to ticket purchases. It knows, however, how many people follow its channels and interact with its content, but cannot determine whether that activity results in attendance.

What the BSO can measure is more limited: total ticket sales, the 20-30% increase in <30 ticket purchases since the app launched, over 11,000 subscribers, platform return rates, geographic distribution of registrations, and app usage data. These are useful metrics as they can describe how the tools perform, but they do not describe whether the tools are achieving the institution's broader goals regarding the audience diversification.

As already mentioned, even where data exists, isolating the effect of any single initiative is difficult. The Sales and CRM Manager reflected on this:

We had lots of new visitors during the last years... But I can't really tell you if it's only because of the new formats or the new digital ones? Or also because there were tickets available. And also, there's a totally different programme... So, I think actually it's a little bit of everything.

- Interviewee 3

Programming changes, ticket availability, digital initiatives, and leadership changes have all happened simultaneously since 2021. Separating their individual effects is not possible with the current infrastructure.

The IT partner of the BSO explained the technical reason:

The ticketing systems are a little old. They're just databases, right? And they sit on a screen at a dumb terminal in a box office.

-Interviewee 1

The BSO operates three separate data systems: ticketing and CRM, the app database, and campaign tracking tools, which are not connected to each other. Survey-based approaches face a further issue. The Sales and CRM Manager described the selection bias:

Those people who are more engaged with the opera house are more likely to take 15 minutes. Someone who visited once - I think it's less likely.

-Interviewee 3

The people whose data would matter most: first-time visitors, occasional attenders, new and diverse audiences are precisely those least likely to respond. The institution therefore cannot reliably measure whether its audience composition is changing over time.

The Sales and CRM Manager summarised the situation plainly:

It's quite hard to measure... It's the main question we all have.

-Interviewee 3

This is not a problem unique to the BSO. The IT developer confirmed it is characteristic of the sector more broadly:

We're just not there yet, [we're] years away from unified data enabling comprehensive analytics.

-Interviewee 1

The measurement gap affects this research directly. Whether digitalisation contributes to audience diversification cannot be answered from the data currently available, as the systems to track it are not implemented yet. The relevant question becomes not only whether digitalisation democratises access, but also what data would be needed to answer that, and why it remains difficult to obtain.

5.2.4. AI Adoption: Craftsmanship over Quick Solutions

Of all the topics covered in the interviews, AI adoption produced the most consistent responses. Across all four interviewees, spanning internal staff, an external IT partner, and the original strategy architect, the position is the same: AI is not currently a meaningful part of the BSO's digital operations, and the sector as a whole is not ready for it. The reasons behind this convergence, however, are more varied and more structural than simple reluctance.

The Digital Projects Manager described the institution's practical experience with AI tools directly:

For the time being, nothing has really been a stepping stone, because anything that we've tried was never enough, never, let's say aesthetically satisfied enough.

-Interviewee 2

The BSO has tested AI for specific tasks (e.g. season preview image generation), and found the output insufficient for its standards. The reason the Digital Projects Manager offered goes beyond quality alone:

I think the buzz word is really craftsmanship. We cannot, on the one hand, pay somebody to create every shoe on stage by hand... and then say that a machine rendered me an image... It feels weird.

-Interviewee 2

This articulates the broader institutional values and the brand foundation of the BSO. Its product is built on artisan quality, as every production element is created to a standard that defines the institution's identity. Introducing AI-generated content into that environment creates an internal contradiction that is not only aesthetic, but primarily reputational. The institutional response is to wait until AI quality reaches a threshold that is consistent with the brand, a timeline the Digital Projects Manager estimated at two to three years, at minimum. The Sales and CRM Manager confirmed the same experience from the communication side:

We tried to sometimes use it for text or stuff like that, but it's not as good as we want it to be. Right now, we don't see it as a big part of our work.

-Interviewee 3

They also noted that artist resistance to AI is broad and consistent within the institution:

I would say every artist is really sceptical. Regarding all the artistic work... I don't think that anyone tells any artist "You have to use AI."

-Interviewee 3

The external perspective adds a technical dimension to this picture. The IT partner of the BSO identified infrastructure as the primary blocker, not quality standards or cultural resistance, but the basic data conditions required for AI to function usefully:

This is more than just having AI help you write 50 social posts, right? It's got to be able to access all the data and help you process it.

-Interviewee 1

As described in the previous chapter, the BSO currently operates three disconnected data systems. AI tools designed for audience analysis, personalisation, or campaign optimisation require unified, accessible, and structured data to work. Without that foundation, meaningful AI integration is not technically feasible regardless of institutional willingness. The same interviewee made the dependency explicit:

Until those ticketing providers sort of level up and provide ways to get the data out... used by AI... That is a problem.

-Interviewee 1

They also described the broader sector pattern: awareness of AI is present, but concrete use cases are not:

There is a lot of trepidation about going all in on any sort of AI... They don't really know what that could be. At the moment people are still very laser focused on using the technology to reach the audiences. Not a proven use case yet for what it can do for them.

-Interviewee 1

The original digital strategy architect offered the longest timeline and the most structural explanation. When working at the BSO in 2021-2022, AI was not yet on the agenda, as LLMs (Large Language Models such as ChatGPT, Gemini, etc.) had not been released, and the topic was not present in the sector. But their current assessment, based on work with multiple cultural institutions, is that the gap between where the sector is and where it would need to be to use AI effectively is considerable:

In my opinion, opera houses or cultural institutes will not talk about it in the next 10 years. They are far away from understanding... Getting an institution who can really participate or get value out of this... they are far, far away.

-Interviewee 4

A specific regulatory barrier reinforces this. According to original strategy author, a publicly funded institution operating under Bavarian state governance, the BSO cannot freely use US-based AI tools for official matters:

You can't use ChatGPT in a public opera house, because the ministry says no - it's American. It's not in the European Union.

-Interviewee 4

European alternatives exist, but the infrastructure required to use them responsibly (data governance frameworks, technical integration, staff capacity, etc.) is not yet in place. This creates a cycle where the institution cannot experiment without infrastructure, cannot build infrastructure without proof of concept, and cannot generate proof of concept without being allowed to experiment. As the original strategy author put it:

If you don't have the infrastructure, you can't improve some proof of concept... You aren't allowed to use it. That makes the barrier or the gap even bigger.

-Interviewee 4

Despite this, the same interviewee was the most optimistic about AI's potential in the sector, precisely because the resource constraints that make human-intensive work so difficult are also the conditions under which AI could deliver the most value:

AI can really do a lot of stuff for efficiency and for better results, especially when you lack resources - which is a problem in the cultural sector. So, it could be a really, really big chance.

-Interviewee 4

The overall picture across all four interviews is one of informed caution rather than ideological resistance. The BSO is not opposed to AI, as it has tested it, found the output insufficient for its current quality standards, and identified the conditions under which adoption would become viable. Those conditions include higher and more consistent

output quality for creative applications, unified data infrastructure that would allow AI tools to function meaningfully, regulatory frameworks suitable for publicly funded institutions operating under state governance, and at least some proven use cases within the opera and performing arts sector. None of these conditions are currently met, and several depend on developments (in ticketing infrastructure, EU data regulation, and sector-wide experimentation) that are largely outside the BSO's direct control. Until that foundation exists, the institution's approach is to continue developing competence in the digital tools already in use, rather than introduce a layer of complexity that the current organisational and technical infrastructure cannot yet support.

5.2.5. Digitalisation: Where It Can't Help Anymore

Digital tools have demonstrably expanded what the BSO can do in reach, in content, in communication, among others. But the interview data is equally consistent on where those tools reach their limits. Several of the most important challenges the institution faces are structural, economic, or cultural in nature, and cannot be resolved by digital means alone, regardless of how well those tools are designed or implemented.

The most fundamental limit is the live experience itself. The Sales and CRM Manager put it directly:

This life feeling you will never get during a digital format. So, if you don't get the people to really step over this... through the door... Maybe there is an ending.

-Interviewee 3

Streaming platforms, behind-the-scenes content, and social media can generate awareness and interest. However, for an institution whose core product is a live performance in a physical space, digital engagement that never converts to physical attendance has a limited scope:

I think it can be interesting. It can be funny... "Oh yeah, maybe I will go there." But if it doesn't get you to the point where you really do it, maybe sometimes it gets a little bit irrelevant after some time for those people.

-Interviewee 3

The external IT partner of the BSO framed this in economic terms. Opera is a perishable product: an empty seat on a given night represents revenue that is permanently lost:

You've got performances with seats and if that seat isn't filled, that money is lost and the potential for that revenue is gone and it's never going to return.

-Interviewee 1

Digital reach is in principle unlimited, whereas the physical capacity is not. The economic model of opera remains tied to filling seats, and no number of streaming subscribers or social media followers changes that constraint. This creates a ceiling on what digital tools can contribute to institutional sustainability, regardless of how effectively they are used.

On the question of cultural distance, the external IT partner was equally clear:

I wish that it could be solved by just technology alone. But it doesn't. Every little bit helps - not being afraid of engaging with technology, democratising access - you can do both. But it doesn't solve it.

-Interviewee 1

The people for whom opera feels most remote, those with no prior cultural contact with the art form, for whom it is not part of their social world, are not reached by digital tools in any meaningful way. Better apps and more engaging social content do not change the fundamental perception that opera is not for them. That perception is shaped by social factors: class, education, cultural background, community norms - all which digital communication cannot address directly.

The original digital strategy architect offered a more nuanced position on the physical-digital boundary. They did not see physical attendance as the only valid outcome of digital engagement:

It's not the question for me - it's the fascination spark of the opera getting to the people. And for me, it's completely OK that people don't come physically to the theatre.

-Interviewee 4

But they also acknowledged the institutional tension this creates:

The question is whether the BSO can survive over the long term without the physical context, because the fascination of opera is physical. It's those overwhelming, goosebump-making experiences when you hear and you see and you feel and you smell.

-Interviewee 4

The conclusion they proposed is maintaining a connection between the two: digital as a gateway and an independent channel simultaneously, rather than a substitute for live attendance.

They also identified what they considered the hardest practical challenge in digital cultural communication - the work of translation. Placing opera content into a digital space and expecting it to perform is not sufficient, since the content has to be rethought for each platform and context:

It's always the simplest way just to take the art or the opera and put it in a digital space. But it doesn't work. You have to condense the fascination behind the artwork and then you have to know the social media platform or the new kinds of communication. And then you have to translate - and then it can spark again, but in this new context.

-Interviewee 4

This translation process is, according to their expertise, the most demanding of digital cultural work. It requires simultaneous fluency in the art form and in the logic of digital platforms, which change continuously:

That's the hardest thing - because you always have to reinvent it, because social media and digital communication reinvent itself over and over again. You have to try a lot and you have to fail, and then some things work and some things don't.

-Interviewee 4

Taken together, the interview data points to a consistent conclusion: digitalisation is a necessary and valuable part of the BSO's strategy, but it operates within limits that are structural rather than only technical. It cannot replace the live experience, resolve the economic model's dependence on physical capacity, overcome cultural distance for those furthest from the art form, nor restore the loyalty patterns of a generation that no longer subscribes in the way previous ones did. What it can do is to expand geographic reach, lower some access barriers, build brand awareness, and create new forms of engagement. It should be, therefore, understood as one component of a broader institutional response rather than a complete solution.

5.3. Audience Engagement

5.3.1. Competition (Re)definition

One of the significant conceptual shifts visible in the interview data concerns how the BSO understands its competitive environment. The traditional frame, opera houses competing with each other has been largely replaced, at least at the strategic level, by a much broader understanding of what the institution is actually competing against.

The Digital Projects Manager elaborated following on this point:

We are not competing with other opera houses. We are competing with Netflix, we are competing with BMW, we are competing with Dior, we are competing with luxury markets, hotels, golfing, whatever. We are competing with the experience economy.

-Interviewee 2

The competition, as they framed it, is not for a fixed opera audience but for time and attention. The question a potential audience member faces on any given evening is not which opera house to visit but what to do at all:

I'm not competing with the Viennese opera. I'm only competing with what is around the corner and what could also capture their attention. Attention tonight or tomorrow night?

-Interviewee 2

This framing operates therefore on two levels simultaneously. On the brand level, the BSO competes with luxury goods and experiences (BMW, Dior, etc.) in the sense that it is positioning itself as a premium cultural experience for an audience that has multiple high-quality options for spending. On the attention level, it competes with Netflix, restaurants, and the simple option of staying home, particularly for younger and less committed potential audiences who have no established relationship with the institution.

The Sales and CRM Manager arrived at a similar conclusion, though the path there was more gradual. Asked at the start of the interview who the BSO's main competitors are, they initially named other opera houses and festivals. As the conversation developed, the framing shifted:

I would say it's more like everything you can do during your free time... Regarding digital things, I would say it's of course also Netflix, Amazon Prime. All those streaming platforms.

-Interviewee 3

The process within a single interview from sector competition to attention economy, reflects a broader shift in institutional thinking that has not yet fully stabilised at all levels of the organisation. Strategic leadership has internalised the experience economy framing, but operational staff are in the process of doing so.

The external IT partner mentioned a structural analogy that further defines the approach to competition:

An opera company is more like an airline than a museum. Because you've got performances with seats and if that seat isn't filled, that money is lost.

-Interviewee 1

The same interviewee connected this to Baumol's cost disease, the economic principle that performing arts organisations regularly face (structural cost inflation without the productivity gains):

You can't perform an opera faster through technology... The art is the art and must be performed the way it is... you cannot create efficiencies around the creation of the product.

-Interviewee 1

This can be perceived as harsh economic context in which an institution with structurally rising costs and a fixed physical capacity competes against industries that can scale indefinitely and price flexibly. Furthermore, the competition redefinition could have direct implications for digital strategy. If the primary competition of BSO is the attention or experience economy, as well as and luxury brands, rather than other opera houses, then digital tools are equally important for engaging existing opera audiences more efficiently, as well as for reaching people who would not otherwise consider opera at all, on the platforms and in the formats those people already use.

5.3.2. Access

Access to the BSO operates on three distinct levels, each with different barriers and different responses. Much of the empirical data underpinning this section has been introduced in previous chapters (the audience profile in Chapter 4, the economic ceiling in section 5.1.1, and the platform specifics in sections 5.2.1 and 5.2.2). This section therefore draws those threads together through the lens of access, understood here across three distinct levels: informational access, opportunity access, and the participation itself.

Informational access concerns visibility and legibility, in other words, whether people know the institution exists and feel it is something they could engage with. The results for this layer are visible. Staatsoper.tv reaches registered users from Germany, Japan, the US, the UK, and France, among other countries. Behind-the-scenes formats make the institution more legible to people with no prior connection to it. For long-standing patrons who can no longer attend physically, the platform has addressed a real gap: the Digital Projects Manager described receiving messages from older clients who had waited years for exactly this kind of access.

We've had people write in to us and said, "well, at last I'm able"... a lot of older people who have been clients for a very long time, who maybe have reached an age where they can't go out of the house very regularly...

-Interviewee 2

The institution also frames awareness itself as a valid outcome, independent of whether it converts to attendance. The external IT partner noted that network effects multiply this reach further: each engaged user brings on average one and a half additional people into contact with the institution through their social connections.

Opportunity access concerns whether attending is practically and financially possible. The <30 app is the primary instrument of this layer. 62% of its users have a personal net income below €1,500 per month, a somewhat different profile from the general

audience. However, over 97% come from Germany, with 64% from Munich, mirroring the geographic concentration of the broader audience (Interviewee 3). The scheme lowers the economic barrier within a specific age group and a familiar radius. However, the economic ceiling, the 5% capacity cap for reduced-price-tickets, is a budgetary constraint, and not a demand one, as established in section 5.1.1.

Participation, an actual change in who attends, is where the picture is least clear. The BSO's 2023 internal data shows a profile not meaningfully different from what preceded the major digital initiatives. The Sales and CRM Manager has directly described its audience as not diverse, and as a mostly highly educated people.

Whether this reflects the limits of digital tools, the economic model, cultural distance, or the measurement infrastructure is the subject of the following two sections.

5.3.3. Diversity

The question of audience diversity, especially within the younger audience, produces one of the sharpest contradictions in the interview data. Two people working within the same institution, with access to the same audiences and the same initiatives, reach relatively different conclusions. The Digital Projects Manager described a heterogeneous audience:

There is not one target group... You've got the one who studies theatre, the one who's always there because he loves Wagner... the 25-year-old lawyer... but you also have this artsy person who's not necessarily connected to the opera.

-Interviewee 2

The Sales and CRM Manager was more direct:

It's not actually diverse. Unfortunately... It's mostly people with higher education.

-Interviewee 3

Both observations can be accurate simultaneously, but they are measuring different things. The Digital Projects Manager is describing motivational diversity, whereas the Sales and CRM Manager is describing socioeconomic and demographic diversity.

This distinction is important due to the stated ambition of the 2021 digital transformation, which was precisely to reach audiences beyond the existing base. The digital strategy developed that year explicitly identified a "new and diverse audience" target group (distinct from the existing core of arts-and-culture regulars), including segments such as climate and sustainability activists, left-leaning humanists, and economically liberal entrepreneurs. The original digital strategy architect described the intention:

We had three core audience segments... the core audience we had - really old and rich people, to say it simply; the occasional visitors; and the non-visitors. And for the non-visitors, the goal was transformative: digital touchpoints and relevance framing. Fundamental transformation of appeal, not just better marketing.

-Interviewee 4

However, they also acknowledged what happened in practice:

In practice the institution was actually more comfortable deepening relationships with the existing audience than fundamentally transforming its appeal to non-visitors.

-Interviewee 4

The Sales and CRM Manager confirmed that Munich's own demographic context limits how far diversification can realistically go:

Munich is not that diverse either.

-Interviewee 3

The hardest group to reach, as the same interviewee identified, is not people who have considered opera and decided against it, but people for who do not register it even as a possibility:

The people that have absolutely no contact with culture at all... For them, everything we do is so far away from their daily life. I think they're not even thinking about going to a concert.

-Interviewee 3

The external IT partner framed the broader perception problem facing the art form:

Opera houses in particular have a very specific problem... Grand Opera is like out of reach of a young person... Somebody who isn't rich or who isn't cultured... It's a very specific product with a very specific sort of amount of baggage around it.

-Interviewee 1

The BSO does pursue outreach beyond digital channels, including school visits, neighbourhood engagement, community workshops, VR and AR experiences, etc. These efforts are meaningful, but it is still to be determined to what extent it is possible to produce a change in audience composition. The Sales and CRM Manager acknowledged the debate happening across the sector:

There are some opera houses who say, "well, let's face it, we're never going to get them and maybe that's OK." We don't agree totally with that.

-Interviewee 3

5.3.4. Loyalty

The loyalty question is where the interview data is most urgent in tone. All three internal and external interviewees who addressed it converged on the same diagnosis:

the traditional loyalty model that sustained opera houses for decades is collapsing, and no replacement mechanism is yet in place.

The Digital Projects Manager described the generational shift with a simple analogy:

They [the older generation] have this newspaper coming everywhere, every day, and they didn't even consider if they could buy a different newspaper... Those kinds of clients don't exist anymore and won't exist in the future.

-Interviewee 2

The automatic renewal behaviour, subscribing year after year without question, has been disappeared along with the generation that practised it. The Digital Projects Manager was direct about what this means:

For a very long time everybody relied on the ever coming, the one who had this subscription and would definitely come to the same subscription next year. That clientele is dying.

-Interviewee 2

The subscriber base is still seen as a current source of stability, but is composed largely of older, long-standing patrons. Their continued presence is valuable and economically significant, but cannot be perceived as a foundation that will sustain the institution indefinitely.

The younger generations, on the other hand, have not developed equivalent subscription habits. The Digital Projects Manager noted:

We won't be able to reactivate that clientele because they won't be there anymore and because younger audiences did not subscribe. Not in the same way we did 20 years ago.

-Interviewee 2

Younger audiences prioritise flexibility and optionality, representing a structural mismatch between the institution's revenue model and the behavioural patterns of the audience it needs to cultivate.

The external IT partner added a dimension drawn from the US context that sharpens the picture further:

Once people get married and start having kids, they just stop coming. At all... And you lose them for like 20 years. And then they don't come back until late 50s, early 60s.

-Interviewee 1

This creates a structural 20-year gap in audience engagement: early 20s to late 30s represent active potential attendance; the 30s to late 50s are largely lost to life-stage pressures; and the return comes at retirement age, when the cycle reconnects with the traditional subscriber profile. The <30 app, however, addresses only the first phase of this cycle.

The external IT partner also noted a telling symptom of the sector's response to this crisis: the definition of "young audiences" has been stretched, with some US venues now offering youth pricing up to the age of 45:

These sort of young audience development programs... they're like pushing 45 now... when is a young audience member just an audience member, really?

-Interviewee 1

The Sales and CRM Manager framed the institutional response to all of this in terms of a long-time perspective:

Speaking about the audience in 20 or 30 years, definitely our main goal has to be to get the attention of the younger ones right now.

-Interviewee 3

The 20-30-year timeframe is significant regarding a generational replacement. Digital tools support that by lowering barriers to entry and maintaining visibility among younger audiences. Nevertheless, as already mentioned before, they can hardly produce loyalty where the broader social and behavioural conditions for it do not exist, and they cannot bridge the 20-year life-stage gap that removes engaged young audiences from the institution's reach precisely when they might be deepening their relationship with it.

Chapter 6. Discussion and Recommendations

This chapter addresses the central research questions through a series of analytical questions derived from the empirical findings and the theoretical framework. Each question is answered by drawing on the interview data, institutional documents, and the relevant theoretical literature.

6.1. Does Digitalisation Expand Access to Opera?

The short answer is yes, but the nature of that expansion needs to be defined precisely. Drawing on McCarthy & Jinnett's (2001) distinction between broadening, deepening, and diversifying participation, the BSO's digital initiatives have demonstrably achieved the first two while leaving the third largely unaddressed.

Broadening, reaching more people from existing or adjacent target groups, is most visible in the <30 app. The scheme introduces a new segment of younger audiences who share the socioeconomic profile of the broader audience but would not previously have attended at full price. The app lowers the financial and practical barrier to a first visit, and the 20-30% increase in under-30 ticket purchases documented since its launch reflects this. Kawashima's (2006) extended marketing type is relevant in this context, as the app targets potential and lapsed attendees with an improved access proposition, primarily for financial and audience engagement purposes.

Deepening, increasing the engagement of existing audiences, is Staatsoper.tv's primary function. The platform gives regular patrons more content, and more contact with the institution between potential visits. The 80% return rate confirms that it retains engaged

users rather than simply attracting passive browsers. For mobility-restricted or geographically distant patrons, it also maintains relationships that physical attendance alone could not sustain. This aligns with Kawashima's audience education type, offering existing audiences the same product with additional educational and contextual depth.

Verhoef et al. (2021) define digitalisation as the transformation of existing processes to enable new possibilities, and on the access dimension, this is what the BSO's digital tools have achieved. Information about the institution is more widely available, the purchase process is simpler, and content reaches people who could never attend physically.

The aspect of diversifying participation, changing who accesses the institution in terms of socioeconomic and cultural composition, will be examined in the section.

6.2. Does Digitalisation Lead to More Diverse Audiences?

Not substantially. As documented in the BSO's 2023 internal survey, the audience composition is not fundamentally different from what preceded the major digital initiatives. Understanding the reasons for that requires separating two distinct barriers, each with different causes and different solutions:

The first is *economic barrier*. Diversifying the audience in socioeconomic terms requires a different funding model: more public subsidy directed explicitly at new-audience development, more economic benefits for lower-income groups, and a pricing structure that does not limit subsidised access at 5% of capacity for budgetary reasons. This is a policy question, not a digital strategy question. The Fribourg Declaration on Cultural Rights (2007) places the obligation to maximise access to cultural participation on public sector actors, which is a task that is in the funding and governance level, not solely at the level of communication tools.

The second one is a *cultural barrier*, or *cultural distance*, the condition in which opera does not register as a possibility for people outside the institution's existing cultural

sphere. This barrier has been built over decades, partly as a consequence of the economic model itself: as ticket prices rose and the art form became associated with upper-middle class identity, lower socioeconomic groups gradually stopped considering it relevant to their lives. Eurostat's (2024) cultural participation data confirm this pattern at the European level: participation rates correlate strongly with income and education across all countries measured.

Additional specific finding deserves attention as well. The audience segmentation analysis conducted for the BSO, using Sinus Milieus and audience data to identify target groups, was not meaningfully translated into diversification policy. Although these initial steps were conducted, real efforts to reach structurally new segments did not follow the ambition stated in the 2021 Digitalstrategie. As the author of original digital strategy noted, the institution was in practice more comfortable deepening relationships with the existing audience than fundamentally transforming its appeal to non-visitors.

6.3. What Are the Other Limits of Digital Tools?

Beyond the diversification question addressed above, digital tools face two further structural limits that are specific to opera as an art form.

The first is *immersion* and *togetherness*. Shirzadian (2016) identifies these as defining aspects of audience engagement in live music performance: *immersion* as the loss of awareness of everyday reality through total absorption in the experience, and *togetherness* as the feeling of being part of a shared collective event. Both are specific for physical attendance that digital formats cannot easily replicate. The Sales and CRM Manager of the BSO stated this directly: the live feeling of opera simply cannot be transferred to a digital format., or as the original digital strategy author described the physical experience of opera as "overwhelming, goosebump-making".

This also connects to experience economy framework, specifically the *escapist dimension*, which includes active participation and deep immersion, enabling

individuals to temporarily disengage from everyday context (Chai et al., 2022; Tom Dieck et al., 2018).

The second limit is more fundamental. Since opera is a heavily human-dependent, time-based performing art, it makes *Baumol's cost disease* severe. This cultural “product” still cannot be made fundamentally more efficient through technology, and its most valuable properties are the ones most resistant to digital substitution.

6.4. What Structural Conditions Shape the Pace of Changes?

Regarding the digital context, the answer could lie in the distinction between *digitalisation* and *digital transformation*, and what is the defined goal between two of these. Verhoef et al. (2021) define digitalisation as the transformation of existing processes to create new possibilities, while digital transformation is a holistic, organisation-wide process that changes the foundation of how an institution operates. The BSO has achieved significant level of *digitalisation* in the communication, and digital stage (*Online Kommunikation, Digitale Bühne*), including new platforms, new content formats, and new audience tools.

However, it has still not achieved *digital transformation*, as the governance structures, funding model, decision-making tempo, and the audience composition have not changed substantially. The governance lag is the most structural of these obstacles. Ministry planning cycles operate within three-year cycles at minimum, whereas current digital development requires monthly cycles at maximum. By the time a digital decision moves through approval and reaches implementation, the conditions it was designed for, have significantly changed.

Digital leadership literacy is the second important factor. As the original digital strategy author observed, the institution had a determined leadership that created the conditions for digital ambition, but lacked the technical and strategic fluency to evaluate what was required at the infrastructure and governance level. The result was a strategy that could be initiated and developed to certain extent, but not fully institutionally supported.

Potentially valuable observation, deriving from this research, is the research gap regarding the digital leadership in the cultural management, especially in the field of performing arts. It still represents one of the most recent disciplines, and the one where urgent focus is necessary, both in research and cultural practice.

6.5. How Do Institutions Balance Elite Identity with Democratisation Goals?

With difficulty, and mostly in communication rather than in practice.

The BSO's operational response to the elite-inclusive tension is channel segmentation, with different messaging tones and platforms, for different target groups. This is, however, only a solution at the communication level. Kawashima's (2006) distinction between taste cultivation (introducing existing audiences to new experiences), and outreach (bringing participatory arts to people unlikely to attend) is relevant for this context. The BSO predominantly operates in the taste cultivation mode, or as previously mentioned, deepening and broadening within its existing audience groups. Outreach, in the sense of genuinely reaching groups for whom opera is culturally distant, remains limited.

The historical dimension is also relevant. As the external IT partner noted, opera's elite associations are not inherent, as they are a construction of the last 50 to 70 years. Pine & Gilmore's (2011) experience economy framework suggests that the value of an experience lies in its staging, not its intrinsic properties, implying that the elite staging of opera can also be understood as a design choice and not a necessity, and could in principle be redesigned. The external IT partner also proposed radical price reduction as the most direct route to genuine inclusion, a position that would require major changes in economic framework of the institution.

6.6. What Does Loyalty Crisis Reveal?

The loyalty crisis one of the most critical structural problems of the opera field.

Brown & Ratzkin's (2011) Arc of Engagement describes a five-stage process from anticipatory build-up through artistic exchange to long-term impact echo, in which the BSO's digital tools address the early stages of this arc effectively: content builds anticipation, social media maintains contact, the app facilitates purchase. What has not been designed is the mechanism for sustaining the arc across the critical middle period, the 20-year life-stage gap from the 30s to the 50s, when family formation, career demands, and financial commitments systematically pull people away from cultural participation.

No concrete proposal or structured response to this gap exists within the institution. As the Digital Projects Manager acknowledged it, the traditional subscriber, who renewed automatically year after year without questioning the decision will soon no longer exist. Younger audiences require more flexibility and optionally, whereas the loyalty model of the previous generation does not seem adequate.

What this may require is a redesign of the engagement arc itself to incorporate digital touchpoints as integral stages in a continuous relationship. However, this requires treating digital engagement as a relationship management system, and not only as a marketing channel. Furthermore, it requires acknowledging the generational shift, since the current older generation of loyal subscribers is the last one that is not digitally native by default. Future-older-audiences will have grown up with digital media and will expect cultural institutions to maintain relationships fully through it as well. Therefore, it may be concluded that the institutions building those systems will most probably have an advantage in retaining the audiences they cultivate today.

6.7. AI: Should the Institutions Wait, or Act Now?

The BSO's current position on AI is grounded in concrete constraints rather than ideology. Three independent blockers influence this simultaneously: output quality falls below standards of the institution, fragmented data systems prevent the integrated access that process-level AI requires, and regulatory restrictions slow down the implementation of AI tools in publicly funded institutions.

In technoideological terms, the position of prioritising quality over the aggressive implementation, maps this institution more closely onto technoprogressive principles (Carrico, 2006) and HCAI frameworks (IxDF, 2024) than onto technoliberal field, defined by adoption pressure (Fish, 2023).

However, there is a major risk for the cultural sector broadly, if they wait for AI to mature and consequently accept whatever is offered, since tools designed for commercial, efficiency-driven contexts will hardly serve the core values of publicly funded arts institutions. If cultural institutions want AI development that reflects HCAI and technoprogressive principles, they need to be present in that development through public advocacy, sector-level dialogue with technology developers, collaborative research, and early experimentation in controlled contexts. The performing arts sector currently has almost no presence in wider AI development discussions, which means the tools that eventually reach it, will have been shaped by other priorities.

There is also a potential connection to Baumol's cost disease worth exploring. If AI can reduce administrative, logistical, and communication costs within cultural institutions, without impacting the live performance itself, it could partially lower down the structural cost inflation that Baumol identifies. This remains speculative and requires more research, as well as sector-level experimentation and dialogue.

What is needed concretely: more panels and public discussions on AI in the performing arts, new study programmes examining AI in opera and theatre contexts, structured collaborations between cultural institutions and the technology sector, and collective regulatory advocacy for AI frameworks tackling the publicly funded organisations. Institutions that begin building these prerequisites now will most probably be able to integrate AI meaningfully when the tools reach the quality requirements.

6.8. What Does Digital Leadership Require in Cultural Institutions?

The BSO case illustrates what digital leadership can achieve, but also shows what will be required to sustain a digital transformation. Since the arrival of General Director in 2021, a digital department was created and the digital strategy was

commissioned, resulting in the launch of multiple initiatives. This case also shows, however, that digital leadership literacy is relevant equally as digital ambition. In other words, this transformation requires deep infrastructure and governance understanding, which is the foundation that allows vision to translate into wide institutional change.

The economic implications of digital transformation in cultural institutions are significant. If digital tools can reduce operational costs through process optimisation, and more efficient communication, they could contribute to lowering the structural costs that raise the ticket prices. This could also provide economic path to audience diversification that does not depend solely on increased public subsidy:

digital leader → facilitating digital transformation → reducing operational costs → enabling lower ticket prices → broadening socio-economic access.

This pathway is speculative at this stage, as no opera house has demonstrated it at scale, but it represents the potential mechanism through which digital transformation and audience diversification could be causally connected rather than only associated rhetorically.

The institutional disruption this would require should not be underestimated. Full digital transformation of an opera house's operational model would likely involve significant restructuring, changed role definitions, and reduced staff in some areas. In the risk-averse, hierarchically governed institutions, these changes are hardly achievable, leading back to the governance and leadership conditions established in section 6.4.

6.9. What Can the BSO Case Contribute to the Broader Sector?

The BSO is a certainly one of the best-case scenarios in the industry. It has significant resources, committed leadership, multiple active initiatives, strong external partnerships, and an established international brand. However, the constraints documented throughout this thesis persist even under optimal conditions.

The governance lag, capacity constraints, economic model, measurement gaps, cultural distance, and loyalty challenges documented previously are, according to the empirical data, not specific to the BSO. They appear across comparable institutions, often with fewer resources to address them, whereas the BSO makes them visible and traceable due to its institutional scale.

These findings point to several patterns that extend beyond the BSO specifically:

- (1) The distinction between digitalisation and digital transformation has direct implications for cultural policy. Most institutions have advanced the digitalisation, improving the existing processes through digital tools. Fewer have approached the digital transformation, a fundamental change in how the institution operates. This distinction can be relevant for setting realistic expectations and directing resources toward the appropriate level of digital initiatives.
- (2) Digital leadership literacy is an increasingly relevant criterion in leadership development across the sector. Structured and targeted dialogue between cultural institutions and the technology field, dedicated academic programmes, and targeted professional development represent potential paths for addressing this gap at a systemic level.
- (3) Shared data standards and clearer frameworks would strengthen the capacity of both institutions and policymakers to evaluate what digital investment produces. The current inability to distinguish reach from participation limits meaningful assessment of impact.
- (4) Regarding AI, broader experimentation and sector-level dialogue would be necessary for the development of an informed, values-based

institutional position This would shape sector's own experience and needs, rather than solutions from external contexts.

- (5) Most important point of this thesis tackles diversification and loyalty. Research shows that the most structurally significant changes are likely to require policy interventions rather than institutional initiatives alone. Funding models oriented towards diverse audience engagement, more flexible subsidised access structures, and evaluation criteria focused on participation rather than reach, are among the measures that could address the issue that digital strategy cannot resolve independently.

Chapter 7. Conclusion and Suggestions for Further Research

This study examined how digitalisation impacts audience engagement, cultural access, participation, and diversity in classical music institutions. The four interviews answered the research questions to varying degrees. Questions concerning access, audience engagement, and the structural conditions of digital transformation were addressed with considerable depth and consistency, with strong alignment across all four interviewees on the governance lag, capacity constraints, and economic framework. The diversity question was answered primarily from an institutional perspective rather than from direct audience research, which remains a methodological limitation of the study. The AI sub-question was the least empirically developed, since all four interviewees acknowledged the topic, but could not yet speak from broader operational experience, reflecting the early stage of AI adoption in the sector.

The findings offer a complex answer to the main research question. Digitalisation broadens and deepens audience engagement, by expanding the informational access, reaching geographically distant and mobility-restricted audiences, and by lowering barriers for younger visitors through subsidised digital platforms. Nevertheless, it does not seem to diversify the audience, as the socio-economic and cultural composition of

the audience at the BSO has not substantially changed despite four years of active institutional commitment towards digital initiatives. It becomes evident from the research that, for this change, the political will and policy intervention are necessary. It would require a different economic model: more subsidies directed explicitly at underrepresented groups, and pricing structures that do not structurally exclude lower-income populations, regardless of how effectively digital tools expand informational access.

Several questions this study raises could not be fully answered within its scope, and point towards where the field still needs further research:

The most pressing gaps concern digital policy in the cultural field, as well as digital leadership in publicly funded cultural institutions. How governance frameworks can be redesigned to accommodate shorter, more flexible decision-making cycles, and what digital leadership literacy looks like as a concrete competence, are the questions that would benefit from dedicated research. All mentioned factors will most probably have direct implications on how institutions initiate and sustain digital transformation in future practice.

Consequentially, AI in the cultural and creative industries represents a growing but still underdeveloped research area. The technoideological dimension is also relevant: how institutions position themselves in relation to AI adoption, what a values-based and human-centred approach looks like operationally, and whether AI-supported processes could partially decrease the structural cost pressures that define the economics of our field.

Lastly, the psychology of loyalty in the digital age is also a topic with a major impact for this field. The collapse of traditional subscription behaviour seems to be widely observed, but insufficiently understood. How do digital touchpoints shape long-term attachment, and what does loyalty mean for audiences who engage primarily through digital devices? What motivates sustained engagement with a cultural institution in the age of increasing alternatives and declining habitual attendance? These questions

extend beyond the scope of this thesis and represent directions worth pursuing in future research.

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Use of Digital Tools

This thesis was written in Microsoft Word. Research materials were collected and reviewed primarily from Google Scholar, ResearchGate, and Arsca / Uniarts Helsinki Library.

Remote interviews were conducted via Microsoft Teams, and recordings were transcribed using Adobe Podcast and Tactiq.

The artificial intelligence tools Claude (Anthropic) and ChatGPT (OpenAI) were used for grammar, spelling, and punctuation purposes.