



FROM STAGE TO SCREEN

A REPORT FOR PROJECT ARTS CENTRE

Understanding the opportunities,
impact and reach of Irish Digital Theatre

project

A report for Project Arts Centre
by Sinead McPhillips | July 2021

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Introduction

The global outbreak of the Covid-19 pandemic sent Ireland into lockdown in March 2020 and saw all cultural activity ground to a halt. The pandemic turned everything on its head and disrupted our cultural norms.

Despite all the challenges, and with the help of technology, we've seen a breaking down of geographical barriers enabling access to arts and culture in ways we could never have imagined 15 months ago. This report examines one such example.

In January 2021, *The Approach* by Mark O'Rowe, starring Cathy Belton, Derbhle Crotty and Aisling O'Sullivan, was broadcast live from Project Arts Centre in Dublin.

Presented by Landmark Productions, in partnership with Project Arts Centre and St Ann's Warehouse in New York, *The Approach* saw audiences tune in from all over Ireland and around the world. It was presented with the support of the Arts Council of Ireland and Culture Ireland.

The live broadcasts of *The Approach* took place on 21, 23 and 24 January, 2021 and were available to watch on-demand from 24-31 January.

Acknowledgements

This research report was commissioned by Project Arts Centre and funded through the Arts Council's Capacity Building Support Scheme. It set out to understand the opportunities, impact and reach of digital theatre and was based on the live broadcasts of *The Approach* by Mark O'Rowe, presented by Landmark Productions in January 2021.

Project Arts Centre is grateful to audience members who shared their experiences and offered feedback through interviews and comprehensive online surveys. Special thanks to Anne Clarke of Landmark Productions who facilitated this research through the presentation of *The Approach*.

About Project Arts Centre

Project Arts Centre is Ireland's leading centre for the development and presentation of contemporary art, dedicated to protecting and nurturing the next generation of Irish artists across all forms of the performing and visual arts. Project Arts Centre is proud to be supported by the Arts Council and Dublin City Council.

For more see projectartscentre.ie



Foreword from Project Arts Centre

For those of us working at Project Arts Centre, the changes of the last 15 months have provided us with an opportunity to think more deeply about our vital role as a place where artists and audiences come together.

While it has been heartening to see the outpouring of support for our organisation from our many, varied audiences, we miss being able to welcome them back to our building in their usual numbers. Project has worked to engage our audiences in lots of different ways over the last 15 months, and this presentation of Mark O’Rowe’s *The Approach*, with Landmark Productions and St Ann’s Warehouse in New York, was a major highlight. It has been incredibly useful to have had the opportunity, thanks to support from the Arts Council, to engage Sinead McPhillips in a detailed research project with the audiences for this work.

This production was presented in a very specific time and context (January 2021). We learned a huge amount about how our audiences have been impacted by the pandemic, how we need to build capacity to grow and diversify our audiences, and how projects like this have created opportunities for access by audiences who cannot attend our venue on a regular basis.

As we develop a new 5-year plan (2022-2026) and launch a new policy, *Working Towards Equality, Diversity & Inclusion*, this research will be vital in setting new standards for how we engage with our audiences in innovative ways. It will inform how we develop and communicate our programme, and how we connect a greater number of people with the fantastic artists who make their work in and around the Big Blue Building.

Cian O’Brien
Artistic Director, Project Arts Centre



Setting the Scene

In January 2021, Ireland was under a strict Level 5 lockdown, which carried with it the highest level of restrictions. There was little or no theatre output, and a very slim prospect of live theatre or events returning in the subsequent months. Audiences were missing theatre and there was a definite appetite for same.

Under the government's Plan for living with Covid-19, all venues were closed to the public and working from home, where possible, was advised. Filming under certain circumstances was considered an essential service and it was therefore possible to proceed with the live broadcasts of *The Approach*.

The COVID-19 Guidance for Arts and Culture permitted *'the filming, or other recording of performances in a theatre, concert hall, museum or art gallery, without an audience present, for the purposes of broadcasting such performances on the internet, radio or television'*.¹

After careful research, an integrated streaming and ticketing platform, TicketCo, was chosen to broadcast *The Approach* to audiences all around the world.

¹ *Covid-19 Guidance for Arts and Culture* from the Department of Tourism, Culture, Arts, Gaeltacht, Sports and Media.

Executive Summary

The last year has seen unparalleled changes in relation to how audiences engage with cultural experiences, both online and offline. Prior to the pandemic, we had already seen some pioneering initiatives in the area of digital theatre, most notably the National Theatre London's, NT Live. Since then, as a sector we have been exploring the opportunities this new online world can offer us.

The Approach livestreams came at what appeared to be the perfect time. Audiences were hungry for a cultural lift during some of the darkest days of the pandemic; they were missing live theatre and they wanted to feel part of a communal, instantaneous experience they could enjoy safely from their homes.

While online theatre was never intended as a replacement, nor a salvation for live theatre, it has opened up new ways of experiencing theatre and widened the scope for arts organisations and audiences alike. Many welcomed '*being able to see the actors up close*' and enjoyed having the kind of access that goes beyond what we usually understand to be a purely physical construct.

Executive Summary

Organisations have noted a wide range of benefits from venturing into this new online world, including reaching existing and new audiences both at home and across the globe, and discovering various ways to monetise online.

What has also emerged is a clear appetite for high-quality Irish theatre from overseas audiences. In this research, both US and UK audiences expressed their appreciation at being able to access Irish theatre so readily.

The live performance remains the core of theatre's unique appeal. However, the conclusions derived from the findings of this research point to both opportunities and considerations for the theatre sector and beyond.

The digital landscape continues to evolve and we are gaining a greater understanding of who consumes culture in the digital world, and very importantly why. Even in a post-pandemic world, embracing a hybrid model of both in-person and online offerings could play a part in sustaining arts organisations into the future.

Executive Summary: Key Findings

- **Audience Profile**

The surveyed audience comprised 78% female and 21% male (1% non-binary/other); 82% of the livestream and 87% of the on demand survey respondents were aged 46-66+. 18% and 13% respectively were aged 18-45. The most prominent ethnicities (91%) were *White Irish* or *Any White Background*.

- **Satisfaction**

90% of the surveyed livestream audience and 93% of the surveyed on demand audience said the quality of the performance was excellent. Many commented that it was a very suitable play for online, together with the calibre of the actors and writer/director, and the quality of the filming.

- **Geo-Location**

Audiences tuned in from 44 countries across 6 continents. The top three locations after Ireland were USA, UK and Canada. Of the Irish audience, 70% booked the livestream and 18% the on demand. 74% of on demand bookers were US-based. (Source: TicketCo box office reports).

- **Reasons for Watching**

The top four motivators for watching were; 1) The desire to support live theatre 2) The fact that it was being performed live 3) The cast and writer/director and 4) to be entertained.

Executive Summary: Key Findings

- **Ticket Sales**

64% of overall ticket sales were for the livestreamed shows and 34% for the on demand..

- **Ticket Prices**

For the livestreams, 42% bought the €15 concession ticket (32% for on demand) and 36% bought the standard ticket (68% on demand). There were five price points for the livestreams ranging from €15 - €50 and two for on demand (€15 and €20).

- **Ticket Prices Satisfaction**

49% of the surveyed livestream audience were happy to pay what they'd normally pay at the theatre, while 35% chose a lower price as it was online. 87% of on demand bookers were happy with the two options presented. Given 74% of bookers were US-based, where ticket prices are higher, this might account for the higher satisfaction rating.

- **Booking Patterns**

54% booked in the final 48 hours with 36% of those booking on the day. 13% booked more than one week in advance. The trend we're seeing is much later bookings for online work.

- **Booking Process**

91% found this easy or very easy.

- **Monetising Online**

Online broadcasting has provided a robust, reliable and secure platform for theatres to monetise performances. Opportunities to be explored, beyond ticket prices, include upselling, gift cards and donations.

Executive Summary: Key Findings

- **The Live Element**

62% of the surveyed livestream audience felt it was very or extremely important that it was performed live. The chat function enabled people to see viewers' comments during the stream from all over the world adding to that feeling of a shared live experience.

- **Accessibility**

Offering a captioned performance ensured the show was accessible to a more diverse audience, including the d/Deaf community. The captioned show accounted for 12% of all tickets booked; 60% of these bookers were US-based .

- **The Future**

86% were very or extremely interested in engaging with online events in the future with theatre and music events ranking highest. 43% would consider a mix of online and in-person, 39% were more open to watching shows online but their preference is to see them live. 16% said they would only choose to watch shows online that they couldn't get to in person.

- **Barriers**

Possible threats to watching shows online in the future included not knowing how to find out about them, online fatigue, not enough performance options and poor WiFi connections. Interestingly, ticket prices ranked lowest.

THE RESEARCH

- Research Objectives
- Survey Methodology
- Survey Respondents and Results
- Ticketing and Audience Experience
- The Live Element and Online Engagement
- Barriers and looking ahead

Research Objectives

Project Arts Centre and Landmark Productions set out to use *The Approach* as the basis from which to explore models of digital capture, dissemination and monetisation. Project Arts Centre commissioned this research to understand audience's needs and how best to engage the widest possible digital audience, the best route to market for live digital content and the price point for quality live theatre broadcasting.

This research aims to inform how Project Arts Centre can:

- Create a clear long-term strategy to build audiences for work online
- Continue to support and present the work of artists digitally to as wide an audience as possible
- Understand how and why audiences are engaging with online theatre
- Better understand audience behaviours and experiences around online theatre

While the research is focused primarily around theatre, and is based on the live broadcasts of *The Approach*, it also contains information that gauges the appetite for engaging with arts and culture now and into the future.

It is hoped that the data gathered, and the conclusions drawn in this report, will assist Project Arts Centre to better understand its digital audiences and to find innovative ways to expand its reach and engagement.

Research Methodology



Research methods employed:

- Detailed online audience surveys
- One to one interviews conducted via Zoom
- TicketCo box office reports
- Social media analysis
- Desk research
- Secondary data - various research reports. See Appendix 2.

1,386

Total Respondents
Survey 1

170

Total Respondents
Survey 2

15

One to one
Interviews

Quantitative Research

- Survey 1 to live-stream audience using Survey Monkey.
1,006 respondents.
- Survey 1 to on-demand audience using Survey Monkey.
380 respondents.
- Survey 2 to those who agreed to take part in further research.
170 respondents.

Survey 1 was issued shortly after the performances at the end of January. Survey 2 (follow-up survey) was issued in March.



Qualitative Research

- Fifteen one to one interviews allowed for more in-depth conversation and acted as a counterpoint to the data gathered from the online surveys.
- Personal email invitations were sent to prospective interviewees and all conversations were recorded, transcribed and analysed.
- The interviews provided deeper insights that could not have been easily gleaned through the online surveys. Topics discussed were:
 - Experience booking tickets and logging on
 - Motivation for booking and watching the livestream
 - Awareness of the event and access to information
 - Enjoyment of the show
 - Specifics around performance times, ticket prices and access
 - Communication with the venue organisers

There was some overlap with the questions posed in the online surveys and these served to legitimise some of the online survey results.

Survey Results

An in-depth survey comprised 26 questions was sent to everyone who watched *The Approach*. A follow-up survey was sent to a smaller sample.

The survey results from the livestreams and the on demand were analysed separately.

1,386 respondents engaged across both surveys and 170 took part in the second survey.

It is important to note the survey demographics. The average across both surveys is 78% female and 21% male.

82% of livestream survey respondents are aged 46-66+ and 87% of all on demand respondents are 46-66+. The average across all surveys for 18-45 is 13% and 86% for 46-66+

Survey Demographics

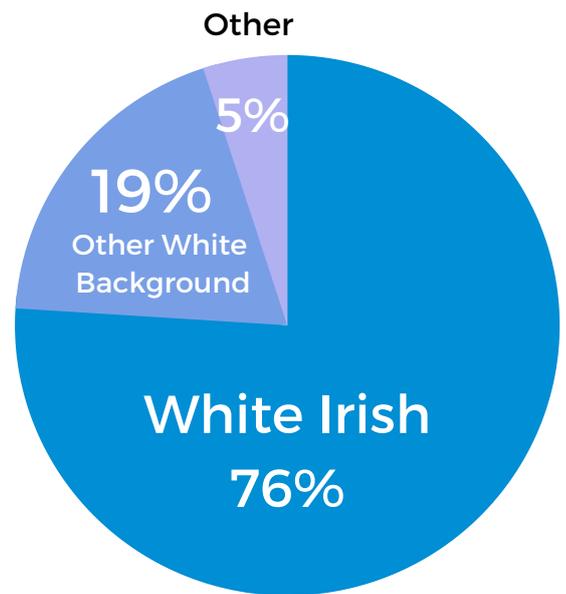
Livestream Audience

Gender

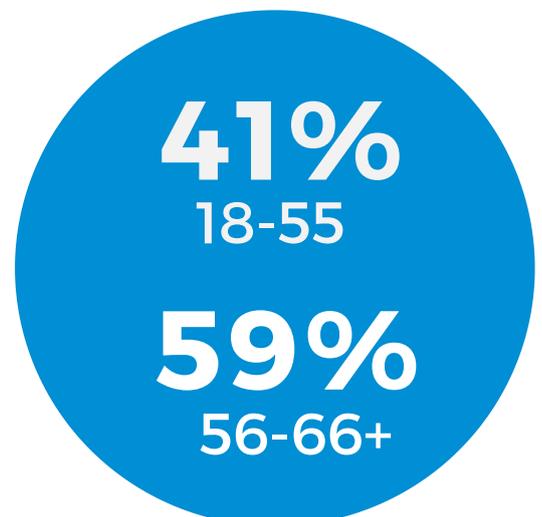
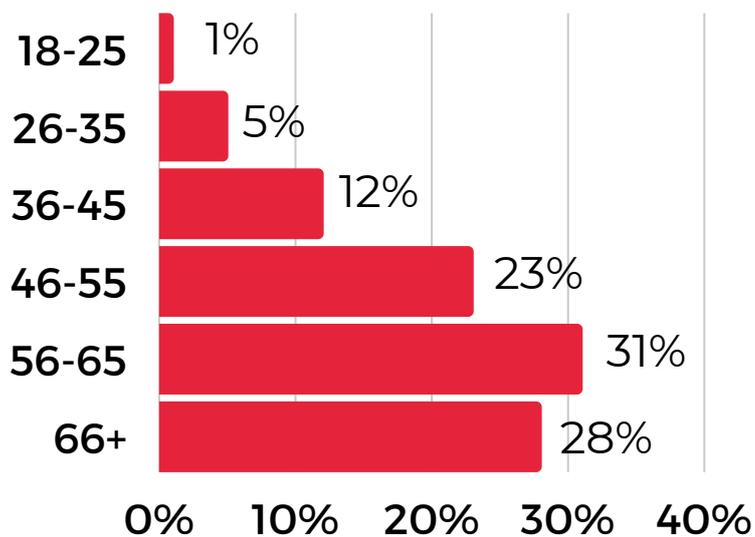


1% Non-Binary / Prefer not to say

Ethnicity



Age



Survey Demographics

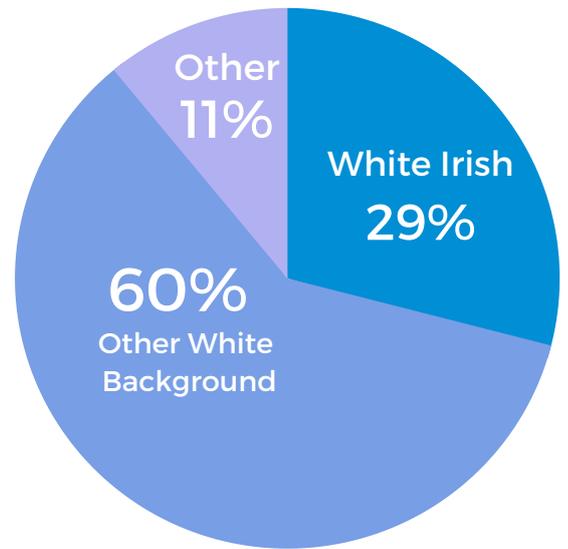
On Demand Audience

Gender

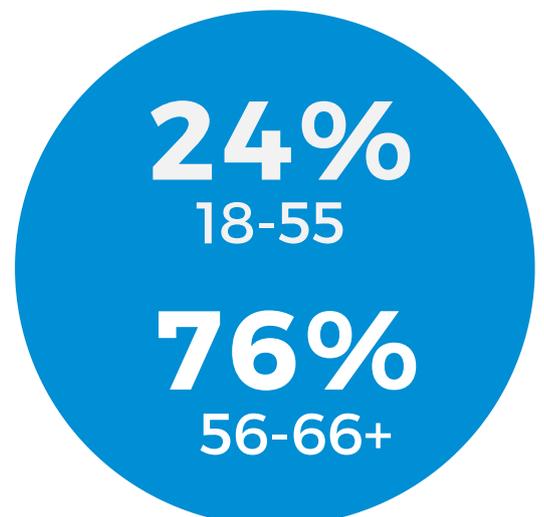
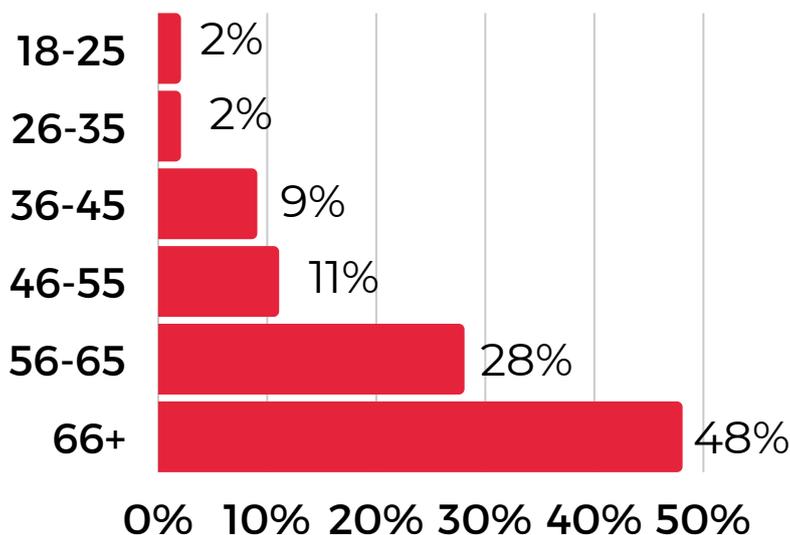


3% Non-Binary / Prefer not to say

Ethnicity



Age



Survey Respondents

GEO LOCATION

Two data sets were analysed showing where audiences watched from. 1) Survey sample results and 2) TicketCo results for every booker. There is only a marginal difference between the two data sets when it comes to the geo location.

Livestreams | Geo Location

- Ireland: **74%** survey vs **70%** TicketCo
- USA: **17%** survey vs **17%** TicketCo
- UK: **5%** survey vs **8%** TicketCo
- ROW (Rest of the world): **4%** survey vs **5%** TicketCo

On Demand | Geo Location

- Ireland: **18%** survey vs **20%** TicketCo
- USA: **74%** survey vs **73%** TicketCo
- UK: **3%** survey vs **4%** TicketCo
- ROW (Rest of the world): **5%** survey vs **3%** TicketCo

ETHNICITY

The two most prominent ethnicities from both the live-stream and on demand survey respondents are *White Irish* and *Any Other White Background* (**94%** live-stream and **89%** on demand). While this is in line with the national population², the ethnic diversity in Ireland is on the rise and it would be important to see this represented in audience numbers into the future. **4%** of the live-stream respondents and **6%** of the on demand are categorised under *Prefer not to say / Other*.

² Source: Central Statistics Office Ireland Census of Population 2016

Theatre Engagement Pre-Covid

We asked how often respondents had attended theatre pre-Covid and if this was their first time to watch a livestreamed theatre show

Of those who watched the livestreams:

- **66%** attend 5 or more theatre shows per year. **35%** of those attend 10+ shows
- **53%** were watching a livestreamed theatre show for the first time

According to B&A research, 'Afficionados' are those who attend 5+ events in a year. It also showed the incidence of online engagement among Afficionados is very high at 61%, which corroborates the findings of this research.³



Of those who watched on demand:

- **84%** attend 5 or more theatre shows per year. **55%** of those attend 10+
- **21%** were watching an on demand theatre show for the first time

³ Source: *Arts During Covid-19*. National Survey October 2020 prepared by Behaviour & Attitudes for the Arts Council.

The Audience Experience

Audience Response and Motivation

- The response to the show was overwhelmingly positive. **90%** of the livestream respondents and **93%** of the on demand respondents said the quality of the performance was excellent. Comments were also made about the play's suitability for the online format, the calibre of the actors, writer/director, and the quality of the filming.
- In order of popularity, the following were the top motivators for watching:
 - 1) the desire to support live theatre
 - 2) the fact that it was being performed live
 - 3) the cast and writer/director
 - 4) to be entertained.

Booking Process and Watching the Show

- **91%** of the surveyed livestream audience found the booking process easy or very easy and **89%** found logging in and watching the show easy or very easy. This is testament to the importance of a user-friendly and simple booking process., which TicketCo provided. Overall **6%** of those who watched the show contacted the support email. See **Appendix 4** for the most common issues presented.

Performance Times

- **57%** felt it was extremely or very important to have a number of times to choose from (there were three livestream times to choose from). The 9pm option was welcomed by parents trying to get children to bed (two of the three livestreamed shows were broadcast at 7.30pm and one at 9pm).

Accessibility

The most obvious benefit of live broadcasts is that audiences can watch from anywhere in the world. Audience members tuned in from all over Ireland, and from 44 countries across 6 continents.

Having the opportunity to watch live theatre where you are, opens up new routes of access for people that might be otherwise challenged in some way in reaching a city centre destination - this could include parents requiring a babysitter, Carers, Disabled people without easy access to transport, older people who may prefer not to travel at night, people in healthcare settings, and so on.

Captioning

A closed captioned version of the play was available for the live broadcasts and the on demand, making the performance accessible to the d/Deaf community. This option was taken up eagerly by audiences, with 12% of all tickets booked for the closed caption performances. 60% of these bookers were US-based, which may have been due to a concern about understanding the accents. It is also possible that the use of captioning is becoming more mainstream, given its usefulness in noisy settings.

How Far in Advance Audiences Booked

With audiences able to decide last minute whether to watch or not, it is not surprising that 54% of livestream audiences (Source: TicketCo) booked in the final 48 hours and 36% on the day. It is therefore important to ensure that messaging about last-minute booking options form part of the communication plan's timeline.

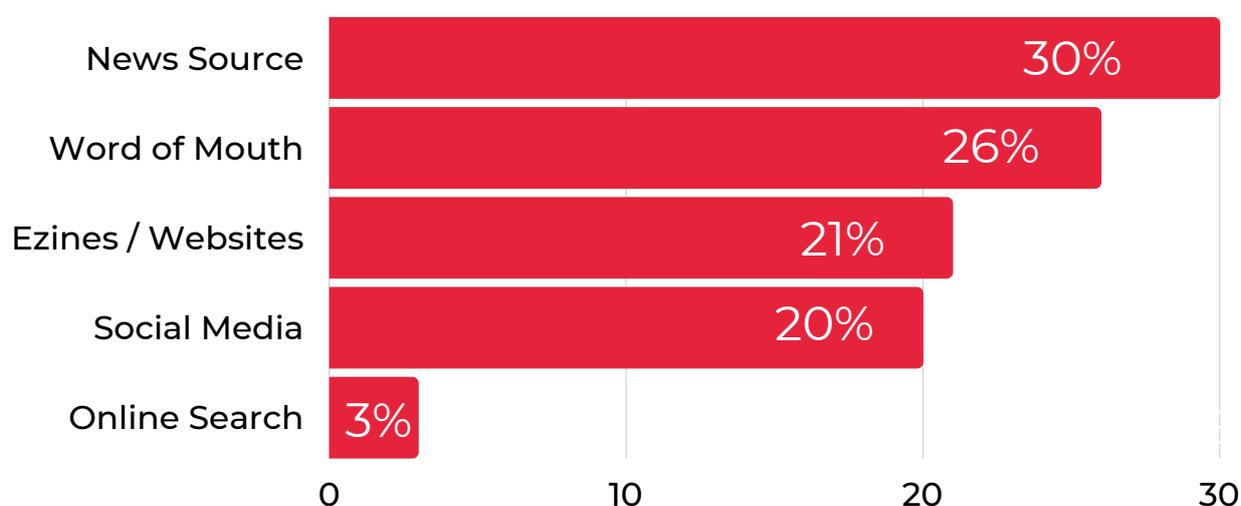
Post-Show Talk

A live post-show talk was offered following the Saturday night performance. 21% said this was a deciding factor in booking a ticket while 52% said it didn't influence their decision. However, survey comments indicated that audiences were very appreciative of the offering so it is something to consider going forward.

How People Heard about the Show

In order of popularity

1. News source – Radio / Print / TV (30%)
2. Word of mouth (26%)
3. Ezines / Organiser websites (21%)
4. Social media (20%)
5. Online search (3%)



News sources featured strongly, possibly due to the PR campaign and RTÉ news features that ran during a time when news viewership and listenership figures were very high due to Covid-19.

The low result for online search might indicate that audiences were not actively looking for events at that time. The second survey revealed that audiences expect to find information about arts events in the following ways:

- Through newsletters they're signed up to (64%)
- Social media (53%)
- Mainstream media* (49%)
- Word of mouth (29%)

*The older demographic for this show might also count for the reliance on mainstream media.

Tickets | Overall Sales

64%

of sales were for
the Live-Streamed
shows

36%

of sales were for
the On Demand
shows

Ticket Prices | Live-Streams*

42%

bought the €15
concession ticket

36%

bought the €25
standard ticket

*There were five ticket prices on offer for the live-streams

Ticket Prices | On-Demand

32%

bought the €15
concession ticket

68%

bought the €20
standard ticket

*There were just two ticket prices on offer for the on demand

Ticket Prices | Satisfaction

49%

were happy to pay
what they'd normally
pay for the theatre

35%

chose a lower price
than they would
normally pay in-
person as it was online

87%

were happy with
the two options
presented

13%

would have liked more
options, or were
confused about the
term 'concession'

Live-Streams

On Demand

Ticket Prices | Live-Streams

Five different ticket prices were offered for the live broadcasts (see below). This helped maximise accessibility and box office revenue. Two options were offered for the on-demand recording. Having a range of clearly defined ticket prices offers more choice, and is appreciated by the consumer. Qualitative interviews also corroborated this.

When *The Approach* went on-sale on December 16, 2020 there was no major theatre competition at that time. In the previous months, there had been a mix of some free, and some ticketed, online events across theatre, opera and music. Ticket prices for *The Approach* ranged from €12.50 (student groups) to €50 (supporter ticket).

- TicketCo box office reports showed that the most popular ticket was the €15 concession ticket (42%) followed by the €25 standard ticket (36%). The high percentage opting for the concession ticket could be attributed to the older demographic (28% aged 66+) and the 34% who 'chose a lower price as it was online'.

TICKET PRICES | % OF SALES PER PRICE POINT

Concession	€15.00	42%
Standard	€25.00	36%
Early Bird	€20.00	7%
Household	€40.00	6.6%
Students	€12.50	2.7%
Supporter	€50.00	2.4%

74% of the live-stream audiences said the performance was 'excellent value for money'.

Ticket Prices | Live-Stream Feedback

- **70%** of the live-stream audience was based in Ireland (Source: TicketCo). **49%** said they were happy to pay what they'd normally pay for the theatre while some paid more than usual to support the sector, or specifically singled out their desire to support Project Arts Centre or Landmark.
- A further **8%** said they would have paid what they normally pay *'if they'd had the means'*.
- **9%** of live-stream respondents chose the 'Other' answer choice and offered some interesting counterpoints. **30%** of those respondents felt that the ticket prices should be lower and their views are reflected below:
 - They would have liked to have paid something lower than what they'd normally pay for an in-theatre experience
 - They thought that €25 was expensive for online but paid it because they wanted to support the theatre / company at the time but wouldn't pay that going forward in a post-Covid world
 - They would like to see reduced prices to reflect the online access
 - Felt that part of the theatre experience is going to the venue itself and would therefore pay less
 - The remaining **70%** were of the opinion that the ticket prices were reasonable, or paid more to support the arts at this time. Some stated they were entitled to a concession but chose the full price to show their support.

Ticket Prices | On Demand

There were just two ticket prices on offer for on-demand; €15 concession and €20 standard (this was €5 less than the €25 standard live-stream ticket).

82% of the on-demand viewers (Source: TicketCo) were from overseas and **74%** of those were based in the US. It was interesting to note that a higher percentage paid the standard price compared to the live-stream audience. This may be due to the high percentage of US-based viewers who are used to higher ticket prices.

While **87%** were satisfied with the two options presented, **5%** would have liked more options and **9%** were confused about the two price points with some commenting that they weren't clear what the difference was. It emerged that US-based audiences did not understand the term concession, which may have added to the confusion.

TICKET PRICES | % OF SALES PER PRICE POINT

Standard | €20.00 | **68%**

Concession | €15.00 | **32%**

'Brands need to prove that they offer good value and tangible results. Consumers may find it hard to spend on things they learned to live without during lockdown, so brands must now over-communicate tangible benefits.'

Ticket Prices | Audience Feedback



I was willing to pay more and support live theatre during Covid as I do love theatre.

I appreciated the Early Bird Options, it felt like there was a good range of ticket prices to maximise accessibility.

I think I paid the normal price as a means of supporting the Project, however if there wasn't a pandemic I would like a reduced price to reflect the online access.

I paid the normal price to support theatre in difficult times but in general think live streamed should be cheaper than in theatre.

The suggested prices seemed quite reasonable.

The Live Element



"My first love is live theatre but the online theatre has been surprisingly engaging."

"Nothing will beat a live show in the theatre, but being able to stream a production as it is actually performed is the next best thing."

Audience Feedback

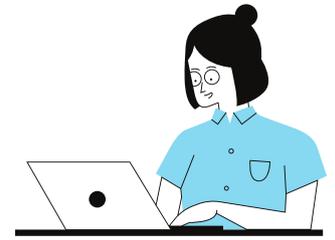
After a prolonged absence of live theatre, and with no prospect of theatres opening anytime soon, *The Approach* was the closest audiences could get to a communal sense of the theatre-going experience. The live element was the second highest motivation for watching the show, preceded in first place by the desire to support live theatre.

- **62%** felt it was very or extremely important that it was performed live with only **12%** placing little importance on the live aspect.
- Knowing it was live ranked second in terms of how it enhanced the experience; one audience member stated- "*The real time experience was like water in the desert.*"

Learnings

- While the live element was important, it can quickly become an issue if technology fails, or connections are unreliable. A back-up plan is essential in the form of a recording or on-demand option.
- When offering a live-stream, it's essential to have box office support on hand to deal with queries and issues in a timely manner. Project and Landmark worked together to ensure a team was available before, during and after the live-streams and a dedicated email was set-up to resolve issues.

Online Engagement



In the follow-up survey that was sent to a smaller sample of 170 respondents, **65%** had watched 'one' or 'a few' online theatre shows in the intervening period since they'd watched *The Approach*. **24%** hadn't watched any more online shows but were hoping to do so in the subsequent weeks and months. **8%** had only had the experience of watching *The Approach*.

Looking to the future:

- **43%** would consider a mix of online and in-person depending on the situation
- **39%** were more open to watching shows online but their preference is to see them live.
- **16%** said they would only choose to watch shows online that they couldn't get to in person.

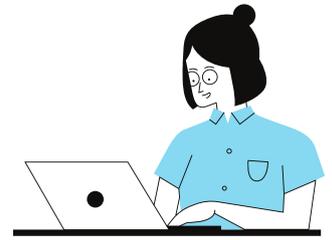
The events they are most inclined to engage with online in the future in order of preference are:

1. Theatre
2. Music
3. Readings
4. Visual Arts / Exhibitions
5. Comedy
6. Dance

'I think live-streaming theatre has a future even when the theatres are open again.'

[Audience Feedback]

Barriers to Watching Shows Online

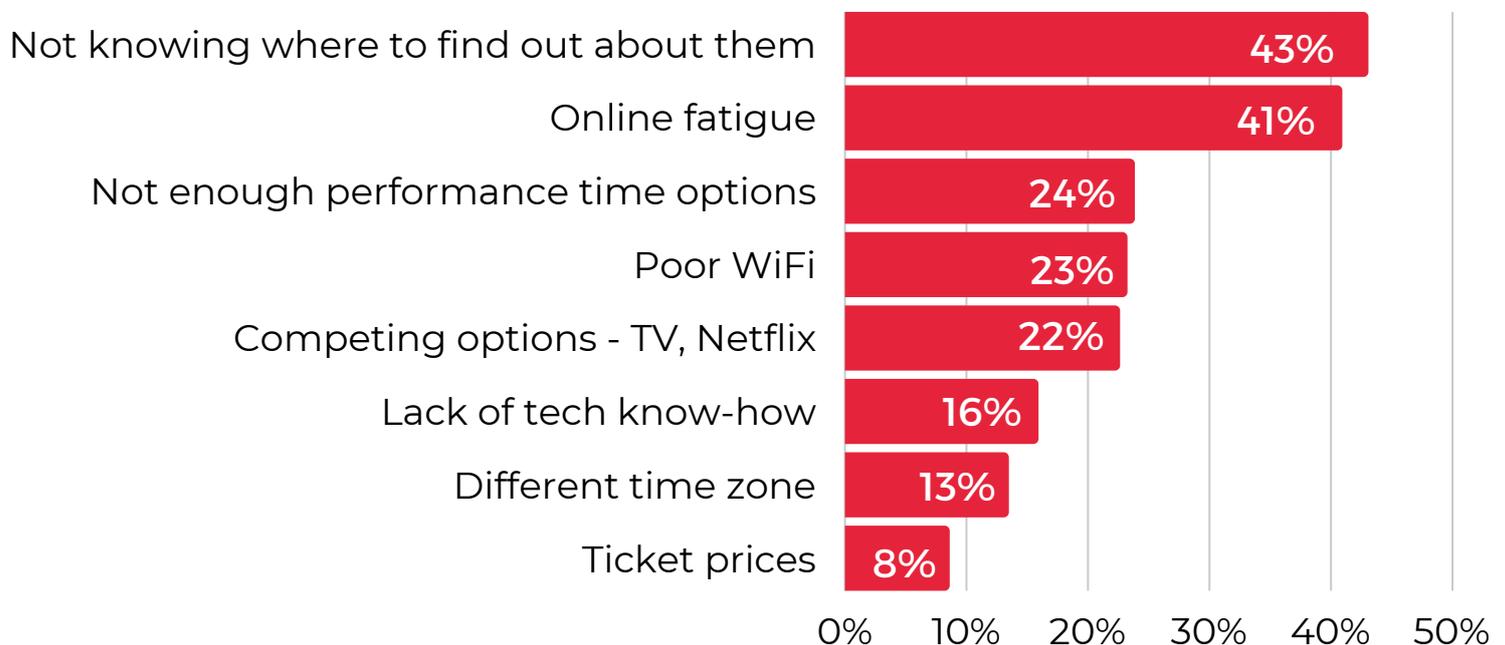


A number of factors could potentially influence online engagement into the future. The survey results below identified the most common barriers. In addition, these might include the time of year and the opening up of society as we emerge from Covid-19.

The research showed that certain barriers to watching shows online could pose threats to its viability into the future. It was interesting to note that ticket prices ranked lowest (8%).

From the producers' perspective, the financial viability of live-streaming could become a barrier when in-person theatre-going returns. There are significant costs involved in live-streaming to the standards audiences have now become accustomed to and without adequate funding, this may not be sustainable.

Survey Question: What do you think are the barriers to watching shows online?



TICKETCO REPORTS

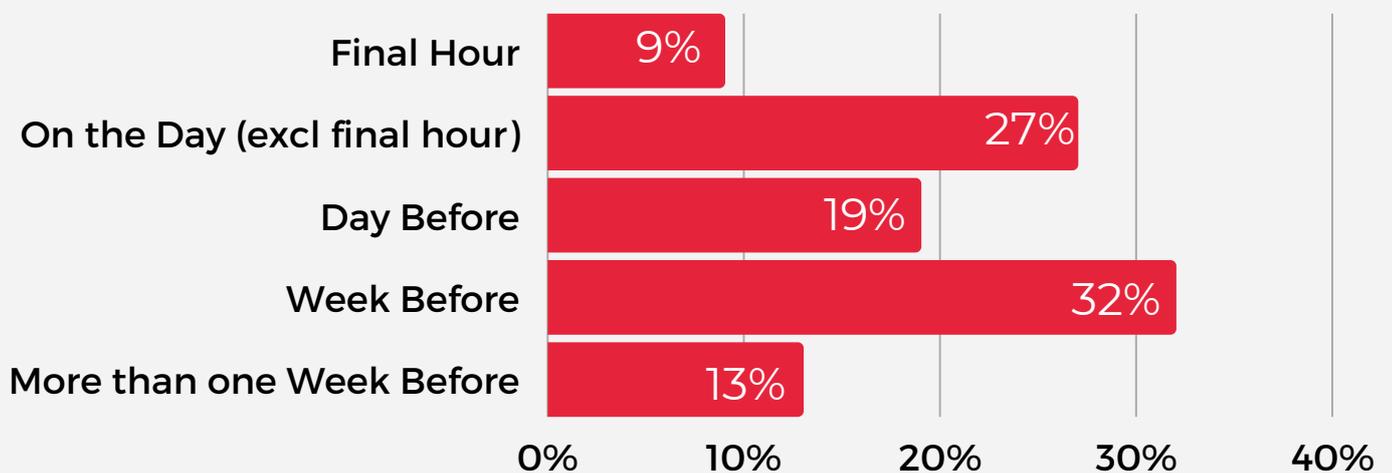
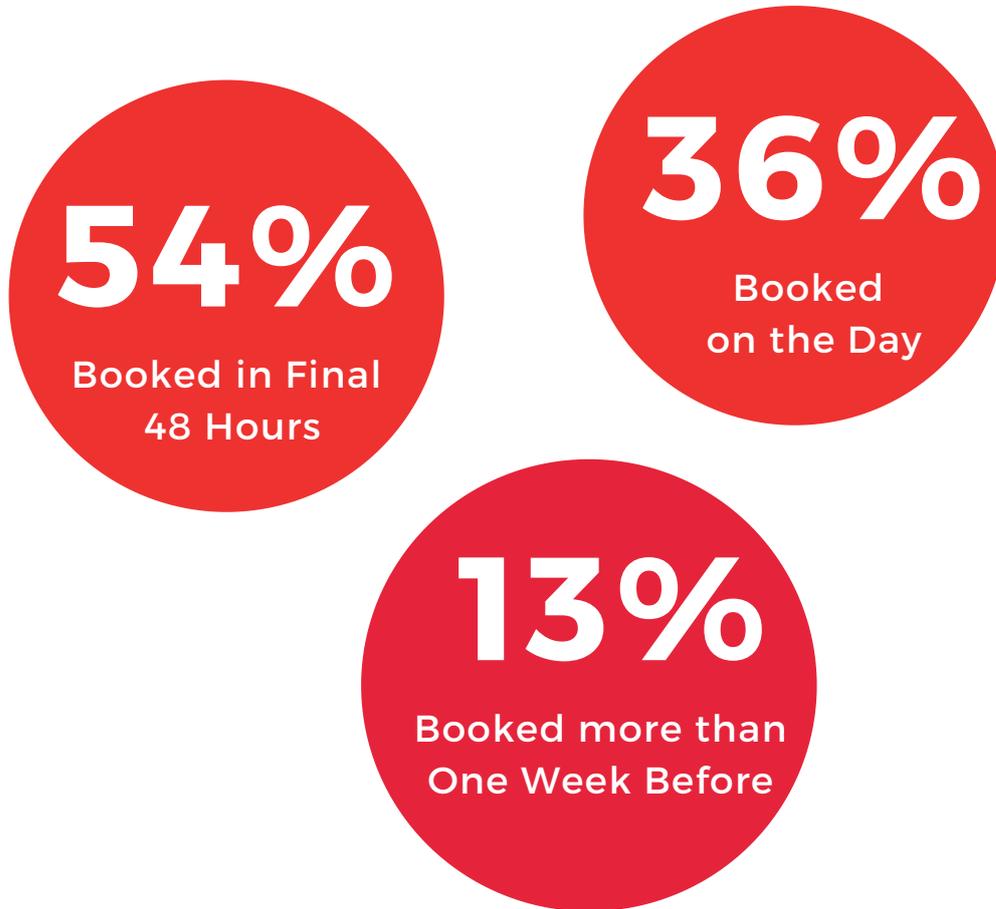
The following information is derived from TicketCo box office reports and relates to everyone who watched *The Approach* and not just survey respondents.

- How far in advance did people book
- Where did people book from

TicketCo Reports

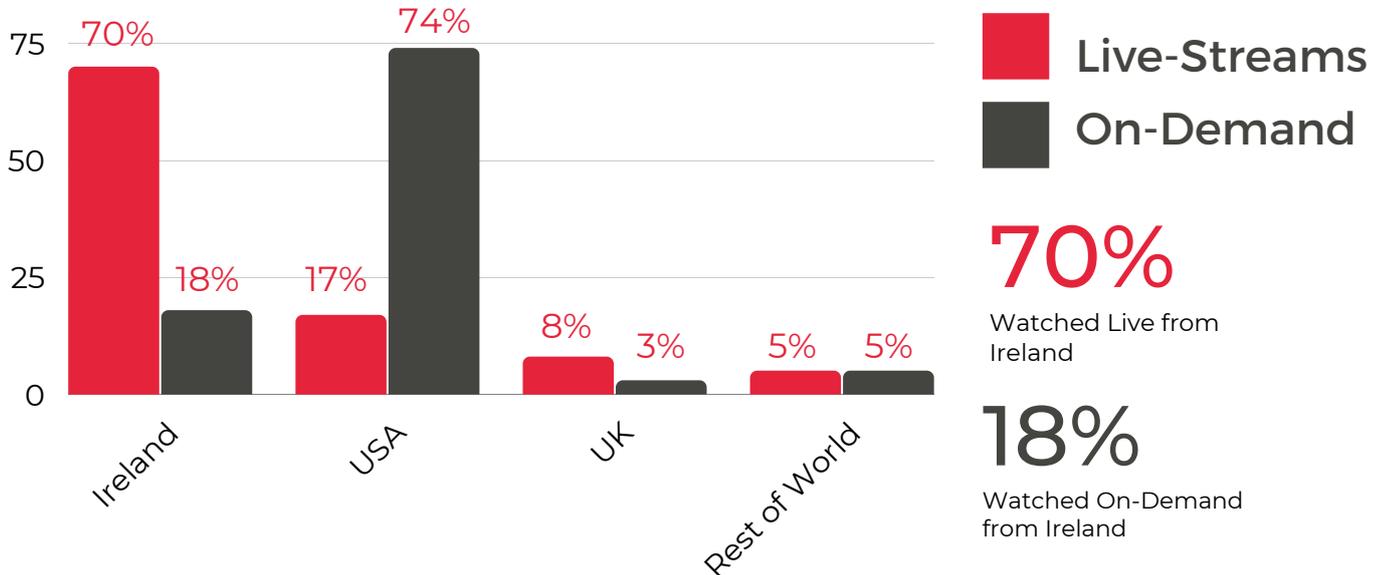
The following data relates to everyone who watched *The Approach*.

How far in advance did people book? (Livestreams)



TicketCo Reports

Where people booked from



44 Countries
6 Continents

Audiences tuned in from all over Ireland and from right across the globe to watch *The Approach*.

The collaboration between Landmark, Project Arts Centre and St. Ann's Warehouse in New York enabled a wider reach and engagement. The global reach surpassed anything that could have been imagined with audiences from **44** countries and **6** continents joining for both the live-streams and the on-demand recordings.

DIGITAL CAPTURE & MONETISATION

- Models of Digital Capture
- Monetisation

Models of Digital Capture

'Online broadcasting has provided a robust, reliable and secure platform for theatres to monetise performances and grow engagement figures.' [TicketCo]

There are many different ways to live-stream an event and it's possible to scale up or down depending on the requirements, and what you think your audience expects from you. If the audience is buying a ticket, they need to feel that what they are paying for is worth it, and that it will be broadcast to a high standard.

The infrastructure needed to livestream performances is readily available. *The Approach* was filmed by Seismic Events, who brought together an experienced team to deliver a highly professional broadcast. Following a thorough interrogation of the different paywall streaming services, it was decided to use TicketCo; a cloud-based platform for efficient event payments with an integrated live-streaming and video on demand feature.

Factors to consider when choosing a live-streaming option range across technological, economic and aesthetic issues and include price, user experience, data analytics, integration, white label branding and customer service. Platforms used on a regular basis in Ireland and the UK are TicketCo, Citizen Ticket, Dice, InPlayer, Vimeo OTT and TicketSolve.

With all paywall platforms, the livestream can only be accessed by ticket holders. The platform will recognise and block anyone attempting to access the livestream, without a verified ticket. A separate guide to Livestreaming accompanies this report.

Monetising Online

Since March 2020 we've seen a variety of both free and ticketed online performances. While free access to content can be great for building new audiences, it's not a sustainable business model. Broadcast technology enables people all over the world to watch shows online, thus generating additional revenue. However, doing it to a high standard can be costly.

There are now a growing number of self-service integrated ticketing and streaming platforms on the market, which allow you to host and sell tickets in one place (TicketCo was used for *The Approach*). The paywall is the obvious first step in monetising. While it is probably still too early to predict what theatre-going will look like in a post-pandemic world, the challenge will be to monetise online performances when audiences return to physical theatres.

The extra resources - both financial and personnel - required to deliver online shows should not be underestimated, especially when you factor in the goodwill from streaming companies and staff alike during the pandemic. Whether that is sustainable in the long-term is not yet clear.

The Arts Council, through its Capacity Building Support Scheme, has made a range of supports available to artists and arts organisations to explore and experiment in the creation and dissemination of digital content, including the presentation of *The Approach*. It is likely that supports will be needed for the foreseeable future to make this sustainable.

Monetising Online

There are a number of opportunities available to monetise online, beyond the standard ticket price.

Ticket Prices | Group Bookings

- Having a range of ticket prices ensures accessibility and allows those who are willing to pay more to do so. It does rely on an honesty system whereby individuals select the price they're willing to pay. The 'Standard plus Support' ticket option included a donation for the company towards future projects
- Group discounts for drama colleges, active retirement groups, corporates etc could be offered to maximise box office income

Upselling

- As consumers become more versed in this new online model, there may be opportunities to consider upsells for:
 - Post-show talks
 - Watching back a live-stream for a nominal fee (separate to the on-demand ticket)
 - Behind-the-scenes content
 - Donations
 - Show programmes - these appear to have been freely available up until now

Gift Cards

- There is potential to maximise the gift card option. Developers are still fine-tuning this offering on their systems but it does open up access to the gifting market

Donations

- The option to make even a nominal donation during the booking process should be worked into the customer journey

COMMUNICATIONS STRATEGY

The Approach was first premiered by Landmark Productions in Project Arts Centre in February 2018.

Just three years later, in January 2021, both organisations were planning a livestream and leading out with a play with a proven track record, written by a renowned Irish playwright featuring a stellar cast.

The show was announced on 16 December, 2020, five weeks prior to the first broadcast.

While the country did open up briefly during the Christmas period, Ireland went into a strict level 5 lockdown on 30 December, 2020. This was in place throughout January and during the broadcasts.

The communications plan was primarily focused around digital marketing and PR, with some radio ad spots secured later in the campaign. Given the low footfall on the streets, the traditional flyer and poster run was deemed unnecessary. The digital campaign centred around organic social media, paid advertising and targeted newsletter campaigns.

KEY MESSAGING

The key messaging for the show focused on:

- The award-winning cast, writer and director and the fact that Mark O’Rowe had written *The Approach* for Cathy Belton, Derbhle Crotty and Aisling O’Sullivan
- The track record; rave reviews from the previous run
- The live element and the fact that the show was being broadcast in real-time to people’s homes. The on-demand performances were not announced until closer to the time to allow for the focus to remain on the live experience.

PARTNERSHIPS | Together Stronger

As the show was presented by Landmark, in association with Project Arts Centre and St. Ann’s Warehouse in New York, it was possible to reach much wider audiences, particularly those previously not within a geographical reach.

St. Ann’s Warehouse had a combined social following across all three channels of circa **122k** and an extensive newsletter database.

They had a highly engaged audience with experience of watching shows online who embraced the opportunity to watch from afar. The St. Ann’s Warehouse audience accounted for **21%** of overall sales.



SOCIAL MEDIA



Project and Landmark had a combined social following of circa 85k across Facebook, Instagram and Twitter. Both organisations reached out to champions and advocates in the sector who generously shared about the show. This combined with St. Ann's Warehouse's social following of 122k resulted in phenomenal engagement on social media.

Audiences from all over the world reached out to share their experience. A sense of community started to build as audiences shared comments filled with positivity, excitement, and acclaim for the show. There was a particularly strong level of engagement on Twitter with a number of accounts with significant followers sharing about the show.

1,664,219

OVERALL THE RESPONSE ON SOCIAL MEDIA WAS PHENOMENAL. THIS WAS THE PROJECTED REACH FOR #THEAPPROACH

5,051,870

THE PROJECTED IMPRESSIONS IS TESTAMENT TO THE AUDIENCES' RESPONSE AND ENGAGEMENT WITH THE PRODUCTION.

EMAIL MARKETING



Both Landmark and Project utilised their own database and also maximised their networks to broker mentions in third-party newsletters as well as across social media. Given the scarcity of events taking place, there was great support from colleagues in the sector who generously included mentions of the show.

As society starts to open up, this is not necessarily something that can be relied upon going forward. However, the pandemic has brought the sector closer together and there is a notable increase in third-party mentions across social media and in e-zines.

PUBLICITY



The strong PR campaign for the live-streaming of two Landmark shows - *The Approach* and *Happy Days* - played a significant role in getting the word out to audiences, and helped to amplify the online campaign. It also ranked highest in terms of how people heard about the show. (News sources: 30%)

The event generated significant coverage in Irish and international media, including television and radio coverage on RTÉ News, Morning Ireland and Ireland AM, as well as articles in The Guardian, The New York Times, New York Magazine and The Los Angeles Times.

4,615,832

THE ESTIMATED REACH FOR
THE APPROACH THROUGH PRESS
AND MEDIA WAS PHENOMENAL



THE AUDIENCE

“Some people say, 'Give the customers what they want.' But that's not my approach. Our job is to figure out what they're going to want before they do. I think Henry Ford once said, 'If I'd asked customers what they wanted, they would have told me, 'A faster horse!'" [Steve Jobs]

The pandemic catapulted the whole world into a space we'd never been in before. As a sector, we had to figure out what the customer wanted, before *they* knew they wanted it. While live-streaming performances was not a new concept, prior to March 2020 the practice had not been a significant alternative to in-person.

While the majority of audiences weren't practised in watching shows online, there was a shared empathy and understanding around missing theatre in our lives.

The whole experience brought companies into more direct contact, and conversation, with audiences. There is a real opportunity to build on this. The question is how do we harness these learnings and turn this into something meaningful for audiences, artists and the sector at large?

DELIGHTING AUDIENCES

'Delight people with simple solutions'

Instagram Co-Founder, Kevin Systrom

What if our main goal was to provide audiences with a remarkable experience through focusing on their needs, interests, and wishes? To essentially delight audiences and to leave them so satisfied and happy that they go out and sing the praises of your brand.

This can include but is not limited to solving customer's problems, listening to their feedback and responding in a timely fashion. The box office staff endeavoured to do this for *The Approach* and the efficient and helpful support was noted by a number of 'delighted' customers.

By following these three simple steps, delighted customers are more likely to become loyal customers and brand advocates for your organisation.

1. Attract
2. Engage
3. Delight

'Customer recommendations to their personal and professional networks can be the difference between your business growing or struggling. It costs businesses 6-7 times more to attract a new customer than to retain an existing one.' (HubSpot)

AUDIENCE DEVELOPMENT

The move to online theatre allowed for more meaningful and immediate engagement with audiences, even though there were no in-person encounters during that time.

This was aided by the online chat function that is available with the *TicketCo* streaming platform during the show, through social media and through direct email engagement.

To date audience development has been focused around a physical space. We now have an opportunity to build on this in the digital realm. Project has acquired over 2k email addresses from audience members who are now part of the Project community.

ARTIST DEVELOPMENT

Another welcome development from the move to online was the opportunity to introduce audiences to new writers, actors, producers and venues. It allows audiences to take a chance on an artist not known to them from the comfort of their home.

A large number of the US-based audiences were delighted at having discovered the work of Mark O'Rowe. Landmark has noted that these audiences have since engaged with subsequent live-streams from Irish writers.

**'I did not know Mark O'Rowe's work but now I do,
I'm very happy about that.'
[Audience Feedback]**

MARKETING STRATEGY

The following marketing recommendations serve as a guide for future online broadcasts. They are informed by the learnings gleaned from *The Approach*. As we learn more about how digital audiences are engaging, marketing campaigns will be honed accordingly.

Touchpoints

- Think about the customer touchpoints and consider mapping out the customer journey to inform your campaign. This can help reveal untapped marketing opportunities. Your brand exists beyond your website and marketing materials.

Website

- Clear layout of information on event page. This is the first port of call
- Remind people they can book up until show time, if this is the case. What may be obvious to you is not to them
- Clear explanations about how both the live-stream and on demand works
- Be mindful of the language and terminology being used - is it accessible to everyone?
- Offer an FAQ section to address common questions

Campaign Planning

- Many people still rely on traditional media to find out about shows. Be careful not to overlook traditional media when planning online events
- Reminders are particularly important for online shows where people are not making the usual arrangements associated with going to the theatre. Consider revisiting the timing of newsletters and social posts in line with your broadcast schedule
- Clear, timely and helpful communications are key
- This research has shown that a large percentage of ticket sales occurred in the final days, particularly in the final 48 hours. Consider a stepped up focus on communication during this period - both online and in the mainstream media
- The on-demand offering is becoming increasingly appealing to audiences as society opens up. Ensure sufficient budget for social advertising is held back for that period
- An efficient and timely system of ticketing, audience communications and customer support is crucial
- There is strength in numbers. The power of collaborating and developing partnerships has been clearly demonstrated with *The Approach*, and for other online shows. Developing strategic partnerships will help to broaden the reach and engagement

Digital Marketing

Social media is now a two-way conversation and we need to prioritise engaging with our followers. Never before have we had the opportunity to develop more meaningful conversations with our audience online.

- Engage with follows on social media and build relationships. Monitoring and responding in real-time is very important
- Consider all timezones and post throughout the day - particularly on Twitter
- Amplify all content as much as possible across social channels
- Schedule consistent and timely reminders about the show - even right up to 10 minutes before show time
- Think outside your usual audience on social media; consider creating new audiences based on interests and locations. You are now on a global stage
- Who are your champions? Reach out to them with suggested copy and assets. Make it really easy for them to share about your event
- People love behind-the-scenes; what can you share to bring them closer to the process?
- Promoters - consider promoters in your messaging. For example, could you include something to say - *"Do you know someone who might be interested in this event? Simply forward this email ..."*

'What it means to connect with a brand virtually will evolve. It won't be enough to just be online.'
[Intel Global Consumer Trends 2021]

OPPORTUNITIES

For Project Arts Centre, there is an opportunity to build the relationship with audiences who watched *The Approach*.

2,254 bookers opted to join Project's newsletter.

That's 2,254 people who may or may not have had a previous experience with Project; they are now part of the Project community.

Devising a more personal campaign for this group could serve to strengthen the relationship. Reaching out with a friendly ask might yield some surprising dividends.



More meaningful engagement with our audiences requires time and resources but will pay off in the long-term. Invest in your community.

LEARNINGS & KEY TAKEAWAYS

LEARNINGS & KEY TAKEAWAYS

Communication

- The live element really fed into the excitement and buzz on social
- Reminders are particularly important for online shows; people can decide right up to show time to watch
- Clear, timely and helpful communications are key

Ticket Prices

- While audiences were generous in their support of *The Approach*, it's possible there will be some price resistance as society, and venues, start to open up. Having a range of options is very important

The Surprises

- How late people left it to book
- How accessible the show was, not only to people overseas but to cohorts we might not have considered
- Significant newsletter sign-ups and the opportunity to grow your community overnight
- The role Twitter played in reaching audiences

LEARNINGS & KEY TAKEAWAYS

Language

- It's important to use language that is universally understood. For example - '*concessions*' is understood in Ireland but not by a US audience
- Captioning is widely understood by disabled audiences but caused confusion for people who aren't familiar with the term in this context. This led to some people inadvertently booking the captioned version and subsequently requesting the non-captioned version
- Spell it out. For example it may be necessary to state that live-stream is -"*a real-time, ticketed performance that can only be watched live at the exact time it is being performed and streamed.*"

Performance Times

- The later start time of 9pm (for the Sunday performance) was noted and appreciated, in particular by parents who are busy with children earlier in the evening
- Having a number of performance time options for live-streams works better for audiences and also allows for word of mouth to build

CONCLUSION

CONCLUSION

This research set out to inform how Project Arts Centre can build audiences for work online, continue to support and present the work of artists digitally to as wide an audience as possible and better understand how and why audiences are engaging with online theatre.

The conclusions derived from the findings of this research point to opportunities, cautions and considerations for Project, and for the wider theatre sector.

Being able to reach audiences in their homes, at a time when gathering in public wasn't an option, has been transformative in how the cultural sector can engage and develop audiences at home and further afield.

The digital environment continues to evolve and we continue to learn. It may well be that certain productions lend themselves more to the digital medium. *The Approach* was certainly one of those productions.

The overriding motivation to watch the show was to support live theatre during a very difficult time for the sector. The concern now is whether it may become less relevant for people to support digital output when the sector reopens and theatres are - hopefully - full again.

Consumers who have participated in virtual activities and events out of necessity will be inclined to want space away from the digital events that they have come to rely on. This doesn't mean they will fully abandon the online world, but rather that they will need to find a way to balance the role of digital experiences in their lives.

CONCLUSION

Digital is not just about live-streaming. It's about how can we become more engaging? How can we connect with our audiences more?

The all-Irish cast, creative and production team for *The Approach* presented work that spoke to contemporary Ireland, both in its subject matter and form, while also showing Ireland to be on the cutting edge of how live performance can be presented through new broadcast technologies.

If there is a way of serving artists and audiences while also bringing some income into organisations, then that is a sensible thing to do.

For Project, it's possibly a case of forging its own path and plugging into its vibrant and engaged community more to interrogate what is needed; to get to know who the building and organisation is serving and how to engage more deeply with its audiences.

Collaboration within organisations, and beyond, is key for growth and for new ideas to flourish. We all need to continue to find new ways to re-emerge and to re-imagine - together.

APPENDICES

APPENDICES

APPENDIX 1

Survey Results. Please click on the links below to view the full survey results.

1. [Survey 1 sent to Livestream Audiences](#)
2. [Survey 1 sent to On Demand Audiences](#)
3. [Survey 2 - follow-up survey sent to 170 respondents](#)

APPENDICES

APPENDIX 2

References

Arts During Covid-19. National Survey prepared by Behaviour & Attitudes for the Arts Council. October 2020

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Survive, Adapt, Renew. Report of the Expert Advisory Group to the Arts Council. June 2020

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Life Worth Living. The Report of the Arts and Culture Recovery Taskforce. October 2020

From Live to Digital. By AEA Consulting for Arts Council England, UK Theatre and Society of London Theatre. October 2016

Mintel Global Consumer Trends 2021

The Space UK Online Audience Toolkit www.thespace.org

TicketCo Reports

APPENDICES

APPENDIX 3

Performance Details

The Approach Live-Streams

7.30pm Thursday 21 January, 2021

7.30pm Saturday 23 January, 2021

9pm Sunday 24 January, 2021

The Approach On Demand

24 – 31 January 2021

Running Time: 60 minutes without an interval

Ticket Price Descriptions

Below are the ticket price descriptions used on the TicketCo booking site.

Early Bird €20

A limited number of discounted tickets is available until Monday 18 January. This ticket lets you watch the show live on one device anywhere in the world. We encourage you to consider the 'Household' ticket if you are watching with others on the same screen.

Concession €15

This ticket lets you watch the show live on one device anywhere in the world. We encourage you to choose the ticket type that most suits your circumstances.

APPENDICES

APPENDIX 3 CONTD.

Ticket Price Descriptions

Standard €25

This ticket lets you watch the show live on one device anywhere in the world. We encourage you to pay what you normally would for a night at the theatre and consider the 'Household' ticket if you are watching with others on the same screen.

Household €40

This ticket lets you watch the show live on one device anywhere in the world. We encourage you to choose this ticket if you are watching with others on the same screen.

Supporter €50

This ticket lets you watch the show live on one device anywhere in the world and includes an additional donation. Your support towards Landmark's work will help secure the future of theatre in the coming year.

APPENDICES

APPENDIX 4

Most Common Customer Questions

Based on feedback that came into our dedicated email account, and the chat function on the nights of the live-streams, below were the most common questions, or technical issues, customers had. Approximately 6% of bookers got in touch with a query, which comparatively was a very low percentage.

- How do I find my ticket? / I can't find my confirmation email. The subject line of the TicketCo made the email difficult to find in inboxes.
- The stream isn't playing / My screen has frozen. This was usually related to the customer's broadband connectivity
- I can't hear anything. This usually required the customer to click the sound icon on their screen.
- How do I cast to my TV?
- US-based customers had some issues completing their bookings as their transaction was being flagged as potentially fraudulent as they were making a booking outside the US. This required them to contact their service provider to proceed with the booking

APPENDICES

APPENDIX 5

Sample of Survey Feedback.

Source: Additional comments provided in surveys.

THE EXPERIENCE

- *The Approach* below me away. The way it was shot for the at home audience made it feel very much as if we were in the room
- The close ups were better than being in a theatre audience.
- I've watched more than 3 dozen online theatre plays and this was one of the best I've seen.
- As it is online, at times it is difficult to get a sense of the atmosphere.
- No substitute to an evening at a live show but the next best thing at the moment.
- Theatre events as good as this one are saving my sanity.

PERFORMANCE TIMES

- Very enjoyable overall. Would love to see more. A slightly later time would be good.
- The 9pm later time for the performance suited me. I have small children and earlier times are difficult.

THE LIVE ELEMENT

- Buying the show live makes you commit to the event
- Such a treat to be watching live, knowing others around the world were doing the same.

APPENDICES

APPENDIX 5 CONTD.

Sample of Survey Feedback.

Source: Additional comments provided in surveys.

ACCESS

- The performance was superb. I will follow the playwright and the actors from now on.
- I did not know Mark O'Rowe's work but now I do, I'm very happy about that.
- It was a very easy simple way to enjoy a show. It can be difficult to find someone to go with and you don't always want to go alone.
- I would like to see online shows available for a longer period.
- I think live-streaming theatre has a future even when the theatres are open again.
- Having live and recorded options is important in case of technical difficulties.

CUSTOMER SERVICE

- Customer service was excellent.
- Would it be worth offering a special price for a combination of live plus recorded option in future?
- I would love if there was an online events listing for shows all over Ireland.

Report Commissioners

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Project Arts Centre would like to thank the Arts Council for supporting this research through the Capacity Building Support Scheme.

