

EXECUTIVE SUMMARY

FROM STAGE TO SCREEN

A SUMMARY 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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Executive Summary

This is an **Executive Summary** of a more detailed research report which can be [downloaded here.](#)

An accompanying **Livestream and Marketing Guide** can also be [downloaded here.](#)

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



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.

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



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 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.

Setting the Scene

In January 2021, Ireland was under a strict Level 5 lockdown, which carried 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*.

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 seemed 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 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 it 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 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 live-stream and **18%** the on-demand. **74%** of the 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 live 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 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.

LEARNINGS & KEY TAKEAWAYS

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Communication

- The live element really fed into the excitement and buzz on social
- Reminders are particularly important for online shows as 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 livestream 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

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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

To download the full research report and accompanying Livestream and Marketing Guide, please click on the links below.

From Stage to Screen: Understanding the opportunities, impact and reach of Irish Digital Theatre. A report for Project Arts Centre by Sinead McPhillips.

Live-streaming and Marketing Guide: A practical guide to producing a monetised theatre livestream. A guide for Project Arts Centre by Sinead McPhillips.

APPENDIX 2

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

1. *Survey 1 sent to Live-Stream Audiences*
2. *Survey 1 sent to On Demand Audiences*
3. *Follow-up survey sent to 170 respondents*

Report Commissioners

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