From Live-to-Digital

Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution

October 2016

by AEA Consulting
for Arts Council England, UK Theatre and Society of London Theatre

AEA Consulting

Report Commissioners and Funders

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Society of London Theatre (SOLT) is an organisation that works with and on behalf of its Members to champion theatre and the performing arts. SOLT delivers a range of services both to assist members and to promote theatregoing to the widest possible audience.

About the Authors

The study team for this report comprised **Brent Karpf Reidy**, Senior Consultant; **Becky Schutt**, Senior Associate; **Deborah Abramson**, Associate; and **Antoni Durski**, Research Analyst of AEA Consulting. **Elizabeth Ellis**, Managing Principal, and **Laura Casale**, Director of Knowledge Management of AEA served as editors. **David Throsby**, Distinguished Professor of Economics at Macquarie University in Sydney, acted as Senior Advisor to the research team.

AEA Consulting is one of the world's leading cultural consulting firms. Since 1991, we have helped hundreds of cultural organizations, governments, foundations, businesses, and individuals around the world realize the contribution that culture can make to communities. AEA has successfully completed more than 800 projects in 33 countries. Our work combines a deep knowledge of trends in culture and adjacent sectors with robust research and analysis. We thrive on new challenges and approach problem solving with curiosity, creativity, and integrity.

The project was guided throughout by a Steering Committee whose members included:

- **Jonathon Blackburn**, Senior Officer, Policy and Research, Arts Council England
- **Cassie Chadderton**, Head of UK Theatre and Membership (and representing Society of London Theatre)
- **Michelle Dickson**, Director for Touring, Arts Council England
- **Paul Glinkowski**, Senior Manager, Creative Media, Arts Council England
- **Andrew Mowlah**, Director, Policy & Research, Arts Council England (and Project Director).

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It is the commissioners' and authors' hope that the study helps to move the Live-to-Digital conversation forward, giving arts organisations of all sizes better understanding of ways to leverage new technologies – if they are so inclined.

INDUSTRY PARTNERS

Aran Dramatica
Babbling Vagabonds
Barn Cinema
Belarus Free Theatre
Belgrade Theatre
Bike Shed Theatre
Bishops Castle
Brewery Arts
Calestrad (music band)
CDET
Central Bedfordshire Council
Concert Theatre
Create London
Defnet Media
Digital Theatre
Eastern Angles
Eclipse Theatre
English Touring Theatre
Event Cinema Association (including its members)
Falkirk Community Trust
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The Regal Cinema
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The Yard Theatre
Theatre Royal, Newcastle
Theatre Royal, Winchester
Theatrical Niche
Time Won’t Wait
Tyneside Cinema
Vincent Dance Theatre
Vocal Eyes
Vortex Jazz
Wales Millennium Centre
Wem Town Hall
Wotton Cinema
Young Vic Theatre

Foreword

The liveness of theatre, music and dance is an inalienable element of human life. For centuries these performing arts have been experienced by people in the same space and at the same time as the creative process happens, and the desire by audiences for this sort of immediate connection with artists in the act of performance continues unchanged. But more than a century ago technology intervened. The invention of revolutionary methods for sound reproduction led to continually evolving means of capturing and redistributing music, to the point where we have become accustomed to listening to music through channels far removed from the original performance. Yet even here, there remains a demand by music-lovers to hear music of all types in the actual presence of the musicians – an experience that can never be replaced, no matter how perfect the reproduced sound might be.

For theatre, opera and dance the impact of technology has been much more recent. Although capturing live performance on film or for television has been around for many years, it is barely a decade since the first moves were made by the National Theatre in the UK and Metropolitan Opera in the US and towards digital transmission of live performances to locations a long way from the theatre. Since those early days the amount of Live-to-Digital activity across the performing arts has expanded enormously in volume and range. The rapidity of this growth has raised some serious questions: In what ways are arts organisations, distributors, funding agencies and consumers reacting to these developments? How are audiences responding to the availability of new channels for consuming traditional products? How do these trends impact upon the need to protect the artistic and cultural integrity of live performance? Is expanded consumption of digital product being achieved at the expense of live attendance at traditional performing arts venues? What is driving the digital market: is it growth in supply, or is it that the availability of new media for the distribution and reception of product is stimulating a latent demand?

A great deal of anecdotal evidence on various aspects of these questions has accumulated in recent times. But, while frequently interesting, the impression it creates may be misleading, and is no substitute for systematic and objective research. So the purpose of this study has been to replace anecdote with hard data. The study is based primarily on theatre in England. Nevertheless, the report contains information and draws conclusions relevant across art-form boundaries, and national jurisdictions. The project applies carefully controlled research methods to derive a wide range of objective and replicable data that provide an extensive overview of the main components of the supply chain for Live-to-Digital product. The conclusions derived from the findings of the research point to both opportunities and challenges in the theatre sector and beyond as the digital environment continues to evolve.

In a report such as this, the use of words such as 'industry', 'product', 'demand', 'consumers' and so on derived from economics, commerce, marketing and management – fields far removed from the arts – is sometimes seen as a sell-out of the pure creative process to the insidious forces of the marketplace. An important strength of this report is that although it uses these terms – and indeed provides an extremely useful glossary to help us find our way through the new terminology – it respects the fundamental and unchanging nature of the performing arts as an expression of human culture.

The data gathered and the conclusions drawn in the report will be of great assistance to performing companies as they seek to formulate strategies in pursuit of the economic benefits available from new digital technologies – strategies that can also open up innovative ways to enhance the cultural value generated by their work.

David Throsby
Distinguished Professor of Economics at Macquarie University in Sydney
July 2016

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1.

Executive Summary

1.1 Arts Council England, Society of London Theatre (SOLT) and UK Theatre are actively interested in the opportunities and questions that 'Live-to-Digital' – the combination of Event Cinema, streaming and downloading online, and television broadcast – presents across the full range of arts and cultural forms. In February 2016 the three partners commissioned AEA Consulting to investigate:

- How organisations that produce, present, exhibit and distribute theatre in England are being affected by 'Live-to-Digital';
- How and why audiences are engaging with theatre in digital formats; and,
- What the wider cultural sector can learn from the experience of the theatre sector and its audiences (as identified and studied in this research).

1.2 The early 21st century has seen unparalleled changes in how audiences engage with live cultural experiences communally in cinemas and online. The National Theatre became the first theatre company to embrace Event Cinema with the launch of *NT Live* in 2009. It followed a path trailblazed in 2003 by David Bowie and followed by the Metropolitan Opera in 2006. Since then, the Event Cinema market has expanded beyond music, opera and theatre to encompass dance, museums and the visual arts; and to include major UK arts organisations – 'household names' – that have increased their virtual capacity at the cinema. In the theatre sector these include the Royal Shakespeare Company, Manchester Royal Exchange, and Kenneth Branagh Theatre Company in partnership with Fiery Angel. With the growing acceptance of the genre and more content opportunities, the market for Event Cinema is forecast to achieve annual revenues of £60-80 million in the UK and $1billion worldwide by 2019, with the UK/Ireland currently the global market leader.[1] Recognising the need for support and promotion in this growing marketplace, the international trade body Event Cinema Association (ECA), headquartered in England, was established in 2012.

"Have seen #TheEncounter 3 times - 1 Live+1 Streaming+1 more. Each of them are a very different experience and holds different quality... "
– Twitter user

1.3 Live-to-Digital also encompasses online distributors and platforms, commissioners and industry bodies, making the ecology more complex.[2] These include Digital Theatre, The Space and Canvas, as well as many individual theatre companies using digital. In response to this rapidly growing and diversifying digital marketplace and building upon a developing body of research on how English theatre is finding its way to audiences in cinemas and online, the commissioners of this report posed 11 questions about the

1 MTM London. *Exploring the Market for Live-to-Digital Arts*. Riverside Studios and HOME: 2015; Hancock, David. "Event cinema in European cinema." IHS Screen Digest Cinema Intelligence Service: 2013; Hancock, David and Jones, Lucy. "Event cinema: a sector in full swing." IHS Technology Cinema Intelligence Service and Rentrak: 2015.

2 Over the past five years, with the rise of Event Cinema and alternative content, a proliferation of new terminology and nomenclature has entered the public sphere in marketing literature and industry-produced publications. Terms such as 'event,' 'live' and 'alternative content' are used interchangeably to account for a diversity of cinematic distribution and exhibition strategies – covering the livecasting of events (theatre, opera, sport, music) to cinema auditoria, the replay of pre-recorded live events in cinema auditoria and immersive screenings. In collaboration with Dr. Sarah Atkinson at King's College London, AEA has developed a glossary to start to clarify a consistent and appropriate application of these terms, taking the lead from the industry that has developed and established many of them (Appendix 1).

theatre sector's and audiences' experiences. The ambition is to fill knowledge gaps uncovered in recent research and topics covering: audience motivations; barriers to participation and experiences with Live-to-Digital; the nature of suppliers' offers; barriers to entry; and the impact on touring. The study also explores the impact Live-to-Digital is having on the nature of the art itself, and what the future may hold.

1.4 This study builds upon *Understanding the Impact of Event Cinema: An Evidence Review,* commissioned by Arts Council England in partnership with the British Film Institute in late 2015 and led by TBR researchers Fiona Tuck and Mitra Abrahams. Over a four-month period, the AEA research team undertook a literature review, stakeholder interviews, focus groups, audience and supplier surveys, and developed case studies of six English organisations currently active in, and attempting to capitalise on, the Live-to-Digital market.[3] Key findings and recommendations are summarised below. A proposed glossary for the sector, developed in collaboration with Dr. Sarah Atkinson at Kings College London and outlining relevant terminology, is provided in Appendix 1.

1.5 For the purposes of focus and given the study's timeframe, the principal art form focus for this study is theatre, which has notably pioneered a number of high-profile initiatives in this market; where possible the research reflects other art form initiatives. The scope of the study is *England* (rather than the wider UK) and *digital platforms* that distribute live theatre (including online, Event Cinema and digital screenings in alternative venues). The study's scope concentrates on those suppliers across the distribution chain and *existing* theatre-going audiences. The audience sample was accessed directly via email and indirectly via social media with support from 74 industry partners (theatres, distributors, exhibitors), as detailed in the methodology. Non-attenders have been subject of some prior research, but deserve further study.

Data reveal minimal impact on live attendance

1.6 Interviews and focus group participants expressed a range of views about the impact Live-to-Digital is having on audiences, not least whether live attendances have declined or increased as a direct result of the availability of Live-to-Digital programming.

1.7 However, survey responses indicate that theatregoers are neither more nor less likely to attend live theatre if they experience it digitally. In fact, those who stream Live-to-Digital work are slightly more likely to attend live cultural performances *more* frequently than the average theatregoer: 37% of those who stream say they attended a dozen times or more in the past year, as compared with 24% of respondents overall.

1.8 These findings corroborate those presented in earlier studies, most recently in *Understanding the Impact of Event Cinema – An Evidence Review* and in the analysis of 44 million ticket transactions for 54 performing arts venues across England, spanning 2009-2013, as provided by Audience Agency, and

3 Belarus Free Theatre; Complicite; The Dukes Theatre; Fiery Angel/Kenneth Branagh Theatre Company; HiBrow; and Theatre Royal Newcastle.

analysed and reported in *Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre*.[4]

Data reveal overall stable levels of touring, but some organisations are experiencing challenges

1.9 The majority of theatre organisations have not reported a decline in the touring market over the past two years: 43% reported no change; and 38% reported an increase in touring activity. Exhibitors surveyed are keen to continue to present both Live-to-Digital and live performances, with 88% of exhibitors planning to maintain or increase the current number of live performances (including live theatre and other art forms) in their venues and 75% of exhibitors planning to maintain or increase their current number of live screenings.

1.10 19% of the sample experienced decreased touring. A very small minority (six organisations out of the 131 surveyed) stated that organisations that present their work (e.g. presenting theatres; mixed-arts-venues) cited Live-to-Digital as a reason the touring company's work is not being programmed.

Streamers are younger and more diverse than live theatre and Event Cinema audiences

1.11 Younger audience survey respondents are more likely than older respondents to stream performances than attend theatre in person or in the cinema: 71% of respondents ages 16-24 have streamed; 55% of respondents ages 25-44 have streamed; and under 30% of those 45 and older have done so.

1.12 Those who stream are more diverse: 68% of survey takers identifying as Non-White British have streamed, nearly twice the average (37%) for White British respondents. This informs part of a critical, and much broader discussion about participation, as raised in the Arts and Humanities Research Council's 2016 report on *Cultural Value,* whose authors argue that Black, Asian and Minority Ethnic (BAME) cultural practice and consumption have been particularly marginalised when discussing participation in cultural activity.[5]

4 'There is no evidence to suggest that film or theatre audiences are being displaced by Event Cinema; however, this could be due to a lack of data rather than there being clear evidence of no displacement effect. There is also no evidence that it is growing new audiences for live theatre performances, but there is an indication that it may inspire further attendance at Event Cinema screenings.' Tuck, Fiona and Abrahams, Mitra, TBR. *Understanding the Impact of Event Cinema – An Evidence Review*. Arts Council England and British Film Institute: 2016. The latter report (also annotated at Appendix 3): Bakhshi, Hasan and Whitby, Andrew. *Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre*. Nesta: 2014.

5 Crossick, Geoffrey and Kaszynska, Patrycja, *Understanding the Value of Art and Culture: The AHRC Cultural Value Project*. Arts and Humanities Research Council: 2016.

Streaming correlates with decreasing household income; while the opposite is true of Event Cinema

1.13 Of those audiences with annual household incomes of £100,000 and over, 94% have attended Event Cinema as compared to 32% who have streamed. On the opposite end of the income scale, of those with household incomes of less than £20,000, 80% have attended Event Cinema and 49% have streamed. An earlier study indicated that low household income correlated with Event Cinema screening attendance; that correlation was not borne out in this sample.[6]

Audiences do not believe Live-to-Digital is a substitute for live theatre; they believe it is a significant and distinct experience

1.14 On average, attendees are highly satisfied with their digital experiences. The vast majority (90% of Event Cinema participants; and 70% of those who streamed) say their experiences meet their expectations. They would recommend the experience to others (83% and 74%, respectively). For audiences – and many creators and suppliers interviewed for this study – Live-to-Digital is seen not as a replacement for live, but as a distinct experience (66% and 77%) that opens up "new ways of seeing theatre" (72% and 75%).

> "I actually felt that Complicite treated it like an interesting 'new' medium that was an integral part of the piece rather than the broadcast."
> – Exhibitor

1.15 This suggests that the digital experience is not viewed as a substitute for attending in person. Most survey respondents disagreed with the statement, "Live-to-Digital work is more engaging than attending live." In fact, 54% of Event Cinema participants and 36% of those who streamed stated that they prefer to attend live theatre.

1.16 Nesta's 2010 research into innovation within the arts/cultural sector as well as recent landmark publications from the Warwick Commission and the Cultural Value Project, emphasize the need to define and measure cultural value through the individual's first-hand experience with arts and cultural activity (live and digital). This study's investigation of audience absorption and emotional response emphasises the subtle but important differences in how audiences experience Event Cinema and streamed performances; the findings underscore the Cultural Value Project's recommendation that engaging with arts at home and online are worth far more consideration.[7]

6 Bakhshi, Hasan and Throsby, David. *Culture of Innovation: An economic analysis of innovation in arts and cultural organisations*. Nesta: 2010.

7 Ibid; *Enriching Britain: Culture, Creativity and Growth. Enriching Britain: Culture, Creativity and Growth: The 2015 Report by the Warwick Commission on the Future of Cultural Value*. The University of Warwick: 2015; Crossick and Kaszynska (2016).

1.17 These findings therefore represent an opportunity for sector development. Interviews and focus group conversations underscore that there are still significant artistic advances to be made within these new media; understanding how audiences engage and experience new art forms digitally, particularly at home, is in its infancy. The Belarus Free Theatre, Complicite and HiBrow case studies explore how theatre productions can use digital technology to create new artistic experiences in new ways rather than simply using technology as a tool to disseminate existing live productions.

"One of my customers said that Event Cinema hasn't yet found its sense of self-expression – he's right. Ultimately we'll be conceiving and making work as a hybrid art form."
– Exhibitor

Consumers are motivated by Live-to-Digital's economics and convenience, but not its 'liveness'

1.18 When asked why they attend Event Cinema, survey respondents often say they do so because it takes less time (64% of respondents) and is less expensive (33%) than attending live. Motivations for streaming include: the ability to access productions at times when the live performance is not available (48% of respondents); avoiding costs associated with getting to a venue (38%); cheaper ticket costs (33%); and saving time (31%). Many respondents also say they have engaged with Live-to-Digital work because a live performance was sold out (38% of Event Cinema audiences; 31% of streaming audiences).

1.19 This aligns with a number of studies on theatre and other art forms, including *A Smooth Sea Never Made a Skilled Sailor – The Dero Project* and *Opera in Cinemas – Audiences Outside London*.[8] Other reports have also documented the increasing cost of theatre tickets, which may have made Live-to-Digital programming, which is often less expensive, more attractive to the consumer in recent years.

1.20 A majority of organisations participating in the supply-side survey think that the 'liveness' of a production (i.e., the event is occurring in real time) is important to their Live-to-Digital audiences, with 47% calling it 'very important' and 35% 'somewhat important'. While exhibitors are less likely to say that 'liveness' is 'very important' (20%), a large majority (67%) still call it 'somewhat important'.

"The ability to have flexibility makes it a far more attractive proposition to me."
– Audience Member, 45-64, North East

1.21 The survey of audience members suggests that in fact 'liveness' does not drive demand for Live-to-Digital, nor affect the quality of the audience experience. Just 17% of surveyed Event Cinema attendees say 'liveness' is 'very important'; 33% say it is 'somewhat important'. Those who stream are even

8 Petrie, Matthew, Schutt, Becky and Hadida, Allegre. *A smooth sea never made a skilled sailor – Dero Project: Research Findings and Insights Final Report*. Fusion Research and University of Cambridge Judge Business School: 2012; Holmes, John. Opera in cinemas – audiences outside London. English Touring Opera: 2014.

less likely to say 'liveness' matters; only 9% called it 'very important' and 20% 'somewhat important'.

Lack of access and lack of interest inhibit Event Cinema consumption, while poor technology and low awareness of available content are barriers to streaming

1.22 Inconvenient timing (38%) and a lack of viewing locations (14%) are among the most commonly identified barriers to Event Cinema consumption among audiences surveyed for this study. Those living in rural areas are especially sensitive to this issue and claim that increased availability would make them more likely to attend an Event Cinema screening in the future (50%). However, the highest rated factor preventing audiences from attending an Event Cinema production was a stated preference for live theatre (54%); this response was complemented by 10% of respondents saying they were 'not interested' in Event Cinema.

"Our broadband connection is so appalling...If it were better, we might watch theatre online."
– Audience member, 45-64, South West

1.23 Meanwhile, a lack of understanding of what content is available (43%) and how one can access it (34%) has put many off streaming. So, too, has poor Internet connectivity. The majority of survey respondents have occasional issues when streaming (15%). Rural respondents were four times as likely as urban respondents to say their viewing is sometimes interrupted.

Economics rarely incentivise but often deter Live-to-Digital production

1.24 Generating new income was the least common motivation among suppliers to adopt Live-to-Digital work (22% of respondents say it "very strongly" motivates Live-to-Digital production, 11% say "fairly strongly"). Cost, meanwhile, was the most commonly identified barrier to adoption for those who have not entered the market (66% of respondents). Those organisations that have worked in the Live-to-Digital marketplace are unsure whether their efforts have or ever will contribute to their organisations' financial stability (64%). Nonetheless, suppliers view their organisations' leadership as "relatively comfortable" with the financial (and creative) risk that Live-to-Digital work represents.

1.25 These findings again align with other studies. *Exploring the Market for Live-to-Digital Art*, for example, also found that organisations are not deploying Live-to-Digital work primarily to generate revenue.[9]

9 MTM London (2015).

Breaking down perceived barriers to entry could promote wider participation among suppliers

1.26 Some suppliers who were interviewed and participated in focus groups believe that the barriers to entry remain too steep for the majority of theatre organisations. Others, however, contend that while a well-known brand, stars or expertise may be a prerequisite for staging Event Cinema, there is still room for small to mid-scale theatre organisations to present and produce bespoke content for distribution on established online platforms. Leveraging digital technology on stage or off can be daunting for theatre practitioners for a number of reasons – lack of capacity, lack of technical expertise, lack of understanding about who partners and audiences are, or might be, and where to find them. Additional training for the sector may promote participation and help organisations overcome perceived barriers.

1.27 Of those who have yet to produce Live-to-Digital work, 40% cited a "lack of understanding about how to enter the market" as a contributing factor preventing them from doing so. Stakeholder and focus group participants further emphasized that there is a compelling need for on-going, sign-posted training in creating, producing, funding and distributing Live-to-Digital theatre; targeted investment; and further research to enable English theatres to enter and find their place in the Live-to-Digital marketplace. By focusing on content development, distribution via online platforms (rather than solely via Event Cinema) and tailored marketing initiatives, new Live-to-Digital initiatives can also be conceived for *and by* younger and more diverse audiences.

Conclusion

1.28 One of the main questions this study set out to explore was the extent to which theatres in England are losing audiences to Live-to-Digital productions. Our research reveals that for the majority of those theatres in our sample, Live-to-Digital work is not displacing attendance. This corroborates the results of several studies published in recent years. Moreover, many theatres have experienced a wide range of positive effects from Live-to-Digital work, including re-energised audiences who can now access theatre content; a wider range of productions on offer; and a 'halo effect' of increased interest in their live repertoire. Suppliers surveyed are three times more likely to say the Live-to-Digital market place has had a positive (38%) or neutral (36%) impact on their organisation than negative (13%). 44% state that the programming schedule is not crowded enough to result in competition between Live-to-Digital and live programming. When asked what benefits Live-to-Digital productions have brought to their organisations, nearly three quarters cite new audiences (72%), followed by new partnerships (45%) and a stronger brand (43%).

1.29 Notwithstanding this, a small number of organisations (11 of the 131, 8%) surveyed say Live-to-Digital has impacted negatively the number of performances and venues for their organisations. Fewer (8, 6%) say it has negatively impacted attendance. Smaller organisations (budgets under £200,000) are 20% less likely than larger organisations (budgets £1 million or over) to say the Live-to-Digital market has positively affected their organisations (30% versus 50%, respectively).

1.30 Ultimately, pitting live and digital theatre against one another is misplaced. The focus should be placed on how England's theatre sector can remain vibrant, vital and relevant while embracing both Live-to-Digital *and* live. Live-to-Digital signals neither the death nor the salvation of live theatre: rather, it represents one means of harnessing rapidly evolving technologies and audience expectations to widen the scope of live theatrical performance. Live-to-Digital cannot replace the individual live performance that remains the core of theatre's unique appeal; nor is anyone trying to do this. Instead, it offers a means by which certain performances can be experienced by more audiences, particularly younger and more diverse ones, in new ways, and it should take its place as one element in theatre's ever-evolving relationship with its audience. It is not the whole future, but it is here to stay, and may very well be an essential element of long-term success for theatre organisations in England, both on and off the stage.

2.

Introduction

"One's fear, which may be groundless, is that eventually we and our equivalent theatres will stop doing plays and they'll all be streamed live from these centres of excellence." Sir Alan Ayckbourn, Playwright[10]

"With the dawn of the digital, there was lots of worry about the end of cinema, the end of live theatre. The naysayers heralded the end – don't listen to it. The more content there is, the more they consume the more content they want. People just want content. And the cultural sector has content." Distributor

"It will soon be possible to distribute grand opera music from transmitters placed on the stage of the Metropolitan Opera House by a radio telephone station on the roof to almost any dwelling in Greater New York and vicinity… The same applies to large cities. Church music, lectures, etc., can be spread abroad by the Radio Telephone." Lee De Forest, 1907[11]

2.1 In February 2016 Arts Council England, Society of London Theatre and UK Theatre commissioned AEA Consulting to research theatre's place in the 'Live-to-Digital' marketplace and determine the impact of Live-to-Digital on theatre audiences, production and distribution in England. This rapidly evolving field encompasses performances broadcast into cinemas and non-traditional venues (Event Cinema), as well as those streamed or downloaded via a host of online platforms. 'Live-to-Digital' has created an explosion of new opportunities for artists, producers, directors and companies to engage with their audiences, and a re-evaluation of the possibilities of traditional theatrical forms.[12] It has also raised complex questions about the nature of the theatre sector and its future, including the use of emerging technologies, financial and artistic risk, and, crucially, the centrality of the live communal experience.

2.2 Both demand and supply in the theatrical sector are shifting with unprecedented speed. Audience tastes and behaviours are changing, and there is increased competition from both within and outside the sector. The last decade has witnessed the growth of a global digital entertainment marketplace with an astonishingly wide spectrum of entertainment forms and platforms now available. Non-live entertainment, including TV, online content, film and video gaming, is highly sophisticated, supremely flexible, and aimed at every available second of audiences' leisure time and income. This marks a serious intensification of the competition faced by the live theatre sector, and its scope is growing daily. Substantial cuts in public funding for the arts in the UK have exacerbated a sense among many theatre organisations – especially smaller ones, and those outside of London – that we are in the midst of a period of fundamental sector change.

2.3 Examining these factors 'in the round' will foster an understanding of how the changes taking place can best be harnessed for the benefit of audiences and theatre practitioners, as well as those operating along the

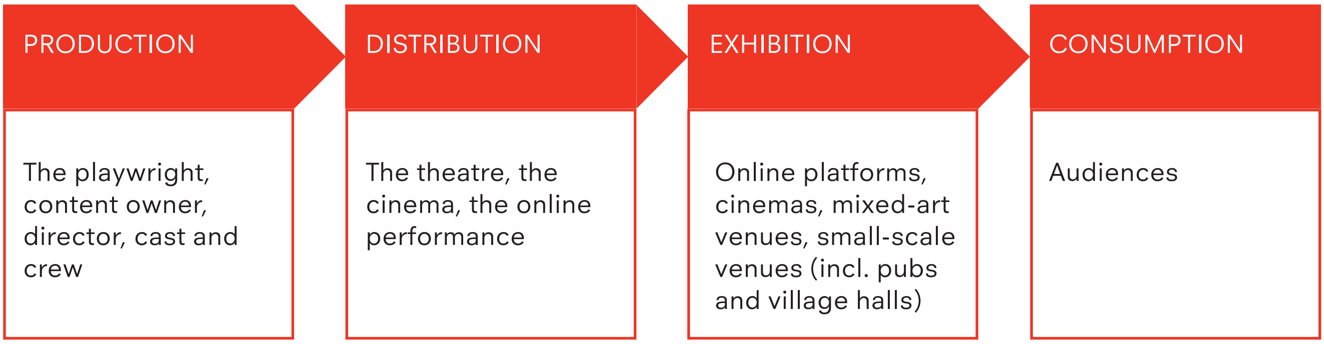
10 Youngs, I. 'Sir Alan Ayckbourn voices fears over theatre screenings.' BBC News, 2014.

11 Chase's 2000 Calendar of Events. NTC/Contemporary Publishing Group. 2000. p. 84.

12 Terms appearing in red are defined when they first appear, with a full glossary available in Appendix 1. Live-to-Digital: All-encompassing term to characterise the wider market for the distribution of digital theatre. For the purposes of this study, the Commissioners have defined it to include: Event Cinema, free or paid live or on-demand availability online, and live or on-demand television broadcast.

wider distribution chain (including content producers, distributors and exhibitors).[13]

FIGURE 1
Theatre Distribution Chain



Study focus

2.4 Arts Council England, UK Theatre and Society of London Theatre are actively exploring the opportunities and questions that Live-to-Digital presents, including recognising the important role digital distribution can play across art form boundaries. For the purposes of focus and given the study's timeframe, the principal art form focus for this study is theatre, which has notably pioneered a number of high-profile initiatives in this market; where possible the research reflects other art form initiatives.

2.5 The scope of the study is *England* (rather than the wider UK) and *digital platforms* that distribute live theatre (including online, Event Cinema and digital screenings in alternative venues). The study's scope concentrates on those suppliers across the distribution chain and *existing* theatre-going audiences. The audience sample was accessed directly via email and indirectly via social media with support from 74 industry partners (theatres, distributors, exhibitors), as detailed in the methodology section below. Non-attenders have been subject of some prior research, but deserve further study.

2.6 While the commissioners recognise that sustaining the UK's current international leadership position in the European Event Cinema marketplace is important, more important is to ensure the theatre sector, and wider cultural sector at large, is better informed about the opportunities across the digital landscape.

13 **Distribution chain (or 'supply chain')**: The chain of organisations or intermediaries through which a cultural production passes until it reaches the audience member. In the 'Live-to-Digital' space, this will include Production (the playwright, content owner, director, cast and crew); Distribution (the theatre, the cinema, the online platform); Exhibition (cinemas, alternative venues, online platforms); and Consumption (the audience).

Distributors: The party responsible for marketing or hosting a production; if the distributor owns the theatre or film distribution network, it will control this directly. Alternatively, it could work through theatrical exhibitors or other sub-distributors. (See Distribution network for examples).

Content producers: Those organisations that develop and create work.

Exhibitors: In the 'Live-to-Digital' space, those platforms or spaces that show the theatre production. This can include online platforms (such as Canvas/YouTube or Digital Theatre); venues (such as mainstream cinemas like the Odeon and the Vue); mixed-arts venues (like The Dukes); or small-scale venues (like pubs or village halls).

Birth and evolution of Live-to-Digital

"When we talked about arts and culture [and Live-to-Digital], it was incomprehensible to so many people... As early as 2010 it was totally bonkers to talk about filmed theatre; it just wasn't a category.'" Distributor

2.7 Live-to-Digital was born in the UK, but not in the theatre sector. Commercial music and opera led the way. In 2003, David Bowie, a trailblazer in many artistic and commercial contexts, launched his album, *Reality,* to 50,000 fans in 88 cinemas in 22 European cities, via a satellite link to a live performance in London's Riverside studios.[14] The success of this event, orchestrated by New York-based BY Experience, inspired the Metropolitan Opera to develop, in 2006, its *Live in HD* series in collaboration with the same distributor. Dubbed 'Event Cinema', the simulcasting of live performances into cinemas and outdoor spaces (including Lincoln Center Plaza and Times Square) proved to be a game-changer that spawned the 'Live-to-Digital' category.[15] Within two years, other opera companies followed in the Met's footsteps, including, in the UK, the Glyndebourne Opera, that in 2008 screened its productions of *Giulio Cesare*, *Tristan und Isolde* and *Così Fan Tutte* into ODEON cinemas.

2.8 In 2009, the National Theatre became the first theatre company to embrace Live-to-Digital with the launch of *NT Live*. This programme went beyond Event Cinema to include both live and encore broadcasts of its plays delivered via satellite technology. [16] Since then, Live-to-Digital has expanded beyond music, opera and theatre to encompass dance and even visual arts and museum exhibitions, and to include many major UK arts organisations that have increased their virtual capacity at the cinema, and in other new ways online.[17] These include the Royal Opera House, the Royal Ballet, BBC Proms, the British Museum and the National Gallery; and, more recently, Royal Shakespeare Company, Manchester Royal Exchange; Shakespeare's Globe; and Kenneth Branagh Theatre Company in partnership with Fiery Angel. 2009 also saw the creation of Digital Theatre, a UK-based online company specialising in the creation and distribution of high definition films of theatrical productions. As one interviewee for this study described this period, "Event Cinema took everyone by surprise. It was a lovely surprise."

2.9 Since 2010, numerous non-profit and commercial entities have entered the growing Live-to-Digital marketplace, which is becoming a more complex

14 Susman, G. ''Reality' Show,' Entertainment Weekly, online version (2003).

15 **Simulcast**: The broadcasting of programs or events across more than one medium, or more than one service on the same medium, at exactly the same time.

16 **Encore**: Recorded performance, often screened after the live satellite broadcast (in Event Cinema) NT Live has since engaged over 5 million people in 2,000 venues in more than 50 territories around the world; the Theatre today estimates that £6.5million in royalties has been redistributed to cast and creative teams since 2009 resulting directly from NT Live broadcasts. So far, it appears to be sustaining its first-mover advantage in the theatre sector by leveraging its carefully constructed distribution network of cinemas and venues around the UK and the world. Source: Schutt, B. 'The Work of Art in the Age of Technological Reproduction: The National Theatre Goes to the Movies,' University of Cambridge Judge Business School (2009; updated 2010-2015).

17 **Virtual capacity**: not limited by the traditional confines of a physical space (e.g. in theatre, limited by a number of seats; a number of nights a play can be staged), the ability to showcase a production to a significantly larger audience via screen or online.

'ecology' that now includes, in addition to established arts organisations, new content producers, platforms, distributors, and industry bodies. 2011 saw the launch of HiBrow, a live event producer and free, curatorial web portal for the visual and performing arts (profiled in a case study at Chapter 7); Cinegi Media Limited, a digital film distribution service designed to enable any venue to become a 'cinema' entered the market in 2012; and the same year Arts Council England and the BBC launched The Space, a pilot scheme that began as a publishing platform and has now evolved into a commissioning and capacity-building Community Interest Company that connects new content to multiple distribution platforms. Recognising the need for support, infrastructure and promotion in this growing marketplace, the UK-based but international trade body Event Cinema Association (ECA) was also established in 2012.

2.10 In 2013, the Digital Funding Partnership supported Event Cinema across the UK through the digitization of 300 cinema screens, characterized by the UK Cinema Association as 'the real story taking place off-screen.[18] Last year saw the launch of Canvas, an Arts Council England-funded Multi-Channel Network that aggregates online audiences to watch UK cultural content on YouTube, Facebook, Twitter and Instagram; and the broadcast of a series of 30-minute theatre pieces, commissioned by Arts Council England, BBC and Battersea Arts Centre. [19] This year, the London-based international touring company, Complicite, partnered with The Space, the Barbican, Edinburgh International Festival, Onassis Cultural Centre, Schaubühne Berlin, Théâtre Vidy-Lausanne and Warwick Arts Centre to stream its production *The Encounter* live for free and as an encore for one week following the live production; this was the world's first use of 3D with 'binaural' sound in theatre (profiled in Chapter 7).[20] The 2016 publication, *Live Cinema UK,* explores the growing market and audience appetite for theatrical film. This includes synchronous live performance, interactive singalongs, and site-specific screenings, the latter made widely known by London's Secret Cinema. Although outside the remit of this study, with film becoming more 'theatrical', this emerging sister market is being actively developed.[21]

2.11 Notwithstanding these developments, Event Cinema today remains the most high profile and quantifiable segment of theatre's Live-to-Digital market. In 2014 Event Cinema globally enjoyed a 32% growth rate and gross revenues of $277 million.[22] In the UK and Ireland, 2014 saw revenues of £35 million, with Event Cinema's share of UK and Ireland box office doubling every year since 2009. Theatre today is the leading Event Cinema genre globally, accounting for more than half of all Event Cinema revenues, with IHS and Rentrak citing "English theatre as the hot new genre in Anglophone countries." (However opera still leads in number of productions in the UK and Ireland, and those productions in the 'visual arts' category, which includes opera, music, ballet and exhibitions). Continuing at this pace and notwithstanding the complications in definition, the

18 UK Cinema Association (previously Cinema Exhibitors' Association), Annual Reports 2013-2014.

19 Canvas is primarily populated by *short-form* content about the arts, though theatres that are a part of the Canvas network might publish long-form content (e.g. whole productions) on their YouTube channel. Multi-Channel Networks (MCNs) are a collection of YouTube channels gathered together by a media agency (also referred to as an MCN) into a recognisable network identity or brand. Canvas is executed by Brave Bison (rebranded from Righster in May 2016).

20 A method of recording sound that uses two microphones, arranged with the intent to create a 3-D stereo sound sensation for the listener of actually being in the room with the performers or instruments.

21 *Live Cinema in the UK* (Live Cinema Ltd, 2016).

22 Hancock and Jones (2015).

market is projected to reach revenues of £60-80 million in the UK[23] and $1billion (USD) worldwide by 2019.[24]

2.12 Yet, despite compelling, often high-profile, examples of audiences engaging with live and streamed theatre experiences communally in cinemas and online, questions remain about the impact of Live-to-Digital on audiences, theatre organisations, and the theatre sector as a whole.

Background to the study

2.13 Over the past few years a number of significant studies have been published examining the burgeoning Live-to-Digital landscape.[25] *Understanding the impact of Event Cinema: an evidence review,* the direct precursor to this study, was commissioned by Arts Council England in partnership with the British Film Institute in autumn 2015. Published in January 2016, the research focussed specifically on the Event Cinema market in order to 'improve understanding of this emerging sub-sector and consider its impact on the broader arts and cultural sectors.'[26]

2.14 The report highlighted the UK's position as the global leader in Event Cinema; the domination of big players in the space; concern about barriers to entry from smaller companies; the business benefits for content producers and exhibitors (cinemas); and made a call for a national strategy for screenings of staged productions. The authors pointed out, however, that many knowledge gaps exist in relation to Event Cinema, including, significantly, the unanswered question of whether film or theatre audiences are being displaced by Event Cinema. The authors conclude that this 'may be due to a lack of data rather than there being clear evidence of no displacement effect.'[27]

2.15 The commissioners of this study therefore recognised a need, and an opportunity, to attempt to fill these gaps; to understand if and how this 'Live-to-Digital' market is being exploited by England's theatre sector; and in turn, how the sector, and audiences, are being affected by its growth. Specifically, through this research, the Commissioners sought answers to the following questions:

Supply and demand profile

1. Who are the audiences for Live-to-Digital theatre performances?
2. What organisations are supplying Live-to-Digital theatrical work?
3. What kind of live performance content is currently being offered digitally that is drawing audiences?

23 MTM (2015).

24 Hancock and Jones (2015).

25 These include: *The role of cross-art-form and media venues in the age of 'clicks' not 'bricks'* (Fleming, 2008); *Beyond Live: Digital Innovation in the Performing arts* (Bakhshi and Throsby, 2010); *The impact of The Met: Live in HD* (van Eeden, 2011); *Bringing cinema to rural communities* (The UK Film Council, 2012); *Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre* (Arts Council England and Nesta, 2014); (MTM, 2015) and Live Cinema Ltd. (2016). The findings from these reports, and others are referenced in the literature review (Appendix 3).

26 Tuck and Abrahams (2016)

27 **Displacement**: Taking over the position or role of; within the 'Live-to-Digital' space, some have argued that, for audiences, digital theatre events will serve the same purpose as live theatre productions

Audience motivations, barriers and experiences

4 What are audience motivations and barriers to attend live theatre performances versus attending Live-to-Digital performances?
5 What impact are digital theatre screenings having on audiences for live theatrical performances?
6 What are the differences in the quality of the experience and access between digital and live theatre events?

Supplier offer, barriers, experiences and impact on touring

7 What are the motivations, opportunities and barriers for theatre organisations to enter the market?
8 Have theatre touring patterns been affected by the advent of digital theatre?

The future of Live-to-Digital

9 What does the future hold for attenders? Will they watch performances in person, in Event Cinema, or online?
10 What are the opportunities for smaller theatre organisations to create digital content?
11 What are the opportunities for co-promotion – where cinemas, producers and local venues work together?

Methodology

2.16 To complete this study, AEA Consulting undertook the steps below. A more detailed methodology summary may be found at Appendix 4.

- Reviewed 45 English-language articles about Event Cinema, live streaming, and related subjects written within the last five years and mainly published in the UK; and prepared a Literature Review of 21 of these studies (Appendix 3);
- Interviewed 35 artists and content producers, distributors, exhibitors and leaders from theatre companies and trade bodies (Appendix 5);
- Facilitated three focus groups in Birmingham, London and Newcastle with individuals from arts organisations located in the region (Appendix 5);
- Undertook a 'demand side' online survey to theatre audiences, with support from a range of partners, completed by 1,263 individuals and made up a mix of individuals who had never experienced Live-to-Digital work and others who had (Appendices 6);
- Undertook a 'supply side' survey to theatre companies, exhibitors and distributors, which yielded 245 completed responses (Appendices 6);
- Held 22 one-to-one, follow-up interviews with audience members who took the 'demand side' online survey (Appendix 5);
- Developed six case studies that foreground key issues and lessons for the field (Chapter 7); and
- Undertook a social media analysis to give an in-depth look at consumer sentiment around a Live-to-Digital and live production (Appendix 4).

2.17 Chapters 3-7 integrate the findings from aforementioned sources and are indicated in the text as follows:

- Stakeholder interview subjects are identified by their primary role in the Live-to-Digital space and quoted anonymously, as agreed with the subject at the commencement of the interview;
- Quotations from audience members and suppliers are drawn from the two surveys, as well as interviews, focus-groups and the social media analysis. These are identified as such and quoted anonymously;
- Evidence from the literature review is cited and sources are given when referenced;
- Quantitative results from the audience and supply-side survey detail the sample size ('n'); the percentage of respondents; and the specific question asked; and
- Case study subjects are identified and quoted directly.

2.18 The project was guided throughout by a Steering Committee composed of the following members:

- Jonathon Blackburn, Senior Officer, Policy and Research, Arts Council England
- Cassie Chadderton, Head of UK Theatre and Membership (and representing Society of London Theatre)
- Michelle Dickson, Director for Touring, Arts Council England
- Paul Glinkowski, Senior Manager, Creative Media, Arts Council England
- Andrew Mowlah, Director, Policy & Research, Arts Council England (and Project Director).

Data Set – Audience Survey

2.19 1,393 audience surveys were returned between 20 April and 18 May 2016, with 1,263 fully completed, for a completion rate of 91%. Those completed responses constitute a data set with a margin of error of approximately 3%.

2.20 The robust size of the sample set allowed for segmentation by a variety of characteristics, including age, annual income, geography and past participation. For the purposes of segmentation, geography is characterised as either 'rural' or 'urban' following the rural-urban classification defined by the Office for National Statistics' 2011 Census Output Areas Rural-Urban Classifications, while participation is determined by whether a survey respondent self-reported *ever* participating in live theatre, Event Cinema, or online or television streaming. Individuals who had not participated in live theatre were discarded from the data set. (See Figure 3 on following page).

2.21 In order to reduce skew in the analysis, responses were weighted to align with theatre age demographics as reported by the 2015 *Taking Part* Survey. It was also the intention to align urban and rural geographic characteristics to that survey, but as the survey results matched that distribution already within the margin of error, no additional weighting was performed.

FIGURE 2
Audience Sample Weighting

Age Segment	# Survey Responses	Proportion of Response	*Taking Part* Audience Segments	Weight	# Weighted Responses
16-24	51	4%	13%	2.98	152
25-44	217	18%	31%	1.71	372
45-64	525	44%	35%	0.79	415
65-74	331	28%	13%	0.47	157
75+	63	5%	8%	1.45	91

FIGURE 3
Audience Survey Segmentation

Segment	# Responses
Age	
16-24	51
25-44	217
45-64	525
65-74	331
75+	63
Income	
Less than £20,000	184
£20,000 – £39,999	350
£40,000 – £59,000	197
£60,000 – £99,999	162
£100,000 and over	64
Participation	
Attended Event Cinema Screening	1069
Did Not Attend Event Cinema Screening	115
Attended Streamed Performance	395
Did Not Attend Streamed Performance	785
Geography	
Urban	828
Rural	262

Data Set – Organisation Survey

2.22 424 organisation surveys ('supply-side') were returned between 20 April and 18 May 2016, with 245 fully completed, for a completion rate of 63%. Those completed responses constitute a data set with a margin of error of approximately 6%.

2.23 As with the online audience survey, the supplier survey segment responses into a variety of categories including budget size, kind of activity, and geography. Organisations who did not indicate that they produce, exhibit, or distribute theatre at all were discarded from the dataset. (See Figure 4 on following page.)

2.24 Based on the mapping in the forthcoming study, *Theatre in England*, the 175 producers surveyed represents 15% of the English market's total producing theatres.[28] Respondents identifying as distributors (5% of respondents) were too few to comprise a segment of their own within the Supplier Activity category. While exhibitors were examined as their own segment (49 total responses), we have been conservative in drawing any conclusions about them as that sample size is relatively low compared to the estimated total number of exhibitors nationally.

FIGURE 4
Supplier Survey Segmentation

Segment	# Responses
Supplier Activity	
Theatre Producer	175
Exhibitor	49
Budget	
Less than £200,000	114
£200,000 – £999,999	77
£1,000,000 and over	46
Participation	
Has Produced Live-to-Digital	58
Has Not Produced Live-to-Digital	111
Geography	
Urban	207
Rural	30

Report structure

2.25 Chapters 3 through 6 provide detail on the research findings addressing the 11 questions outlined above. Case studies on six organisations who share their experiences working in the Live-to-Digital space follow at Chapter 7. The appendices include a proposed glossary for the industry, a bibliography of works cited; a literature review; the consultation list; and a summary methodology statement.

2.26 The study team from AEA Consulting included Brent Karpf Reidy, Senior Consultant; Becky Schutt, Senior Associate; Deborah Abramson, Associate; and Antoni Durski, Research Analyst. David Throsby, Distinguished Professor of Economics at Macquarie University in Sydney, served as Senior Advisor. Elizabeth Ellis, Managing Principal and Laura Casale, Director of Knowledge Management, served as editors of the report.

2.27 The authors are grateful to the Steering Committee and to the wide range of people who participated in this study for their time, candour and insights. It is the commissioners' and authors' hope that the study helps to move the Live-to-Digital conversation forward, giving arts organisations of all sizes the understanding they need to leverage new technologies if they are so inclined.

28 BOP Consulting and Graham Devlin Associates. *Theatre in England*. Arts Council England: 2016 (Forthcoming)

3.

Supply and Demand Profile

"You have people in very rural areas that are able to go and see performances that they could never afford to see in London and in New York. It is exciting" – Touring Theatre Director

3.1 This chapter examines the basic profile for supply and demand in the Live-to-Digital sector, including who is consuming and creating Live-to-Digital work and how those individuals and organisations differ from those who are not in the Live-to-Digital space. The chapter focuses on three questions:

1 Who are the audiences for Live-to-Digital theatre performances?
2 What organisations are supplying Live-to-Digital theatrical work?
3 What kind of live theatre performances are being offered digitally, and which ones draw the most audiences?

Q1. Who are the audiences for Live-to-Digital theatre performances?

3.2 The survey reveals an average audience profile as indicated in the figure below.

FIGURE 5
Audience survey proportionate characteristics for respondents (n = 1,187)

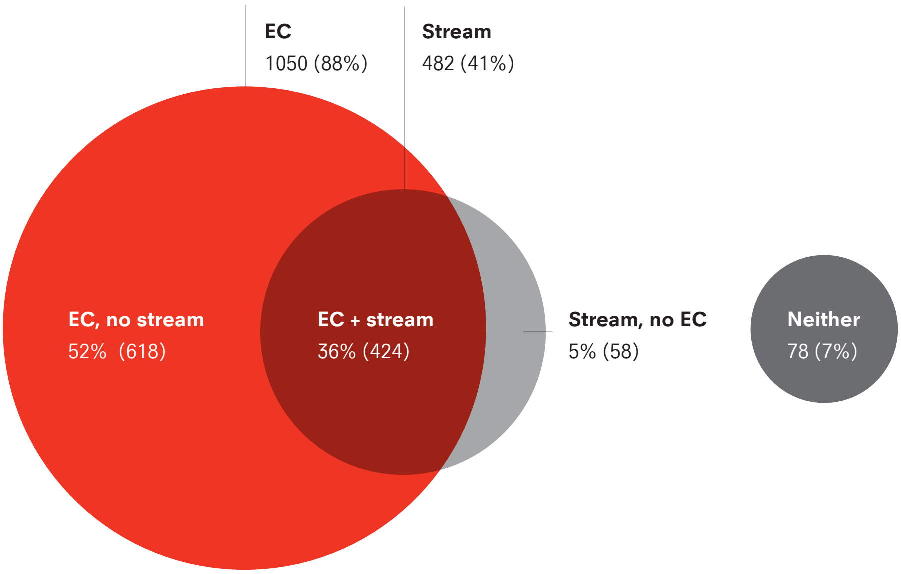
Segment	# Respondents	% Proportion
Age		
16-24	152	13%
25-44	372	31%
45-64	415	35%
65-74	157	13%
75+	91	8%
Income		
Less than £20,000	216	22%
£20,000 – £39,999	355	36%
£40,000 – £59,000	191	19%
£60,000 – £99,999	161	16%
£100,000 and over	59	6%
Participation		
Attended Event Cinema Screening	1050	89%
Did Not Attend Event Cinema Screening	135	11%
Attended Streamed Performance	482	41%
Did Not Attend Streamed Performance	697	59%

Segment	# Respondents	% Proportion
Gender		
Male	272	23%
Female	899	76%
Ethnic Group or Background		
White British	1007	87%
Non-White British	155	13%
White - other	87	8%
Mixed/Multiple ethnic groups	21	2%
Asian/Asian British	35	3%
Black/ African/Caribbean/Black British	11	1%
Employment Status		
In education	88	8%
Employed full-time	439	37%
Employed part-time	116	10%
Full-time parent / caretaker	34	3%
Self-employed	148	13%
Unemployed	25	2%
Retired	324	28%

Source: Online audience survey.

3.3 In Figure 6 below, participation segments are analysed to indicate overlap between the various segments. Just over a third of survey participants (36%) have participated both in Event Cinema and streaming. Meanwhile, 78 individuals (7%) say they neither attended Event Cinema or streamed.

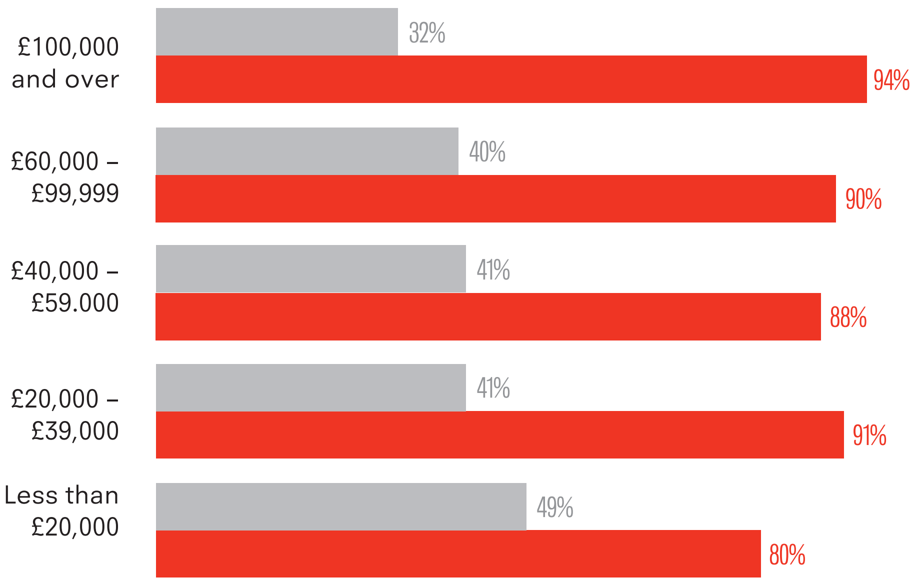
FIGURE 6
Audience survey proportionate participation Segments (n = 1,187)



Source: Online audience survey. Figures not to proportionate scale so that labels are legible. Not included in the diagram are 59 respondents who did not indicate their past participation.

3.4 There are subtle but important differences between those audiences that consume Live-to-Digital and those that attend live theatre performances. As indicated in Figure 7, whether a participant has attended Event Cinema correlates with increasing household income, while the opposite is true of streaming participation. Of those audiences with gross incomes of £100,000 and over, 94% have attended Event Cinema as compared to 32% who have streamed. On the opposite end of the income scale, 49% of those with household incomes of less than £20,000 have streamed and 80% have attended Event Cinema. An earlier study indicated that low household income correlated with Event Cinema screening attendance; that correlation was not seen in this research. [29]

FIGURE 7
Audience survey participation by annual household income
(n = 957)



Source: Online audience survey. Question: "Please choose your annual household income before tax, expenses and deductions (i.e. gross income)."

3.5 As Figure 8 indicates on the following page, younger audiences are much more likely than older audiences to have streamed Live-to-Digital, and somewhat less likely to have attended Event Cinema. While 71% of respondents ages 16-24 say they have streamed Live-to-Digital, only 19% of respondents ages 75 and above say the same.

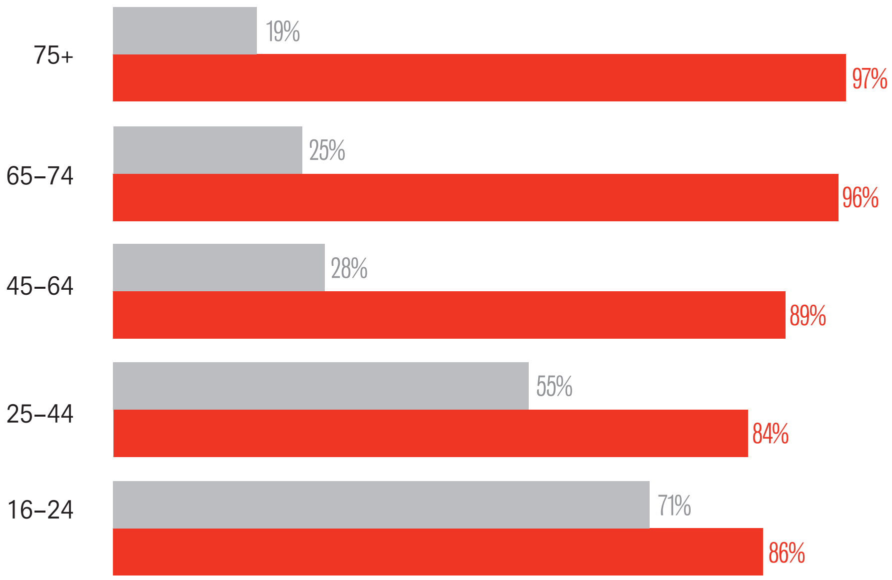
3.6 Despite this difference, however, Live-to-Digital audiences may be ahead of the average for the general population in terms of technology use and age. Other research has found that Live-to-Digital consumers tend to be earlier adopters of technology for their age groups, and that streaming use has increased among older age groups in recent years.[30]

29 On this and several following audience survey figures, audience segments are presented where useful, based on what kinds of live and Live-to-Digital theatre individuals have participated in within the last year. Those segments include participants who have attended live theatre in the last year ("Live Theatre"), who have attended Event Cinema ("Event Cinema"), those who have not attended Event Cinema ("No Event Cinema"), those who have streamed Live-to-Digital performances ("Streamed Perf.") and those who have not streamed ("No Streamed Perf").

30 MTM (2015) and OFCOM. "On-demand and Online Research: Consumption and Concerns." 2016

FIGURE 8
Audience survey participation by age segment (n = 1,187)

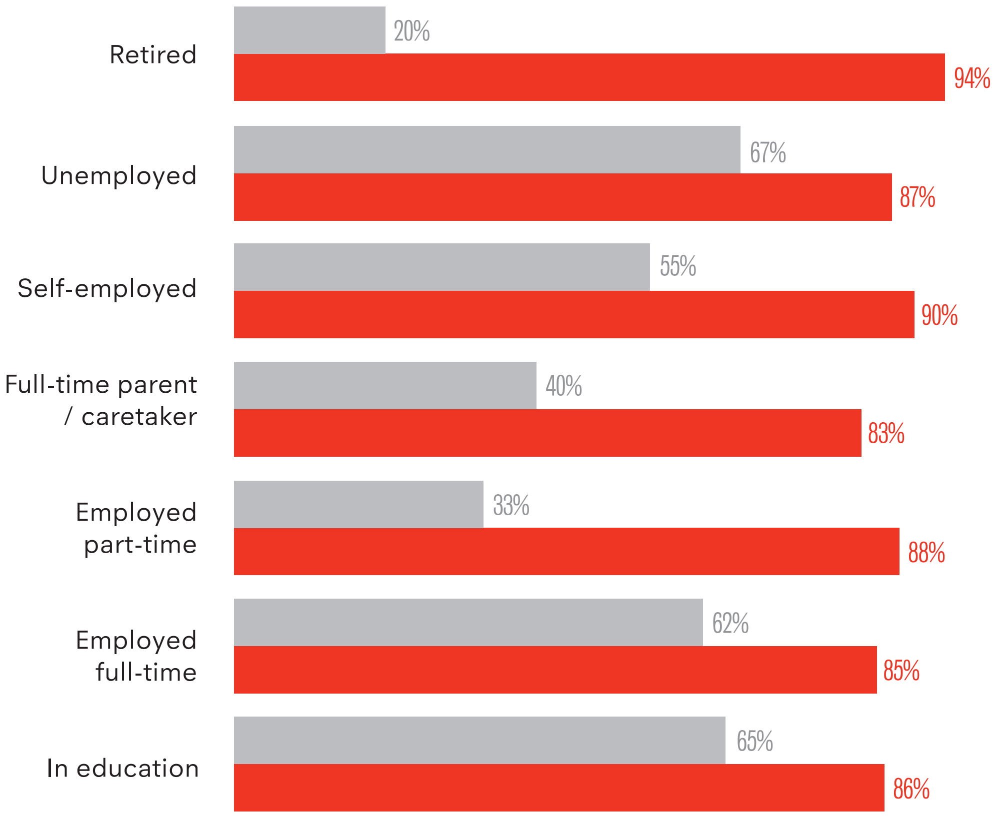
Source: Online audience survey. Question: "Please select your age category based on the age you turned at your last birthday."



3.7 Employment status follows similar trends. As Figure 9 shows, only 20% of retirees have streamed, while 65% of students have; this aligns with findings by age as older individuals are more likely to be retired. There is a relatively equal level of participation in Event Cinema by all employment categories, save for retirees, who are only slightly more likely than other segments to have attended Event Cinema.

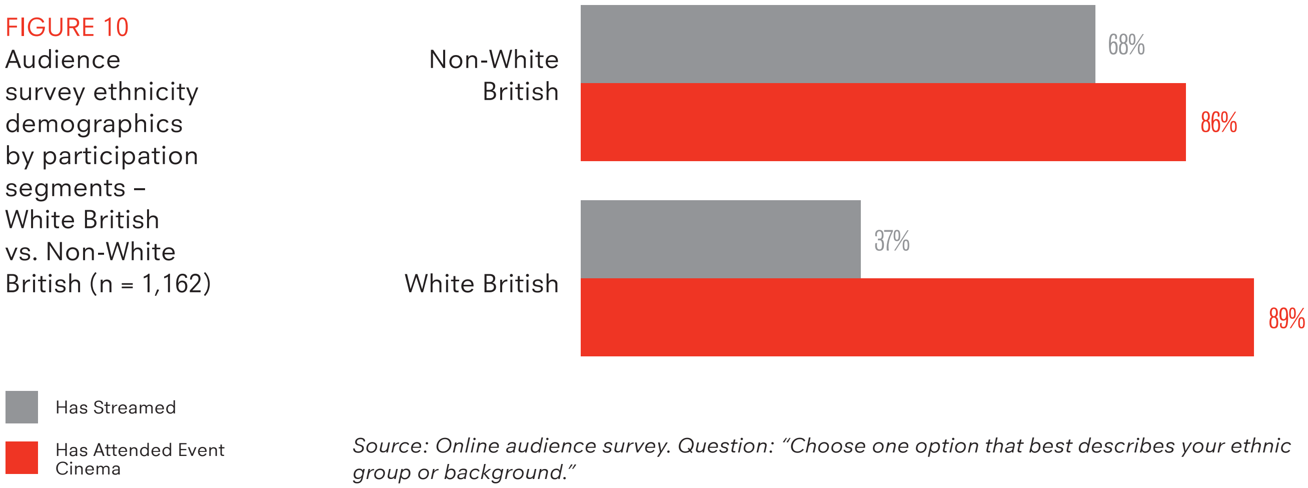
FIGURE 9
Audience survey employment status by participation segments (n = 1,173)

Source: Online audience survey. Question: "What is your employment status?"



3.8 Streaming audiences are also more diverse, as Figure 10 indicates. 68% of Non-white British respondents say they streamed, as compared with 37% of White British respondents. Non-white British respondents are also 9% less likely to say they have attended Event Cinema.

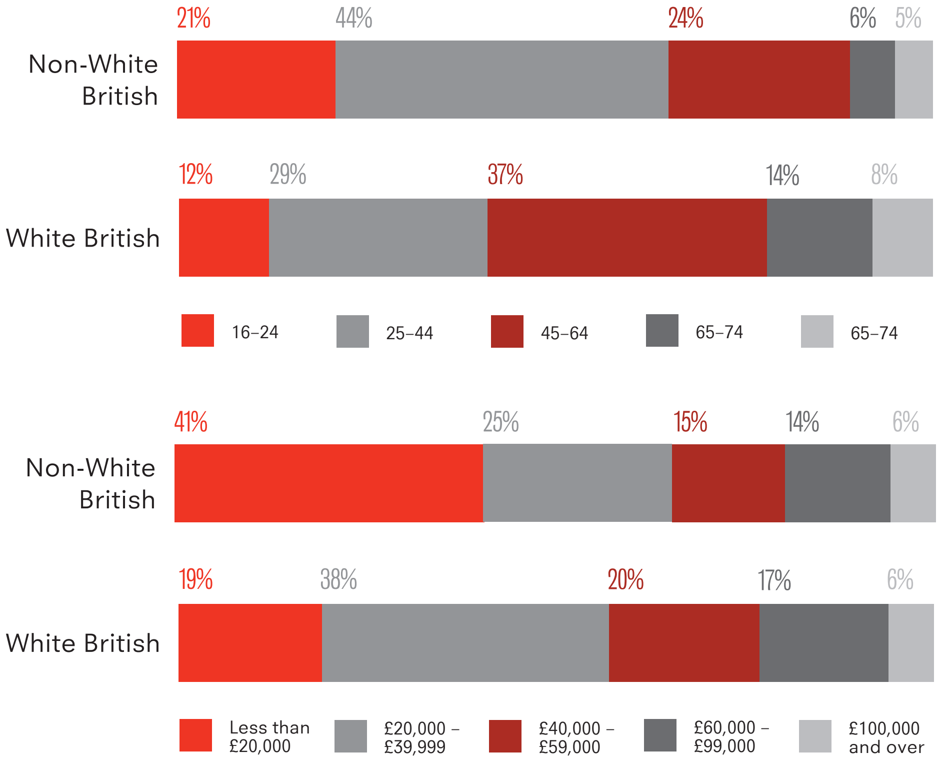
FIGURE 10
Audience survey ethnicity demographics by participation segments – White British vs. Non-White British (n = 1,162)



Source: Online audience survey. Question: "Choose one option that best describes your ethnic group or background."

3.9 It is important to note that the Non-White British respondents were on average younger and less wealthy than White British respondents (Figure 11 below). While ethnicity, wealth, and age thus can be said to correlate with participation in streaming, the survey does not reveal those attributes as causal to participation.

FIGURE 11
Audience age and income demographics by ethnicity – White British vs. Non-White British (n = 1,652, 963)



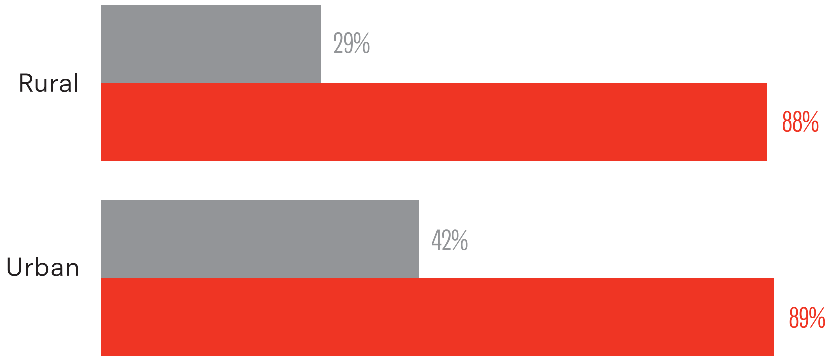
Source: Online audience survey. Question: "Choose one option that best describes your ethnic group or background," "Please select your age category based on the age you turned at your last birthday," and "Please choose your annual household income before tax, expenses and deductions (i.e. gross income)."

3.10 Contrary to what some stakeholders discussed in interviews, the survey reveals that urban, not rural, respondents are more likely to stream content as Figure 12 demonstrates below (42% compared to 29%). This aligns with earlier Arts Council England analysis of the Taking Part Survey, indicating digital and video art event attendance is more common among the urban.[31] Geography does not have any significant impact on whether or not a survey respondent has attended Event Cinema.

FIGURE 12
Audience survey urban and rural geographic distribution by attendance segments in the past 12 months (n = 1,186)

Has Streamed

Has Attended Event Cinema



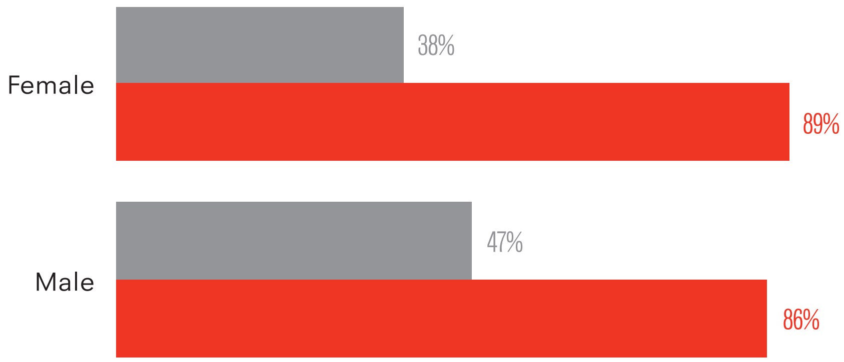
Source: Online audience survey, based on post code classification defined by the Office for National Statistics' 2011 Census Output Areas Rural-Urban Classifications.

3.11 Finally, the survey reveals moderate differences between male and female respondents in terms of their participation with streaming, with males being 9% more likely to have streamed as Figure 13 shows below. Event Cinema participation showed no significant variation.

FIGURE 13
Audience survey gender distribution by participation segments (n = 1,173)

Has Streamed

Has Attended Event Cinema



Source: Online audience survey. Question: "What gender do you identify as?"

31 Arts Council England. *Rural evidence and data review: Analysis of Arts Council England Investment, Arts and Cultural Participation and Audiences*. 2015

Q2. What organisations are supplying Live-to-Digital theatrical work?

3.12 Organisations responding to the online survey can be classified as shown below in Figure 14.

FIGURE 14
Organisation survey proportionate characteristics for respondents (n = 245)[32]

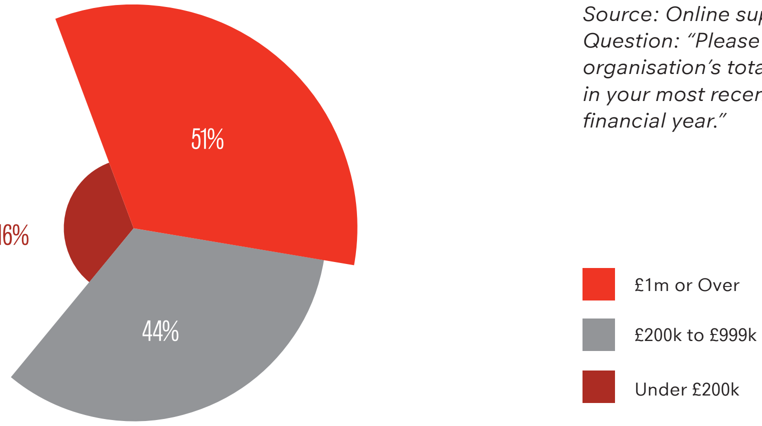
Segment	# Respondents	% Proportion
Suppler Activity		
Theatre Producer	175	78%
Exhibitor	49	22%
Primary Discipline		
Theatre	124	70%
Combined Arts	35	20%
Other	19	10%
Budget		
Under £200k	114	48%
£200k to £999k	77	32%
£1m or Over	46	19%
Statistical Geography		
Urban	207	87%
Rural	30	13%
Permanent Home/Venue		
Yes	74	58%
No	103	42%
NPO		
Yes	72	40%
No	106	60%
Has produced / is producing LTD		
Yes	58	33%
No	111	62%
Not Sure	9	5%

Source: Online supply-side survey.

3.13 As Figure 14 indicates, one-third (33%) of organisations surveyed report to have produced or be in the process of producing Live-to-Digital theatre. Figure 15 below shows that larger annual expenditure correlates with an increased likelihood of producing Live-to-Digital work. Organisations with total annual expenditure of £1m and above are more than three times as likely as organisations with budgets under £200,000 to have produced Live-to-Digital theatre (51% versus 16%, respectively).

32 Categories do not all sum to 100% as the figure leaves out respondents who skipped individual questions.

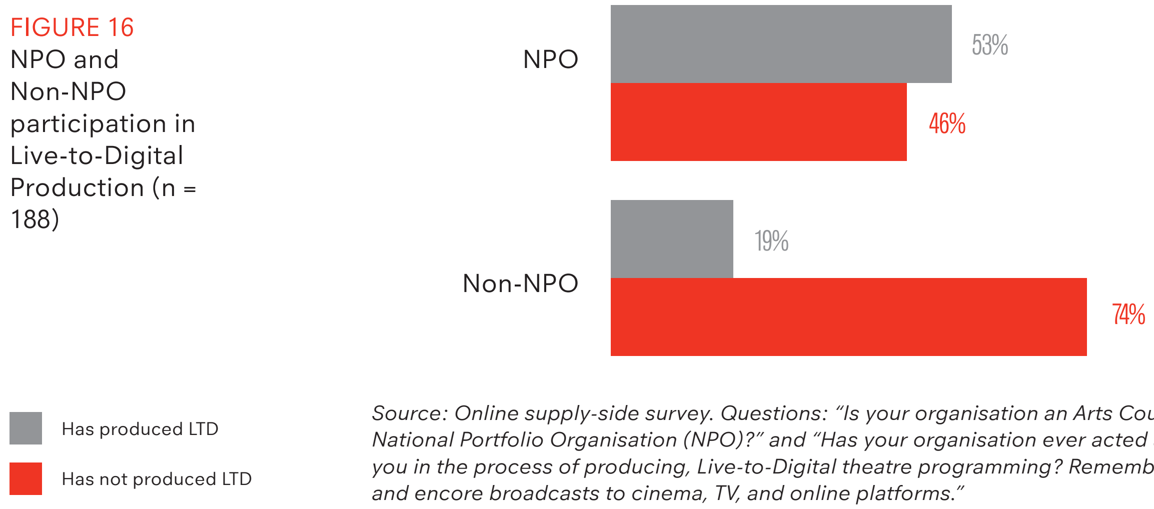
FIGURE 15
Proportion of suppliers involved with Live-to-Digital theatre by total annual expenditure (n = 57)



Source: Online supply-side survey. Question: "Please state your organisation's total expenditure in your most recent reported financial year."

3.14 Arts Council England National Portfolio Organisations (NPOs), which receive three-year funding, are more likely than non-NPOs sample to have produced Live-to-Digital work. While 53% of NPOs responding say they have produced Live-to-Digital work, the same is only true of 19% of non-NPOs responding (Figure 16).

FIGURE 16
NPO and Non-NPO participation in Live-to-Digital Production (n = 188)



Source: Online supply-side survey. Questions: "Is your organisation an Arts Council England National Portfolio Organisation (NPO)?" and "Has your organisation ever acted as producer, or are you in the process of producing, Live-to-Digital theatre programming? Remember to include live and encore broadcasts to cinema, TV, and online platforms."

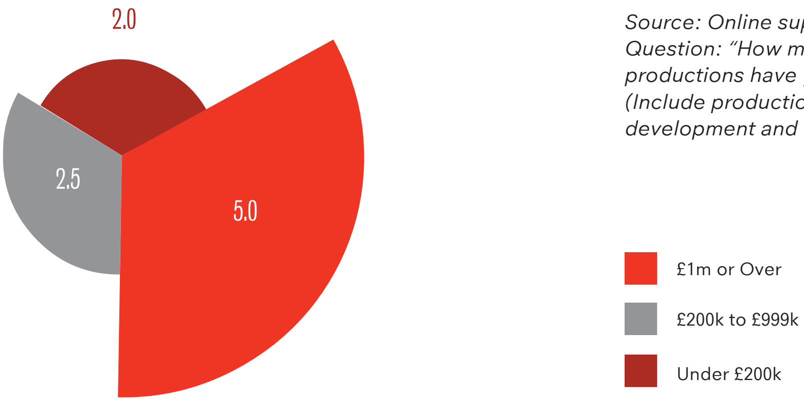
3.15 These findings align with those reported in Ellis and Rushton (2015) which found that NPOs are by far the most active and engaged with digital technology. The authors suggest this may be due in part to their size and continuous financial support, allowing for sustained investment in R&D and risk-taking. That study also reports that large organisations tend to be better able to adapt their business model to exploit digital technologies.[33]

3.16 Whether an organisation is rurally based may related to whether they have produced Live-to-Digital work. Only 2 of the 30 organisations located in rural post codes reported that they have produced or are producing Live-to-Digital theatre.

33 Ellis and Rushton, et al. (2015)

3.17 The median number of Live-to-Digital productions *ever* produced per organisation surveyed is three, for 325 total productions across the entire sample. The number of productions increases with budget size; the median for organisations with budgets under £1m is two, and for those with budgets over £1m, it is five (Figure 17, below).

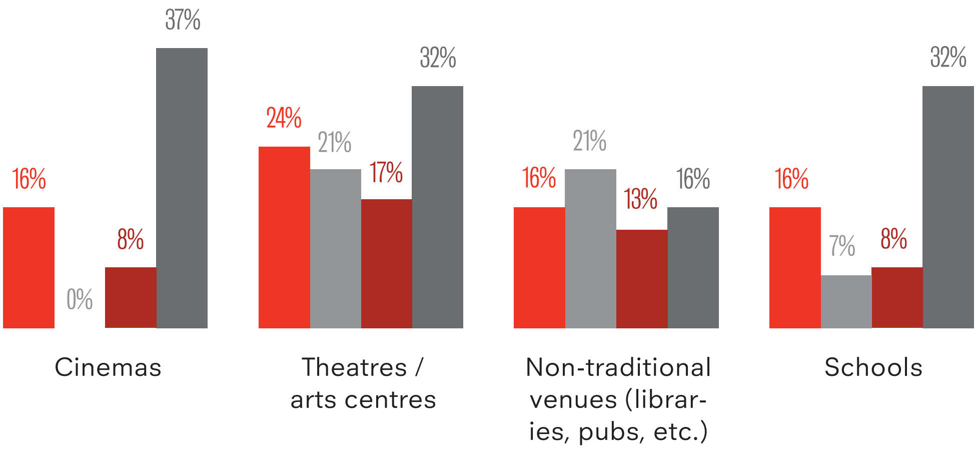
FIGURE 17
Median Live-to-Digital productions produced by total annual expenditure (n = 49)



Source: Online supply-side survey. Question: "How many Live-to-Digital productions have you produced? (Include productions that are in development and ongoing)"

3.18 As shown in Figure 18, total annual expenditure also affects where and how organisations are likely to have distributed their content. The most frequently cited venues that respondents had screened their content in were theatres and arts centres (24% had done so at some point in their history with Live-to-Digital work), followed equally by cinemas, schools and non-traditional venues such as libraries, pubs and cafes (16%). Larger budget organisations are more likely to have programmed cinemas than theatres and art centres.

FIGURE 18
Venues used for Live-to-Digital distribution by total annual expenditure (n =63)

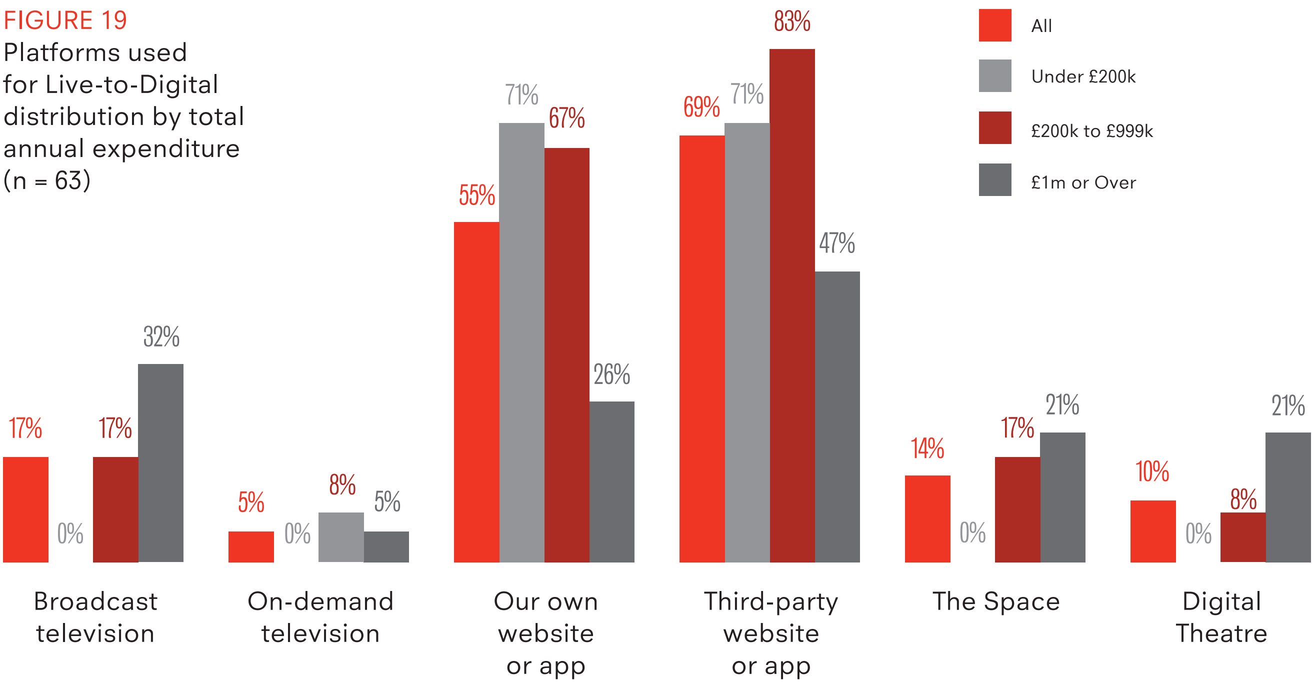


Source: Online supply-side survey. Question: "For which of the following types of venues/screening platforms have you provided Live-to-Digital productions? Please include only full productions, not excerpts used for marketing or other purposes."

"Nobody in the cinema industry except Cinema For All has got decent statistics about the weird and wonderful venues, particularly because it's a blue ocean situation for a market that's not there yet."[34] Distributor

3.19 The majority of respondents (69%) have distributed Live-to-Digital content on third-party websites/apps or their own websites/apps (55%) (Figure 19).[35] Use of these platforms was higher for organisations with budgets under £1m, while organisations with larger budgets were more likely to have distributed content online through platforms such as Digital Theatre and The Space.[36] Very few respondents of any budget category have used on-demand television for distribution.

FIGURE 19
Platforms used for Live-to-Digital distribution by total annual expenditure (n = 63)



Source: Online supply-side survey. Question: "Through what screening platforms does your organisation distribute Live-to-Digital content? Please tick all that apply."

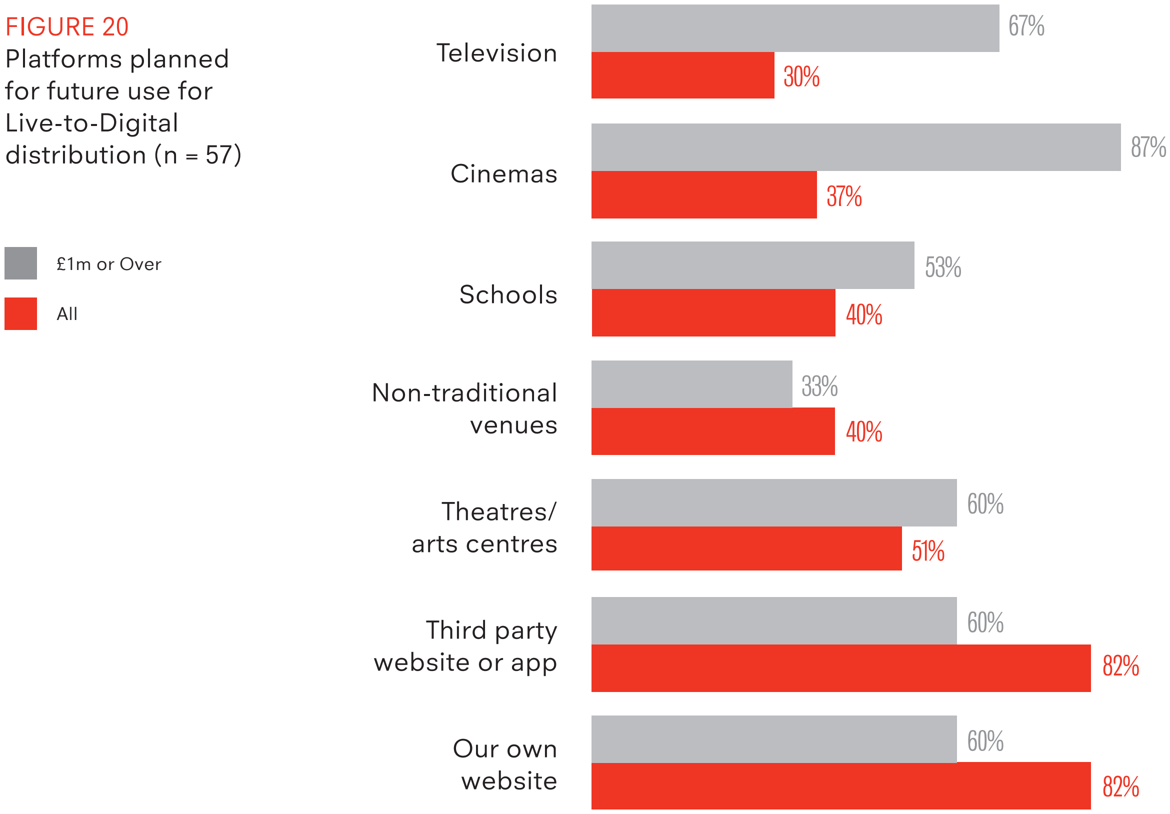
34 Cinema For All is a charitable organisation providing resources and advice to groups seeking to show films in their local communities; the organisation conducts an annual survey of the community film exhibition sector that includes questions about audience interests.

35 Examples of websites/apps provided to respondents included YouTube, Vimeo, and Periscope.

36 The Space, created by Arts Council England and the BBC in 2012, has evolved from a publishing platform to a commissioning agency, connecting new content to multiple distribution platforms. Many respondents experienced The Space as a platform prior to its current iteration as a commissioner.

3.20 The majority of organisations that *plan* to produce Live-to-Digital theatre in the future say they are likely to use their own website (82%) or a third-party website (82%). For those considering screenings in venues, theatres and arts centres are the most likely sites. Organisations in the largest budget category are most likely to identify physical venues as future sites of screenings and less likely to anticipate using their own or a third party website (Figure 20).

FIGURE 20
Platforms planned for future use for Live-to-Digital distribution (n = 57)

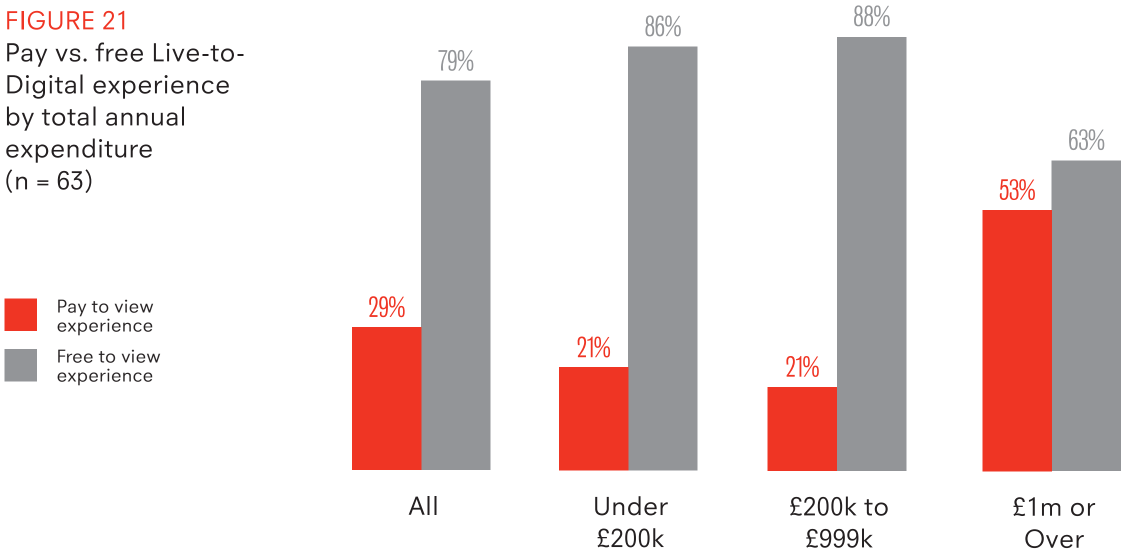


Source: Online supply-side survey. Question: "Which of the following venues/screening platforms are you likely to use for future Live-to-Digital productions?"

3.21 Belarus Free Theatre, Complicite and Theatre Royal Newcastle (highlighted case studies at Chapter 7) provide examples of how work might be distributed across non-Event Cinema platforms. For example, Theatre Royal has distributed to 170,000 patients across 180 NHS hospitals via Hospedia, the national hospital television network.

3.22 Figure 21 (following page) shows that 29% of respondents who have produced Live-to-Digital theatre have experience of income generation, through for example pay-to-view platforms or by charging admission for live screenings in venues. Organisations with budgets over £1m are more than twice as likely as smaller ones to have charged viewers for admission or online/on demand viewing (53% versus 21% for the smallest organisations, and 17% for mid-sized). They are also less likely than other segments to have used a free platform.

FIGURE 21
Pay vs. free Live-to-Digital experience by total annual expenditure
(n = 63)

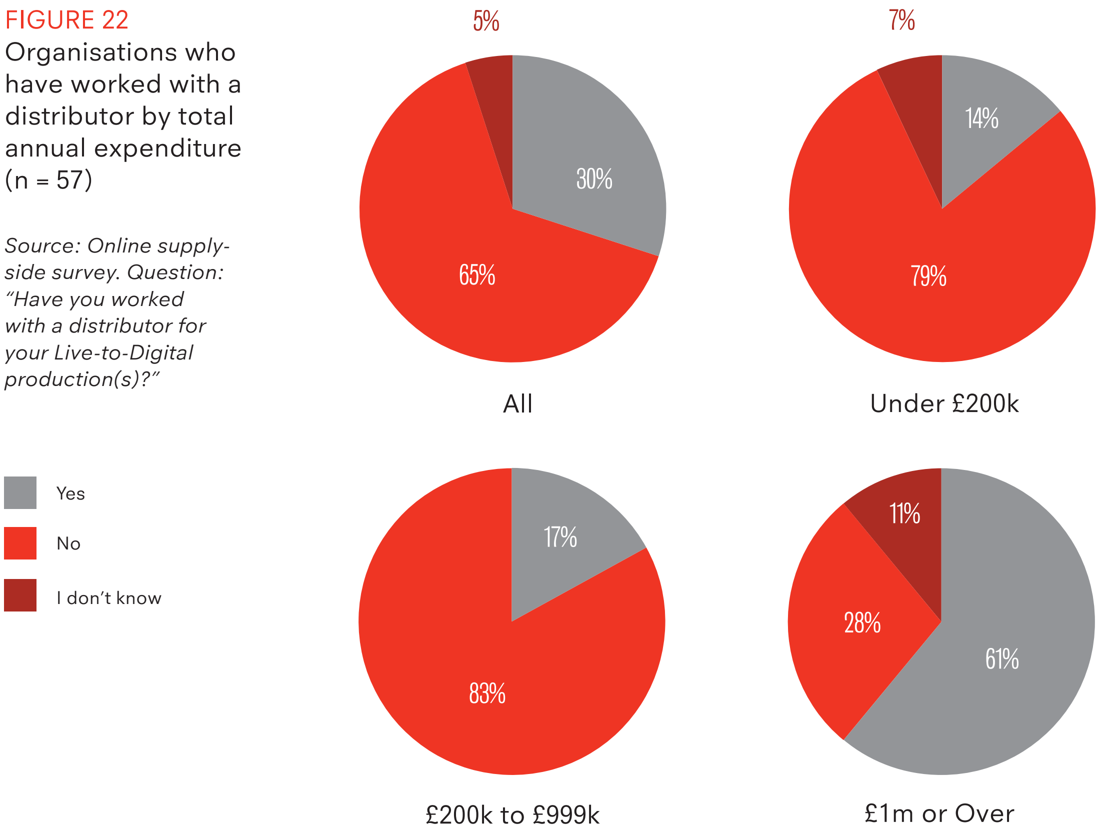


Source: Online supply-side survey.

3.23 Small organisations, with annual expenditures of under £1m are less likely to have engaged a distributor to exhibit Live-to-Digital productions than those with budgets of £1m or over (Figure 22). Only 14% of the smallest budget category cohort has worked with a distributor, while 61% of the largest budget category cohort has done so.

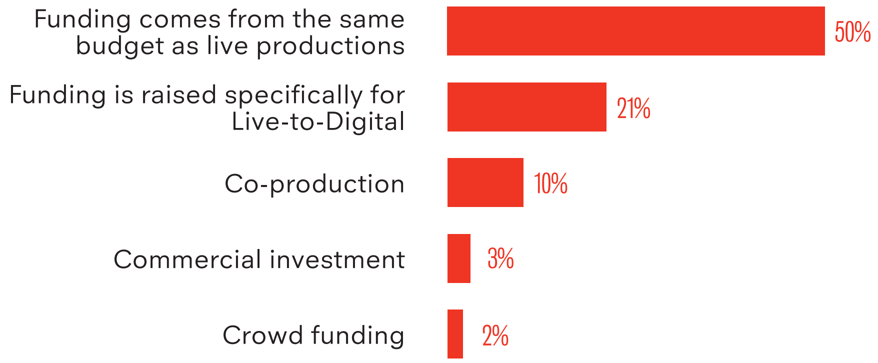
FIGURE 22
Organisations who have worked with a distributor by total annual expenditure
(n = 57)

Source: Online supply-side survey. Question: "Have you worked with a distributor for your Live-to-Digital production(s)?"



3.24 As shown in Figure 23, organisations tend to fund Live-to-Digital productions from the same budgets as live productions. Less than one quarter have fundraised specifically for a Live-to-Digital production. Few respondents have funded projects through commercial investment (3%) or co-producing with a third party (10%).

FIGURE 23
Funding models used for Live-to-Digital productions (n = 63)

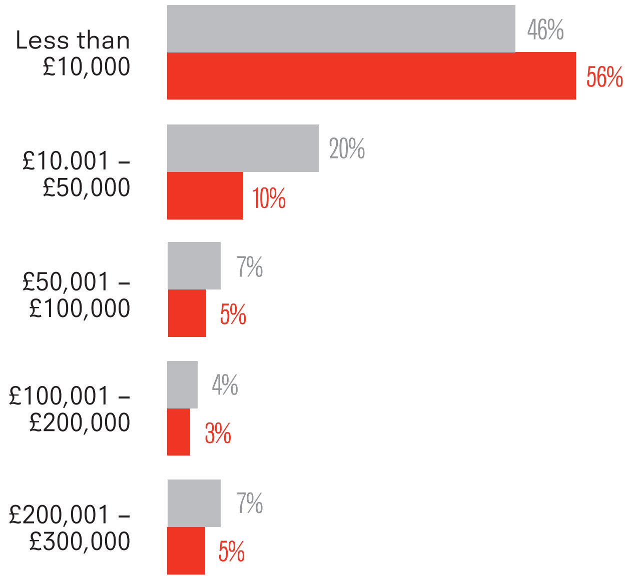


Source: Online supply-side survey. Question: "What funding models have you used for Live-to-Digital productions?"

3.25 About half of surveyed organisations (46%) have spent less than £10,000 on their most expensive Live-to-Digital production.[37] Few report (11%) ever spending above £100,000. Average production costs mirror highest production costs, indicating that most organisations who have produced more than one Live-to-Digital work have done so at approximately the same scale (Figure 24).

FIGURE 24
Live-to-Digital production costs, most expensive and average (n = 56)

Source: Online supply-side survey. Questions: "What was the approximate budget for your most expensive Live-to-Digital production to-date?" and "What is the approximate average budget for your Live-to-Digital productions?"



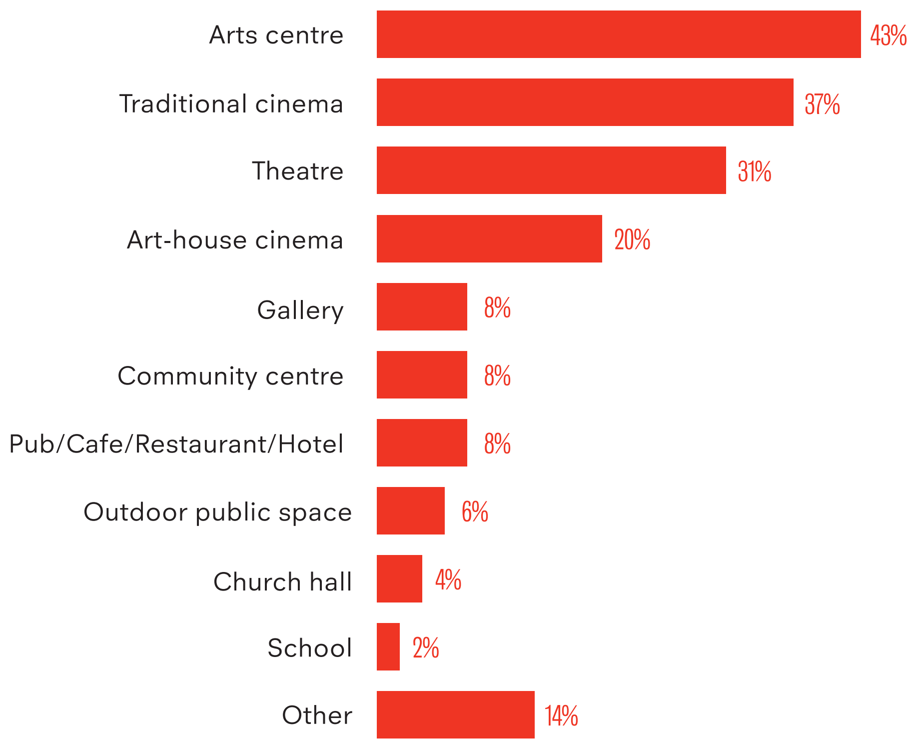
37 MTM (2015) documents the indicative costs of bringing Live-to-Digital work to market. For example, for a full Event Cinema performance costs tend to range between £150,000 – 500,000. Miracle Theatre's *Manual for Bringing Theatre to the Screen* provides streaming figures for four performances in detail, ranging from £15,000 – £100,000. Miracle Theatre (2015).

Exhibitor specific profile

3.26 As demonstrated by Figure 25, exhibitors surveyed were most likely to operate an arts centre (43%), traditional cinema (37%), and theatre (31%), respectively. Altogether, 51% of respondents operate other kinds of venues including galleries, community centres, pubs, church halls, and schools.

FIGURE 25
Venues operated by exhibitor respondents (n=49)

Source: Online supply-side survey. Question: "What type of venue(s) does your organisation operate? Tick all that apply."



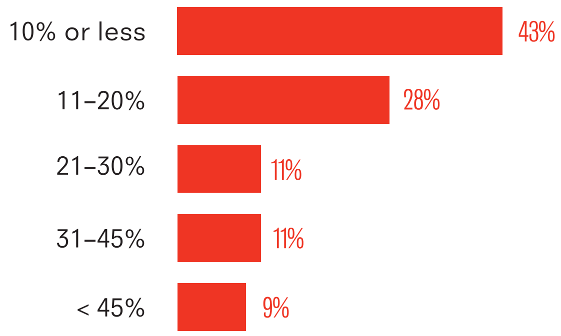
3.27 As indicated below in Figure 26, 78% of respondents receive live performances in their venue(s), and 67% receive live theatre. The Dukes in North West England (case study at Chapter 7) provides a detailed picture of the theatre's programmatic and financial results from exhibiting Event Cinema in venues operated by exhibitors.

FIGURE 26
Venues operated by exhibitor respondents (n=49)

Source: Online supply-side survey. Questions: "Does your organisation host live performances in its venue(s)? Include hires by third-parties?" And "Does your organisation act as a venue for live theatre, including hires by third parties?"

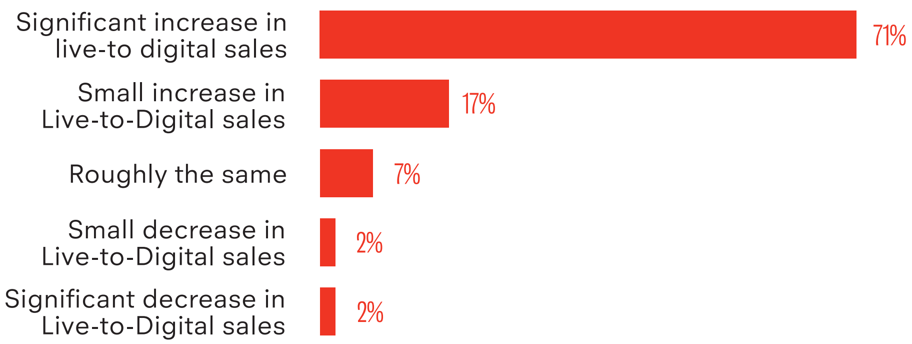
3.28 Most exhibitors (70%, Figure 27) take less than one-fifth of their gross box office sales from Live-to-Digital arts programming.[38] However, a majority (71%) report that this percentage has significantly increased over the past three years (Figure 28).

FIGURE 27
Exhibitors' approximate percentage of gross box office sales comprised of Live-to-Digital programming (n=49)



Source: Online supply-side survey. Question: "Approximately what percentage of your gross box office sales were Live-to-Digital tickets (including encores)?"

FIGURE 28
Exhibitors' approximate percentage of gross box office sales comprised of Live-to-Digital programming compared with three years ago (n=49)



Source: Online supply-side survey. Question: "How does this percentage of your gross box office sales from Live-to-Digital tickets compare with three years ago?"

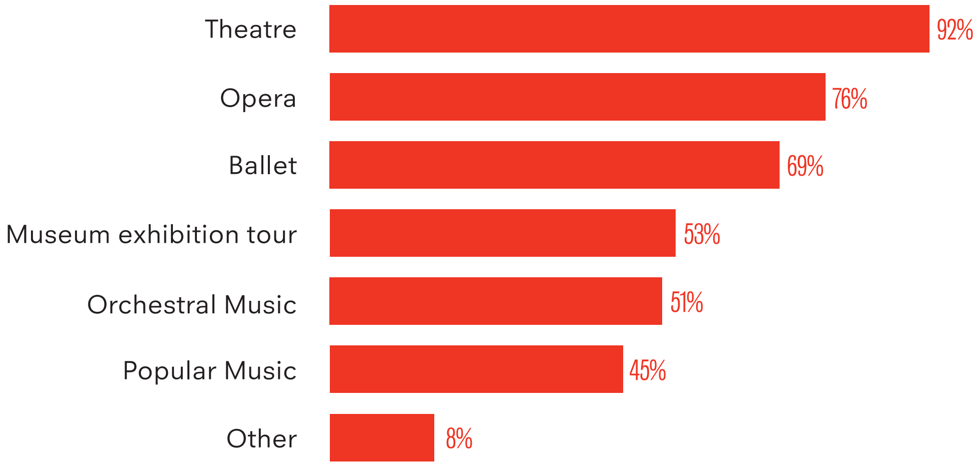
38 Includes encore screenings.

Q3. What kind of live performance content is currently being offered digitally that is drawing an audience?

3.29

The majority of exhibitors surveyed (92%) report that they screen Live-to-Digital theatre productions within their venues (Figure 29). This is followed by Opera (76%), Ballet (69%), and Museum exhibition tours (53%).

FIGURE 29
Genre of Live-to-Digital Exhibited
(n = 49)



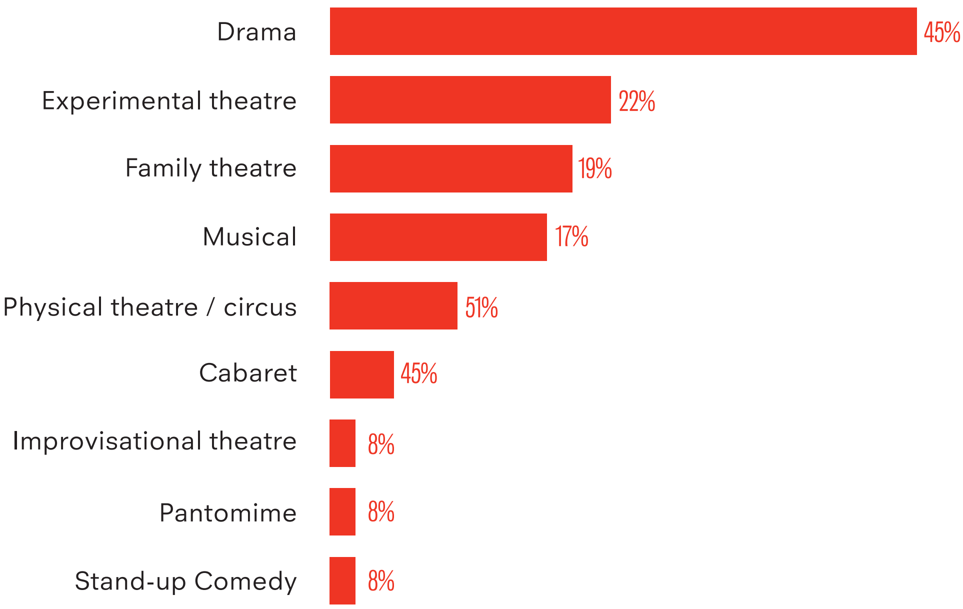
Source: Online supply-side survey. Question: "What types of Live-to-Digital productions, including encores, have been screened in your venue(s)?"

3.30

Among those theatre organisations surveyed that have produced Live-to-Digital work, drama is the most common genre of Live-to-Digital work produced (45%), followed by family theatre (19%) and musical (17%) (Figure 30).

FIGURE 30
Genre of Live-to-Digital Theatre Productions
(n = 46)

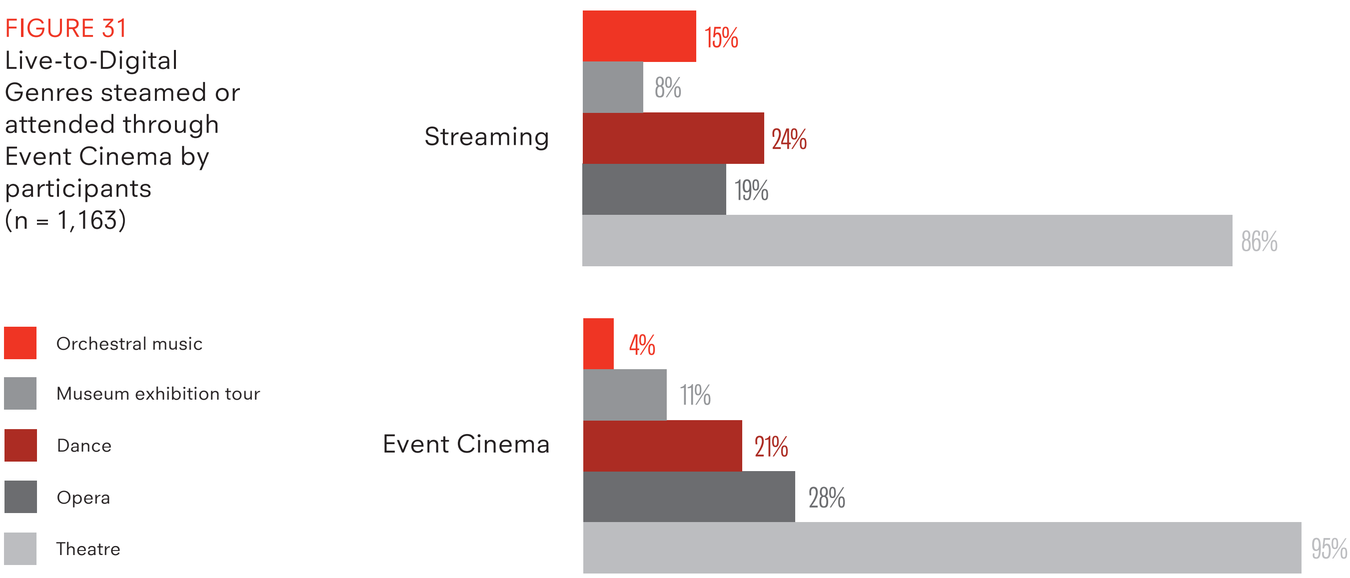
Source: Online supply-side survey. Question: "Within which theatre genres would you classify these productions?"



3.31

Theatre was the most commonly *consumed* Live-to-Digital work among survey respondents (95% of Event Cinema attendees; 86% of those who streamed). This is expected given the survey sample was drawn from existing theatre audiences (Figure 31). Beyond theatre, opera (28%) is most popular within Event Cinema followed by dance (21%), while dance is more popular than opera (24% and 19%, respectively) among streamers.

FIGURE 31
Live-to-Digital Genres steamed or attended through Event Cinema by participants
(n = 1,163)

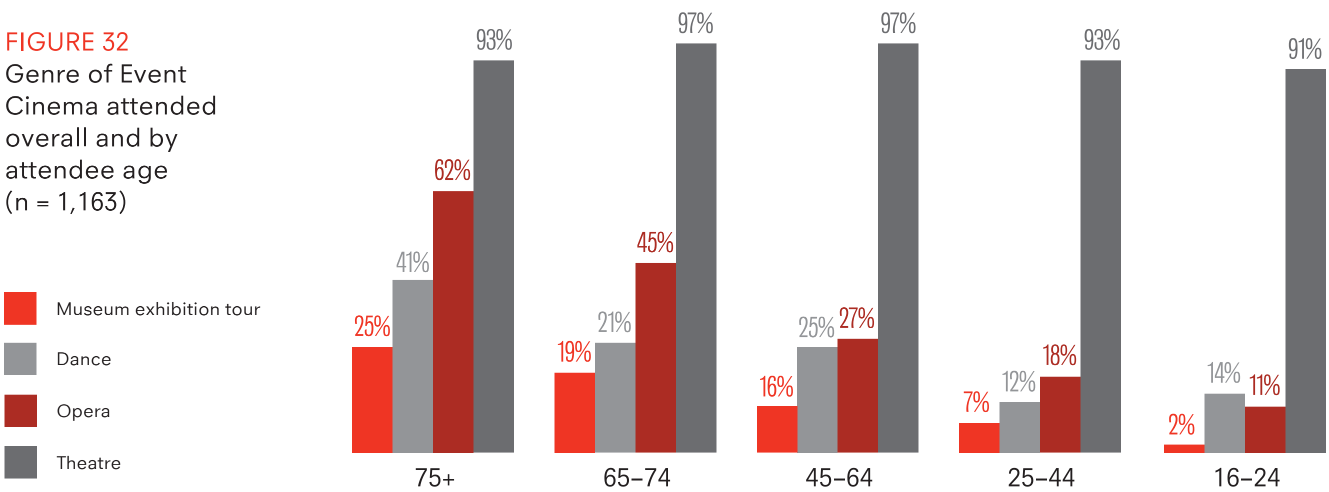


Source: Online audience survey. Question: "Which types of Event Cinema have you attended? Please tick all that apply" and "Which types of live or on-demand streaming performances/cultural events have you seen online or on the television? Please tick all that apply."

3.32

Individuals age 65 and above were nearly twice as likely to have attended opera through Event Cinema than all other age groups (62% for that age group against an all age average of 28%) (Figure 32).

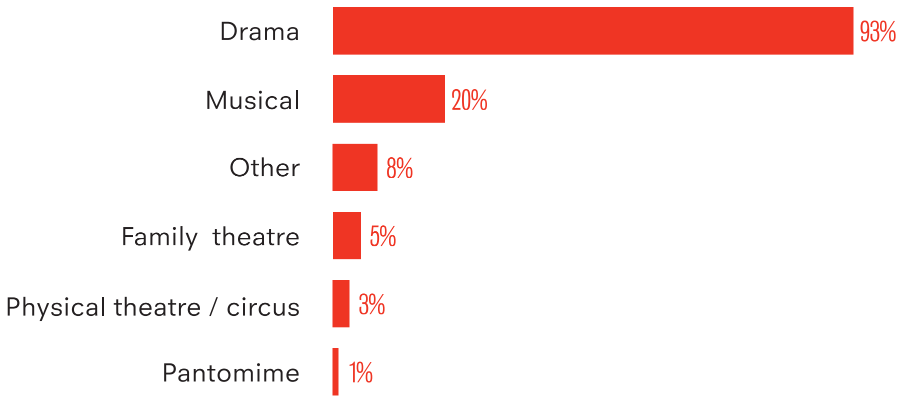
FIGURE 32
Genre of Event Cinema attended overall and by attendee age
(n = 1,163)



Source: Online audience survey. Question: "Which types of Event Cinema have you attended? Please tick all that apply"

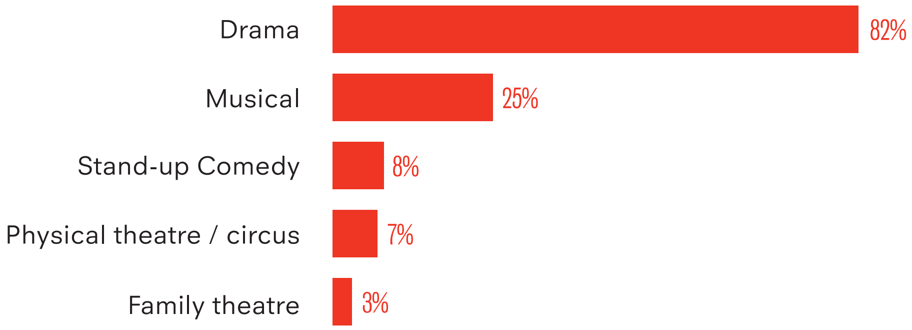
3.33 When asked about experiences attending Event Cinema with *theatrical content* specifically, drama was the most viewed theatre content (93%), followed by musical theatre (20%) (Figure 33).

FIGURE 33
Genre of theatre Event Cinema events attended (n = 1,186)



Source: Online audience survey. Question: "What types of theatre Event Cinema screenings have you seen? Please tick all that apply."

FIGURE 34
Genre of content streamed (n = 375)

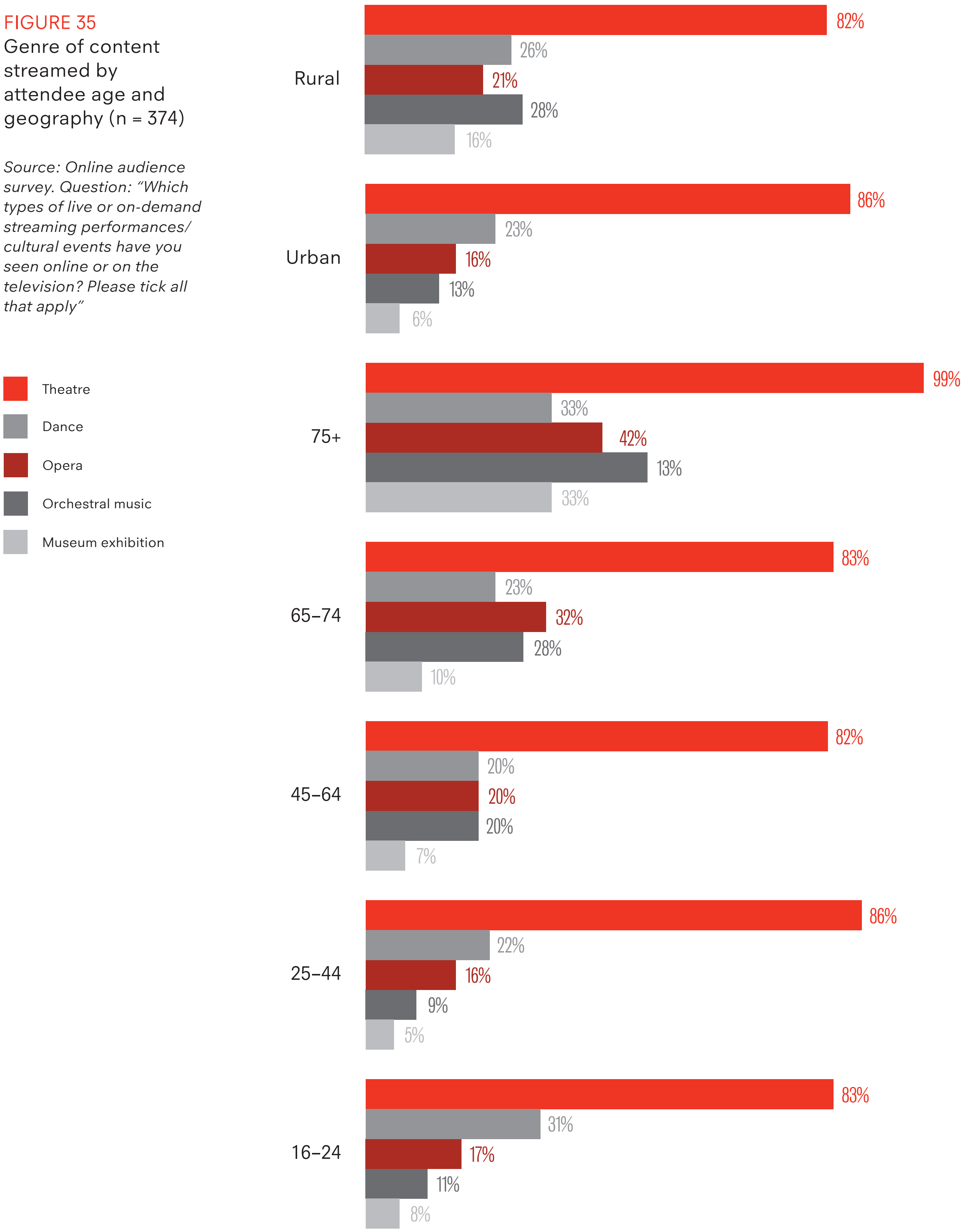


Source: Online audience survey. Question: "What types of theatrical performances have you streamed live or on-demand? Please tick all that apply"

3.34 As with Event Cinema theatre, older audiences gravitate towards opera; 42% of respondents ages 75 and above have streamed opera as compared with just 16% of those ages 25-44. Rural and older audiences were more likely to have streamed orchestral music than urban audiences (28% versus 13%), as well as have streamed a museum exhibition tour (16% versus 6%) (Figure 35).

FIGURE 35
Genre of content streamed by attendee age and geography (n = 374)

Source: Online audience survey. Question: "Which types of live or on-demand streaming performances/ cultural events have you seen online or on the television? Please tick all that apply"



4.

Audience Motivations, Experience and Barriers

4.1 This chapter examines what drives attendance to Live-to-Digital events and how that work is perceived by its audiences. It focuses on three questions:

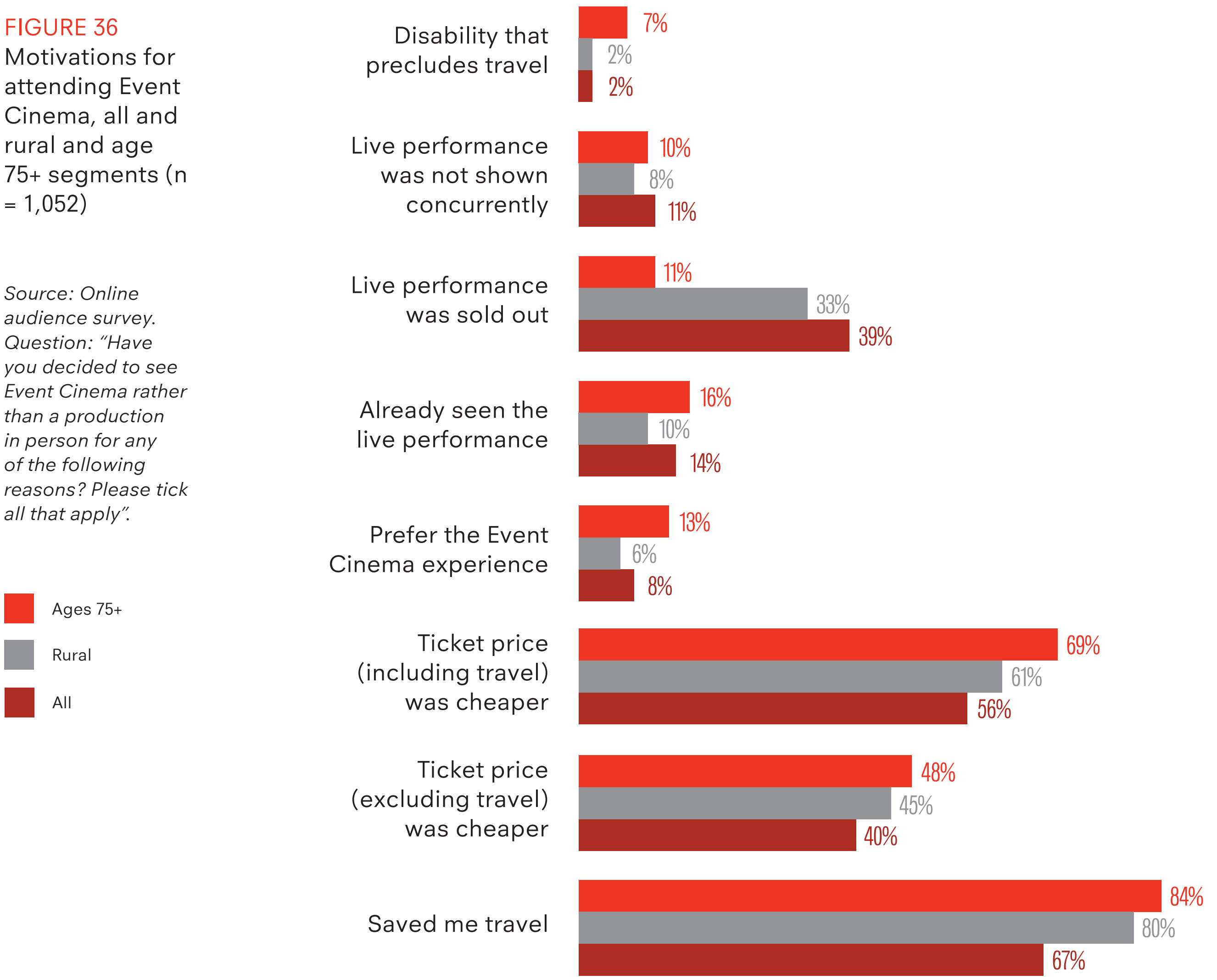
4 What are the audience motivations and barriers to attend Live-to-Digital versus live theatre?
5 What are the differences in the quality of the experience and access between digital and live theatre events?
6 What impact are digital theatre screenings having on audiences for live theatrical performances?

Q4. What are the audience motivations and barriers to attend Live-to-Digital versus live theatre?

4.2 The most commonly identified motivation to attend Event Cinema is that it saves travel time (67%) over attending live theatre in person (Figure 36). This is especially true for older respondents and those living in rural areas.

FIGURE 36
Motivations for attending Event Cinema, all and rural and age 75+ segments (n = 1,052)

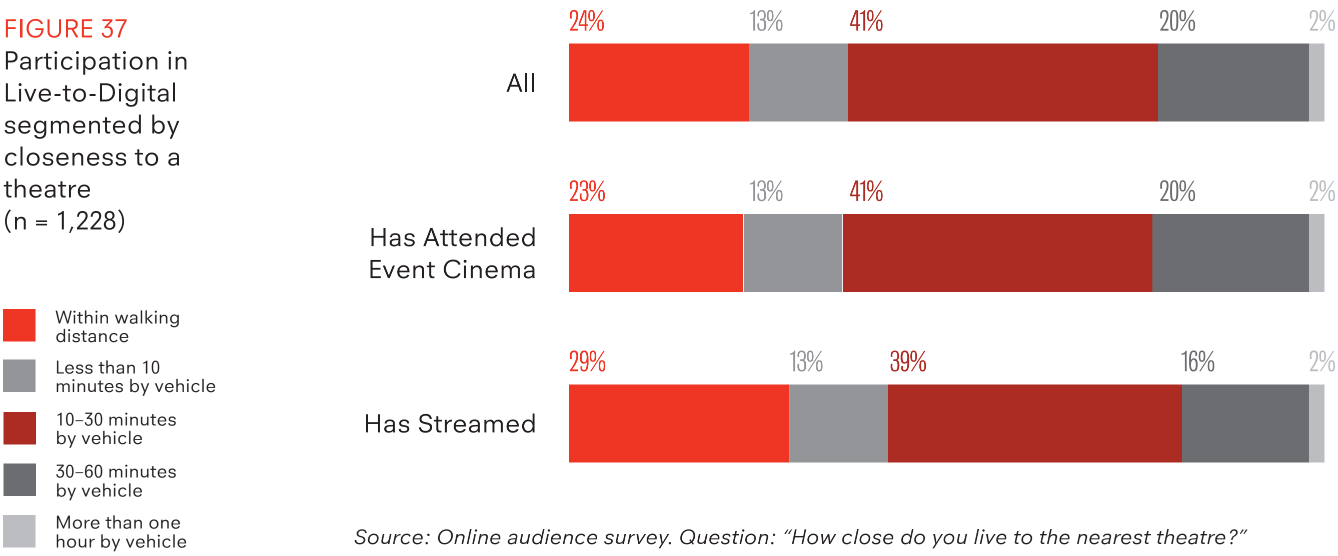
Source: Online audience survey. Question: "Have you decided to see Event Cinema rather than a production in person for any of the following reasons? Please tick all that apply".



4.3

While travel time is an identified barrier, the relative proximity of a theatre has little impact on whether or not an individual reports having participated in Event Cinema and has a reverse correlation with whether that individual has streamed (Figure 37). This aligns with findings in Section 3 which indicate that urban survey respondents, who are more likely to live near a venue, are more likely to have streamed. Furthermore, a similar sized majority of survey takers across all participation segments (61% - 66%) have travelled at least one hour in order to attend live theatre within the past twelve months (Figure 38).

FIGURE 37
Participation in Live-to-Digital segmented by closeness to a theatre
(n = 1,228)



Source: Online audience survey. Question: "How close do you live to the nearest theatre?"

FIGURE 38
Proportion of respondents who have travelled at least one hour by vehicle to see live theatre in last twelve months by participation segments
(n = 1,161)

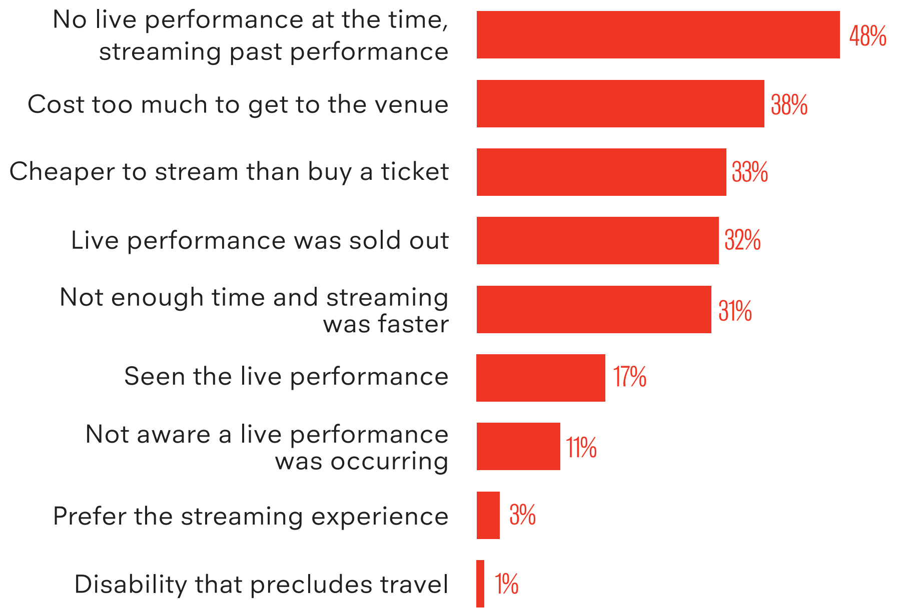
Source: Online audience survey. Question: "In the past 12 months, what was the furthest you traveled to attend a live theatre performance?"

4.4

Economic factors were similarly important to those who chose to stream, with both cost to get to the venue (38%) and cheaper to stream (33%) highlighted by a third of respondents who had accessed theatre via streaming. The availability of streaming at times that live performance was *not* available (e.g., streaming after the fact, on demand) was the most commonly identified motivation, with 48% of survey respondents selecting this statement.

Source: Online audience survey. Question: "Are any of the following reasons you have streamed a theatre performance online or on TV, rather than going in person? Please tick all that apply."

FIGURE 39
Motivations for streaming online (n = 376)



4.5 These trends were also evident from the social media analysis and from audience qualitative research:

- "Watching theatre from the comfort of your own home. Fantastic! #TheEncounter" Twitter user
- "I live in London so I can see a lot of theatre. I enjoy online with my mum. I'd like to take my mum to the cinema, but it depends on the price. If the [Event Cinema] price were more like a normal cinema, I'd take friends and family." Audience Member, 16-24, Greater London
- "Yes I would [like to attend the live performance after seeing it in the cinema]. But live prices are pretty expensive." Audience Member, 16-24, North West
- "I wouldn't go and see it live because I've seen it! The point is the convenience and the cost. Unless it was my favourite actor who I was desperate to see live. I feel like I already had the experience. And they're usually sold out live anyway." Audience Member, 45-64, Greater London
- "Living in Sheffield, going to London is pricey. There are shows I couldn't see live for financial reasons, or time constraints." Audience Member, 25-44, Yorkshire & Humberside.

4.6 Cost as motivator for attending Live-to-Digital programming was highlighted in a number of other studies, including research focused on other art forms.[39] Reports have also documented the increasing cost of theatre tickets in recent years, which may have made Live-to-Digital programming more compelling economically.[40] Incidentally, live broadcast audiences do not pay VAT on cinema tickets, although their 'in house' theatre/opera/ballet counterparts do, making the proposition even cheaper overall.[41]

4.7 The extended access Live-to-Digital work provides was also an important factor (i.e. performances made available after the live production run is

39 Petrie, et al (2012) and Holmes (2014).
40 British Theatre Consortium, SOLT/UK Theatre, and BON Culture. *British Theatre Repertoire*. 2016.
41 UK Cinema Association (previously Cinema Exhibitors' Association), *Annual Reports* 2013-2014.

complete, or when live performances are sold out). About a third of all respondents who either attend Event Cinema (39%) or stream work (32%) say they did so because a live performance was sold out (Figures 33 and 36, above).

- "*Hangman* I've seen in cinema – tickets for live were so difficult to get." Audience Member, 25-44, Yorkshire & Humberside

4.8 Many of the stakeholders interviewed individually as part of the supply-side study expected star power to be the driving draw for Live-to-Digital consumers. This was not borne out in audience interviews. While several interviewees pointed out the important role well-known actors play as ambassadors for live theatre – often pulling in audience members for the first time (either on screen or live, in a venue) – few audience members interviewed cited specific stars as a primary motivation to their attending.[42] This may be due to sample-bias, as those interviewed self-identified as regular theatre attendees.

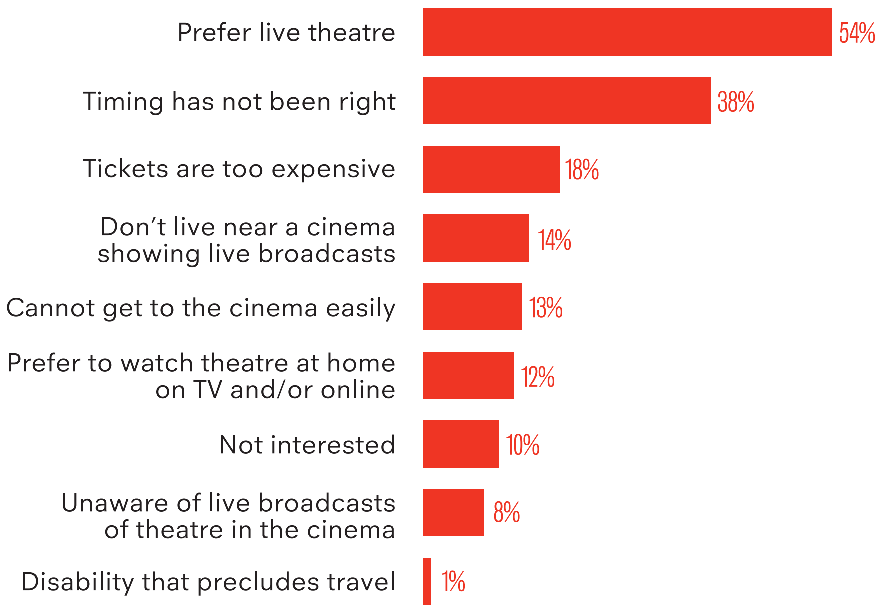
- "Certainly everything I've seen so far in the top third of the marketplace is at least in part star driven. From an independent standpoint, you can't finance without a star on board, and you often can't get a star without finance." Producer
- "How do I choose what to see in Event Cinema? The famous actor is important if it is someone I like, but more important is that I like the play and the theatre company. The whole thing of hype and how popular an actor is not important to me." Audience Member, 25-44, Yorkshire & Humberside

4.9 One of the most common reasons some people do *not* participate in Event Cinema and streaming is a preference for attending the theatre in-person, as evidenced in Figure 40. 54% prefer live theatre, complemented by 10% of respondents saying they are 'not interested' in Event Cinema. As discussed in Question 6 (on the following page), this aligns with individuals reporting that Live-to-Digital work has not impacted their desire to attend 'live' performances in-person.[43]

42 It is worth noting that those audience members interviewed for the study were a self-selected group who attend both live and Live-to-Digital at least monthly – therefore their motivations for attending theatre may not be restricted to the draw of celebrity.

43 Albeit based on a very small sample, the qualitative study, *Live Theatre in the Age of Digital Technology: 'Digital Habitus' and the Youth Live Theatre Audience* raised important questions about the respite live theatre can provide for youth audiences who are seeking tangible connection, heightened emotional response and stress relief – all of which can be found on the stage. (Richardson, 2015)

FIGURE 40
Barriers to Event Cinema attendance (n = 115)

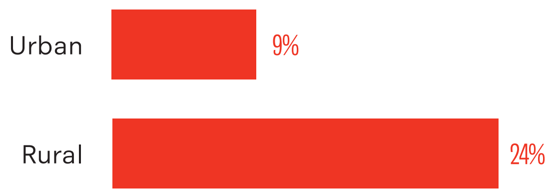


Source: Online audience survey. Question: "What factors have prevented you from attending an Event Cinema screening of a theatre performance, to date? Please tick all that apply."

- "[Event Cinema] just won't work for me at all. The whole idea for theatre, for me anyway, you're there, you're live, you're with the people, you're breathing the same air...I just wouldn't fancy it at all." Audience member, 45-64, Yorkshire & Humberside
- "I certainly find a real connection with the people on stage. And I do perform as well and I feel a real connection with an audience – it is just not there when it's with a screen." Audience member, 45-64, Yorkshire & Humberside

4.10 Figure 41 also highlights other barriers to Event Cinema attendance, including inconvenient timing (38%), price (18%), and viewing locations (14%). Individuals in rural areas were more likely than those in urban areas to identify a lack of proximate venues as a barrier (24% versus 9%) (Figure 38).

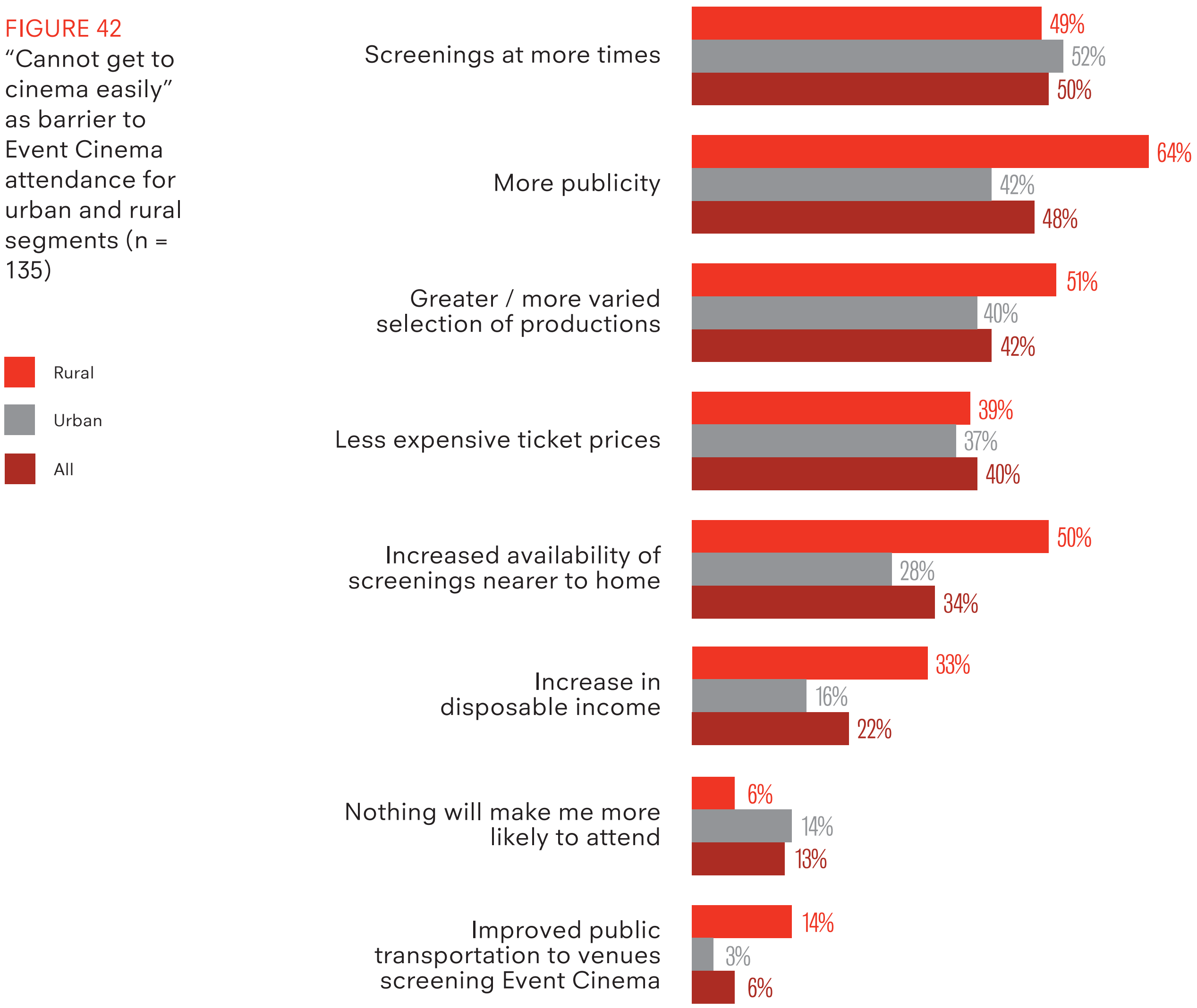
FIGURE 41
"Cannot get to cinema easily" as barrier to Event Cinema attendance for urban and rural segments (n = 115)



Source: Online audience survey. Question: "What factors have prevented you from attending an Event Cinema screening of a theatre performance, to date? Please tick all that apply."

4.11 When respondents who had not yet attended Event Cinema were asked what might make them likely to attend in the future, 50% identified more frequent screenings (Figure 42). This issue was raised frequently in audience interviews as well. 50% of rural survey takers said increased availability of screenings closer to home would similarly make them more likely to attend, as compared with just 28% of urban respondents.

FIGURE 42
"Cannot get to cinema easily" as barrier to Event Cinema attendance for urban and rural segments (n = 135)



Source: Online audience survey. Question: "What factors might make you more likely to attend an Event Cinema screening in the future? Tick all that apply."

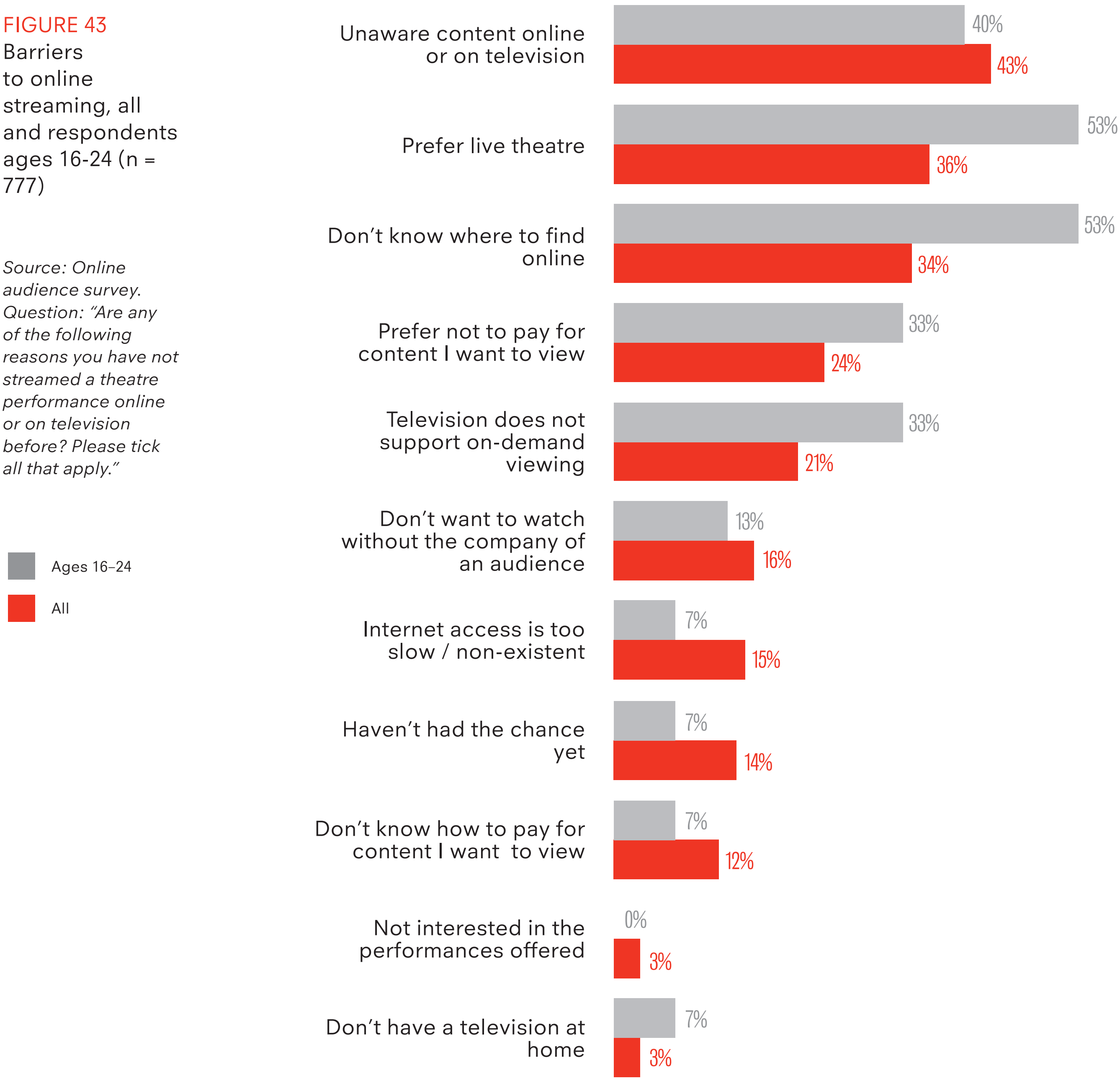
- "I miss that I can't sometimes share those experiences of theatre because I can't make 8pm at that day at that theatre. It would be great for many of us to channel the experience of that play in a way that is really immediate and profound, and also when we want to see it." Audience member, 25-44, North East
- "When I see the way my kids watch film, they watch when they like and where they like. And that seems to be the tremendous attraction. Your timetable is not dictated by anyone else...there are lots of different ways you can access it at different times, communally around the table." Audience member, 45-64, North East

4.12 Although not raised by audiences as a barrier in the survey or interviews, the lack of film classification of Event Cinema was highlighted as an impediment to participation in stakeholder discussions and may lead to questions or concerns from audiences and the British Board of Film Classification in the future about the content of the production. Currently all Event Cinema productions receive a 12A default classification, but as one stakeholder explained "this is a sticking plaster. The issue is that no one can see the content before it gets broadcast." Notwithstanding the potential challenges of classifying theatre content, determining how best to rate Event Cinema productions in advance of their live and encore screenings in cinemas was raised as an important issue.

4.13 A general lack of information, meanwhile, is a significant barrier to streaming by those who have not yet streamed. Many survey respondents were not aware of what content is available (42%) or how one can locate that content online (34%). Interestingly, the youngest survey respondents were 19% more likely than the sample's average to say they did not know where to find content (Figure 43).

FIGURE 43
Barriers to online streaming, all and respondents ages 16-24 (n = 777)

Source: Online audience survey. Question: "Are any of the following reasons you have not streamed a theatre performance online or on television before? Please tick all that apply."



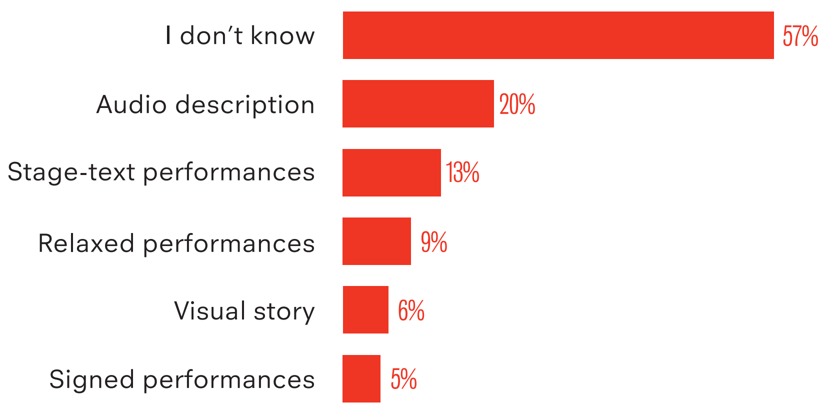
4.14 Other barriers to streaming discussed in audience interviews include the screen size; the lack of social interaction; and the potential for interruption. Not all, however, agreed that these were barriers.

- "I don't like the little screen; it would be like watching TV. I don't like the concept." Audience Member, 25-44, Greater London
- "I feel that it's a very compromised way of watching it. Part of going is the social side". Audience Member, 45-64, East Midlands
- "I can watch it with other people in other cities and other countries. I've sent a link to family to watch together. It's important. It becomes an event." Audience Member, 16-24, Greater London
- "I'm not interested. I don't like the idea. Event Cinema is uninterrupted. Streaming you can get interrupted. It's not the same experience, not a communal experience, not an event. It cheapens it." Audience Member, 45-64, South West
- "Cinema is much more relaxed. But it's not a good idea to buy popcorn because it's so quiet. I had to suck popcorn through all of King Lear!" Audience Member, 45-64, South East
- "It's a bit strange watching a play in a cinema. They show you the audience from the theatre but you're not part of it. People talk more in the cinema. And do you clap or not? Biggest question. There's a wall. They feel a bit embarrassed. You feel silly while they're taking bows." Audience Member, 45-64, Greater London

4.15 Lack of awareness about services available for access needs may also be a barrier to participation (Figure 44). One-in-eight of survey respondents identify as disabled or say they attend performances with someone who is a disabled person. However, 57% of those individuals do not know what access services are available in Live-to-Digital arts content either in the cinema or through streaming.

- "I'm a wheelchair user. Going to live theatre, it is always an issue: where are we going to sit? How do I get to the loo? All that caper! Some venues are easier than others, but some are absolutely hopeless. Wheelchair access is easy at the cinema." Audience member, 45-64, South West

FIGURE 44
Awareness of access services available in Live-to-Digital arts content in the cinema or through streaming by respondents identifying as disable or as having attended performances with a disabled individual (n = 123)

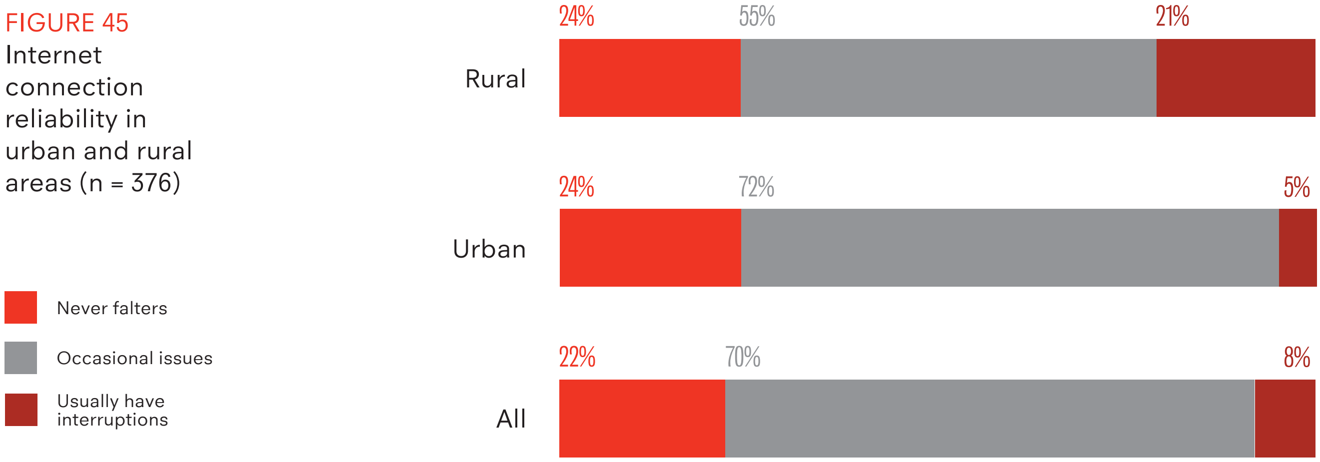


Source: Online audience survey. Question: "Which of the following services are currently made available in Live-to-Digital arts content that you view in the cinema or stream online or on television? Tick all that apply." and "Are you disabled or do you attend performances with someone who is a disabled person?"

4.16 Exploring ways in which Live-to-Digital programming can be made more accessible to those with disabilities, including through the services indicated in Figure 44, was highlighted as an area of opportunity in several stakeholder and audience interviews.[44] As one Theatre Director interviewed stated, "[Live-to-Digital] is massive for a sector that particularly struggles to get to venues. With the cinema screenings it can at least mean that people wouldn't have to travel so far…streaming and downloading means not having to travel at all."

4.17 For all audiences, technology was also identified as a barrier to participation with streamed content. Figure 45 illustrates that 70% of survey participants say their home Internet access occasionally has issues when streaming videos. Rural respondents are four times more likely than urban respondents to say interruptions are usual when streaming (21% versus 5%).

FIGURE 45
Internet connection reliability in urban and rural areas (n = 376)

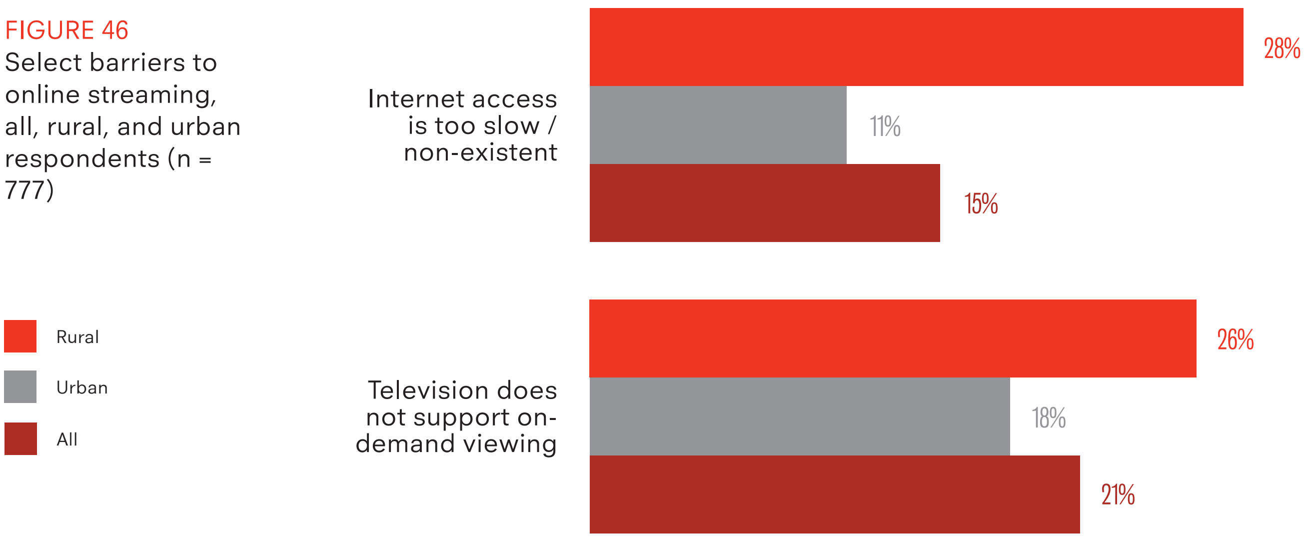


Source: Online audience survey. Question: Is your home Internet access fast enough to allow you to watch video without interruptions (the screen freezing, audio and video out of sync, etc.)?

4.18 Rural respondents are also nearly three times as likely as urban respondents to say a slow or non-existent connection has prevented them from streaming in the past (28% versus 11%). A fifth of respondents overall (21%) also said that a lack of a television equipped with on-demand viewing capabilities has prevented streaming (Figure 46).

44 Access services include:
Audio Description – For visually-impaired audience members, live commentary provided by trained describers, interspersed with the actors' dialogue. There is also a 'programme notes' description, starting 15 minutes before the production, which helps to capture the atmosphere, costumes, characters and action before and during the course of a performance. Description is relayed via a discreet headset linked to the infra-red audio system.
British Sign Language (BSL) – For hearing-impaired audience members, or audience members unable to communicate, the use of hand movements, gestures, body language and facial expressions to communicate.
Captioning – For hearing-impaired audience members, transcription or translation of the dialogue, sound effects, relevant musical cues, and other relevant audio information.
Relaxed Performances – Specifically designed to welcome people who will benefit from a more relaxed performance environment, including people with an Autism Spectrum Condition, sensory and communication disorders, or a learning disability. There is a relaxed attitude to noise and movement and some small changes made to the light and sound effects. An easy way to understand the atmosphere is perhaps, 'the opposite of the quiet carriage on the train'.

FIGURE 46
Select barriers to online streaming, all, rural, and urban respondents (n = 777)

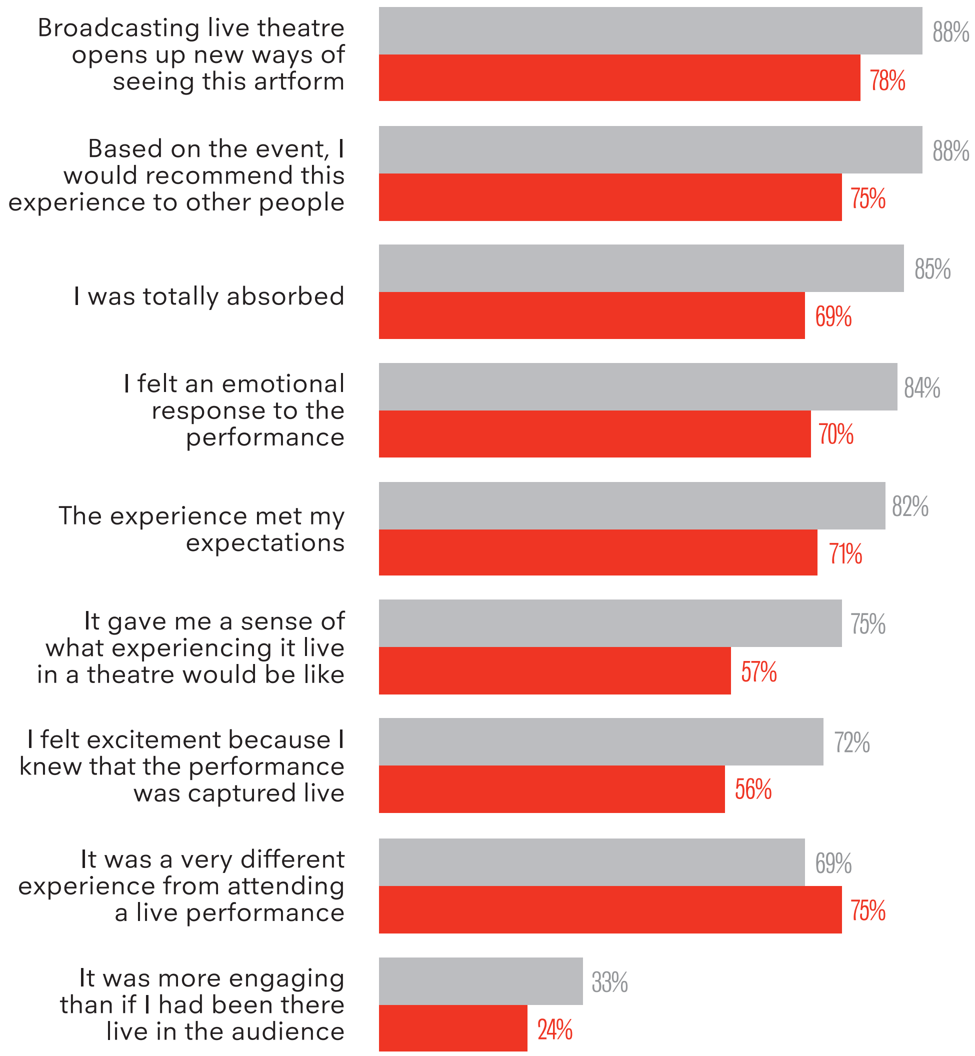


Source: Online audience survey. Question: "Are any of the following reasons you have not streamed a theatre performance online or on television before? Please tick all that apply."

Q5. What are the differences in the quality of the experience and access between digital and live events?

4.19 As indicated in Figure 47, which shows weighted average responses to experiential questions, Event Cinema audiences and streaming audiences agree that Live-to-Digital work "opens up new ways of seeing the art form" (88% Event Cinema participant weighted average, 78% streaming participant). Many also agree that seeing Live-to-Digital it is a "very different experience" than attending live (66% Event Cinema and 77% of streaming audiences). Participants are likely to say screenings met their expectations (82% Event Cinema and 71% streaming audiences) and are likely to recommend the experience to others (88% Event Cinema and 75% streaming audiences). Overall, however, Event Cinema participations are more likely to agree with the statements explored in Figure 44, with the exception that streamed participations are more likely to agree that the experience is different than attending a live performance.

FIGURE 47
Perception of Live-to-Digital experience (n = 1,069 and 459)
Weighted average based on scale with strongly agree = 100%, agree = 75%, neither agree nor disagree = 50%, disagree = 25%, strongly disagree = 0%

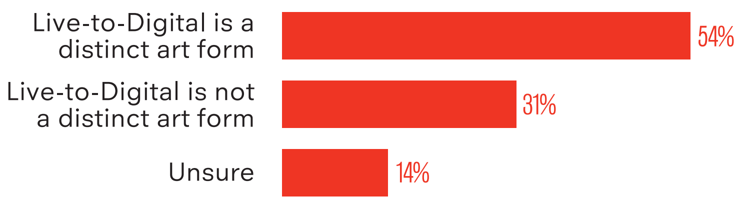


Event Cinema
Streamed Performance

Source: Online audience survey. Question: "How strongly do agree with the following statements about Event Cinema screenings, based on the last time you attended?" and "How strongly do agree with the following statements about streaming theatre online or on TV, based on the last production you watched?"

4.20 That participants agree Live-to-Digital is a distinct experience from attending live aligns with supplier perceptions; 54% of suppliers surveyed believe Live-to-Digital productions are an art form distinct from other mediums such as theatre, opera, ballet, and film (Figure 48).

FIGURE 48
Suppliers' views regarding whether Live-to-Digital is a distinct art form from other genres (n = 245)



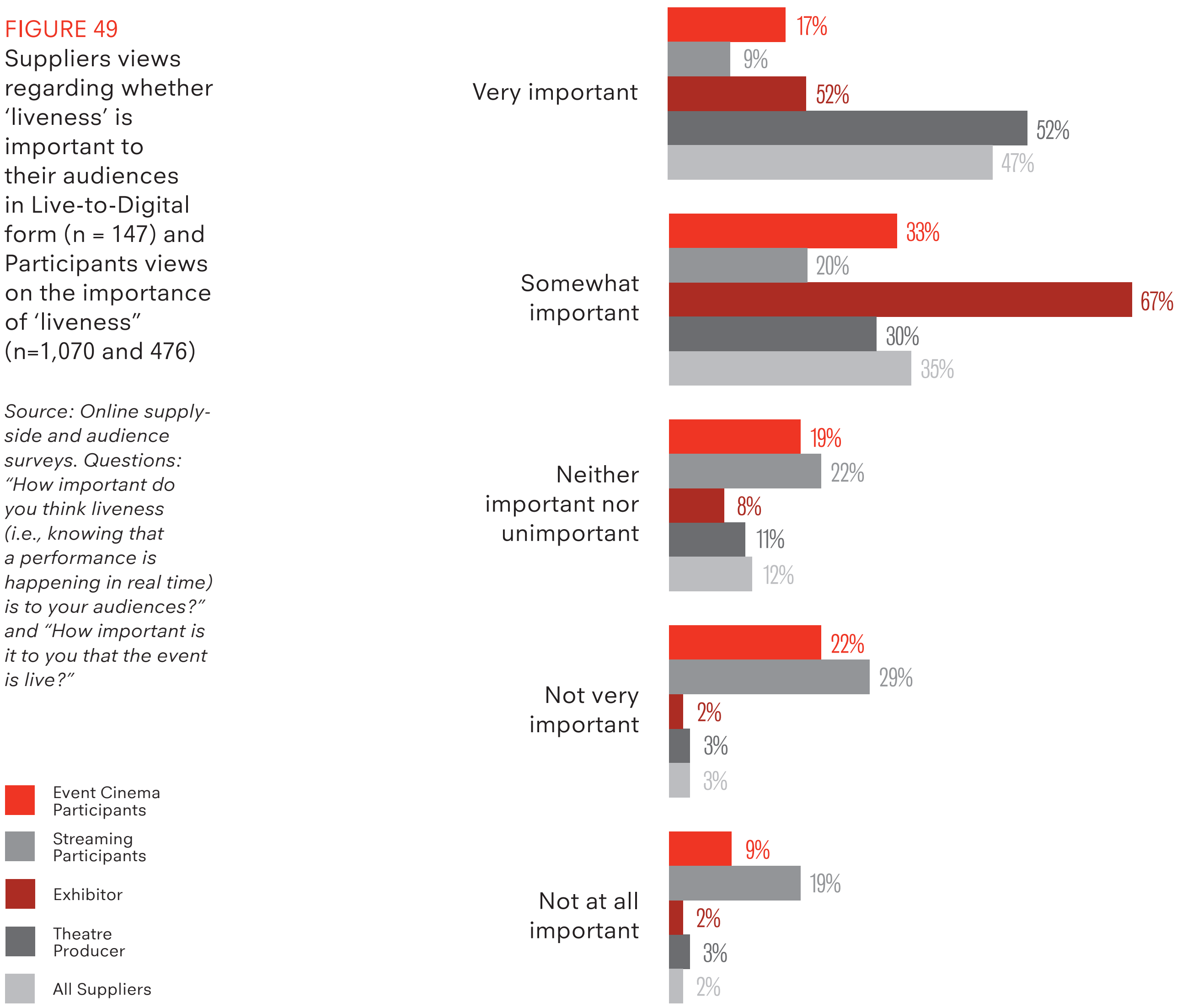
Source: Online supply-side survey. Question "Do you see Live-to-Digital content as an art form distinct from live theatre, opera, ballet, film etc.?"

4.21 Neither the 'liveness' of an event nor its overall verisimilitude to the live production seem to greatly influence the quality of the experience for audiences. This was especially true for those who streamed. As Figure 47 on the previous page indicates, survey respondents on average neither agreed nor disagreed with the statements "Streaming gave me a good sense of what experiencing it live in a theatre would be like" and "I felt real excitement because I knew that the performance was captured as a live event."

4.22 Audience interviews and survey takers had mixed feelings on whether it was important that Event Cinema or streamed performances are beamed live. Only 17% of Event Cinema audiences say the liveness of a work is "very important", 33% say it is "somewhat important". Numbers are lower for those who streamed: 9% say 'liveness' is "very important" and 20% say "somewhat important." Audience perceptions around 'liveness' also contradict those held by Live-to-Digital suppliers. When asked how important 'liveness' is to audiences, 47% of organisations said "very important" and 35% said "somewhat important". Producers were much more likely than suppliers to say 'liveness' was "very important" (52% and 20%, respectively). (Figure 49)

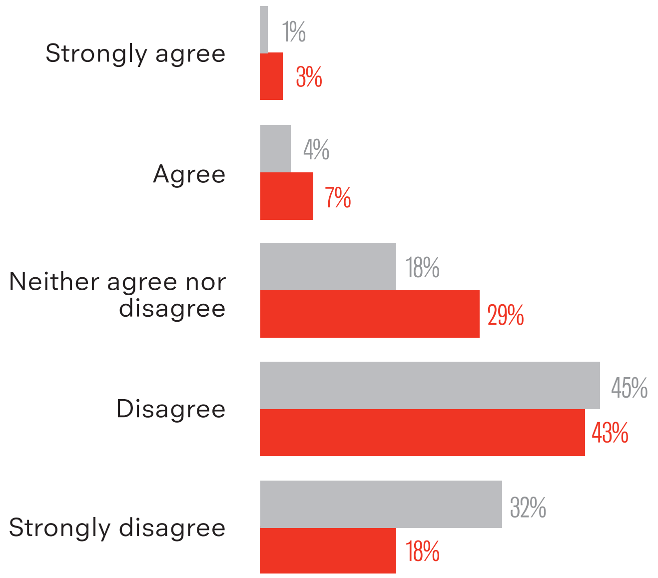
FIGURE 49
Suppliers views regarding whether 'liveness' is important to their audiences in Live-to-Digital form (n = 147) and Participants views on the importance of 'liveness" (n=1,070 and 476)

Source: Online supply-side and audience surveys. Questions: "How important do you think liveness (i.e., knowing that a performance is happening in real time) is to your audiences?" and "How important is it to you that the event is live?"



4.23 While not stated by the majority of respondents, a proportion of respondents who had participated in Event Cinema (10%) and streaming (5%) audiences "agree" or "strongly agree" that performance in those formats was more engaging than seeing the work live. (Figure 50, following page). Bakhshi and Throsby (2010) identified a similar effect, albeit significantly more pronounced in their study of *NT Live* in 2010.[45]

FIGURE 50
Participants agreement as to whether Live-to-Digital is "more engaging" than attending a live performance (n = 1,069 and 459)



Source: Online audience survey. Question: "How strongly do agree with the following statements about Event Cinema screenings, based on the last time you attended?" and "How strongly do agree with the following statements about streaming theatre online or on TV, based on the last production you watched?"

- "The advantage is you can really see the actors, the expressions on their faces, acting even with their eyelids...which you would never see if you went to the National," Audience Member, 65-74, West Midlands
- "It is really interesting to compare both the live production and Event Cinema – I often try to see both. Sometimes it is actually better in the cinema, the camerawork is better. But it has a negative side too - you are confined to what the cameraman wants you to see. On the screen it becomes across as a bit too intense. Hamlet live was powerful. But in the cinema, it felt like it was overacting a bit. Yet people who haven't seen it live loved the cinema version." Audience Member, 25-44, Yorkshire & Humberside
- "I do like the risks; when it's live it's teetering on the edge." Audience member, 45-64, Yorkshire & Humberside
- "If I couldn't make it to the 'live live', repeat is as good as any." Audience Member, 45-64, West Midlands
- "It always feels live whether it is or not" 16-24, Audience Member, Greater London
- "Not important. I actually prefer an encore. They're usually shorter. Others finish late at night late for a teacher. It's a big factor." 25-44, Audience Member, North West

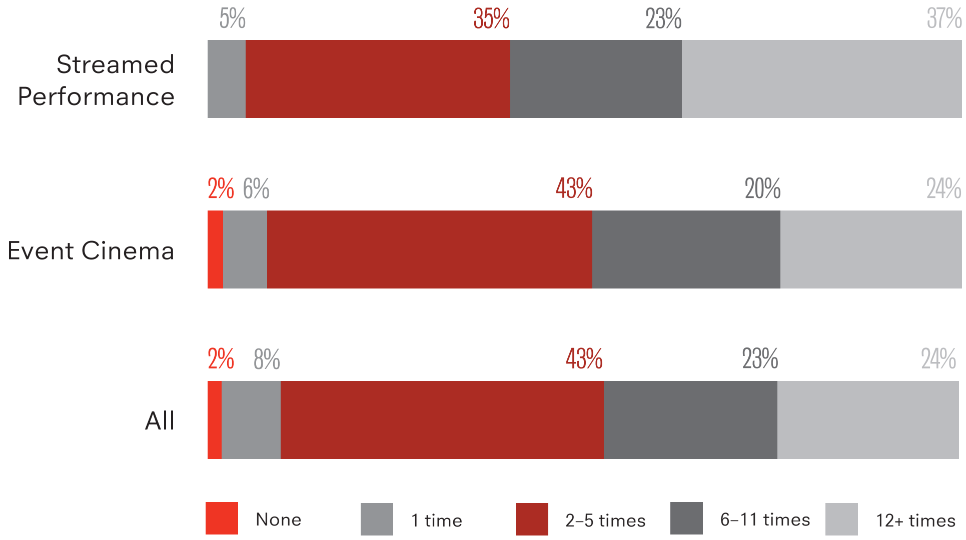
45 Cinema audiences reported higher levels of emotional engagement with the production than those who had experienced the play at the National Theatre (60.6% of cinema audiences strongly agreed with the statement that they were 'totally absorbed' compared to 38% of theatre audiences; 31.5% of cinema audiences agreed, and 39.2% of theatre audiences agreed). (Bakhshi and Throsby, 2010).

Q6. What impact are digital screenings having on audiences for live theatrical performances?

4.24 Participation in Live-to-Digital performances does not appear to correlate with any decrease in the frequency with which audiences report participating in live cultural performances, including theatre, or the kinds of events they attend. In fact, those who stream are slightly more likely to attend live cultural performances *more* frequently than the average theatregoer; 37% of those who stream say they attended a dozen times or more in the past year, as compared with 24% of respondents overall (Figure 51).

- "Nothing will stop me from live productions! But [the streaming platforms] gives me as much theatre as I want and [the opportunity to] experience things that I wouldn't necessarily think I'd enjoy. If you had said to me, here's a ticket to see *Hip Hop Othello* [the Q Brothers] live at the Globe [in 2012], I wouldn't have gone. But watching it on the iPlayer [The Space], I thought it was fantastic – I wish I had seen it live." Audience Member, 45-64, West Midlands)

FIGURE 51
Frequency of live cultural performance attendance in the last 12 months by Live-to-Digital participation segment (n = 1,187)



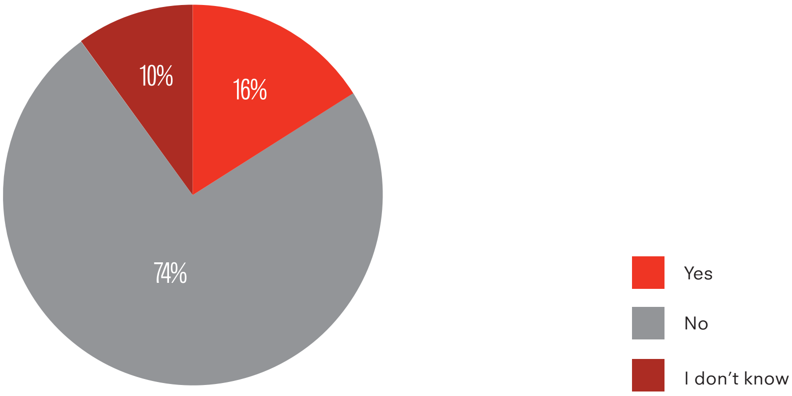
Source: Online audience survey. Question: "How many live cultural performances of any kind have you attended in the past 12 months? [Do not count popular music concerts]."

4.25 Event Cinema and streaming do not seem to be 'substitutes' for attending live performance.[46] When asked whether they would have seen their most recent Event Cinema performance live if it were not presented on screen, the majority of respondents said 'no' (74%); however 16% of audiences stated that 'yes', that they would have seen it live– suggesting that there could be an impact on live performance. (Figure 52). As discussed above, when asked what has prevented attending Event Cinema in the past, 54% said they prefer live theatre;

46 **Substitute**: A product or service that a consumer sees as the same or similar to another product such that an increase in demand for one will be associated with a decrease in demand for the other. In the 'Live-to-Digital' space some have raised concerns that Event Cinema is becoming a substitute for a live performance.

36% of those surveyed have not streamed a theatre performance online or watched on television because they prefer live theatre.

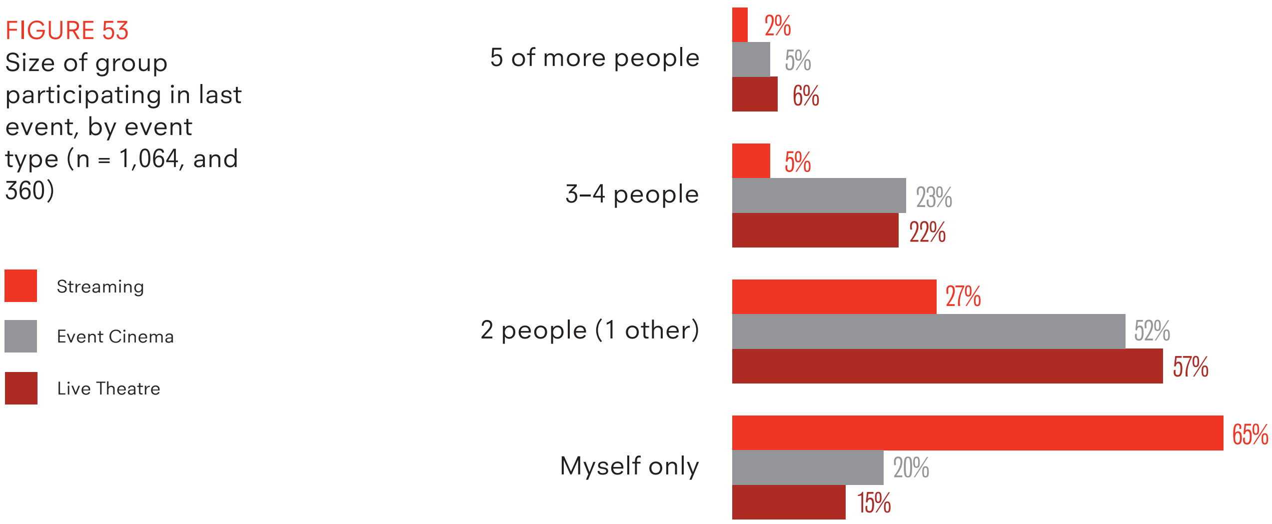
FIGURE 52
"Thinking back to the most recent Event Cinema performance you saw would you have seen it live if it was not screened in the cinema?" by geography (n = 1,072)



Source: Online audience survey. Question: "Thinking back to the most recent Event Cinema performance you saw would you have seen it live if it was not screened in the cinema?"

4.26 Live-to-Digital streaming may be impacting how audiences relate to theatre work socially. Live theatre performance and Event Cinema screenings are equally social occasions, with individuals as likely to attend live theatre in pairs or groups as they are live cinema. As Figure 53 shows below, only 15% of live theatre goers attend solo, compared with 20% of Event Cinema attendees. Streaming performances, however, are more often a solitary act; 65% of survey respondents have streamed solo.

FIGURE 53
Size of group participating in last event, by event type (n = 1,064, and 360)



Source: Online audience survey. Questions: With how many people did you attend your most recent theatre event?", "With how many people did you attend this Event Cinema performance?", and "With how many people did you stream the most recent theatre performance online or on television that you viewed?"

5.

Supplier Offer, Barriers, Experiences and Impact on Touring

5.1 This chapter examines what prompts or prohibits suppliers' participation in the Live-to-Digital marketplace and what impact, if any, Live-to-Digital work has had on theatre touring. It focuses on two questions:

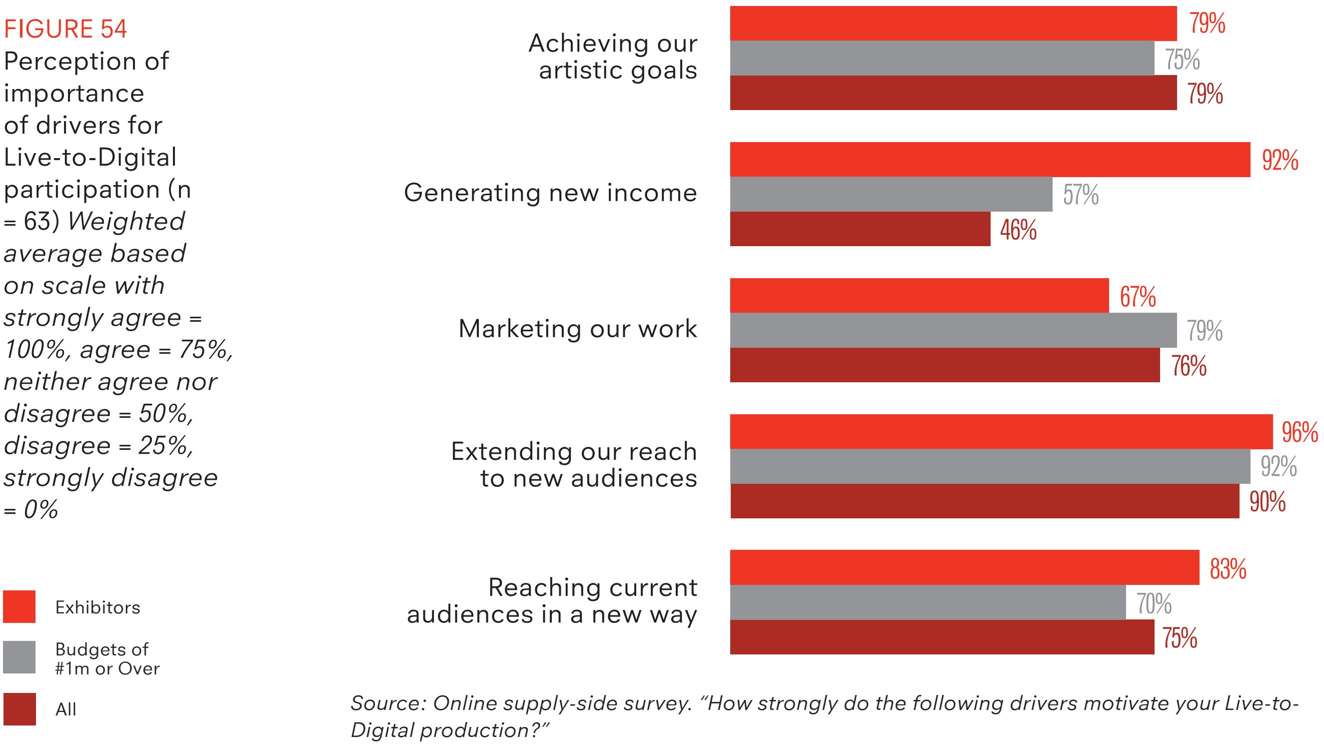
7 What are the motivations and barriers for organisations to enter the market?
8 How have theatre touring patterns been affected by the advent of digital theatre?

Q7. What are the motivations and barriers for organisations to enter the market?

Motivations

5.2 As shown in Figure 54, the most powerful stated motivation by suppliers for creating Live-to-Digital work is reaching new audiences (90% weighted average). This was true for suppliers of all kinds and sizes, and especially true for exhibitors. A corollary, but less strongly identified motivation, is reaching current audiences in new ways (75% weighted average).

FIGURE 54
Perception of importance of drivers for Live-to-Digital participation (n = 63) *Weighted average based on scale with strongly agree = 100%, agree = 75%, neither agree nor disagree = 50%, disagree = 25%, strongly disagree = 0%*

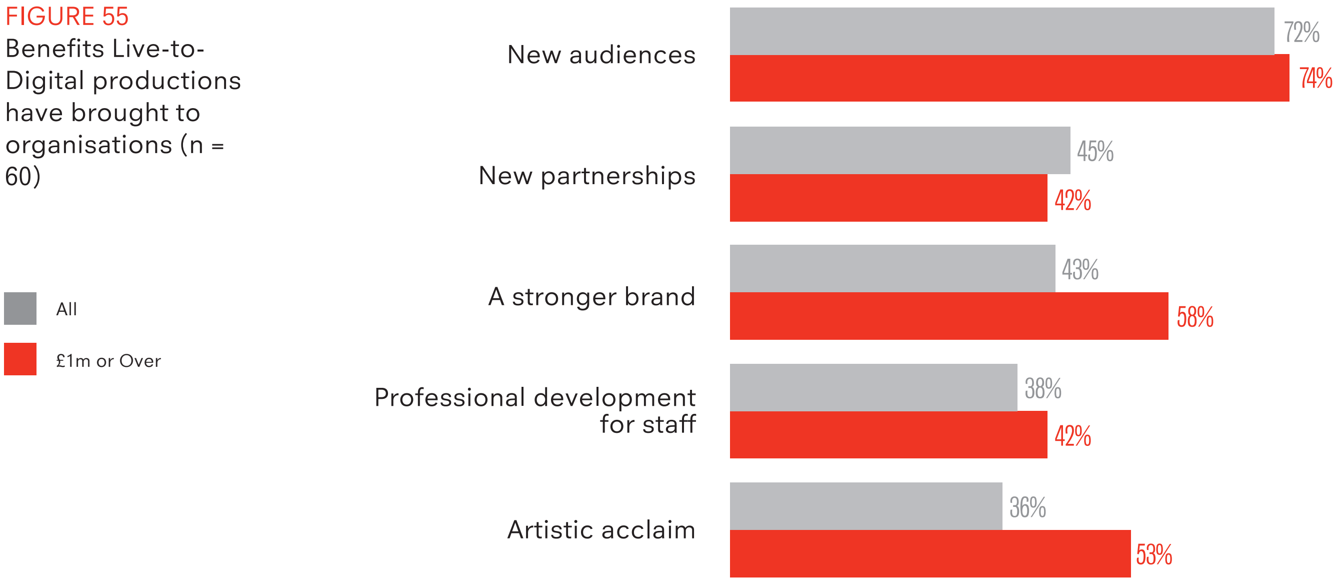


Source: Online supply-side survey. "How strongly do the following drivers motivate your Live-to-Digital production?"

5.3 Respondents believe that reaching new audiences is also the top benefit Live-to-Digital work has brought their organisation (73%). While a stronger brand and artistic acclaim were also highly rated benefits, audience development was by and large the strongest benefit identified by participants (Figure 55).

Data from the audience survey reveals streaming is attractive to younger and more diverse audiences (Chapter 3), however organisations were not asked to quantify what new audiences they had specifically reached through existing Live-to-Digital programming. Thus this question in its current iteration only suggests the potential and hope to reach new audiences through Live-to-Digital and could be explored more in future research with self-identified non-attendees.

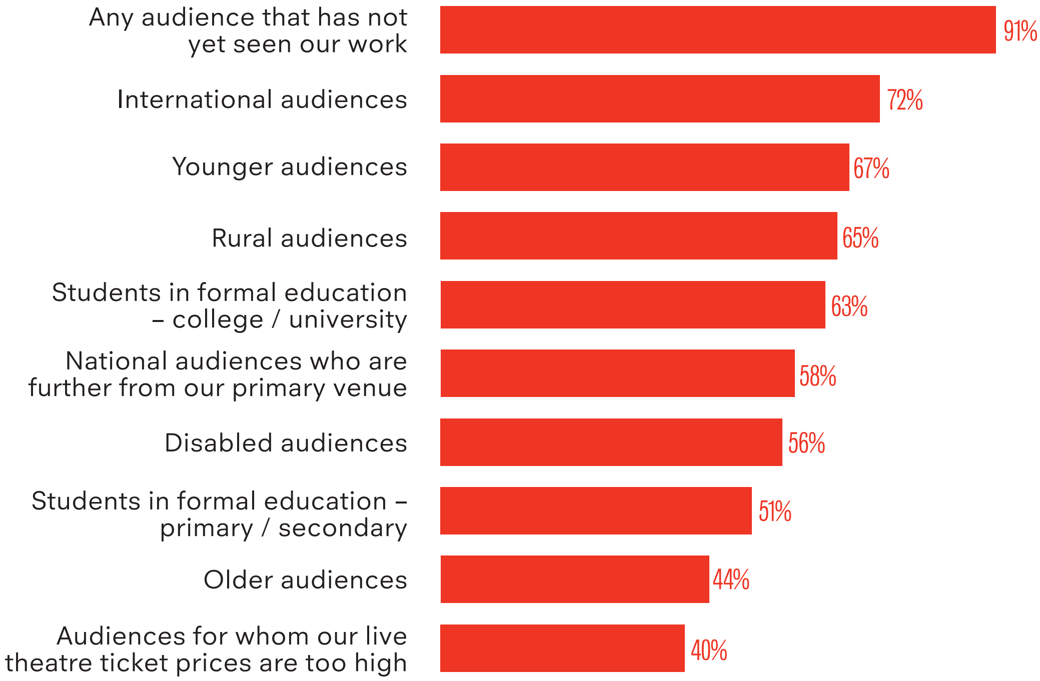
FIGURE 55
Benefits Live-to-Digital productions have brought to organisations (n = 60)



Source: Online supply-side survey. Question: "What benefits have Live-to-Digital productions brought to your organisation?"

5.4 When asked what new audiences their Live-to-Digital work tries to reach, most organisations indicate that they would like to attract *any* audience who has not yet seen their work (91%) (Figure 56 at overleaf). Beyond that generality, respondents are more likely to say they seek international audiences (72%), younger audiences (67%), and rural audiences (65%) above older audiences (44%) and those priced out of theatre (40%).

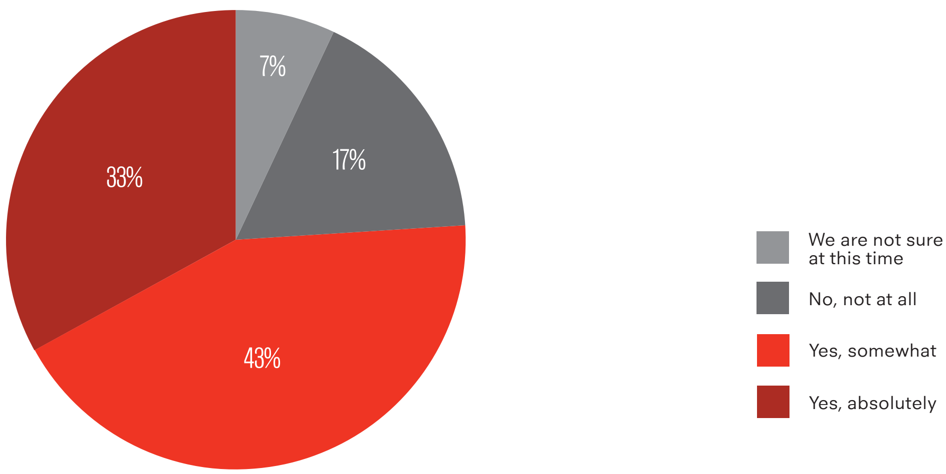
FIGURE 56
Types of new audiences that organisations aim to serve via Live-to-Digital, by percentage of organisations selecting (n = 47)



Source: online supply-side survey. Question: "Which of the following types of new audiences do you aim to serve via Live-to-Digital?"

5.5 Suppliers were also likely to say that achieving overall artistic goals is an important driver of Live-to-Digital work (79%). Respondents who have produced Live-to-Digital theatre see it as critical to their overall mission, though smaller organisations also identify the work as crucial in that way (Figure 57).

FIGURE 57
Organisations agreement with whether Live-to-Digital production is critical to organisational mission (n = 58)

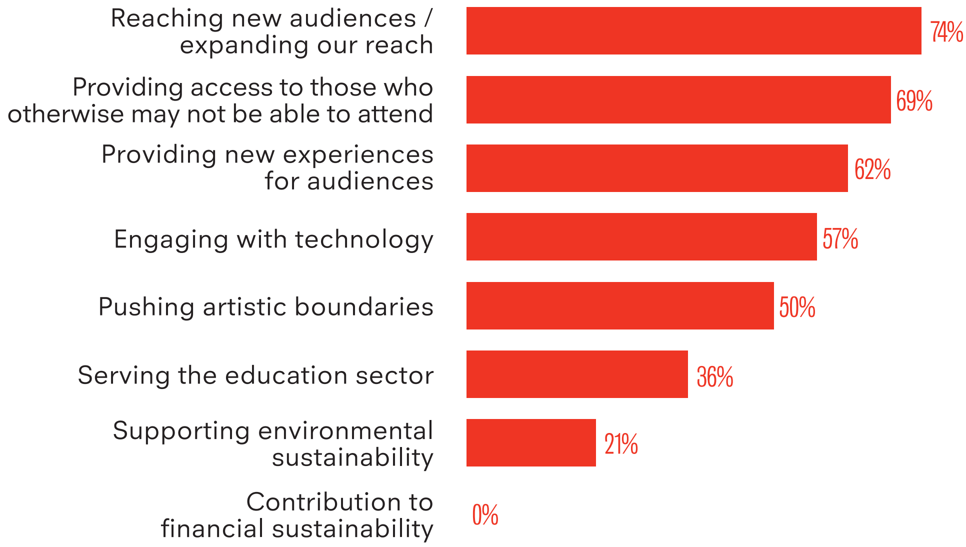


Source: Online supply-side survey. Question: "Do you see Live-to-Digital production as critical to your overall mission?"

5.6 As illustrated in Figure 58, when asked how Live-to-Digital work fulfils mission, organisations are mostly likely to say through 'reaching new audiences' (74%);

followed by 'providing access for those who otherwise may not be able to attend their productions due to factors like cost and distance' (69%); 'providing new experiences for audiences' (62%); 'engaging with technology' (57%); and 'pushing artistic boundaries' (50%). Serving the educational sector (36%) and supporting environmental sustainability (21%) are cited less frequently.

FIGURE 58
Aspects of mission fulfilled by Live-to-Digital work (n = 46)

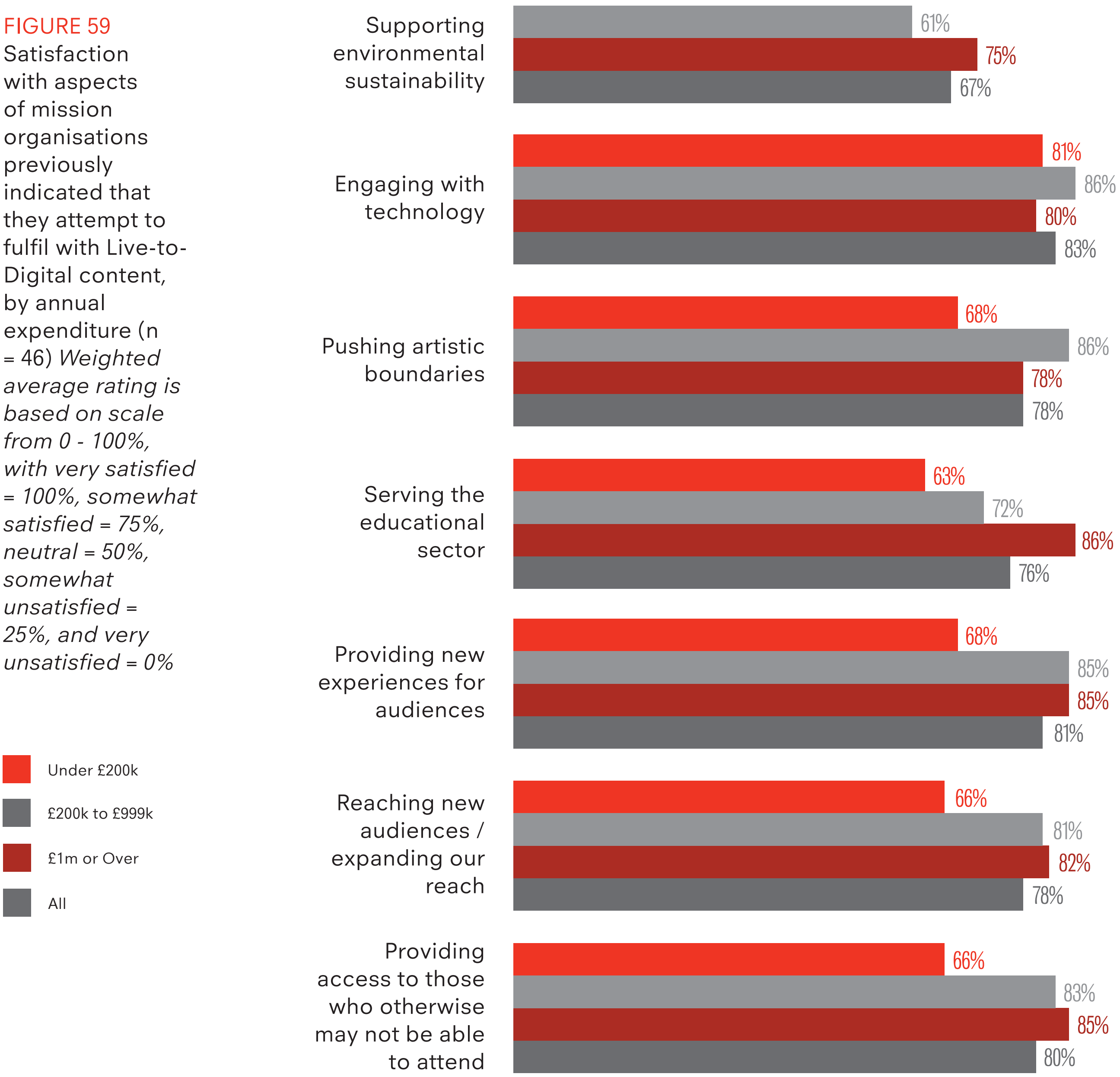


Source: Online supply-side survey. Question: "How satisfied has your organisation been with your Live-to-Digital productions to-date, in terms of fulfilling your organisation's mission?"

5.7 Figure 59 (overleaf) indicates that organisations are generally satisfied with how their Live-to-Digital productions have fulfilled their mission. All respondents rated themselves between 'somewhat satisfied' and 'very satisfied' with each aspect of their mission they were attempting to fulfil through Live-to-Digital work. Organisations with annual operating budgets of under £200,000 are generally less positive than organisations with higher annual expenditures about the mission-related outcomes of their productions, with the exception of general satisfaction with how they have engaged with technology.

- "I'm quite interested in ways you can use that technology to take one of our plays to people who can't physically get to the theatre – old people's homes, isolated rural communities in the North East – in order to broaden our regional reach and the funding we get to represent that. This is very different from selling our stage plays through a cinema network which realistically isn't going to happen, unless we can somehow cast Helen Mirren…." Theatre Marketing Director
- "We're a presenting house. We did think about becoming a screening house [as well] because we thought there might be some money in there. But we went against the idea because it means splitting up the week, which we can't afford to do. And it's about planning timetables, and it's about cost of equipment and frankly there are better places [for cinema screenings] here up the road…let's see if we can jump on the bandwagon, but it wasn't a realistic bandwagon to jump on." Theatre Director
- "It is absolutely critically about giving access for my community to the very best art forms. I'm not doing it for money." Exhibitor

FIGURE 59
Satisfaction with aspects of mission organisations previously indicated that they attempt to fulfil with Live-to-Digital content, by annual expenditure (n = 46) *Weighted average rating is based on scale from 0 - 100%, with very satisfied = 100%, somewhat satisfied = 75%, neutral = 50%, somewhat unsatisfied = 25%, and very unsatisfied = 0%*



Source: Online supply-side survey. Question: "How satisfied has your organisation been with your Live-to-Digital productions to-date, in terms of fulfilling your organisation's mission?"

Barriers

FINANCIAL, STAFF CAPACITY, SKILLS AND RIGHTS CLEARANCE

5.8 Figure 60 (following page) illustrates experienced and perceived barriers to entering the Live-to-Digital marketplace. Lack of funds is indicated as the strongest *experienced* challenge (47%) and *perceived* barrier (66%) working in the market.[47] This aligns with Figure 51 above, which shows that generating new income was thought of as a much weaker driver to participating in the Live-to-Digital market by organisations that have produced Live-to-Digital work.

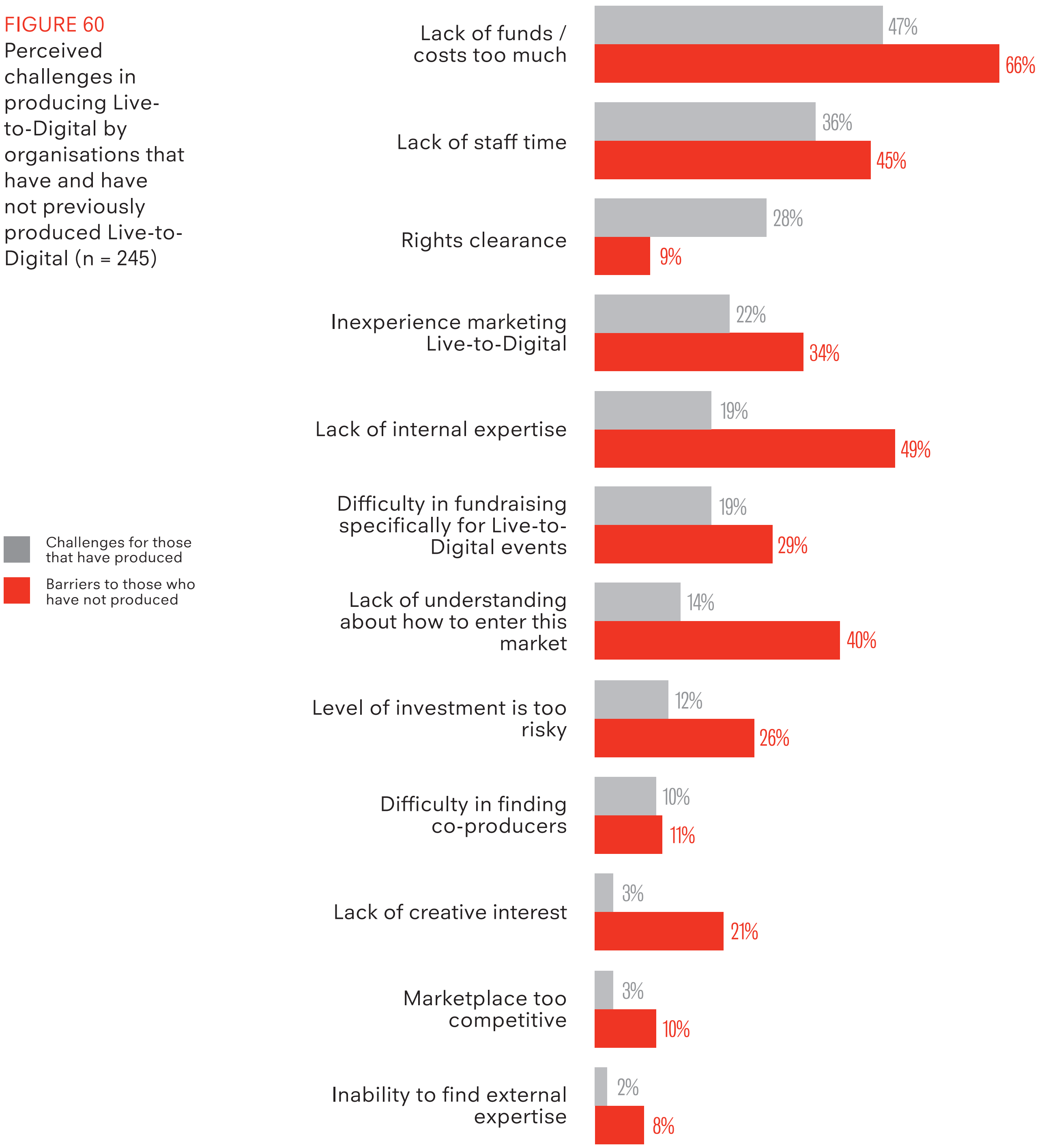
5.9 Lack of staff time follows as significant *experienced* challenge (36%) and *perceived* barrier (45%). The lowest identified challenges to having produced work and barriers to entry are "inability to find external expertise" (3% of past producers, 8% of those who have not yet produced) and "marketplace too competitive" (3% and 10%).

5.10 Rights clearance was also a challenge identified by many who have produced work (28%). Stakeholder interviews revealed that it can present a significant financial burden and time commitment.[48] Many interviewed consider the digital rights landscape to be inconsistent and incomprehensible, and in stark contrast to the clarity provided by the traditional framework for securing rights to produce a live play for a limited run to a set capacity in one location. Among organisations who have not yet created Live-to-Digital theatre, rights were not cited as a primary barrier to entry (9%), this may be due to the fact that many of those surveyed have not gotten to the stage in their own Live-to-Digital work to have to confront this hurdle (Rights issues are explored in further detail in Chapter 6).

47 This is corroborated by MTM (2015); 75% of 111 respondents (and 48 theatres) across the cultural sector saw external and internal funding as a barrier holding back their Live-to-Digital activities, with skills and expertise cited as the second most common barrier (41%).

48 **Rights**: In the context of this report, the specific rights referred to are the ability to use particular content for exhibiting it in a particular format in a particular region and for a period of time. Theatrical rights refer to the rights that are received to exhibit films in cinema halls. The distributors buy theatrical rights from the film producers and make arrangements with the theatre owners to exhibit the films to the public. The theatrical rights are limited by predefined territories and for a period of time.

FIGURE 60
Perceived challenges in producing Live-to-Digital by organisations that have and have not previously produced Live-to-Digital (n = 245)



Source: Online supply-side survey. Questions: "What factors have been significant challenges for your organisation in producing Live-to-Digital productions? Please tick all that apply." and "What factors have prevented you from producing LTD, to-date? Please tick all that apply."

5.11

63% of organisations that have produced Live-to-Digital work are unsure whether the work contributes or will contribute to their organisation's financial sustainability in the future (Figure 61, following page). This is not surprising, given to date other research suggests there are few proven models for the monetisation of Live-to-Digital, particularly online.[49]

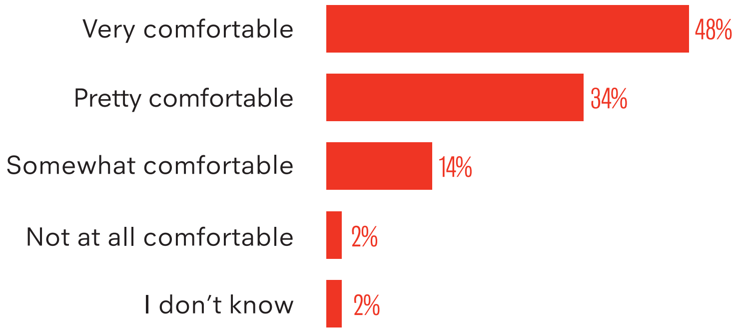
FIGURE 61
Respondents' opinions regarding whether Live-to-Digital is contributing or will contribute to their organisation's financial sustainability in the future (n = 58)

Source: Online supply-side survey. Question: "Do you feel that Live-to-Digital production currently is or will in the future contribute to your organisation's financial sustainability?"

5.12

Figure 62 shows that when asked to rate the comfort of their senior leadership with taking financial risks on Live-to-Digital productions, 82% of respondents characterised them as 'very comfortable' or 'pretty comfortable,' which suggests there may be appetite for more experimentation.

FIGURE 62
Ratings of senior leadership comfort levels with the financial and creative risks of Live-to-Digital work (n = 63)



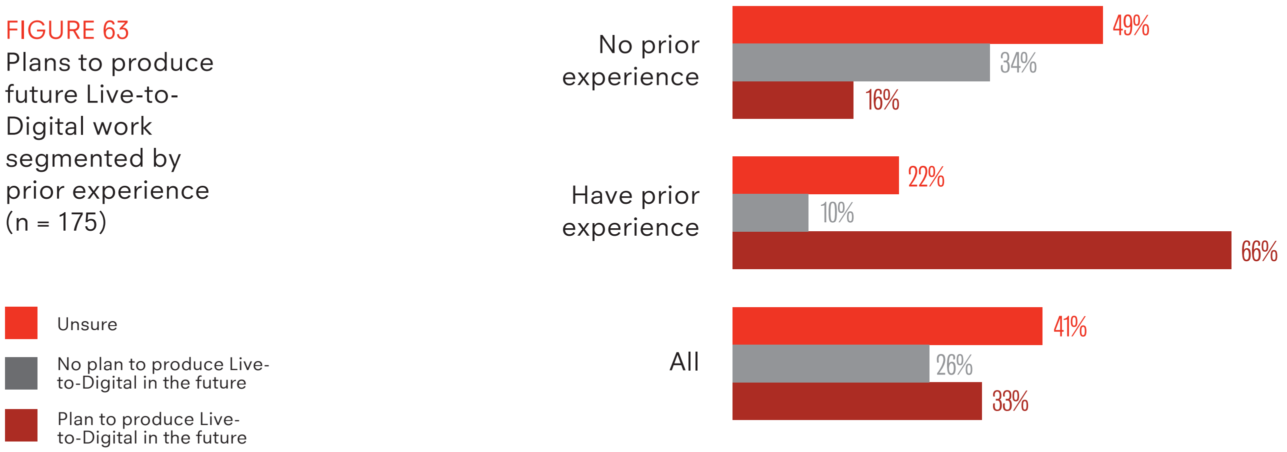
Source: Online supply-side survey. Question: "How comfortable is your senior leadership team with taking financial risks on Live-to-Digital productions?"

5.13

The majority of organisations who have not produced Live-to-Digital work do not currently have plans to enter (34%) or are unsure (49%) if they will participate in the market. Conversely, the majority of organisations (66%) that have produced Live-to-Digital work in the past say they plan to do so again in the future (Figure 63, following page).

49 MTM (2015).

FIGURE 63
Plans to produce future Live-to-Digital work segmented by prior experience (n = 175)

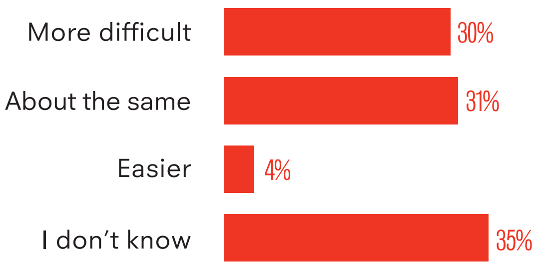


Source: Online supply-side survey. Question: "Do you plan to produce any Live-to-Digital productions in the future?"

5.14

When asked what factors will influence their organisations' decision to produce Live-to-Digital work in the future, respondents most frequently identified obtaining funding (58%, Figure 65 on following page). This does not mean, however, that the process for funding future Live-to-Digital work is more difficult to fund than traditional live productions; respondents were as likely to say it was "about the same difficulty" (31%) as those who said it was more difficult (30%) (Figure 64).

FIGURE 64
Relative ease or difficulty of funding Live-to-Digital productions, compared with funding live (n = 57)



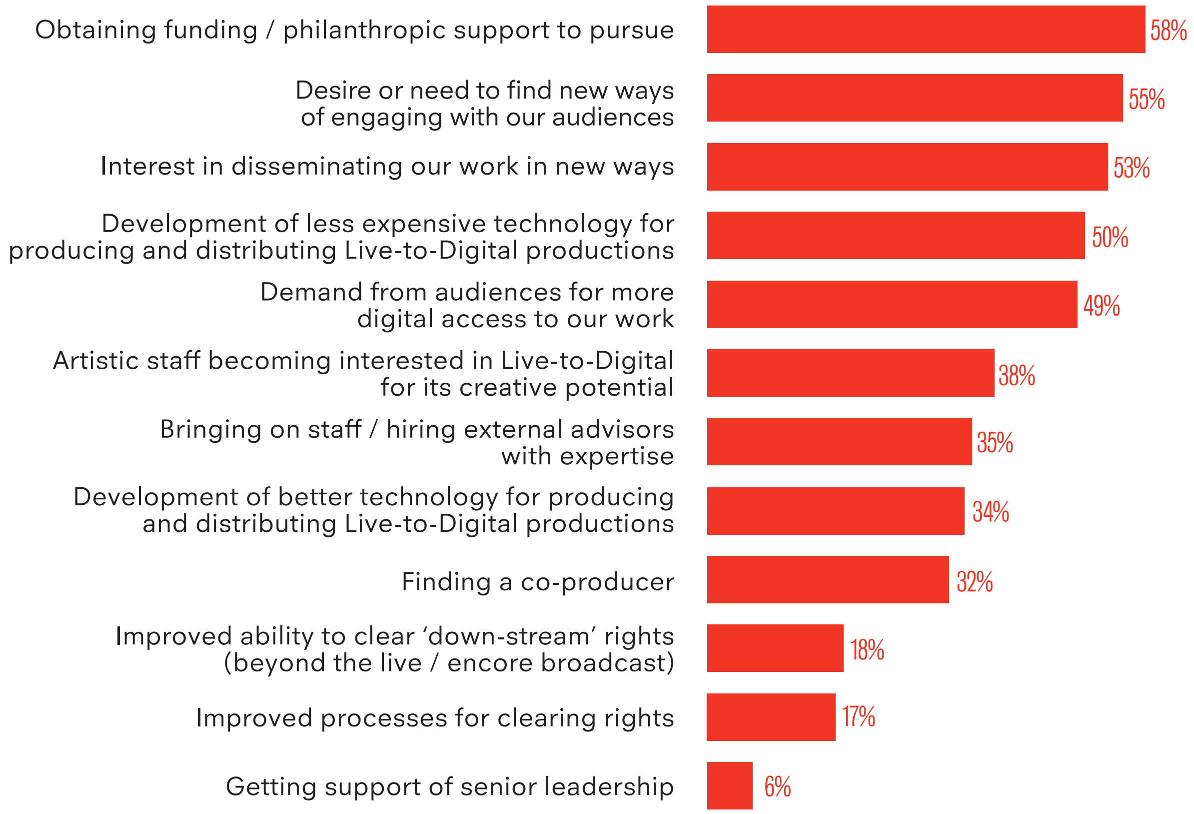
Source: Online supply-side survey. Question: "How have you found the process of funding Live-to-Digital productions, in comparison for funding traditional live productions?"

5.15

Other commonly selected factors that would influence producing in the future include the "desire or need to find new ways of engaging with our audiences" (55%), "Interest in disseminating our work in new ways" (53%) and "Development of less expensive technology for producing and distributing Live-to-Digital productions" (50%) (Figure 65).

- "Digital is something I'm interested in – there are ways we could really use it, yet I have no idea how to access the facilities or the people to talk to, and how to distribute it. It feels like it isn't for us. Not because we don't want it, but because it feels like it is for the really big names." Artistic Director

FIGURE 65
Factors that will influence whether organisations produce Live-to-Digital in the future (n = 187)



Source: Online supply-side survey. Question: "Will any of the factors below influence whether your organisation produces Live-to-Digital productions in the future? Please tick all that apply."

INFRASTRUCTURE

5.16 While 34% of survey respondents (Figure 65, previous page) identified "better technology for producing and distribution" as a factor that would influence their desire to produce work in the future, focus groups participants and interviewees did not identify infrastructure requirements as a significant barrier to entering the market.[50] Many suggested the breakdown of this barrier reflects the establishment of the Digital Screen Network (DSN) in 2005, which funded 212 cinemas to install digital projectors, prioritising the smaller, independent cinemas which may not have had the reserves to invest in projectors that at the time cost £50-75,000. This programme was followed in 2009 by the UK Film Council's Rural Cinema Pilot Scheme that sought to ensure rural cinemas made the expensive, but necessary transition from DVD to digital projection.[51]

5.17 Some interview and focus group participants from organisations did indicate a need for improved online and on demand platforms that are curated, rather

50 This is a marked improvement from the experience reported in Petrie et al (2012), where technology was shown to be a real barrier – public broadband network was not sufficiently reliable to deliver live streaming to rural and remote locations.

51 The UK Film Council (2012)

than open to all (e.g., YouTube), but this was not raised as a significant barrier to participation.[52]

- "[Today] With the exception of the top of Scotland, there is no infrastructure barrier for streaming live and on-demand content. The content is available and a commercial deal can be struck – within region and content holders." Trade Body Director

QUALITY

5.18 Many of those interviewed emphasized a notable improvement in the quality of Event Cinema productions over the past five years. While encouraging for audiences, those theatre companies not yet active in this space are concerned that this creates a further barrier to entry – the costs and required resources to achieve ever-higher levels of production value are perceived to be high and growing. Fiery Angel and Kenneth Branagh Theatre Company, for example, underscore this problem; the company shares its experiences entering the Event Cinema space at the 'high-end' in 2016 in a Case Study included in Chapter 7.

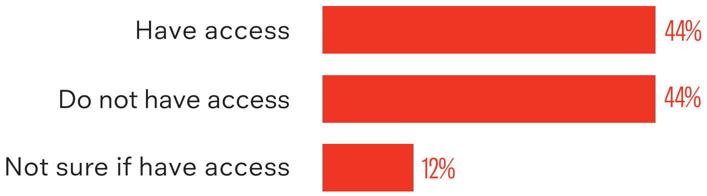
- "The theatre companies were clearly learning as they did it. You can see they are experimenting – with sound, camera positions, and surround sound." Exhibitor
- "It felt like they've improved. One of the first ones I saw was *One Man Two Guvnors*. Because it was a lot of audience interaction (James Corden got people out of the audience). It felt like being in the kitchen when there's a really good party going on in the living room. Some of the more recent things I've seen, View from the Bridge, felt like you were right there in the room." Audience Member, 45-64, North East.
- "The consequence of the work looking better somehow makes you feel that it is more expensive, and harder to do, and you'll need more expertise to feel like whatever you do is of a similar quality; you're competing equally with somebody with much more resource than you." Artistic Director

AUDIENCE / VIEWER DATA

5.19 Approximately half of supply-side survey respondents (44%) do not have access to audience data from their Live-to-Digital productions (Figure 66). Not surprisingly the majority of respondents (90%) indicated that having direct access to that data would be 'very important' (65%), or 'somewhat important' (25%) (Figure 67). This requires collaboration from exhibitors. Those theatres that have enjoyed success in accessing box office and/or streaming data should be encouraged to share their experiences.

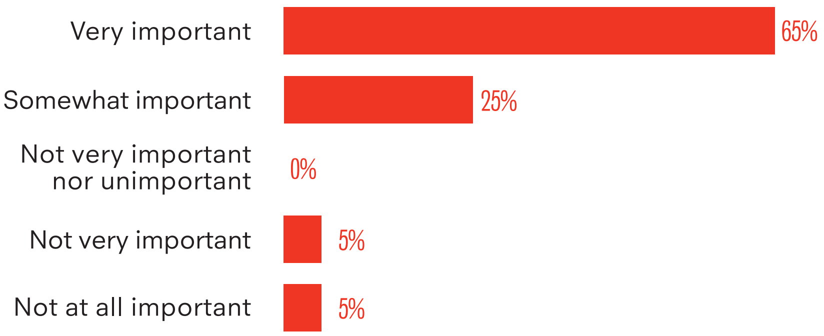
52 Canvas, the Arts Council-funded platform, is now actively working in this space. See the following chapter for more information on that programme.

FIGURE 66
Suppliers with access to audience data from their Live-to-Digital productions (n = 57)



Source: Online supply-side survey. Question: "Do you have access to audience data from your Live-to-Digital productions?"

FIGURE 67
Importance of accessing Live-to-Digital production data (n = 20)

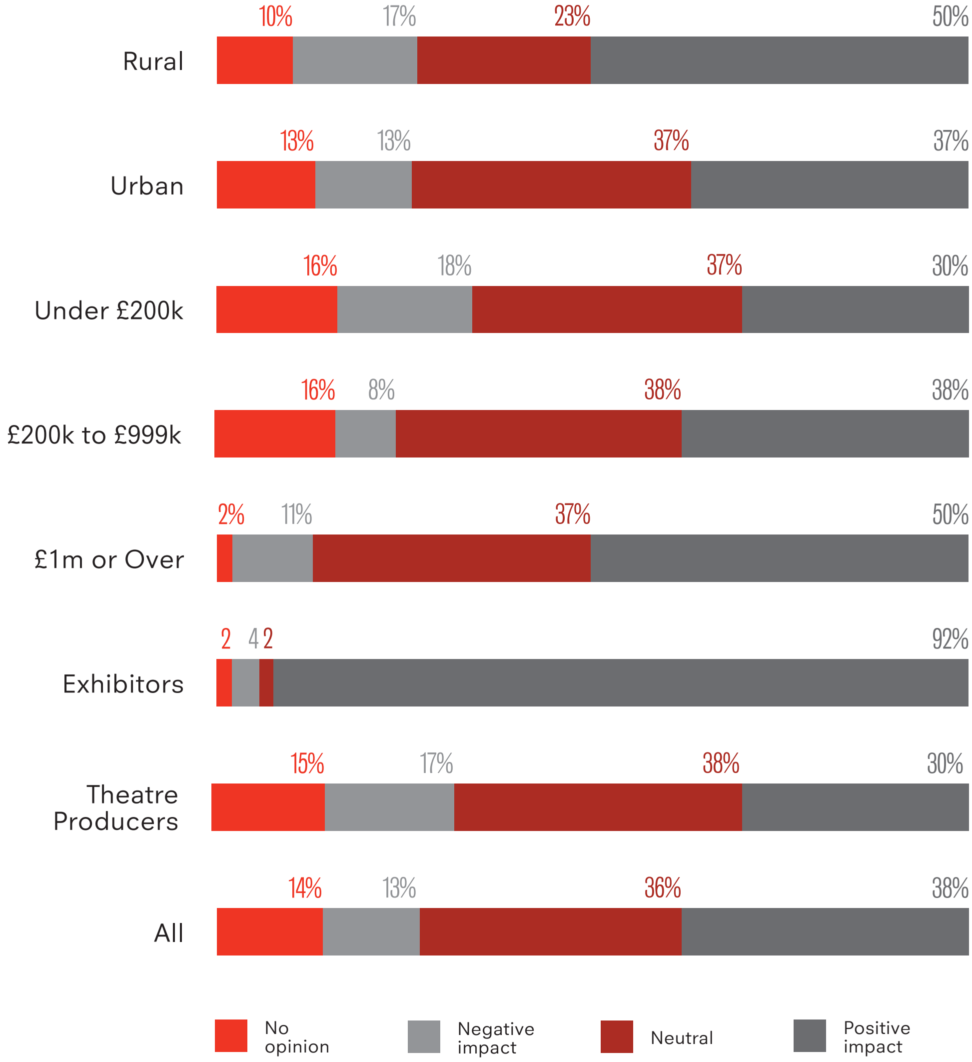


Source: Online supply-side survey. Question: "How important would it be for you to have direct access to this data?"

IMPACT OF LIVE-TO-DIGITAL MARKETPLACE

5.20 General negative feelings towards Live-to-Digital do not seem to represent a significant barrier to participation. Overall, respondents are more likely to say the market place has had a positive impact on their organisations (38%) as opposed to negative (13%) (Figure 68). However, smaller budget organisations were least likely to say Live-to-Digital work has had a positive impact on their organisations (30%). Urban respondents were also less likely to identify a positive impact (37%) than were rural respondents (50%). An overwhelming number of respondents from exhibitor organisations (92%), meanwhile, identify a positive impact.

FIGURE 67
Opinions about the impact of Live-to-Digital market place on respondents' organisations (n = 243)



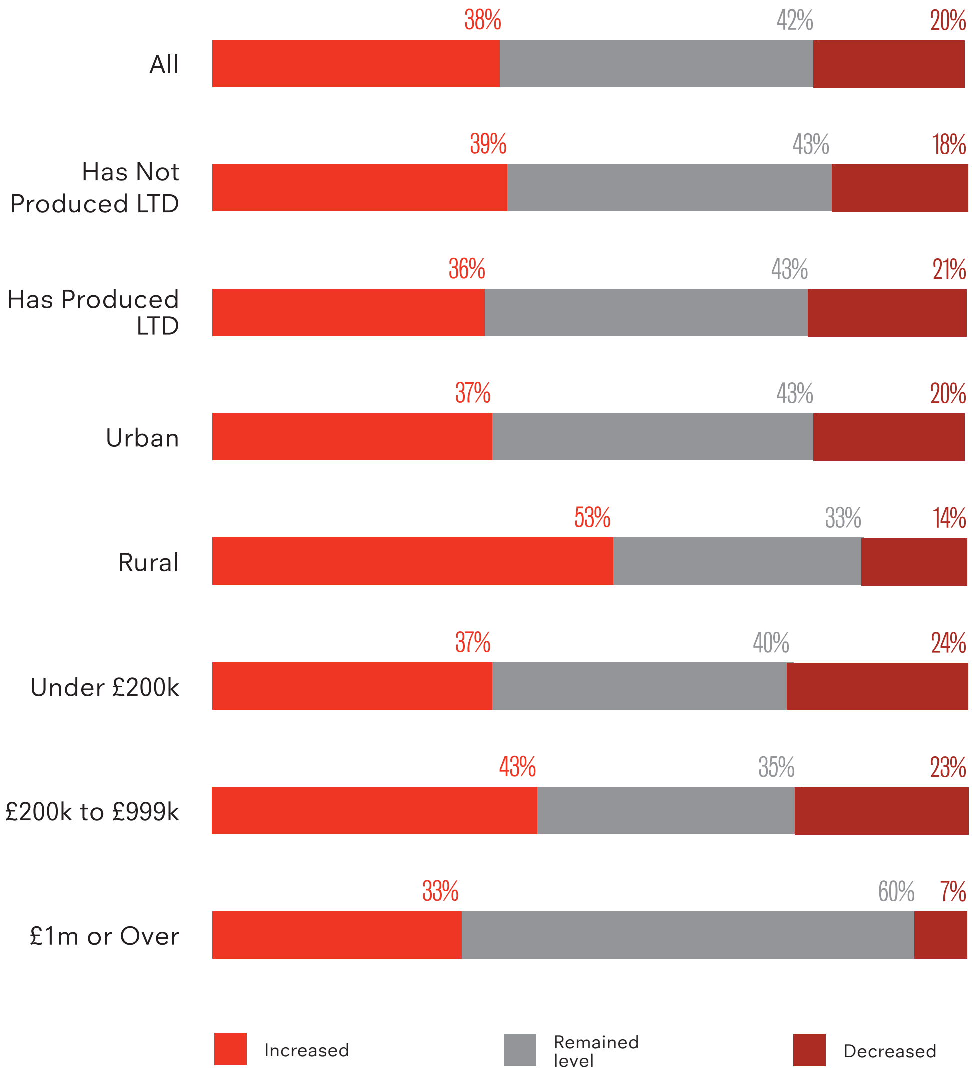
Source: Online supply-side survey. Question: "Do you feel that the Live-to-Digital market has had a positive or negative impact upon your organisation?"

Q8. How have theatre touring patterns been affected by the advent of digital theatre?

5.21 Three-quarters of all surveyed organisations tour their live theatre productions. As shown in Figure 69, 80% of touring organisations report an increase (38%) or no change (42%) in touring over the past two years. Rural organisations are 16% more likely to report an increase in touring than the urban segment. Whether or not an organisation has previously produced Live-to-Digital work does not seem to impact significantly whether they have toured less.

5.22 Organisations in the largest budget category were the least likely to say touring had decreased (7%). Although not the majority, 20% of organisations recorded a decrease in touring, specifically smaller organisations (24%). This is likely a significant change to their operating model from years prior. However, the cause of this change may not be attributable to Live-to-Digital, as explored here, and should be monitored from the touring companies' and exhibitors' perspectives over time.

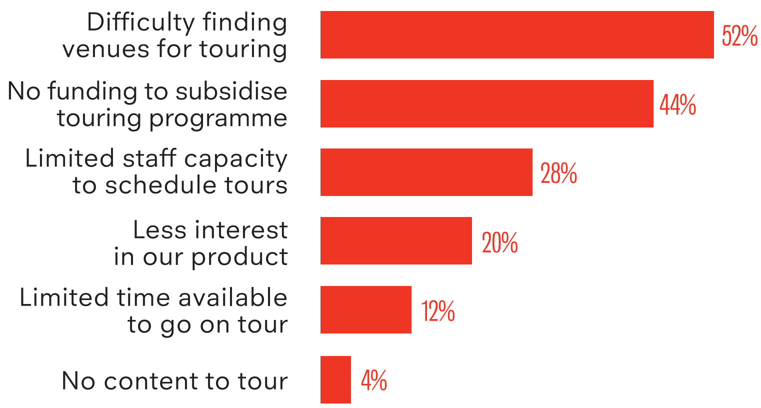
FIGURE 69
Touring levels in the last two years for all organisations, by budget, geography, and prior Live-to-Digital experience (n = 177)



Source: Online supply-side survey. Question: "Has your touring increased or decreased in the last two years?"

5.23 As shown in Figure 70 (overleaf), among the 20% of organisations for whom touring has decreased, many cite difficulty in finding venues for touring as a factor (52%). A lack of funding to subsidise touring programmes (44%) and limited staff capacity to schedule tours (28%) are also significant factors.

FIGURE 70
Reasons for decreased touring in past two years (n = 25)



Source: Online supply-side survey. Question: "You indicated that your organisation has decreased touring in the last two years. What has led to that decrease?"

5.24 However, Live-to-Digital is not reported as a major cause of the decrease in touring – only 6 of 131 touring company respondents indicated that venues had explicitly stated to them that they were programming more Live-to-Digital content because it is less expensive than live productions (Figure 71).

FIGURE 71
Reasons cited for difficulty in finding venues (n = 13)

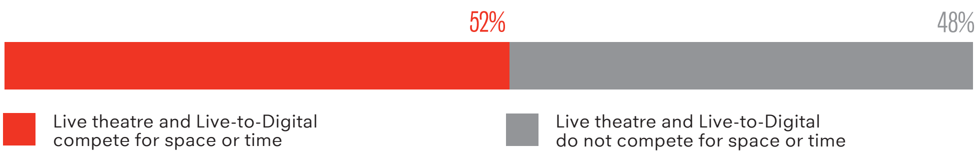
Reason	#
Venues not interested in our product	4
Venues explicitly stated they were programming more Live-to-Digital content	6
No staff capacity to fully research touring market	6

Source: Online supply-side survey. Question: "You indicated that venues stated to you that they were producing more Live-to-Digital content. What reasons did venues state to you for this change?"

- "We've seen some theatres who have generally stopped taking our work. Venues have made it clear: it's easier, it's cheaper, you get a technician in, you don't have to come in that day. The theatre itself isn't being used – it becomes a cinema." Touring Theatre Director

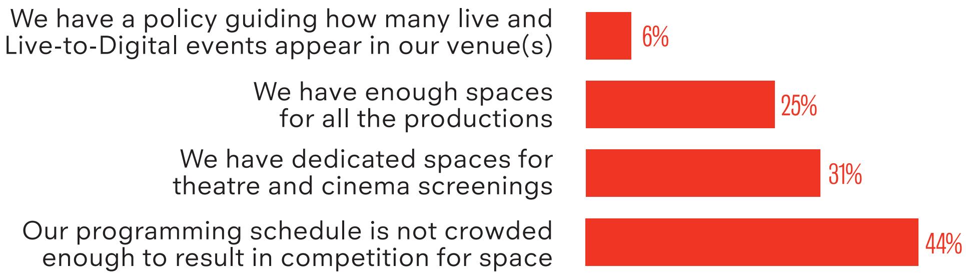
5.25 About half of exhibitor respondents (52%) indicate that Live-to-Digital screenings compete for space or time in their venue(s) (Figure 72). When asked what factors prevent theatre productions and screening from competing for space, 44% of exhibitor respondents indicated that their 'programming schedule is not crowded enough to result in competition for space'; 25% have 'enough spaces for all of their venues' (Figure 73).

FIGURE 72
Competition for space or time between live theatre and Live-to-Digital screenings (n = 33)



Source: Online supply-side survey. Question: "Do live theatre productions and Live-to-Digital

FIGURE 73
Reasons why there is not competition for space or time (n = 16)



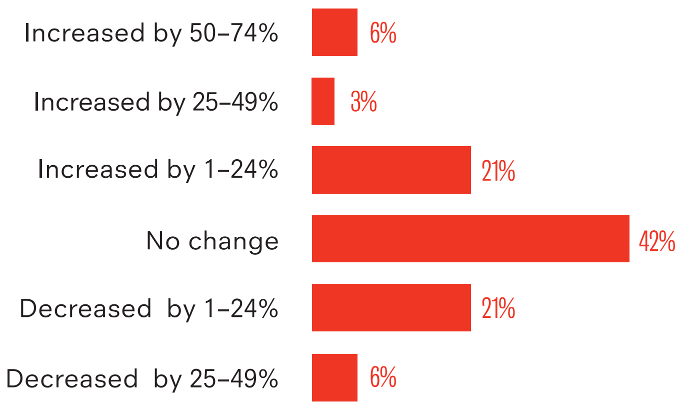
productions compete for space/time in your venue(s)?”

Source: Online supply-side survey. Question: “What factors prevent theatre productions and screenings from competing for space in your venue(s)?”

5.26

When asked whether the number of live theatre productions has changed in their venues, the response was fairly balanced, with 42% of exhibitors reporting no change, 27% reporting a decrease and 30% reporting an increase (Figure 74).

FIGURE 74
Exhibitors' change in number of live theatre productions in the last 2-3 years (n = 33)

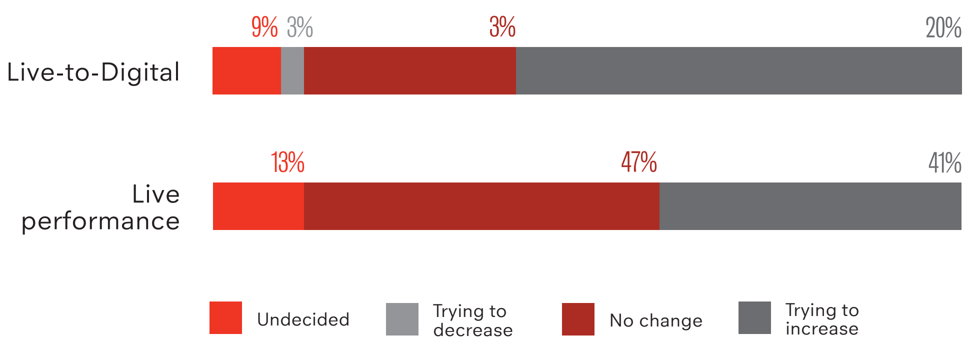


Source: Online supply-side survey. Question: “How has the number of live theatre productions in your venue(s) increased or decreased in the last 2- 3 years?”

5.27

As shown in Figure 75, 88% of exhibitors plan to maintain or increase the current number of live performances (including live theatre and other art forms) in their venue(s); 87% of exhibitors also plan to maintain or increase their current number of screenings.

FIGURE 75
Exhibitors' stated intentions regarding the number of performances and live screenings in their venue(s), by event type (n = 33)



Source: Online supply-side survey. Question: “Are you trying to increase or decrease the number of Live-to-Digital screenings in your venue?”

5.28 Thus it appears that losses in touring productions in some venues are being offset by increases in others. While it is not possible to prove causation, those organisations that produce Live-to-Digital work may also benefitting from a healthy touring circuit. The majority of exhibitors are also keen to continue to present both Live-to-Digital and live performances in tandem, with at least 40% trying to increase the programming offer for both, demonstrating exhibitors themselves are interested generally in both live and digital work (Figure 75).

5.29 It is would be unwise to disregard the experiences of the sample for whom touring has decreased. However, with only six organisations citing Live-to-Digital as an explicit reason given for their work not being programmed, it is not possible to conclude from the experiences of this study's sample that Live-to-Digital is the cause of the decrease. Rather Live-to-Digital is a potential factor in a dramatically changing funding and cultural environment.

5.30 Ultimately, many interviewed framed the challenges some touring companies are facing within wider societal changes (e.g. how consumers are accessing culture and entertainment content; dramatically changed funding climate). Many interviewed suggested this is a critical opportunity for those experiencing challenges in having their work shown to revisit the quality of their content; to reconnect with audiences; and to adapt to this new normal:

- "If your live content is not good enough, you need to adapt. Theatre organisations need to raise their game." Funder
- "There are economic reasons why venues are programing Event Cinema. I think it's good that they can give their audiences that offer. It makes other produced work step up to the plate a bit more." Producer
- "Really the only thing is for us as theatre producers to keep on keeping on. It's about trust, an audience feels it can trust the RSC, it can trust the National – they can trust us. Theatre companies are having to step up to the plate. The [regional] theatre too is about trust. There are certain theatres we tour to – you can see the programmer has done a beautiful job of truly building audiences. Just stretching them a little bit; they never programme anything unless they've seen it. Whoever comes will like it or love it. It is everyone trying not to be lazy. Theatre companies, programmers not being lazy – encouraging good regional theatre to happen. A lot of the Arts Council funding disappearing has been terrible in lots of ways, but it is also great – there was a lot of lazy work, people were just being indulged...if you are forced, if you know you have to pay the bills, you've got to make sure it is good." Touring Director

6.

The Future of Live-to-Digital

- "It is time to find some new models of delivery and distribution. It is not to follow the same leader, but to find the right mechanisms and platforms to engage with your audience. It is ultimately a creative challenge and it was ever thus." Producer

6.1 This chapter explores the potential future for Live-to-Digital audiences and theatre organisations. It answers the final three questions raised in the brief:

9 What does the future hold for attenders? Will they watch performances in person, in Event Cinema, or online?
10 What are the opportunities for smaller theatre organisations to create digital content?
11 What are the opportunities for co-promotion – where cinemas, producers and local venues work together?

Q9. What does the future hold for attenders? Will they watch performances in person, in Event Cinema, or online?

6.2 No evidence uncovered in interviews, focus groups, or surveys indicates that theatregoers' interest in Live-to-Digital work will wane in the coming years. While no report can forecast with certainty the technological and related developments that will alter the marketplace in the coming years, it is likely that digital content will become more accessible and more commonplace and that attendees will continue to consume it both online and via Event Cinema.

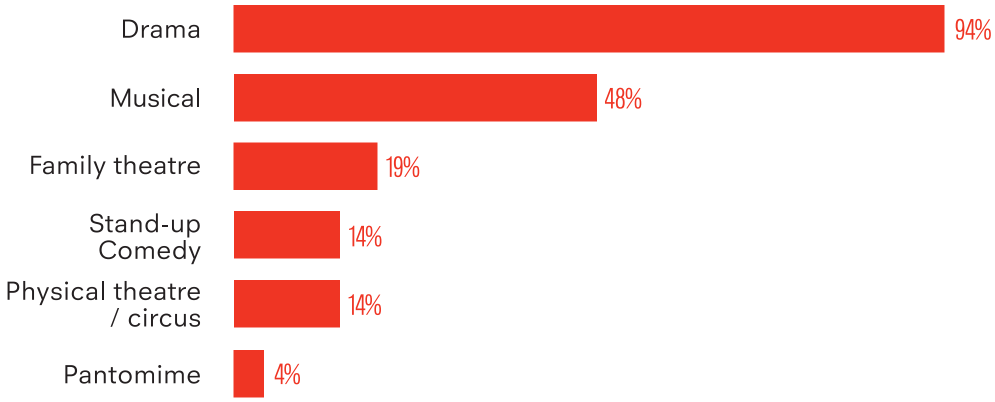
6.3 As discussed in Chapter 5, there is also no strong evidence pointing towards an abandonment of live theatre in favour of digital content. It is likely that theatregoers will continue to attend in person, as well as at Event Cinema screenings and online – just as people continue to attend live sporting events and rock concerts alongside downloading music, purchasing CD's (and even LPs, which are seeing a resurgence in popularity) and streaming.

6.4 Survey and interview findings did, however, illuminate what kinds of theatre-related content audiences might like to attend in Event Cinema in the future. Drama and musical theatre were by far the most popular (94% and 48% respectively) (Figure 76, overleaf). Notwithstanding the study's audience sample (comprised mainly of existing theatre-goers), the popularity of musicals highlighted in this research is not surprising – this is echoed in *British Theatre Repertoire's* 2016 publication, which, based on 2014 data, showed that musicals provided the majority of attendance and box office receipts across the UK.[53]

53 British Theatre Consortium, et al (2016)

6.5 The same publication also reports 'significant rises' in the commissioning of new adaptations, translations and plays for children; and suggests that new works (nearly two-thirds of all theatre productions) generate a fuller portrait of ethnic diversity in present day Britain.[54] Richardson (2015) argues that avant-garde live theatre may represent a bigger sub-genre of interest to youth audiences.[55] Adapting these genres for Live-to-Digital productions warrants further investigation.

FIGURE 76
Audiences' desired genres of future Event Cinema work
(n = 1,047)



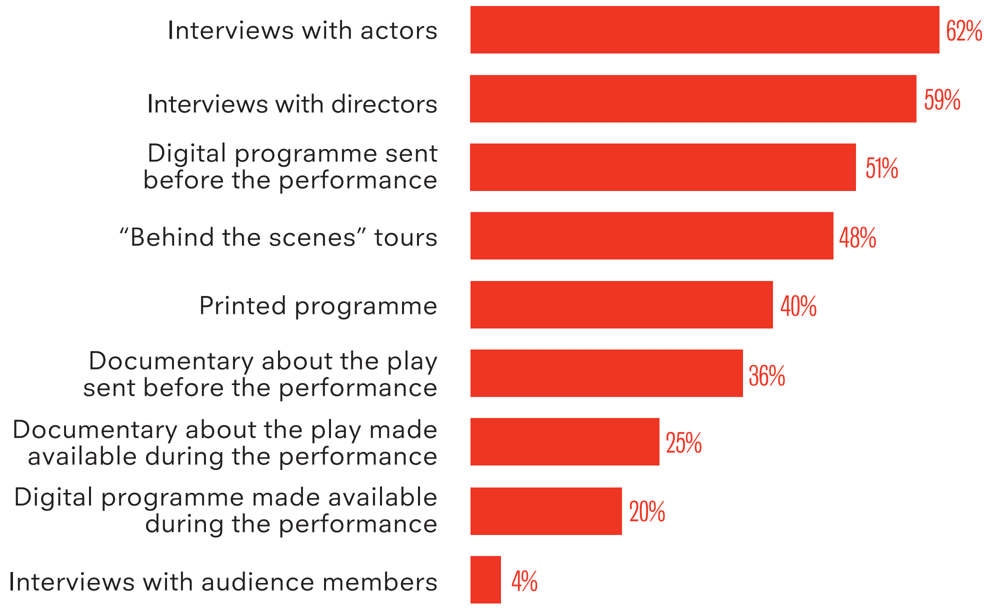
Source: Online audience survey. Question: "What type of theatre are you most interested to see broadcasted in the cinema in the future? Please tick all that apply"

6.6 When asked what additional supplementary content they would like to see as part of an Event Cinema screening, audiences were most likely to say interviews with actors and directors (62% and 59%, respectively). This rated much higher than documentary material shown at the performance (25%) or made available in advance (36%). Survey takers were also interested in digital programmes sent in advance of the performance (51%), while respondents ages 16-24 were very interested in digital programmes available *during* the performance (Figure 77).

- "I followed the Donmar on Twitter and I only knew about *Coriolanus* because of the digital programme. That's what urged me to buy a ticket.... I watched [the Encore] in a cinema in Birmingham and the digital programme with commentary was amazing. It felt like you're watching the DVD with commentary with the director, and three or four actors giving insights to do with the staged stuff, and occasionally funny little notes about how they rehearsed it....I watched it with headphones on my iPhone and I think the other audience members thought, "What the hell is this girl playing at?"" Audience Member, 16-24, West Midlands

54 ibid
55 Richardson (2015)

FIGURE 76
Audiences desired supplementary content of future Event Cinema work (n = 1,001)



Source: Online audience survey. Question: "What types of supplementary content would you like to see as part of an Event Cinema screening? Tick all that apply."

Q10. What are the opportunities for smaller organisations to create and distribute digital content?

- "It's a risk adverse sector, with ostrich mentality – if they bury their head in the sand, digital is going to go away." Producer
- "Without sounding too prissy about it, there is a general view that the future will see the crossover with cinema and augmented reality rather than with virtual reality. Cinemas see as their USP the communal experience, the social experience – there is a sense that VR cuts you off from that." Stakeholder

6.7 Event Cinema tends to dominate the press, boasting tales of impressive financial returns and the democratisation of culture through new technology, yet it is clear from this study and prior research that Event Cinema occupies just one corner of the digital landscape. Near-saturated by the super-brands, often trading on exclusivity, rarity value and 'liveness' and constantly pushing the quality of performance and production to the next level, Event Cinema does not present much room for smaller entrants precisely because the barriers to entry are real. These include the need to have a well-known brand, risk capital to invest, star casting and expertise.

- "Presently Virtual Reality is all designed around the world of gaming, which is a kind of immersive storytelling, but as far as what the promise is for the future of this 'art form', who knows...The technology is about taking you out of your present reality and putting you smack in the middle of someplace else. It doesn't need to be venue-based. You can do it at home...the economic impact will not be felt in your community." Theatre Designer

6.8 More broadly there are notable developments in the technology space that are already being leveraged by some cultural organisations, with the cinema sector often moving first. These include Virtual and Augmented Reality; 4K technology; 4D technology; and other potentially disruptive technologies. Although these technologies are generally being deployed by larger companies, several small to mid-scale suppliers interviewed and partaking in focus groups recognised the importance of these developments, and the desire to understand if and how they could be adopted and/or adapted for small to mid-scale theatre companies. Some 2016 technology developments are highlighted here, followed by potential ways in which smaller companies could embrace new technology. The Virtual Reality and Augmented Reality market are projected to reach up to $30 billion and $120 billion, respectively, in worldwide revenues by 2020.[56] Developed by the LA Philharmonic digital initiatives team, the Orchestra brought virtual reality devices to communities throughout Los Angeles in autumn 2015 via the *VAN Beethoven mobile experience*. The VAN enabled users to experience a four-minute performance at the Orchestra's home, the Walt Disney Concert Hall on a virtual reality headset. [57] *Wired* magazine wrote of the event, "This is the first time I've seen a nonprofit organisation harness this technology to bring a cultural experience to underserved communities....[This is] the larger promise of virtual reality, realised."[58] Digital Theatre is releasing its first Video 360 augmented reality production in 2016.

6.9 NT Live in partnership with Sony and the Vue captured the world's first multi-site live 4K transmission in autumn 2015 with Benedict Cumberbatch's *Hamlet*, the fastest selling show in London's theatre history.[59] (4K is four times the definition of standard HD). Johnny Carr, Alternative Content Manager at the Vue, speaks to this, and the broader trend toward high quality and high definition, "What is going on screen is of significantly higher quality than a few years ago. Particular seasons have dropped away, those with fixed camera and one shot. [Now we see] six or seven cameras, all storyboarded, HD, everything down to the wigs and costumes has to be the highest quality."[60]

6.10 4D technology, combining 3D film with physical effects (e.g. rain, strobe lights, vibration) that occur in the theatre in synchronisation with the film, has been installed in 530 screens worldwide.[61] According to the same *Hollywood Reporte*r article, Charlotte Jones, Principal Cinema Analyst at IHS Technology, "estimates that the market has doubled over [an] 18 month [period in 2014-15]."

6.11 In the immediate term, Event Cinema is likely to shift from being delivered via satellite to IP technology.

56 http://www.digi-capital.com/news/2015/04

57 http://www.laphil.com/vanbeethoven

58 Hempel, J. 'LA's Philharmonic Is Bringing the Symphony to Everyone—In VR.' Wired. 2015

59 4K is a horizontal resolution of 4000 pixels; It was recorded in 4K then screened better than live (2K) on DCP for multiple encore performances exclusively at Vue Cinemas. (these were exclusive 4K encores; other chains had 2K encores).

60 Interview for this study, 12 May 2016.

61 Rittman, A. 'Will 4D Ever Catch On?' Hollywood Reporter, 2015

- "That's the way the world is going – It's much more secure, bandwidth getting better. This is a little bit challenging for the sector – just seven years ago they adopted satellite equipment – so we will run the two systems in parallel." Producer

6.12 Screening Room, the brainchild of former Napster co-founder Sean Parker, would enable consumers to bring new release movies into their homes for £35 for a 48 hour-period (plus an initial outlay to purchase the set-top box). Shortening the theatrical release window[62] (from big screen to personal hire via DVD and other streaming services), *Variety* reports there has been early interest from major studios, including Universal, Fox and Sony. Yet, as Manohla Dargis writes, "the Arthouse Convergence – a group representing more than 600 art-house cinemas and businesses – wrote an open letter that forcefully takes issue with this venture, arguing that it would devalue the in-theatre experience and increase piracy. Put another way, it could destroy an entire segment of the industry – exhibition – and moviegoing itself."[63]

6.13 As stated, many of these advances are being realised by established brands and present the same barriers to entry for smaller and mid-scale organisations, particularly around real and perceived costs, as Event Cinema. In order to enter the Event Cinema (and potentially the Virtual Reality and Augmented Reality) market(s), many suggested it would be most appropriate for small to mid-scale companies to collaborate with larger players through well-curated, high-profile collaborative initiatives – e.g. a set of performances programmed in cinemas over a short period. Many of those larger theatre players interviewed for this study, including producers and distributors, indicated an openness to discussing what form this could take. There is also opportunity for small to mid-scale theatres to focus on using digital platforms existing beyond Event Cinema.

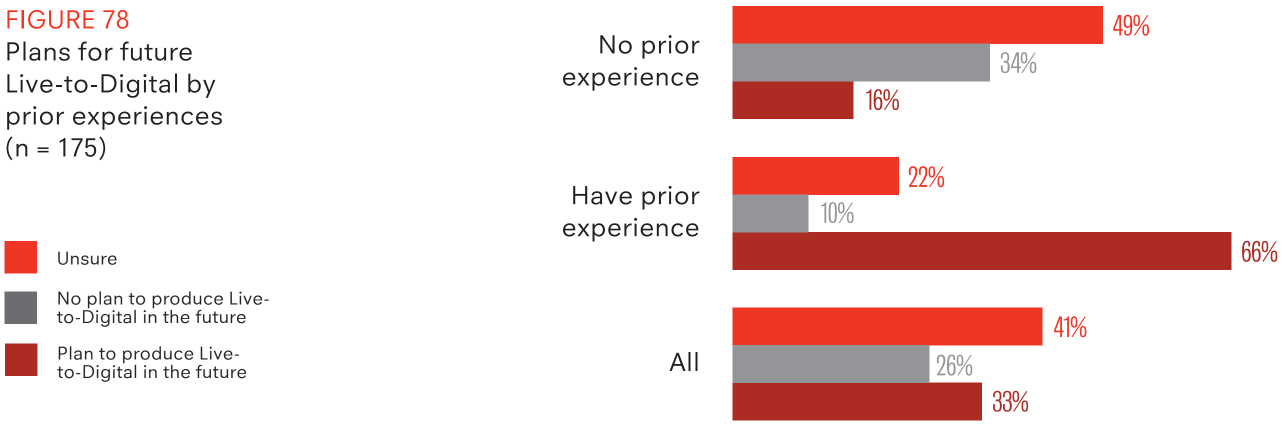
62 **Release window**: The time or 'window' between a film's theatrical release and its release on other platforms.

63 Participating distributors would also get a cut of the $50-per-view proceeds, also believed to be 20%, before Screening Room took its own fee of 10%.

6.14

33% of all supply-side respondents *plan* to produce Live-to-Digital theatre in some form in the future, although as Figure 78 (following page, also discussed in Section 5) demonstrates below, those that have delivered Live-to-Digital initiatives in the past are more likely to plan to deliver them in the future. This underscores findings from the *Digital Culture 2015* study, with the authors stating "It continues to be the case that it is the digital experimenters (those that are willing to embrace and take risks with technology) and digital leaders (those that place the most importance on digital) that are most likely to see positive impacts on their organisations – in the audiences they reach, the way they operate, and in their creative capacities."[64]

FIGURE 78
Plans for future Live-to-Digital by prior experiences (n = 175)



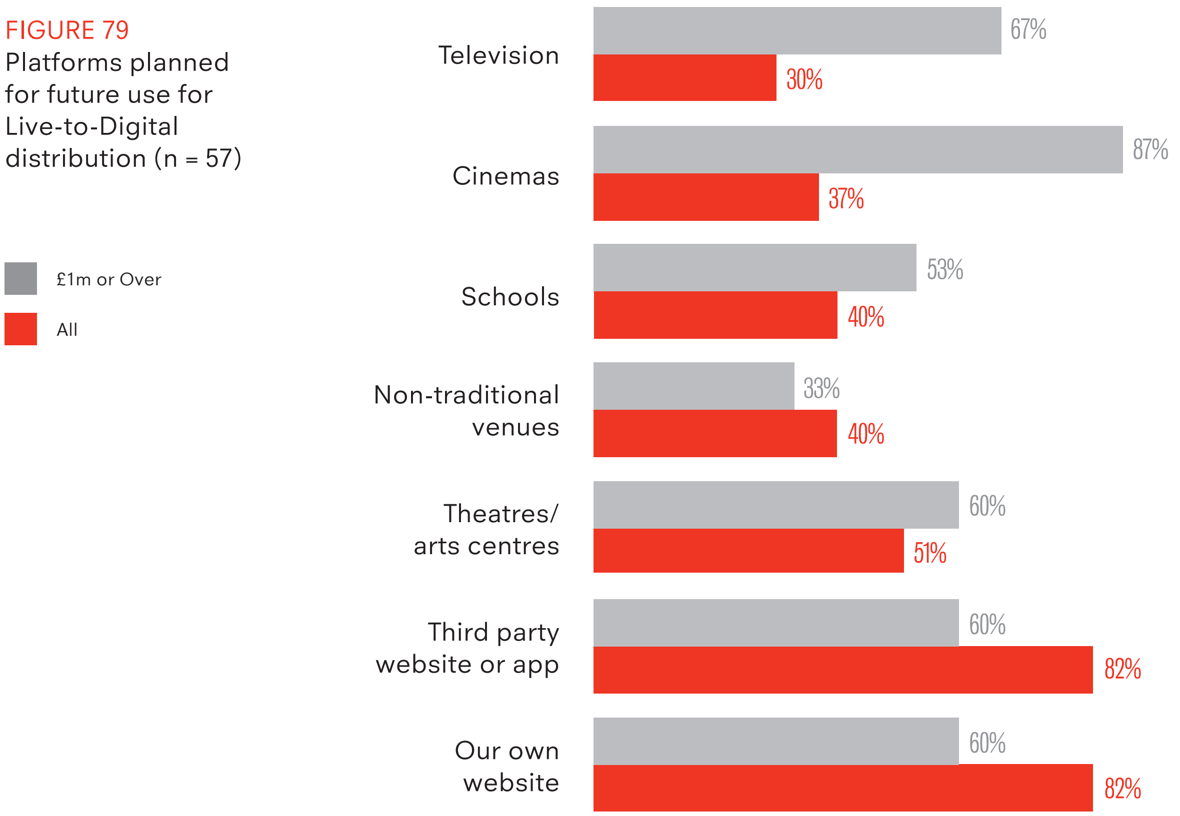
Source: Online supply-side survey. Question: "Do you plan to produce any Live-to-Digital productions in the future?"

6.15

Organisations that *plan* to produce Live-to-Digital theatre in the future say they are likely to use their own website (82%) or a third-party website (82%). (Figure 79, also discussed in Sections 3 and 5.) For those considering screenings in venues, theatres and arts centres are the most likely sites. Organisations in the largest budget category (£1m+) are more likely than the full sample of all budget categories to identify cinemas (50% more likely), television (37% more likely), schools (14% more likely) and arts centres (9% more likely) and 22% less likely than the full sample to anticipate using their own or a third party website.

64 Ellis and Rushton, et al (2015)

FIGURE 79
Platforms planned for future use for Live-to-Digital distribution (n = 57)



Source: Online supply-side survey. Question: "Which of the following venues/screening platforms are you likely to use for future Live-to-Digital productions?"

Q11. What are the opportunities for co-promotion – where cinemas, producers and local venues work together?

6.16 Interviews, focus group, and survey findings pointed towards numerous ways in which cinemas, producers, and local venues might work together at co-promotion. The most basic need identified by stakeholders was for a shared diary that would allow supplies to know what Event Cinema is taking place. Having access to that information allows theatre programmers and presenters to have a sense of what is happening on all of the screens in their communities. This way, productions may be planned around digital competition, preventing unnecessary calendar chases.

6.17 If information were shared both ways, there are also opportunities to communicate, explore and plan joint marketing opportunities, and co-align programming where possible. Producing, touring and presenting theatres may also benefit from a sector-wide calendar populated with touring and production schedule listings, as recommended in *Theatre Touring in the 21st Century: An Exploration of New Financial Models.*[65]

65 Devlin, Graham and Dix, Alan. Theatre Touring in the 21st Century: An Exploration of New Financial Models. UK Theatre: 2015

- "We are frustrated by the lack of coordination between the theatre show and the cinematic screening...we often don't know the screenings are happening until we get a brochure. There's no kind of marketing coordination." Artistic Director
- "Large producing companies want to know about headlong clashes." Producer
- "We are all aware in terms of what is going on in terms of Event Cinema – but I don't know without digging quite deeply what's happening in regional venues... Say I want to put on an encore of *the Audience*, I don't know what the local 'live' competition is. If there's less relevant competition in the marketplace [during a certain period], I'm going to sell more." Exhibitor
- "We might be influenced if we see something massive is playing [live, on stage] in Birmingham. It might influence our decision about when to go out with our content – in theory it's a win-win for everyone." Distributor

6.18 The cinema distributors interviewed for this study emphasised their commitment to their local markets. Many discussed the potential for collaborative efforts aimed at audience development, innovative marketing initiatives, and data sharing that might exist among local cinemas, local theatres, and national 'superbrands'. Such comments underscore early recommendations from Nesta that collaboration between cinemas and theatres is paramount.[66]

6.19 UK Cinema Association continues to work to preserve the 'unique nature of the cinema experience' which unites local communities, particularly in the context of the changing (and truncating of the) release window. Although this is a broader issue the cinema sector is grappling with, the commitment shared by both cinemas and theatres to influencing positive social impact and community-building is evident.[67]

- "Pooling the data would give everyone more information, but they're at an impasse because they think it will give away their competitive advantage. There is a lot to learn from other industries." Producer
- "How often are regional theatres handing out discount coupons to people going to Event Cinema broadcasts in their neighbourhoods? Are there ways organisations are successfully partnering (and joint-marketing) with cinemas in their communities that we don't know about here or around the world?" Artistic Director

6.20 Stakeholders of all backgrounds also spoke of possibly creating a series of digital tours, presented to both live and online audiences and include post-show discussions (live and online) across multiple venues. This sentiment aligns with recommendations in *Revenue Generation in the Arts: 2015-16,* which suggested that there is opportunity to focus on touring work in more ecologically sustainable ways – with digital being one vehicle for doing so.[68] Additionally, *Theatre Touring in the 21st Century: An Exploration of New Financial Models* further emphasises the need for organisations to collaborate in the form of co-productions to allay financial instability and changes in the touring ecology.[69]

66 Bakhshi and Throsby (2010)
67 UK Cinema Association (2013-14)
68 Arts Quarter LLP. Revenue Generation in the Arts: 2015 – 16. Arts Quarter: 2016.
69 Devlin and Dix (2015).

- “Digital is the new touring model.” Artistic Director
- “One thing we would like to explore are international connections. It strikes me that there is a real appetite for the type of work we’re making in mainland Europe. We’d be interested how this connection could be made – both in terms of touring and digital.” Artistic Director
- “There are ways of packaging up content – smaller companies may do better in consortium and by bundling their content around a theme. Or new writing, or theatre from the regions. Partnerships are really worth exploring.” Distributor

7.

Case Studies

7.1 The six cases presented here capture a particular moment in England's theatre sector – a moment of compelling digital advances with theatre being presented in new ways to new audiences. These cases provide evidence of disparate experiences – with a £500K star-driven production in Event Cinema juxtaposed with live online streaming of a small touring company (with an annual budget close to that of one Event Cinema production) captured by two cameras.

7.2 Yet, the similarities are important. All of the highlighted companies have found a model that works for them, integrating discussions about how to deploy and leverage digital at an early stage in the artistic (and, in some cases, business planning) process; being confident in their motivation for why they are using the platform they are using; and admitting there is still a lot to learn, with many more audiences to be found.

FIGURE 80
Case studies – an overview

Case Study	LTD Platform	Theatre Type	Organisational Structure	Venue-based	ACE NPO
Belarus Free Theatre	Online	Producing	Not-for-profit	✗	✗
Complicite	Online	Producing	Not-for-profit	✗	✓
Duke's Theatre	Event Cinema	Producing / Presenting	Not-for-profit	✓	✓
Fiery Angel / Kenneth Branagh	Event Cinema	Producing	Commercial	✓	✗
HiBrow	Online	Producing / Presenting	Commercial	✗	✗
Theatre Royal Newcastle	Hospedia	Presenting	Commercial	✓	✓

Underground performance in Minsk.
Credit: Georgie Weedon

Belarus Free Theatre

"When your friends are kidnapped, killed, thrown into jail, tortured, there is no way for you to just stay and observe. I don't have such a luxury to be apolitical, and I don't have time to spend doing entertainment theatre, it has to have a meaning behind it." Natalia Kaliada, co-Founder, Belarus Free Theatre[70]

"Many of the audience have seen nothing like this before; to hear the problems of their country spoken about honestly makes them feel a little braver and less alone." Laura Wade, the Guardian[71]

"Getting our work to as wide an audience as possible is obviously what we're trying to do, but there's certainly no financial benefit of doing it...it's not the impetus." Clare Robertson, General Manager/Producer, Belarus Free Theatre

Overview

7.3 Founded in March 2005 by playwrights and human rights activists Nikolai Khalezin and Natalia Kaliada in close collaboration with stage director Vladimir Shcherban, Belarus Free Theatre (BFT) stages 'fiercely political productions'[72], which are often directly critical of the Belarus regime and explore 'taboo' subjects including mental health and sexuality. Under President Alexander Lukashenko's dictatorship since 1994, the country's corrupt and repressive practices, including sanctioning the torture and murder of political opponents, have severely restricted creative expression. BFT works to restore that expression through evocative and challenging theatre productions. Described by New York Times theatre critic Ben Brantley as 'one of the most powerful and vividly resourceful underground companies on the planet,'[73] and today an Associate Company of the Young Vic Theatre in London, BFT is committed to ensuring its UK work is accessible to audiences in Belarus and other countries where freedom of expression is effectively forbidden. The founders wish to ensure that the people of Belarus 'do not feel they are abandoned or forgotten,'[74] with the BFT staging 100 live performances underground in Minsk each year, and another 1-2 new productions a year for performances in the UK and touring internationally. Yet to fulfil their founding commitment to serving those living in repressed societies, BFT has relied on new technologies at the core of its work – initially in production and increasingly, in the last few years, in distribution as well.

70 Hussey, G. *Freedom of Expression Awards 2016*, 16 March 2016, awards.indexoncensorship.org

71 http://www.theguardian.com/stage/theatreblog/2010/dec/13/belarus-free-theatre

72 http://www.economist.com/blogs/prospero/2012/06/belarus-free-theatre

73 http://www.nytimes.com/2013/01/18/theater/reviews/belarus-free-theaters-minsk-2011-at-the-public-theater.html?_r=0

74 http://www.huffingtonpost.co.uk/victoria-sadler/belarus-free-theatre-_b_8473644.html

Production

7.4 Performing on tour in New York in 2012 when the results of President Lukahsenkno's election were announced, and having publicly supported the opposition, the company founders narrowly escaped 'being rounded up in a massive clampdown' as part of those supporting democratic political opponents (although they have before and since experienced more than their fair share of political abuse). Forced into exile as political refugees in the United Kingdom, the leadership team has dedicated their time and artistic energy to producing plays for their founding audiences in Minsk. Given that the company's nine-member ensemble, two teachers and two managers are still based in Belarus and, since the team has been geographically fractured, the artistic team has relied on Skype to hold rehearsals. As Clare Robertson, BFT's General Manager/Producer, describes the process, "They are literally sitting at home on their computers directing the actors … being able to direct through Skype has made the company able to continue. I don't know how we would have found a way for the work to keep going otherwise." (Though she jokes, "the actors sometimes pretend the connection is bad because they're tired of taking notes!") To this day, and with no sign of political pressure or artistic aspiration letting up, the company uses Skype, not only for rehearsals, but also for holding master classes with the students of their two-year training programme in Minsk, Fortinbras.

Distribution

7.5 The company also identified an opportunity to leverage digital advances to share the company's new work with audiences around the world, and most especially those in Belarus. While the company still bravely performs underground in Belarus (to attend the free production, audiences are required to undergo a rigorous ticketing process – including a pre-show interview, a designated meeting point, a secret performance location and a requirement to take their passports, in case of a raid), the founders' impetus for live streaming was to build a connection to their audiences in their home country. This drives them to this day. As Robertson describes it, "Category A is people we are trying to reach in Belarus. Category B is people in other countries like Ukraine, like Russia, where freedom of speech is restricted. Category C is the rest of the world – they know our work from touring, or have never had the opportunity to see our productions."

7.6 And so, starting in 2013, the company began live-streaming work out of the UK, first out of the Edinburgh Fringe Festival with a performance of Trash Cuisine at the Pleasance[75]. Subsequently all UK productions had one single live stream for each production, available on the company's website, via HowlRound and via the company's Ministry of Counterculture platform, www.moc.media/en/.

75 Trash Cuisine challenges the ongoing existence of capital punishment in the contemporary world. 36 countries retain the death penalty in both law and practice, and Europe remains on the list of continents where capital punishment still exists because of Belarus. (deathpenalty.info.org)

7.7 "But BFT is nothing if not ambitious," Robertson explains. In October and November 2015, as part of their 10th anniversary season, Belarus Free Theatre streamed their entire programme of Staging a Revolution, a concert (I'm with the Band) at KoKo in Camden and two-week festival, featuring ten of their most acclaimed productions, which were performed at underground (though safe) venues around London and at the Young Vic. As Robertson explains, "we had suddenly gone from one performance being live streamed to 11 in a two-week period, with a very limited budget. We were trying to find a way to afford to do it, to have the capacity to do it."

Technical considerations

7.8 The team recognised the importance of finding the right partner production company. Robertson describes the process, "We put it out to tender – but all of the UK companies came back to us, and said we can't financially deliver this. We were in New York and we found CultureHub (through New York partners La Mama Experimental Theatre Club), who has the experience of doing it, totally get who BFT is, and said they could make it work financially [including, notably, covering airfare to London]. What was really interesting was the company's model – they were so light on their feet. It was a really simple approach but really effective."

7.9 Employing just two cameras with a team of three people, CultureHub edited the performances live, and "made it all happen as it went out." They spent considerable time trying to secure an Internet connection that could actually bear live streaming, especially for the underground venues, including a car park under Westminster. In some performances, the team ended up streaming using the 4G network rather than an Internet connection. "We also talked a lot about what we could do with mics [microphones] – and whether the actors could actually physically wear them. But that doesn't work with BFT because everyone is always taking their clothes off, and the theatre is very physical, and that would have a negative impact on the performance. Because we were performing in quite small spaces, they managed to find different solutions to microphones in the space."

7.10 As Robertson clarifies, "If you had a lot more money and a lot more time, [you could] get the production team involved much earlier, see the performance, come up with a detailed mapping of exactly what's going to happen. But that just wasn't feasible within our budget. In a way, the feel of it suited the style of theatre that we make. And especially with the underground venues, we were literally getting in that morning and making the show happen. You can make theatre anywhere, you don't need anything to make theatre, you just need people in the room with other people."

Added value

7.11 Each performance in the festival was accompanied by a post-show discussion led by a partner NGO where the audience and a panel of experts had the opportunity to delve deeper into the taboo topic raised by the performance. As part of the live-streams the company also featured interviews with the creative team and other company members at the interval. Robertson explains that this builds upon BFT's commitment to reflection and discussion, "The post show discussion has been a part of the company's work from the very beginning. That's how it works in Minsk, you get people together to see a show and then people sit together and talk about the show afterwards. Because all of the shows are about particular issues, especially in Belarus, you are talking about a topic you have potentially never had the opportunity to talk about in a safe space."

Trash Cuisine.
Credit: Simon Annand

The results

7.12 Live streams of their two-week anniversary festival (2015) were viewed on 23,000 devices in 30 countries. In addition, as part of one of two commissions with the Space, the concert was live-streamed by the BBC and distributed on BBC Arts online, Belsat (a Belarus-focused independent news channel based in Poland) and Espresso TV (Ukraine), with 434,552 watching the live-streams (BBC Arts: 4,540, Espresso: 425,748, Belsat: 4,364) and further on-demand views.[76] Combined with the live streams, the digital distribution increased the audience who viewed the productions by over tenfold, from 1700 to over 23,000.

7.13 The recordings of the live streams remained online for a further two weeks (hosted by Howlround and also embedded on BFT's website). Robertson

76 BFT had 2 separate commissions from the Space – the 2nd was to produce the live stream of 'Trash Cuisine' on 8 November 2015 for distribution on www.belarusfreetheatre.com, and to produce 6 edited 'highlights clips' of scenes from productions filmed throughout the BFT Festival 'Staging A Revolution' for distribution on BBC Arts Online – see http://www.bbc.co.uk/programmes/articles/2sZHbcRVJklMrLrzsjhNxFJ/staging-a-revolution-belarus-free-theatre-in-london.

explains, "We also piloted a community screenings programme where individuals were able host a screening of a production of their choice, a programme which I'm planning to develop further this year."

Next steps

7.14 The team aims to build the community streaming programme, with a much more targeted approach to finding partners, including individuals, groups and relevant agencies (for example, a production about schizophrenia in 2016-17 will find the company partnering with mental health agencies, group homes and centres). The team also plans to work with CultureHub again this year on live streams of the two new productions in the UK

7.15 As Robertson suggests, there is also opportunity to build the "long-tail" of the performance, to ensure ongoing accessibility: "It's an asset of ours, and certainly we get a lot of interest from university groups studying the BFT. Only making performances available for two weeks, we of course condense interest as part of a festival – yet there may be opportunity for the programming to be available longer."

7.16 And perhaps most importantly, the company is striving to find a way to live stream out of Belarus, rather than just into the landlocked nation. Robertson shares the experience to date, "It's proved to be more complicated than we expected – access to the internet in Belarus is monitored as there is only one internet provider, but there's a possibility to again use the 4G network." It's less a political issue, although "BFT is aware that if the authorities are monitoring internet activity, there's a chance that the stream could get shut down, and you might be leading the authorities to information you don't want them necessarily to have. That's what we're trying to work on now – exploring what security precautions we need to take. Authorities know where we are, but this could be leading them directly to us and our audiences. A lot of risk is involved."

Belarus Free Theatre

KEY LESSONS

* The BFT approach shows the benefits in having clarity and confidence in the work and who it is aimed at: BFT's focus is first and foremost Belarus audiences, and all of the work (digital and live) is geared toward reaching and engaging these audiences. Everything else is a bonus
* A proactive approach can be best for digital – BFT did not hesitate to experiment
* The digital interventions fit with the feel of the company's work and its ethos and aligned with its brand as a small-scale, international touring company
* BFT was prepared to be flexible for each performance, engaging with a team that was ready for different physical environments, plots, scale of production and audiences
* BFT built networks that were appropriate for its own content; depending on who your audiences are, some content may be better suited to "live" than available for a short time, or even in perpetuity

Belarus Free Theatre

KEY FACTS

Year founded:
2005

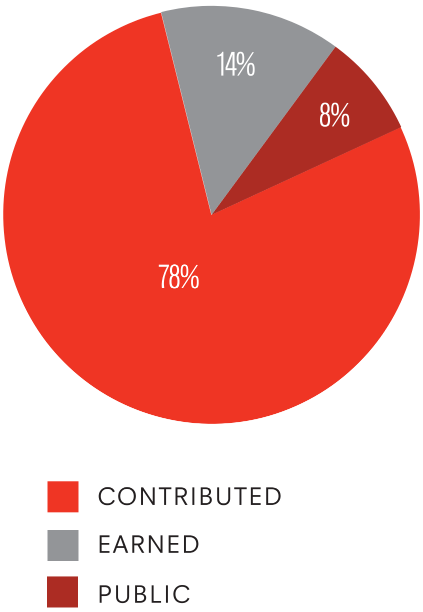
Annual attendance 2015 (live)
13.6k

Annual attendance 2015 (digital)
532.5k

Annual number of performances
110

OPEX (2014-15)
£811k

INCOME (2014-15)



Live-to-digital partners

BBC ARTS
CULTUREHUB
THE SPACE
TOTALLY THEATRE
YOUNG VIC

Full-time employees:
20
(8 in the UK, 12 in Belarus)

Simon McBurney in The Encounter.
Credit: Robbie Jack

Complicite

"Drop out and tune in because this is the most extraordinarily immersive personal experience. Put your headphones on, sit back and have your mind blown by a storyteller at the height of his powers and an exceptional story that affects us all" – Benedict Cumberbatch

"I would definitely not have booked [tickets to the see] The Encounter [reading about it] on paper, but I read about it on Twitter and I experienced it live online for free. I really did feel like I was there. I was part of the audience. It was outstanding and it has made me want to go and see it." Audience member, 45-64, West Midlands

"@Complicite Will there be another opportunity to see the Encounter online again?" Twitter user

Overview

7.17 Complicite, a London-based international touring company, produced a live stream of its hugely successful live production The Encounter in March 2016. In partnership with The Space, The Barbican and Sennheiser, the streamed production drew inspiration from the themes, ethos, and sophisticated sound design of the plot and format of the live production. In the first live-streamed production ever to use 3D, 'binaural' sound, The Encounter was available on Complicite's YouTube channel and on Barbican's website for one week only. The work raises important questions about the complementary way of experiencing live and streamed theatre and the power of the short release window of a streamed production.

7.18 Founded in 1983 by Annabel Arden, Fiona Gordon, Marcello Magni and Simon McBurney, Complicite is now led by Artistic Director Simon McBurney OBE and Producer Judith Dimant MBE. The Company has played in more than 40 countries across the world, won more than 50 awards and has been described as "the most influential and consistently interesting theatre company working in Britain" by The Times. Complicite presented 102 live performances to audiences in UK and international theatres during 2014/15, resulting in a total of 38,102 people experiencing the Company's work.

7.19 Complicite began as a collective and its work remains informed by a spirit of collective enquiry and collaborative curiosity. The Company often undertakes extensive periods of research and development which brings together performers, designers, writers, artists and specialists from diverse fields to create their works. These many diverse Associates – as they're known – have developed and evolved a shared creative language, which provides an anchor for the explorative work for which the Company has become well-known and which foregrounds the work they bring to the stage. In turn, this focus on a collaborative devising process has meant that Complicite has also become known for a distinctive, visually rich stage language, which layers physical performances and tightly choreographed ensemble work with innovative lighting, sound and video design.

7.20 The main body of work has been of devised theatre pieces and adaptations and revivals of classic texts, but the Company has also created opera and worked in other media, with radio productions of *Mnemonic* and John Berger's *To The Wedding*, a collaboration with The Pet Shop Boys in Trafalgar Square in central London, and The Vertical Line, a multi-disciplinary installation performed in a disused tube station.

Encounter-ing Live-to-Digital

7.21 Complicite recently ventured into the Live-to-Digital space with a live stream of The Encounter in March 2016. The production, a one-man show inspired by Petru Popescu's Amazon Beaming, explores the themes of time and consciousness and contains sophisticated sound design that takes the audience on a journey through an Amazonian rainforest. Following eight years of research and development, The Encounter had its World Premiere at the Edinburgh International Festival in August 2015, followed by a UK and international tour to Lausanne and Athens.

7.22 Complicite co-produced the show with the Barbican, Edinburgh International Festival, Onassis Cultural Centre – Athens, Schaubühne Berlin, Théâtre Vidy-Lausanne and Warwick Arts Centre. It was supported by Sennheiser, which provided the headsets, and The Wellcome Trust, which awarded a grant for research and development of the production.

7.23 Following the work's tour, Complicite teamed up with The Space to create an online broadcast of the show from London's Barbican Centre. In the first live-streamed production ever to use 3D, binaural sound – a method of recording sound that uses two microphones, arranged with the intent to create a three dimensional stereo sound sensation for the listener of actually being in the room with the performers – the audience, both those 'live' in the theatre and those streaming online, experienced the performance through headphone sets. A binaural microphone which recorded and transmitted sound separately to each ear created an intense atmosphere of the rainforest, its characters and settings for each individual audience member.

Audiences

7.24 67,000 viewed the Live-to-Digital version of The Encounter. 13,500 viewers concurrently experienced the live stream, with an additional 53,500 streaming the performance during the remainder of the week when the recording was available online.

7.25 Audiences of the live broadcast were, on average, slightly younger than Complicite's regular, live audiences. The biggest gains were noted in the 25 – 34 age category. The stream also reached an international audience, with most log ins noted from the United States, Australia, Canada and Taiwan.

Top locations	Views	13–17	18–24	25–34	35–44	45–54	55–64	65+
UK	32.1k	2%	20%	34%	20%	13%	7%	5%
United States	9.7k	1%	16%	29%	23%	15%	11%	6%
Australia	2.3k	17%	18%	26%	17%	11%	6%	5%
Canada	2.1k	1%	14%	31%	24%	16%	7%	7%
Taiwan	1.4k	1%	28%	48%	14%	7%	1%	0%
France	1.4k	1%	14%	38%	19%	13%	12%	5%
Japan	1.6k	1%	9%	26%	33%	20%	8%	3%
Spain	0.9k	0%	12%	21%	34%	21%	8%	5%
Italy	0.7k	1%	13%	40%	21%	11%	4%	11%
Greece	0.7k	1%	12%	30%	29%	14%	9%	6%

Business model

7.26 The total cost of producing the live stream was £50,000, not including Complicite staff time spent on the project. Expenditure include hiring a production team (testing and set up during rehearsals and on the day capture with a live audience); marketing costs (mainly production of promotional videos); and other miscellaneous expenses. The Space and the Wellcome Trust provided funding for production costs (exclusive of staff time) and Sennheiser supplied headsets in the form of an in-kind contribution.

Marketing

7.27 According to Holly Foulds, Complicite's Communications & Development Manager, there were three marketing aspects which helped to promote the live stream.

- "Celebrity pull" – prior to launching to the live stream, Complicite reached out to several household theatre names requesting them to appear in short videos promoting the performance. The response was overwhelmingly positive and the likes of Rowan Atkinson, Benedict Cumberbatch, Laura Dern, Andrew Garfield and Oscar Isaac appeared on Complicite's YouTube channel endorsing the show and encouraging audiences to tune in for the live stream. Although such marketing strategy was partly possible thanks to Complicite's existing network, some of it was carried out speculatively through a 'hit and miss' approach.
- Organisational partners – Complicite partnered with a number of organisations (e.g. Barbican, The Financial Times, The Guardian, Tara Arts) that agreed to broadcast the performance live on their websites. The partnerships were symbiotic – Complicite extended its reach, while partner organisations generated additional traffic for their websites and social media channels.
- Reputation – the live performance of *The Encounter* had already gained wide acclaim *prior* to the live stream. It received a Herland Angel Award and raked up top reviews in *Evening Standard*, *The Guardian* and *The Telegraph*.

Complicite

KEY LESSONS

- Use your network (however big or small) to build anticipation for new work through social media
- Technology can create an immersive digital experience – binaural sound turned an impediment (headphones, distance from the "liveness") into an opportunity
- Live-to-Digital work helped reach new audiences and demographics – both in terms of age groups and geographical locations
- 65 percent more people saw the Company's work online during a single week of broadcasts than live in a theatre over the course of an entire year

Complicite KEY FACTS

Year founded

1983

Annual attendance 2015 (live)

38k

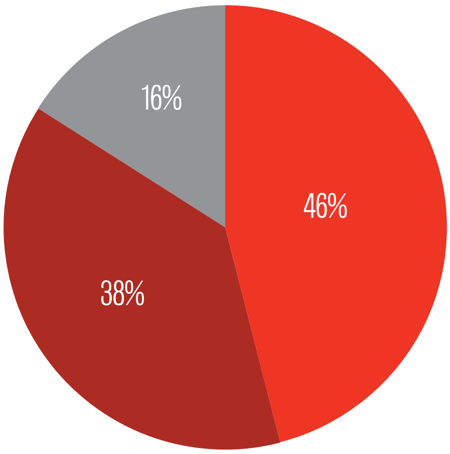
Annual attendance 2015 (digital)

63k

Annual number of performances

102

INCOME (2014–15)



EARNED
PUBLIC
CONTRIBUTED

Live-to-digital partners

BARBICAN ARTS CENTRE
THE SPACE
THE WELLCOME TRUST
SENNHEISER

OPEX (2014–15)

£892k

7 Full-time employees

Impact of The Encounter live stream

11% + (Twitter)
3500% + (YouTube)
11% + (Facebook)
30% + (Email)

LIVE STREAM COST

£50k

The Dukes – Robin Hood
Credit: Daniel Tierney

The Dukes Theatre

"[Event Cinema] really ups the challenge to us as a producing theatre to compete with it artistically. At its best, theatre is an event...How can we make our work irresistible?" Joe Sumsion, Artistic Director

"A friend of mine recently reminded me that ten years ago we were all being encouraged to consider Second Life as a platform for new work. The use and impact of that technology, Second Life, it's negligible [today]." Ivan Wadeson, Executive Director

"[Let's] show [that Lancaster] is not the apathetic, stay-at-home backwater condemned by its critics in the past". Lancaster City Council, upon supporting The Dukes Theatre on opening in 1971 (and ever since)

Overview

7.28 Located in Lancaster, North West England, and housed in a 1796 Georgian Chapel, The Dukes Theatre opened its doors in 1971 with its 313-seat raked-auditorium doubling as a theatre stage and cinema from day one, which was unique at that time, according to Executive Director Ivan Wadeson. In 2008, The Dukes underwent a £300k capital refurbishment, upgrading its second 240-seat theatre in the round (with a project installed shortly thereafter as part of the Digital Screen Initiative). Today, with 300 live events per annum, in addition to 500-560 film screenings, The Dukes' leadership balances producing new work, presenting touring work and showcasing Event Cinema all under one roof.

7.29 This integrated programme has reaped artistic and financial rewards. Yet, despite the benefits new technology brings the organisation, the team remains committed to ensuring its live work is fit for purpose – for the community, for its spaces, and for the times. The team will only consider 'digitally touring' its work via streaming if it makes sense programmatically, although at this time they recognise that they lack the capacity and expertise to do so even if digital were to become a strategic priority.

Artistic inspiration

- *"I remember going to watch War Horse live by satellite with my family, and during the interview beforehand the director explained that this was an example of 'poor theatre'. I laughed out loud. It didn't look like poor theatre at all (although I knew what she meant!)"* Joe Sumsion, Artistic Director

7.30 The Dukes produces four 'home-grown' new works each year; two are familiar tales re-told with one taking place at Christmas and the other, the highest grossing production of the year, a walkabout theatre production in Lancaster's Williamson Park over six-weeks in the summer. Called "The granddaddy of outdoor promenade theatre shows for family audiences" by the Guardian, recent walkabout productions include commissioned adaptations of *Hansel &*

Gretel (2014) and *Oliver Twist* (2015), while Christmas productions have included new versions of *Cinderella* (2014) and *Beauty and the Beast* (2015). In addition, The Dukes engages new writers to develop two new works each year that resonate with local themes. These have included *Quicksand* (2011) about the local Polish community set in Morecambe Bay, and Sabbat (2009) about the Lancashire Witches prosecuted in 1612.

7.31 With all of these productions, Sumsion explains, The Dukes team has been influenced in subtle but important ways by the work they and their audiences see via satellite on the stages of The National Theatre, the Royal Shakespeare Company and others. This included changing the space in which the Christmas show was presented. As Sumsion describes, "While we moved [from the rake] to the round for artistic and economic reasons, we also did so with a consciousness that we were [previously] working in the same space as the RSC and the National and to some degree we are going to be compared [to them]."

7.32 In the autumn the team is producing a new play (in part, crowd-funded), "The Ockerbys on Ice", by Debbie Oates, that explores the world of cryonics through a fictional account of an ordinary couple who have "won a shot at immortality", with the husband becoming the first British person to be cryonigcally frozen. "The production requires us to take a reasonably high tech approach – with actors and monitors performing in the round," describes Sumsion. Because of the high-quality production values of Event Cinema, The Dukes team emphasizes that it can positively differentiate itself from the national companies by creating a local experience for its audiences that cannot be replicated anywhere: "We want people to come here and experience theatre here. The way we compete in a good way is making a unique experience that you literally cannot get anywhere else in the world."

7.33 Yet Wadeson emphasizes the importance of working within an appropriate scale and leveraging the live experience: "This summer we're presenting an adaption of *The Hobbit* at Williamson Park. We are creating a different experience, on a budget that is a fraction of that [that of Peter Jackson's recent film adaptations], in a different space. The fact is there – we have adjusted how we present our live work, but not in a huge sense."

Financial returns

7.34 The challenges of staging high-quality produced live work, "particularly with tight production budgets in times of austerity," as Wadeson concedes, has meant that Event Cinema has been able to support The Dukes' own producing and presenting work. Wadeson calls Event Cinema "a financial shot in the arm – we've seen the positive elements of it. It has enabled us to cross-subsidise our produced and presented work; we get a higher yield than our produced work; and we have much lower, controlled costs."

7.35 Wadeson says Event Cinema is not cannibalising[77] its live audiences. The Dukes' data suggest there is a high degree of crossover and very similar audiences

77 **Cannibalisation**: One entity encroaching upon the service and the market of another. In the 'Live-to-Digital' space, some have raised concerns that live theatre venues will see their audiences cannibalised (or eaten) by online theatre and Event Cinema productions.

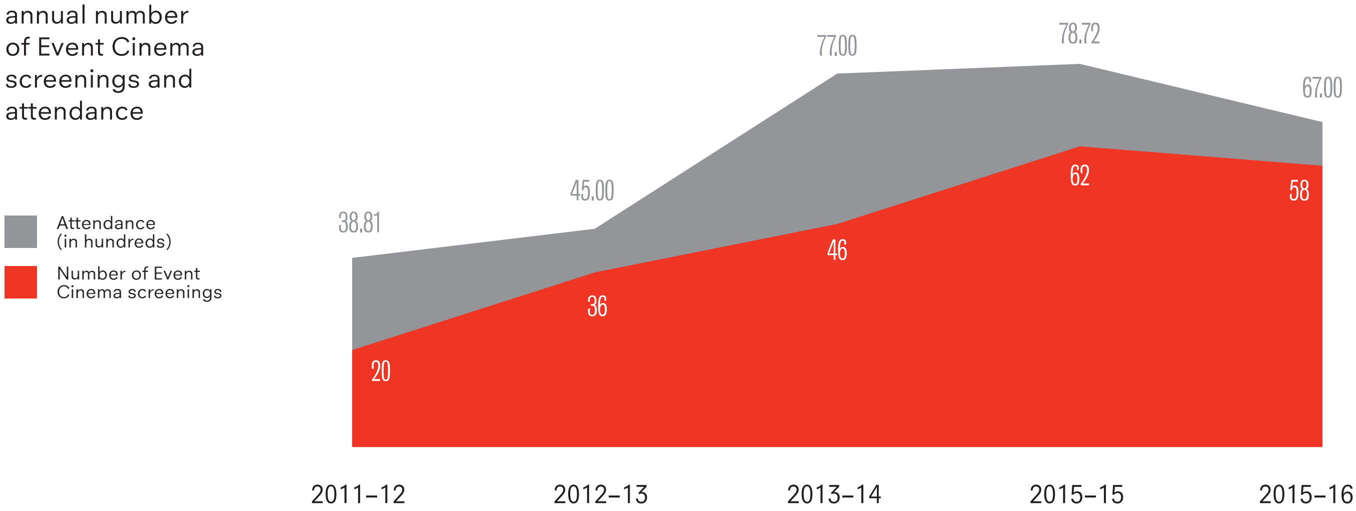
for both live work and Event Cinema screenings. In 2015-16, 53% of Event Cinema bookers also booked for a live production; and according to analysis by The Audience Agency analysis there is a large catchment area for The Dukes (80% traveling for up to 60-minute drive time) that applies for both Event Cinema and theatre, thus serving audiences from Lancashire and Cumbria too, whereas the audience for regular film screening is much more local.

7.36 The company doesn't yet track whether Event Cinema is bringing in new audiences (but emphasizes that "screening ballet and opera definitely expands the art forms available to the public, which hopefully does increase diversity too.")

The Dukes' Event Cinema programme

7.37 Despite steady growth in Event Cinema globally and with minimum cinema competition locally (while the Vue is less than 0.5 mile away, it does not present much cultural/arts Event Cinema), Wadeson attributes the recent dip in attendances (preceded by five years of steady growth) to a few factors: "There is less novelty of live by satellite and there were fewer event titles this year. Certainly productions like *War Horse* and Benedict Cumberbatch's *Hamlet* are big draw events, and there are fewer of those. There is a definite increase in the number of encore screenings – it's not live, it's not as special. We have expanded so much in these four years, trebling the number of screenings. We haven't had to sell it as much in the past but now it is a more familiar offer and for those other factors, we need to put more marketing work behind it."

FIGURE 81
Dukes Theatre – annual number of Event Cinema screenings and attendance



Calendars and touring

7.38 The Dukes takes a hierarchical approach to programming their seasons as Wadeson explains, "[Our priority programming order is] homegrown, visiting theatre, and then we put in the cinema programme. Within that we're trying to maximise the cinematic offer, increasing the number of screenings to five on a Saturday when we can. Yet, we've managed to do that while also expanding our theatre programme and our visiting programme first and foremost."

7.39 The programming schedule does not clash with the Event Cinema programme being released by the 'super-brands.' As Wadeson explains, "There was only one date where we had a prior commitment to the touring company, Northern Broadsides with 'The Winter's Tale'. When the dates came out for a live-by-satellite screening from Kennneth Branagh Theatre Company, we didn't take the initial screening to avoid a direct clash. [With an average of 45 screenings per year for the past five years] that's the only time we've had a clash."

7.40 In terms of presenting work, the team has started to reduce the number of one nighters and looks to book touring companies for longer runs – split and full weeks. This reduces the impact on technical and marketing teams and should also help to build and maximize theatre audiences. Because of these longer runs, the team has more flexibility in when they schedule the Event Cinema productions. Wadeson doesn't think Event Cinema has affected who and what they programme: however, he does believe there may be an effect on touring companies; will they still create work for tour if they know the RSC are also going to be bringing the same production to cinema screens around the country?

7.41 Sumsion sees more opportunities and a positive benefit. "Hamlet by Shakespeare At The Tobacco Factory is being presented [at the Dukes] this week. There has already been a lot of Shakespeare this year for the 400th anniversary. We've screened Benedict Cumberbatch in Hamlet; and Maxine Peake from the Royal Exchange Theatre in another production of the same play. But I don't necessarily think that's a bad thing. Does awareness of these high profile Hamlets lead to people wanting to see a live version? The headline for me is it's making really fantastic productions available and accessible for our audiences – I think at its best it encourages theatre going, not discourages it."

Breakfast at Tiffany's screening in Morecambe Winter Gardens as part of Vintage Festival. Courtesy of The Dukes

Digital content development?

7.42 While digital content has a home at The Dukes, the leadership is not yet sure if they will distribute content of their own. Sumsion explains "I'm not sure who the market would be currently and our model is working really well. It has the local focus… digital might take us away from our primary purpose." Wadeson adds, "We are an ambitious company with a big remit, deeply committed to our original work. I find it hard to imagine how we would develop our expertise [in digital], not to say we couldn't do it, but only if the production warranted it. In the future, in a few years' time, if there were an option, we would want to consider it. But I don't quite know how."

The Dukes Theatre

KEY LESSONS

* Ensure the platform makes sense for your productions and audiences; not every production needs to be released or realised in digital form
* Proactively consider how the existing theatre offer in the national (and international) digital landscape can positively influence your artistic, marketing, and programmatic decisions
* Know your audiences, understand their motivations, and leverage the cross-overs between the two
* Investigate ticketing trends closely, and adapt your marketing (or programming) accordingly

The Dukes Theatre KEY FACTS

Year founded
1971

Average annual number of screenings
('mainstream' screenings + Event Cinema)
500

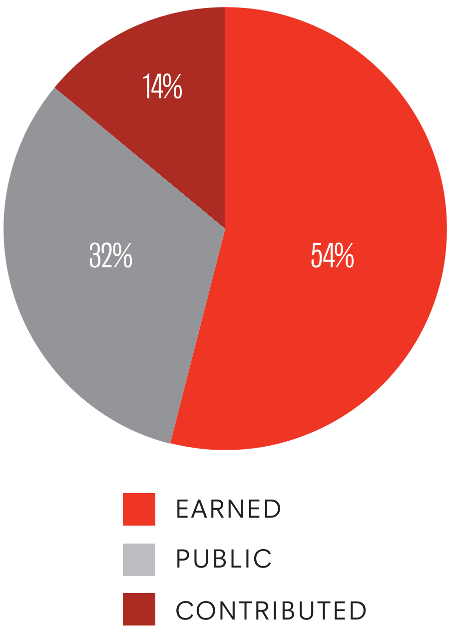
Live-to-digital partners
PICTUREHOUSE ENTERTAINMENT
ARTS ALLIANCE MEDIA
MORE2SCREEN

Annual attendance 2015 (live)
61.3k

Annual attendance 2015
('mainstream' screenings + Event Cinema)
32.3k

Annual number of performances (live)
213

INCOME (2014–15)



OPEX (2014–15)
£1.7m

Full-time employees
24

Judi Dench (Paulina) and Kenneth Branagh (Leontes) in The Winter's Tale.
Credit: Johan Persson

Fiery Angel / Kenneth Branagh Theatre Company

"I think there's a hugely important 'shared experience' halo effect that we see in theatre around these high-profile productions when you add a live broadcast into the equation. Far from risking losing potential theatre audiences to the cinema broadcast, it makes the potential of being at the actual 'event' all the more desirable." Jon Bath, Head of Production, Fiery Angel[78]

"I am very pleased that so many people will be able to see The Winter's Tale at the cinemas, especially because I hear the theatre tickets are just about sold out." Dame Judi Dench[79]

"In 2015, where theatre-making and film-making meet is exciting. The cinema broadcasts of our plays hope to challenge the possibilities of this relationship. Our prime responsibility has to be to the theatre audience but there are inflections and gradations of the ways in which it can be approached from a visual point of view…it is possible to serve both masters well." Kenneth Branagh[80]

"I was very lucky to see it live after I had seen it in the cinema. I ended up debating whether I should see it the cinema as I didn't want to 'spoil it' seeing it live. I loved it in both." Audience member, 16-24, West Midlands

Overview

7.43 As part of its 2015 season, the Kenneth Branagh Theatre Company and its production partner Fiery Angel collaborated with Picturehouse Entertainment's distribution arm to broadcast live three plays from its six-production season – William Shakespeare's *The Winter's Tale* and *Romeo and Juliet;* and John Osborne's modern classic, *The Entertainer*. *The Winter's Tale*, the inaugural production, was staged at the Garrick Theatre in London for a 12-week autumn run (in repertory with another production) with an international cinematic broadcast taking place on 26 November 2015 with encore screenings from 30 November until the end of January 2016.[81] Streamed live to 520 cinemas in the UK with a further 800 overseas (in partnership with Fathom Events in the USA), *The Winter's Tale* generated £1.1million sales in the UK in one night only, with the expectation that final accounts will exceed £3million in revenues from the worldwide release.

7.44 Jon Bath, Head of Production at Fiery Angel, describes the impetus for entering the Event Cinema market, "We had danced on the edge [of the marketplace] but to make this production work at this scale, we had to include

78 Hutchinson, D. 'Branagh producer: Cinema screenings are 'call to arms' for live audiences, *The Stage*, 21 March 2016

79 Brown, M., Kenneth Branagh's Garrick productions to be shown live in cinemas worldwide, The *Guardian*, 10 September 2015

80 http://www.branaghtheatre.com/news, 10 September 2015

81 17 October 2015 –16 January 2016

distribution via cinemas as part of the initial business model; it was not a bolt-on to our business model." As he explains, "*Winter's Tale* cost £1million up front, plus additional weekly costs in excess of £120,000 per week with little margin to be made from the theatrical presentation alone. We could only pull the company involved together for what totalled 53 performances due to availabilities and other commitments, not least those of key performers including Judi Dench and we could only sell 708 seats for each performance taking us to capacity at the Garrick Theatre. How could we extend the reach? We are a commercial venture that would otherwise struggle to make the figures stack up and show a respectable potential margin to weigh up against the risks involved. We had to expand virtually."

Fiery Angel

7.45 Bath is transparent about the costs of Event Cinema, and the barriers to entry, particularly for small and mid-scale companies operating in the subsidised space. "There's not much space for 'indies' in Event Cinema," as he explains, "Event Cinema costs a lot to do – that's an issue, the genuine on-the-line risk. The costs of production, marketing and PR, and satellite and other distribution, and doing it on the top end, offering a premium product of quality to compete in the global cinema market is pushing on towards a £500,000 risk (see 'Key facts' below)."[82]

7.46 The model Fiery Angel employed built upon the theatre sector's existing forays into Event Cinema, trail-blazed in cinemas by the UK's National Theatre and online by Digital Theatre. As Bath describes, "The market is still young. We were quite keen not to ignore what has gone before, but to learn from it and do our own version. How can we improve? Should we structure things differently? What's our bespoke model?"

Distribution

7.47 After a courtship period with a range of distribution companies, the two companies decided to partner with Picturehouse Entertainment: "We were approached by many parties in the marketplace. But we were very keen to not go down the route to handing out our production control. Picturehouse seemed best to work with – progressive in their approach; big but not too big; specialising in more niche content with specialist product – Hollywood, but not blockbusters. They understand the marketplace. They're also investing in the network, doing the groundwork – they spend a lot of time developing and paying attention to what happens, where there is room for improvement, where the gaps are. It feels like a genuine partnership to us."

82 Not including a partial rebate as part of the Film Tax Credit, for which the broadcast qualifies.

Theatre vs. Film

7.48 Artistically, the company was confident in its aesthetic approach: "We are replicating a live event, we're not making a film. That's a really crucial point. The risk being, if you start taking this as serious feature film making, you're making a low budget film – yet it will never be as perfect as a film. We're not making a Pinewood studio production of *The Winter's Tale,* we are showing the live version (or an 'as live' version for those encore screenings) in front of a live audience. We've seen that that's what the audience enjoy and we don't see the downstream [i.e. making previous performances available online or on other platforms] as being part of our company's mission." Further, if they were to distribute on other platforms, as Bath argues, scale, sound and lighting will have to be compromised "to appear on a 4-inch wide iPhone. That's not what we're presenting."

Rights

7.49 The bespoke model also included negotiating rights in a different way from previous arrangements. Bath describes the structure, "Ultimately we endeavoured to reward the artistic side as well as possible. It was no more painful than most negotiations...we came up with a model with a respectful cheque up front, which is recoupable against royalties. With the exception of key stars, we soaked up all of the downstream rights – this way, if we want to do something later on [future cinematic or online release], we don't have to go back to fifty people."

Results

7.50 Bath describes the wider halo effect Event Cinema has had on their live work in two ways. First, "The live broadcasts of the Kenneth Branagh Theatre Company productions are a billboard for what's happening in the West End. We've agreed to show each of the three plays live over one month in Japan... suddenly it's a trade mission. We won't make much money, but it's an exciting way of promoting and showing what we do – come to the West End and see it for real."

7.51 Fiery Angel and the Kenneth Branagh Theatre Company have not felt the effects of cannibalisation of their live audiences. On the contrary, "there is no sense it has done anything other than raise excitement for our work – it becomes a premium to see it live, like going to see your favourite band rather than listening to the album. The theatre production becomes a promotional tool for the broadcast and the broadcast for the theatre production. We were very keen to announce the mini-series from the season [the three Event Cinema productions] – and we had the conversation that while *Romeo and Juliet* had sold very well, it had not yet sold out. Should we be waiting until it's sold out and then announce the broadcast?" The team decided to announce the release, and ticket sales increased the next day. In fact, over the week following the announcement of the cinema broadcast, we added a further 20% to advance ticket sales for the theatrical production up to that date.

Tom Bateman (Florizel) and Jessie Buckley (Perdia) in The Winter's Tale. Credit: Johan Persson

Next steps

7.52 With *The Entertainer*, a more niche theatrical production, the partner companies have decided not to go through a major distributor within the United States, and instead to focus upon an independent release. "Where the global appeal of Shakespearean titles suits distribution across multiplexes etc., we decided to focus on the potential 'art house' and independent venues for John Osborne's play whom we hope have more direct access to audiences familiar with the play."

7.53 They are also evaluating which future projects are most appropriate for this platform. As Bath explains, "It's about selecting the stand out projects from a commercial reach point of view. A broadcast is never going to work on every show although I would stress, this is by no means a sign of lack of success of artistic merit for those productions which we don't feel are right for the venture. There's nothing telling us that this should be a line item for every show we do. There's no evidence that there's appetite for that. [David Wood's] *Goodnight Mister Tom,* for example, is an incredibly classy production. It's had two West End seasons, three UK tours and won an Olivier Award – It's an incredibly well-loved production. But we never had a sense that we should do a broadcast of it."

Fiery Angel / Kenneth Branagh Theatre Company

KEY LESSONS

* The industry is still very young – there is not just one way of doing it. Build on what has already been done, but make sure it is right for your company
* Certain projects are appropriate for certain platforms; not all are appropriate for streaming or broadcasts
* Brand and star power that shines on stage also carries digitally
* Build digital into the business model from the beginning
* Yet leverage the fact that digital may offer other benefits, including marketing
* Take the time to find partner that is right for your organisation; Event Cinema Association, the industy non-profit trade body, has members across the distribution chain, some of whom will be looking for exciting new content

Fiery Angel / Kenneth Branagh Theatre Company

KEY FACTS

Year founded

2000 Fiery Angel

2015 Kenneth Branagh Theatre Company

Annual attendance 2015 (live)

37.5k

ANNUAL NUMBER OF PRODUCTIONS

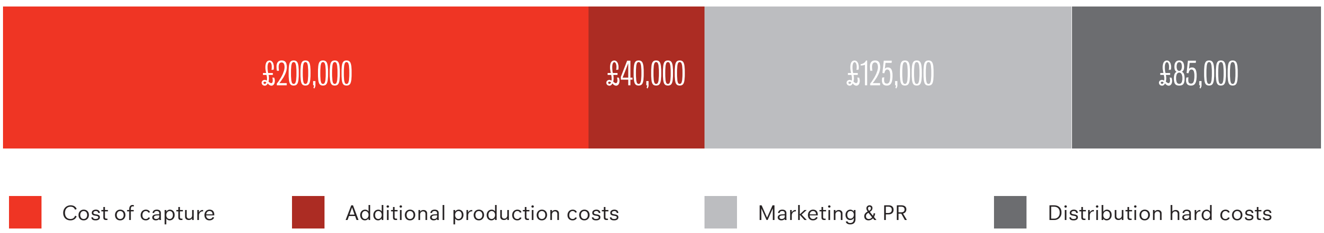
3

Live-to-digital partners

PICTUREHOUSE ENTERTAINMENT
FATHOM EVENTS
GARRICK THEATRE

Event Cinema costs per production

£450k



Annual attendance 2015 (Event Cinema)

210k

EVENT CINEMA REVENUE (GROSS)

£3.0million

John Hurt as Pagliacci
High Brow Productions, Ltd.

HiBrow

"Creative individuals have been marginalised by the institutions that have historically had control over the commissioning and broadcast of arts programming. There has been tyranny in the process. My hope is to create a global platform where creative people are free to pursue artistic work at the highest level outside of that system and have control over their work."
– Don Boyd, Founder, HiBrow

Overview

7.54 In 2007, British cinema veteran Don Boyd was deep into a BBC-commissioned filmed Hamlet set in China. Months of planning work complete and production and artistic crews in place, the plug was pulled on the project three days before work was to begin due to the BBC's lack of funding. Boyd was deeply frustrated by the cancellation: "There was something wrong here. Only a handful of companies commission and produce filmed and broadcast work, yet there is unfairness and uncertainty in the commissioning process that ultimately marginalises the artists involved."

7.55 But Boyd saw the moment as an opportunity. An avid technologist, he knew that proliferating and cheaper technology meant smaller outfits could soon provide the same service the BBC could – production facilitation, broadcast capabilities, and the ability to reach a global audience economically. He began asking his colleagues in the film, theatre and arts communities if they would be interested in curating and producing film and broadcast work where the creative talent would be supported rather than side-lined. Many had suffered similar experiences and the answers were enthusiastically "Yes."

The market

7.56 Boyd got to work and the result was Hibrow, a live event producer and free, curatorial web portal for the visual and performing arts with dozens of hours of content that officially went 'live' in 2011 after a two-year online pilot period.

7.57 Boyd assembled some great business minds and crafted a plan for Hibrow. He regrets not having enough creative visionaries alongside the business brains, however, as the result was "too narrow." This, paired with the financial crisis that gripped the globe, meant Boyd was less successful in pitching for funding than he had originally hoped. "We had a target of £2.4 million to fully fund and start up the project. We ended up existing on about £100,000 for the first 18 months." Hibrow subsequently received a grant of £430,000 from Grants for the Arts in 2013. With a total expenditure of £1.1 million over eight years, Arts Council England was a significant contributor to the development of the platform.

7.58 It was not just the banking collapse that inhibited Hibrow's launch. Boyd says that he encountered a great deal of fear around technology then that does not exist today. "Eight years ago people were in dial-up mode mentally. No one believed you could reach audiences through a computer and no one believed you could produce high quality work on a screen!" As the market has begun to prove itself, especially in the last few years, "people have begun to understand what an online audience is and what is possible through the work." Hibrow was handicapped by being ahead of its time; but the world is different now and the barriers to entry – mental and technological – have lowered considerably.

Platform and productions

7.59 Hibrow is now the home of 200 hours of original video programming and 450 online videos. A quarter million people have accessed the portal, with 10,000+ average monthly visits and an average viewing time of 12 minutes. "While we aren't on par with the 'big guys'," remarks Boyd, "that's a lot of people for an indie start-up and a lot more people that you can fit in a small theatre each month."

7.60 Hibrow is not just a portal for content, but is a direct producer of all of the work they host. One of its most notable efforts was in partnership with the Traverse Theatre during the 2010 Edinburgh Festival. The goal for the work were staged readings, as Boyd and the others involved believed technology allowed viewers to get inside the creative process in new ways. For them, the staged reading presented a digital opportunity – a kind of live performance that fitted the technology perfectly.

7.61 A handful of plays were co-commissioned, with two explicit instructions, says Boyd: "First, you could write whatever you wanted, and, second, everything was to be written with the cinematic, not live, in mind as the primary experience." Each production has two directors assigned, one for theatre, and the other for broadcast.

7.62 The five plays were beamed out in a single morning to cinemas nationwide through Picturehouse, while audiences watched the readings live at the Traverse every morning for the run of the Edinburgh Festival. Balancing the readings, online audiences enjoyed rehearsal and interview videos, captured in the days leading up to the broadcast. The broadcasts reached a much wider audience than the Traverse can hold and, importantly, were produced with a relatively modest budget of around £50,000.

7.63 This pioneering experiment in Live-to-Digital theatre was transmitted at almost the same time as NTLive's first transmission. The Traverse partnership with Hibrow was repeated again in 2013 with a fully staged production, which resulted in a full-length feature film The Salon, and again in 2014 with Hedda in London. In 2014 in partnership with the BBC and Summerhall, a major Edinburgh arts venue, Hibrow broadcast eight shows it developed across eight evenings to 30 cinemas nationally and 'live' to the BBC's newly created Arts Online platform.

7.64 Cumulative expenditure for all of Hibrow' efforts totals some £1.1 million over the eight years of existence, about half of what Boyd originally wanted to raise for his first year alone. But those figures do not represent the real cost of doing business. Boyd notes that about three-quarters of all expenditure is on content. “Our overhead is absurdly low,” say Boyd, “as many of the individuals involved, myself included, are giving the majority of our time as a benefit-in-kind.”

Curators and creativity

7.65 Key to Hibrow’s mission is putting curators at the centre of the work and product. This means not shying away from ‘niche’ content, lesser-known talent and events staged in other countries (Africa, USA and Russia in particular), though Hibrow has also engaged with household names and popular works. By focusing on curators, Boyd believes Hibrow can push the limits of what is created for digital distribution globally. “Artists and audiences are frustrated with the standard offer, where technology just creates a secondary version of the live performance. Conservative institutional producers are not taking risks and exploring what is truly possible through the digital experience.” This is a “wasted opportunity” to Boyd, as the audience is ready for new experiences rather than strictly digital translations of live events.

7.66 This work requires technological as well as artistic ingenuity and Hibrow endeavours to work with creative talent that can lead the way in both regards. “Even we fell into the trap of creating work that did not take advantage of the media,” says Boyd, “but we and others are now truly pushing to create innovative work.”

7.67 A focus on the creative side has had its issues, however. Boyd admits that he has underdeveloped Hibrow’s infrastructure and market presence as a result. The majority of the limited funds went towards production rather than staffing, promotion, marketing and advertising, and as a result it is not as widely known as he would like, which has resulted in less funding than expected and productions running on skeletal crews. “Mass-market machinery has an upside: infrastructure and brand,” notes Boyd. He also notes that Hibrow experienced aggressive competition from media outlets like The Guardian who were desperate to protect their vast online market audience share which made it difficult to promote within the traditional media outlets for arts content.

Next steps

7.68 Boyd is optimistic as to the future of Live-to-Digital work in general. Through technology, he thinks, “we are equalizing the creative process. Individuals and small groups can compete with large companies on a global level. Tech is becoming less institutionalized and more readily a set of tools that serve the art.” More creators now realise “relaying performances and art is not only technologically and economically feasible, but it is no longer frightening either!”

7.69 There is much territory yet to explore in the kind of content one can create for a digital platform. Hibrow has a handful of new ideas in motion that will capitalize on this – so long as the funding can be found that will secure the company’s forward momentum.

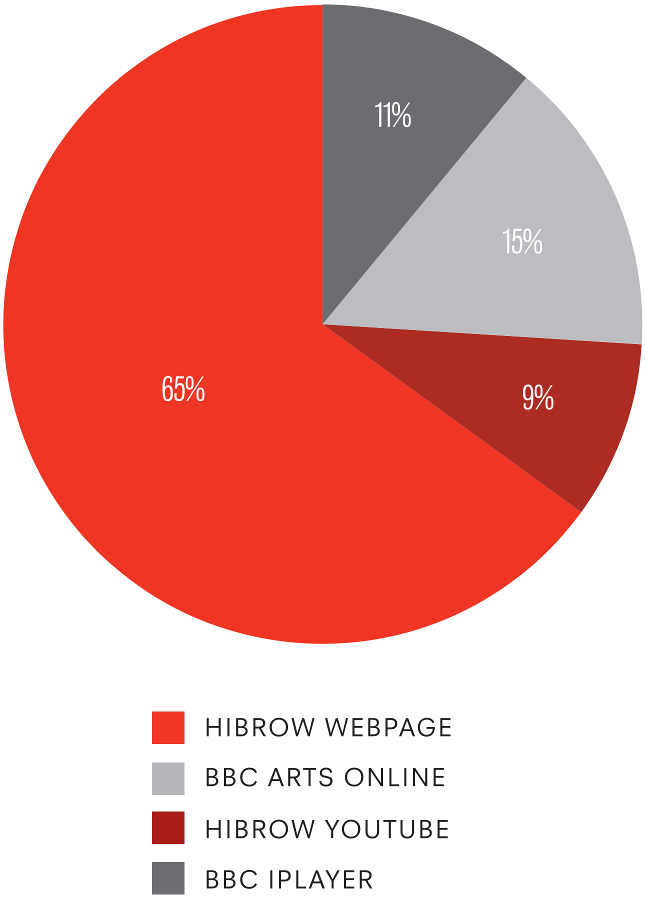
HiBrow

KEY LESSONS

* Live-to-Digital work is not restricted to large-scale, globally-known brands
* Small-scale production can champion creative risk-taking work that might not find a home on other platforms
* New content created and filmed for online platforms can prioritize the digital audience over the live one
* Focusing on the curatorial side is important, but too much focus on it can handicap your ability to operate successfully
* Live-to-Digital production is not only possible at smaller scale, but it can fuel creative talent
* It is easier to persuade funders and other of the wisdom of broadcast – funding and audiences may be closer to your reach than you expect

HiBrow

KEY FACTS



AVERAGE COST PER PRODUCTION

£50k

Annual attendance 2015 (live)

1.8k

Annual attendance 2015 (Event Cinema)

10.6k

ANNUAL ATTENDANCE 2015 (ONLINE)

117.4k

Annual pantomime.
Credit: Keith Pattison

Theatre Royal Newcastle

"When I first got involved at the Theatre Royal I arranged trips for the children in the local hospital to come to see the panto, but I soon realised that the sickest children weren't able to come and were missing out...So I had the idea of bringing the magic of the panto to them instead and the idea just grew and grew." Howard Tait, Trustee, Theatre Royal Newcastle

"What we have on our side are three things: We have a very good pantomime, which is not star-led. They are the best pantomimes in the country for a variety of reasons, and therefore they are extremely accessible. Second, we have very high production values – both in the pantomime and in the filmed production. Third, we have Howard [Tait] and his enthusiasm. In a sense it is delivered each year on a wing and a prayer. It works because he's passionate about it and makes it happen." Philip Bernays, Chief Executive, Theatre Royal, Newcastle

Overview

7.70 Theatre Royal Newcastle's annual pantomime, the fastest-selling in the country, attracts more than 90,000 people from England's North East region with an ambitious 90+ performance run from November to January each year. Staged in the Grade 1-Listed theatre in the heart of Newcastle, the bespoke and lavish productions are written and produced by Qdos Productions (Newcastle-born Michael Harrison is Managing Director of their pantomime division), offering the consistency of the same artistic team year on year.

7.71 Trustee Howard Tait, a member of the Theatre's governing body since 2001, recognised the thrill and attraction of this programming but was struck by the fact many people were excluded from the experience when a close family friend's young son struggling with a terminal illness was unable to attend. As Tait describes, "You go into the hospital, you try to put on a brave face and put on a show of bravado while people are sitting there in a bad way. If there is one day you don't want to be in hospital, it's Christmas day. It's bad enough for an adult – but for the child and for the parents it's a horrible thing (though having said that, the nurses, and doctors in this country are brilliant)."

7.72 Realising how many hospitalized children were missing out on the performance, Tait's first response was to ensure over eighty children, caregivers and families could see the show, arranging buses and free tickets to see the pantomime live. He remembers that "by the time I joined the board, I had forgotten how lovely pantos were, it seemed a good idea to take a few of the kids down to see the one in Newcastle."

7.73 Yet Tait recognised there were many who were too unwell to be able to attend in person. He shares his revelation to go digital, "I was in the hospital on Christmas, and of course next to all the beds there's a television set – it's pay as-you-view. While the NHS is free, the screens are not. They have all these lovely TV sets and I thought: I wonder how that all works. Bizarrely I thought, I'll explore it." Tait tracked down Hospedia, the [now] Slough-based global company responsible for the television programming in UK hospitals (including IPTV, video on demand, internet connectivity and telephony) and pitched to them the idea of broadcasting the pantomime through their network without charge.

7.74 Hospedia agreed, and so Tait, Theatre Royal Newcastle and Qdos Productions worked out the details with them. Tait explains, "It was reasonably technical – with different hospitals and different satellites. And so begging, stealing, borrowing, you name it, I eventually put together a team of lighting, sound, and camera technicians, and on a Saturday we went to theatre and filmed with three cameras and beamed it into hospitals in Newcastle." In that first year their Aladdin programme reached four hospitals and 2,000-3,000 screens on 15 December.

The results

7.75 Tait describes the team's views before the programme was broadcast, "We were very nervous about whether it would work – distributing it on to a certain channel, promoting to all the doctors and nurses. But, it actually really worked!" The programme's success cemented Tait's commitment and vision. "I thought, can we do it in the whole UK? Can we improve it if we have hot head cameras, if we edit it digitally, and make it like a movie – 5 or 6 cameras, 20 hours of footage? I went back to Hospedia and pushed the boat out. I was quite nervous because they had never done anything like this before that doesn't generate revenue. Why should they give me two hours free in the hospital?"

7.76 After the initial 2012 broadcast, Hospedia signed on for another year. Said Tait, "so we had 168,000 screens to sort out. 17 communications methods. We got to know the technical people at Hospedia. [Further] Playing live in Newcastle means there are some elements of the local in it. Will the non-local audiences understand some of the language? Will they understand the jokes? But That Christmas we showed it in every single NHS hospital, in Wales, England, Scotland and Northern Ireland. It went everywhere and was the first of its kind in the world. I was interviewed 5 times by Sky Television, ITV, every national paper."

7.77 Now five years later and thanks to the in-kind support of Hospedia and a large team of technical experts, Theatre Royal Newcastle's most recent 2015 pantomime, Dick Whittington, was screened for free to170,000 patients across 180 NHS hospitals on 21 December 2015. Theatre Royal Newcastle has forged a new and important path for engaging "hard to reach" audiences. Tait explains, "Without the partners' good will, it would not be possible. If you did it commercially, it would cost a lot of money."

7.78 Since 2012 the programme has become an established part of the Christmas season for hospitals across the country. As Philip Bernays, Theatre Royal's Chief Executive explains, "Initially we had to tell the patients that it was on. We were sending out leaflets and posters to the hospitals. And it was quite hard to get that message through. Now over the years there's almost an expectation that the pantomime will be there." Tait adds, "The first year we put it on on Boxing Day. The next year, they asked, can you put it on for a second performance (so that the parents, who ran out of jokes, can watch it!) And then they said can you broadcast [a recorded encore] one more through the week because some of the aunties can't be there to see it!...Eventually it was on three times."

7.79 As Tait explains, "It hasn't cost the theatre one single penny. It hasn't cost the Council a single penny. We have had fantastic support from the production team. The cast were great [all of whom go to the local hospitals before and after the production is broadcast to meet the patients]. A lot of people said, what about the royalties? But luckily because we're not making any money on it, we're not selling it, it's just a gesture." Further, because the production is going out in a closed, non-commercial environment, the team can control the fact that people cannot record it.

*Steve Arnott as dastardly King Rat.
Credit: Keith Pattison*

Next steps

7.80 Bernays and Tait believe the programme has room for growth, but the team lacks the capacity and funds now to scale the programme much more. Tait explains, "It would be possible to hike it up. We would promote it more before it happened. It would actually allow us to ensure that awareness was out there so we would have maximum views."

7.81 Ultimately the team sees the programme as a catalyst, as Tait describes, "The North East has its obstacles. We have high levels of unemployment, and we often get overlooked by Government decision makers in London, so we have to try extra hard to bring culture, art and innovation into the city. Programmes such as this are vitally important, it shows that with energy and innovation we can create brilliant new things. And nothing is more brilliant than bringing entertainment of this calibre to families across the North East who wouldn't normally be able to see it."

Theatre Royal Newcastle

KEY LESSONS

* Start small – test out a project to see what works well
* Take seriously even the smallest ideas you may have
* Cultivate carefully your relationship with partners, but don't hesitate to approach them with thoughtful ideas
* Engage volunteer and executive leadership

Theatre Royal Newcastle

KEY FACTS

Year founded

1837 venue built

1977 Newcastle Theatre Royal established

Annual attendance 2015 (live)

405.6k

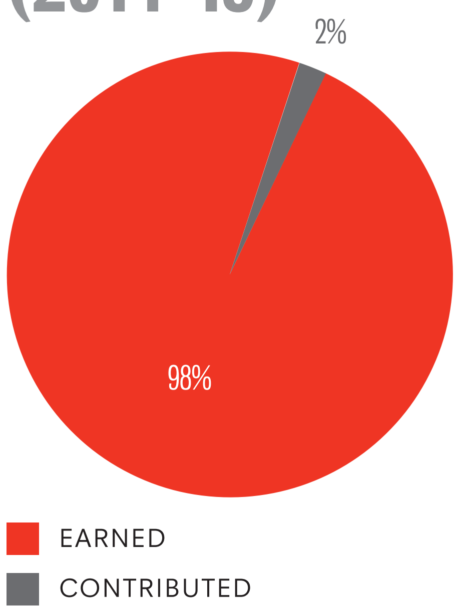
Annual attendance 2015 (digital)

532.5k

Annual number of performances 2015 (live)

406

INCOME (2014–15)



OPEX (2014–15)

£12million

NUMBER OF PARTNER HOSPITALS **180**

Live-to-digital partners

HOSPEDIA
QDOS PRODUCTIONS

Annual Pantomime attendance (live)

90k

Annual Pantomime attendance (digital)

170k

Annual Pantomime performances (live) **92**

3 NUMBER OF BROADCASTS

Appendix 1: Glossary of key Live-to-Digital and related terms

THIS GLOSSARY WAS DEVELOPED IN COLLABORATION WITH DR. SARAH ATKINSON, SENIOR LECTURER IN DIGITAL CULTURES, SCHOOL OF ARTS AND HUMANITIES, KING'S COLLEGE LONDON

Over the past five years, with the rise of Event Cinema and alternative content (defined below), a proliferation of new terminology and nomenclature has entered the public sphere in marketing literature and industry-produced publications. Terms such as 'event,' 'live' and 'alternative content' are used interchangeably to account for a diversity of cinematic distribution and exhibition strategies – covering the livecasting of events (theatre, opera, sport, music) to cinema auditoria, the replay of pre-recorded live events in cinema auditoria and immersive screenings which incorporate simultaneous theatre, performance and live music elements.

We have therefore found it useful to develop a glossary to start to clarify a consistent and appropriate application of these terms, taking the lead from the industry which has developed and established them. In addition to terms specific to Live-to-Digital, we have included definitions for economic terms used in the report and other relevant theatre terms which have some relation to digital distribution (e.g. access services).

Within this glossary, we make a clear distinction between 'event-led' cinema – the creation of live events around a particular film screening, and its contrasting proposition – 'Event Cinema' –the coverage of live events in cinema auditoria – such as sport, opera and theatre – around which there is already much lively academic discussion (Martin Barker, 2013), and an organisation established to support such activities (The Event Cinema Association).

Alternative Content (see Event Cinema) – A term normally used by the industry to describe Event Cinema.

Audio Description – For visually-impaired audience members, live commentary provided by trained describers, interspersed with the actors' dialogue. There is also a 'programme notes' description, starting 15 minutes before the production, which helps to capture the atmosphere, costumes, characters and action before and during the course of a performance. Description is relayed via a discreet headset linked to the infra-red audio system.

British Sign Language (BSL) – For hearing-impaired audience members, or audience members unable to communicate, the use of hand movements, gestures, body language and facial expressions to communicate.

Captioning – For hearing-impaired audience members, transcription or translation of the dialogue, sound effects, relevant musical cues, and other relevant audio information.

Cannibalisation – One entity encroaching upon the service and the market of another. In the 'Live-to-Digital' space, some have raised concerns that live theatre venues will see their audiences cannibalised (or eaten) by online theatre and Event Cinema productions.

Complement – Two goods or services the demands for which are positively related, such that an increase in demand for one will be associated with an increase in demand for the other. In the 'Live-to-Digital' space some have argued that digital theatre productions and live theatre are complements – the success of Event Cinema or digital streaming will raise the demand for live theatre.

Content producers – Those organisations that develop and create work.

Digital footprint – The use of technology both on and off site; more specifically how venues extend their reach and role using digital technology such as virtual business networks, online audience development, digital programming, and digital art works.[83]

Displacement – Taking over the position or role of; within the 'Live-to-Digital' space, some have argued that, for audiences, digital theatre events will serve the same purpose as live theatre productions.

Distribution chain (or 'supply chain') – The chain of organisations or intermediaries through which a cultural production passes until it reaches the audience member. In the 'Live-to-Digital' space, this will include Production (the playwright, content owner, director, cast and crew); Distribution (the theatre; the cinema; the online platform); Exhibition (cinemas, alternative venues; online platforms); and Consumption (the audience).

Distributors – The responsible party for marketing or hosting a production; if the distributor owns the theatre or film distribution network, it will control this directly. Alternatively, it could work through theatrical exhibitors or other sub-distributors. (See Distribution network for examples).

Downloading – Copying data from one computer to another typically via the Internet.

Downstream rights – Rights secured from content owners, cast and crew for performances made available after the live event (e.g. online or in an encore performance).

Encore Performance (or 'playback') – Recorded performance, often screened after the live satellite broadcast (in Event Cinema).

Event Cinema[84] – Also referred to as Alternative Content, the use of cinema

83 Fleming (2008)

84 As reported in Tuck and Abrahams, 2016, '[Event Cinema] is not the only terminology in use, nor is it necessarily the most appropriate. Often still referred to as alternative content (as it still tends to be in the US), it was the launch of the Event Cinema Association in 2012 that set out to rebrand alternative content to Event Cinema. For some, the formation of the Association has cemented this term going forward. For others, this is still up for debate. There are positive connotations regarding the word 'event' as indicative of a special or one-off experience. On the other hand, cinemas may regard all of their screenings as an event, and in this context the term may fail to differentiate their offering. Feedback at an IHS Europa Cinemas Conference in 2013 noted that upon asking the opinion of the 150 attendees present, only three people preferred Event Cinema to alternative content. A further factor is that whilst the venue to which content is streamed is often a cinema, other venues do also screen content, such as theatres with screens. In this context the term Event Cinema may be regarded as being too explicitly associated with the mode of exhibition, rather than the content itself.'

theatres to display a varied range of live and recorded entertainment excluding traditional films. This may include theatre, opera, musicals, ballet, music, exhibitions, one-off television specials, sport, current affairs, comedy and religious services. In the UK, the majority of Event Cinema productions are currently transmitted via satellite, although the expectation is that satellite technology will be replaced by Internet Protocol (IP) delivery in the near future.

Exhibitors – In the 'Live-to-Digital' space, those platforms or spaces that show the theatre production. This can include online platforms (such as YouTube or Digital Theatre); venues (such as mainstream cinemas like the Odeon and the Vue); mixed-arts venues (like The Dukes); or small-scale venues (like pubs or village halls).

Eventising – An industry-given term for the creation of events as part of a distribution strategy (can be widely applied to other product releases, not just film).

Event-led Distribution (see Live Cinema)

First mover – An actor that gain a competitive advantage through capturing new demand or through control of resources. In the cultural space, The Metropolitan Opera (Live in HD) was the first-mover internationally to showcase opera in the cinema; The National Theatre was the first in theatre to do so. In the commercial sector, first-movers can gain a competitive advantage through control of resources; if they do not capitalize on this advantage, they may make room for new entrants.

Halo effect – The potential range of additional benefits that organisations experience as a direct or indirect result of (in this case) delivering Live-to-Digital programming; this could include brand enhancement, increased interest from existing and new donors, increased press and increased audiences.

LIVE CINEMA

Augmented cinema adds a further dimension to the film text through: the site – situating the screening in a location relevant to the film itself – e.g. *Harry Potter* at Kirkstall Abbey, through sensory enhancement (Smell-o-vision, Taste-a-longs, Stereoscopic 3D, 4DX); and elements of non-interactive performance. This category would also therefore include auditory modes of augmentation such as the following:

Live scored are those where the full original score is played with the film exactly as originally intended, retaining all other elements of the film soundtrack. In the summer this included a season at the Royal Albert Hall that included *Interstellar* (2014), *Back to the Future* (1985) and *The Godfather* (1972).

Re-scored events are those in which the original soundtrack is either completely dubbed over or new elements are mixed in.

Enhanced (Screenings) At the most basic form of intervention the category of *enhanced* would include outdoor and open air screenings. The physical experience is often enhanced but this is not relative to the story of the film. This would include a range of differently sited screenings. It is the social experience of film reception that is given some degree of enhancement.

Participatory (Screenings) The participatory category always includes some element of audience direct engagement in elements of the original text and this category itself includes its own spectrum of immersive intensity.

Live by Satellite (see Event Cinema)

Livecasts (see Event Cinema)

Live-to-Digital – All-encompassing term to characterise the wider market for the distribution of cultural content. For the purposes of this study, the Commissioners have defined it to include: Event Cinema, free or paid live or on-demand availability online, and live or on-demand television broadcast.

Multi-Channel Network (MCNs) – As defined by YouTube, entities that affiliate with video platforms (such as multiple YouTube channels), often to offer content creators assistance in areas including product, programming, funding, cross-promotion, partner management, digital rights management, monetization/ sales, and/or audience development. MCNs are not affiliated with or endorsed by YouTube or Google. Canvas, launched in October 2015, is an MCN specifically for the arts/cultural sector funded by Arts Council England.

Playback (see Encore)

Pop-up Screens - Refers to inflatable cinema screens which can be located in various locations – rooftops, stately homes, parks, woodland etc.

Relaxed Performances – Specifically designed to welcome people who will benefit from a more relaxed performance environment, including people with an Autism Spectrum Condition, sensory and communication disorders, or a learning disability. There is a relaxed attitude to noise and movement and some small changes made to the light and sound effects. An easy way to understand the atmosphere is perhaps, ‘the opposite of the quiet carriage on the train’.

Release window – The time or ‘window’ between a film’s theatrical release and its release on other platforms.

Rights – In the context of this report, the specific rights referred to are the ability to use particular content for exhibiting it in a particular format in a particular region and for a period of time.

Theatrical rights refer to the rights that are received to exhibit films in cinema halls. The distributors buy theatrical rights from the film producers and make arrangements with the theatre owners to exhibit the films to the public. The theatrical rights are limited by predefined territories and for a period of time.

Rights-holder – Legal entity or person with exclusive rights to a protected copyright, trademark or patent, and the related rights of producers, performers, producers and broadcasters. A right holder may license a portion of or all of a protected work through international legal and licensing provisions.

Simulcasts – The broadcasting of programs or events across more than one medium, or more than one service on the same medium, at exactly the same time. (The Metropolitan Opera began simulcasting their operas to Times Square in 2006.)

Streaming – Transferring data so that it can be watched as a steady and continuous ‘stream’. With streaming, the browser can start displaying the data before the entire file has been transmitted. In this study’s case, streaming means watching a theatre performance in real time directly from the Internet via a broadband connection on a computer or hand-held device. This differs from downloading a file of the performance and watching it at a later point; i.e. copying data from one computer to another typically via the Internet.

Substitute – A product or service that a consumer sees as the same or similar to another product such that an increase in demand for one will be associated with a decrease in demand for the other. In the ‘Live-to-Digital’ space some have raised concerns that Event Cinema is becoming a substitute for a live performance.

Virtual capacity – Not limited by the traditional confines of a physical space (e.g. in theatre, limited by a number of seats; a number of nights a play can be staged), the ability to showcase a production to a significantly larger audience via screen or online.

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Appendix 3: Literature Review

METHODOLOGY

This review synthesizes the body of literature on theatre production, distribution and audiences in the context of Live-to-Digital. The review includes 25 English-language sources (reports, articles, academic papers policy documents) written about the topic since 2008. Every attempt was made to be as complete as possible in this review; however, there are certain to be articles that were left out. In addition, the review is not critical, and does not review the data each article collected, methods with which they assessed, etc., but instead attempts to synthesize the shared conclusions of the articles studied when viewed in their totality.

SYNTHESIS

Big players currently dominate the Event Cinema space within the Live-to-Digital sub-sector. However, research indicates that Event Cinema has the potential to reach a wider, international audience through greater marketing exposure, with expanded opportunities for greater profitability and for participation by smaller players. Although in its infancy, there is evidence that material success for existing stakeholders depends on flexibility and adaptability in the face of emerging trends, digital technology and a fragmented, rapidly evolving ecosystem. In order to assure a sustainable future for stakeholders, sub-sector profitability can benefit from additional strategic changes. For example, financial risks and challenges in securing capital can be mitigated by increased collaboration and the creation of consortia. The production, distribution, and exhibition of Event Cinema also demands an audience-driven, multidisciplinary approach. Restrictions and risk factors associated with Event Cinema investment is a deterrent to reliance on public offerings as a major source of capital. Alternate sources of funding and business models should be explored, such as private offerings and joint ventures.

Research has shown UK public recognition of the term ‘Event Cinema’. However, the UK public generally is uninformed with respect to the scope and depth of available content, and the presently available physical and digital viewing platforms. Further investigation into the successful business models of other creative industries, such as film, should be explored. In addition, due to the lack of consistent, large-scale data, further examination is recommended on the impact of Event Cinema on other creative industries in the UK. Last, further inquiry is recommended into the behaviours of specific audience demographics, and the connection or interaction among specific types of live theatre and Event Cinema.

SUMMARY ANNOTATIONS

Arts Council England. ***Rural evidence and data review: Analysis of Arts Council England Investment, Arts and Cultural Participation and Audiences.*** **2015**

The research reviewed the various rural arts initiatives sponsored by Arts Council England, paying special attention to rural participation trends in arts and culture. The data sought to inform discussion on accessibility and engagement with arts and culture, as well as policy changes related to arts and culture in rural communities. The research tackled arts engagement within a broad spectrum; particular engagement with cinema, as well as video & digital art, was only fleetingly mentioned. Nonetheless, given the importance and interest in understanding rural audience and supplier experiences with Live-to-Digital programming, this study is included in this review to establish context.

Key Findings:

- Regular arts engagement was higher in rural areas than in urban areas, across England (type not specified). However, causation was unclear; understanding key drivers of higher arts engagement, including audience development strategies, was suggested.
- Regular arts engagement was highest in the rural South. However, funding barriers had also been shown to be greatest in this region; this represented a significantly unmet demand. In contrast, regular arts engagement was lowest in the rural North East.
- People living in rural areas were less likely to participate in digital or video arts events than their urban counterparts.
- Rural individuals and organisations were still at a disadvantage in relation to grant-funding, with fewer successful applications.
- People in minority and ethnic groups from rural areas were more likely to be engaged with arts and culture than their urban counterparts.
- The Arts Council does not plan to implement specific rural programmes or investment, but instead seeks to make better use of networks and partners to raise awareness of arts and culture in rural areas in the coming years.

Bakhshi, Hasan and Throsby, David. ***Beyond Live: Digital Innovation in the Performing Arts.*** **Nesta: 2010**

This study compared cinema audiences and 'traditional' theatre audiences. The study was conducted using 2,500 online surveys from two National Theatre Live pilots. The surveys assessed respondents' motivations, expectations, and experiences of performances, in addition to socio-demographic data. The study affirmed the democratising, inclusive role that digital technology can play in the discovery and experience of creative content. It concluded that live cinema screenings and theatrical performances would 'function in parallel', targeting different audiences, in some cases.

Key Findings:

- Live broadcast was proven to extend the 'virtual capacity' of a performance, mitigating notable barriers such as distance and unavailability of tickets.
- Most remarkable was that significantly more low income individuals

attended the cinema screenings – 24.5% compared to 15.8% in theatres. This typically under-represented group also responded that they were now more likely to attend a theatre performance.
- Despite lower expectations, cinema audiences reported higher levels of emotional engagement with the production than those who had experienced the play at the National Theatre (60.6% of cinema audiences strongly agreed with the statement that they were 'totally absorbed' compared to 38% of theatre audiences; 31.5% of cinema audiences agreed, and 39.2% of theatre audiences agreed)
- Collaboration between cinemas and theatres is paramount: cinemas aid in the promotion of digital broadcast through their established audience base.
- Many publicly funded arts organisations may be slow to innovate, due to their cushion of financial security.
- Branding was reaffirmed as a key contributor to successful promotion and box office success.
- Despite the digital, on-demand sensation, audiences still craved live, collective experiences – both in theatres and in cinemas.

Bakhshi, Hasan and Whitby, Andrew. *Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre*. Nesta: 2014

The research paper uses a new, `big' data set, composed of 44 million ticket transactions for 54 performing arts venues across England. The study spanned a period from early 2009, when National Theatre Live was launched, through to late 2013, to assess the impact of such live broadcasts on box office performance at theatre venues.

Key Findings:

- National Theatre Live appeared to have boosted local theatre attendance in neighbourhoods most exposed to the live broadcasting programme.
- There was no evidence of cannibalisation on theatre attendance at a broad spread of English venues since the National Theatre Live programme was instituted in 2009.
- The unexpectedly strong effect of Live Simulcast on non-theatre attendance was worthy of further investigation: it may have reflected the relatively close substitutability of the theatre and non-theatre productions in the analysed data sample; or it may have suggested that another, unknown cause was driving the treatment effect.

British Theatre Consortium, SOLT/UK Theatre, and BON Culture. *British Theatre Repertoire*. 2016.

The British Theatre Consortium, SOLT/UK Theatre, and BON Culture's Report evaluated the condition of theatrical production and attendance in the UK in 2014. Spanning 59,386 performances, 5,072 shows, 274 venues, and 33 million visits, the findings were measured against the 2013 findings, affirming significant trends and challenges. Despite the detailed findings, critical factors such as socio-economic status and education level of theatre attendees were not included. Most significantly, however, the study confirmed that the sector is artistically and financially flourishing, implicitly indicating that Live Cinema does not have an adverse effect on theatre attendance.

Key Findings:

Cost

- The average price paid for a theatre ticket in 2014 was £33.52, a rise from 5.7% in 2013, illustrating the cost savings of Live Cinema events.
- Due to its limited offering of performances, opera tickets were priced highest among all theatre tickets. The potential correlation between rising Opera ticket prices and Live Cinema for Opera is worthy of investigation.

Genre

- Operas and musicals consistently performed well above average with respect to attendance and box office revenue. Musicals in particular provided 51% of all attendance and 61% of box office.
- The commissioning of new adaptations, translations and plays for children had seen a significant rise. Due to the increased usage of online and on-demand services by children and teens, the viability of Live Cinema for children online and On-Demand may warrant further investigation.
- New works – constituting 62% of all theatre productions – generated a fuller portrait of ethnic diversity in present day Britain. The preceding illustrated a potentially untapped and diverse, cross-over audience for Live Cinema.

Location

- London maintained its dominant position for theatre in the UK, contributing 54% of performances, 62% of attendance, and 73% of box office revenues. Three-fifths of all theatre visits in the UK occurred in London.
- Wales had entered a 'golden age of theatregoing', taking 72.3% of its potential box office. The insatiable appetite for theatre and the cross-over potential for Live Cinema in Wales warrants further exploration.

Devlin, Graham and Dix, Alan. *Theatre Touring in the 21st Century: An Exploration of New Financial Models.* UK Theatre: 2015

This report assessed the current landscape of the theatre touring industry in the UK. The report also analysed the investment potential of new and existing financial models in both the commercial and non-profit sectors. No mention of the viability of theatre touring broadcasts (in cinemas or online) was made, yet given importance and interest in understanding the relationship between Live-to-Digital and UK touring trends, this study was included in this review to establish current context.

Key Findings:

- The entire UK Cultural sector continued to experience significant budget cuts, with local government spending on arts down by 25% since 2008/09, and ACE funding down by 25% since 2008/09. Part of the investment standstill was drawn from an insecurity about future audiences.

- Collaboration in the form of co-productions was recommended to allay issues of financial instability and changes in the touring ecology.
- The creation of a new web portal could better equip touring producers and venues to develop the sector in a variety of ways.
- The development of consortia is discussed at length; cost sharing, creating finance for investment, development of new work, and member training are among the chief benefits. The USA's NPN (National Performance Network) represented a successful consortium that may be used as a model for implementation in the UK, on both a large and small scale.
- The spectrum for funding and investment was far and wide, with viable options (crowdsourcing, endowments, EIS & SEIS) for new work, socially conscious work, and established work.

Ellis, Richard and Rushton, Caroline, et al. MTM. *Digital Culture 2015: How Arts and Cultural Organisations in England Use Technology.* Arts Council England, Arts and Humanities Research Council and Nesta: 2013-2015

This 3-year longitudinal study surveys 900 arts and cultural organisations in England. The implementation, impact, and perceived importance of digital technologies was assessed. The study highlighted key trends in digital technology adoption, as well as organisational, structural, and financial barriers and challenges. The study was accompanied by an online data portal and a series of eight factsheets that go into further detail on different parts of the sector.

Key Findings:

- Digital technology played a crucial role for many organisations. 90% regarded digital as important for marketing; 80% for preserving and archiving; 74% for operations. Activities in these areas were well-established and continued to deliver valuable impacts
- Three-quarters (72 %) of organisations reported a major positive impact from digital technology on their ability to deliver their mission.
- Social media had become firmly entrenched with image sharing platforms such as Instagram, showing rapid growth, and mobile-readiness had improved since 2013 with 59 % operating a mobile-optimised web presence
- Digital technologies had become more important for revenue generation, with 45 % of organisations reporting that this was important to their business models, up from 34 % in 2013.
- National Portfolio Organisations (those organisations receiving three-year funding from Arts Council England) were by far the most active and engaged with digital technology. This may be due in part to their size and continuous fiscal support, allowing for sustained investment in R&D and risk-taking.
- Larger organisations were typically abler to adapt their business model to exploit digital technologies. In contrast, small organisations were least likely; this may be due in part to differences in financial security.
- Organisations that experiment and/or take risks with digital technology were significantly more likely to report positive impacts. Despite the probability of positive impact, fewer organisations were investing in R&D and taking risks.

- More organisations had highlighted concerns around access to finance, with 73 % of organisations seeing lack of funding for digital as a barrier to their aspirations (up from 68 % in 2013).
- There was evidence that some organisations were in 'test and learn' mode, trying things out and then deciding not to continue if they did not deliver enough benefit to justify the cost. Crowdfunding and livestreaming, for example, had sometimes been more difficult and resource-intensive than expected. (e.g. Crowdfunding as a source of funding and marketing has generated widespread buzz. However, implementing an effective campaign is difficult and time consuming; though 25% of organisations wanted to implement crowdfunding, only 2% followed through).
- Respondents reported a number of organisation-related factors which might have inhibited use of digital technologies, including a lack of a senior digital manager in their organisation, IT systems being slow/ limited and there being a lack of suitable external suppliers.
- The same trend was clear with digital skills, where organisations felt less well-served across 12 out of 13 areas tested in comparison to 2013 (with only digital marketing remaining stable), although the changes were only significant for four areas: website design, digital production, digital commissioning and rights clearance.
- Significantly fewer organisations (especially smaller ones) reported that they exhibit the R&D behaviours that the survey suggests correlated with digital success, such as experimenting and taking risks, and evaluating the impact of digital work.
- Northern England and London had experienced the biggest positive impact and fewest barriers from digital technology. In contrast, organisations in the South, particularly the Southwest, seemed to encounter the most barriers.
- Theatre organisations reported a significant decrease in the importance of digital technology to distribution and creation.
- Digital distribution such as live streaming and online tours had seen a decrease, from 15% down to 12%.
- There had been a stable shift to investment in social media. However, the jury was divided on the effectiveness of social media to generate sales revenue.

Fleming, Tom. *Crossing Boundaries: The role of cross-art-form and media venues in the age of 'clicks' not 'bricks.* UK Film Council, Arts Council England and Arts and Humanities Research Council: 2008

Commissioned in 2007, the study was published before the astronomical growth of Event Cinema. Nonetheless, it captures a historic moment in the sector's relationship to digital advances and investment in technological infrastructure at that time. The study attempted to understand the changing structural and cultural role of cross-art-form and media venues in the UK. Featuring six high-performing venues across the UK, the study was intended to determine how digital disruption affects the cultural, creative, and financial impact of the venues in their respective cities and regions. The venues - Broadway (Nottingham), Showroom (Sheffield), Cornerhouse (Manchester), FACT (Liverpool), Tyneside (Newcastle) and Watershed (Bristol) were all specialised cinema programmers, who provided a detailed SWOT Analysis on their respective businesses. Though not the main focus of the study, opportunities and barriers for venues resulting from digital disruption are applicable to the Event Cinema sector today.

Key Findings:

Strategic

- The featured venues were redefining themselves as multi-purpose 'cultural producers', dramatically and spontaneously changing how their content was produced and consumed in the face of digitisation.
- In lieu of an 'Infrastructure For You' approach, the study encouraged venues to adopt an 'Infrastructure by You' approach, in which audiences played a more proactive and influential role in the programming, infrastructure, and digital and physical footprint of the venue.
- The establishment of a national network may facilitate collaboration and knowledge sharing among venues and their strategic partners.
- Strategic alliances with theatre, galleries, and music venues alike could position venues as leaders in innovation and the dissemination of cutting-edge media.
- Innovative operational structures must be established in order to thrive in the face of the industry's strategic and organisational crossroads.
- The media venues were incubators for the cross-pollination of ideas from different sectors, enabling a 'creative economy'. With the proper infrastructure, new business and new talent were connected and showcased.
- Creative infrastructure was emphasised. Uniquely flexible spaces, the venues operated as 'critical brokers, commissioners and connectors, generously linking activity, both physically and digitally, in a way that gave them a role akin to that of a curator'. In this right, venues 'cross boundaries', and provided a platform for new ideas.

Digital

- The study defines venues' 'digital footprint[85]' as the use of technology both on and off site; more specifically, how venues extended their reach and role using digital technology such as virtual business networks, online audience development, digital programming, and digital art works.
- Mobile media was shifting media consumption, trending to personalised, smaller screens.
- New platforms and a growing demand for personalisation provided an opportunity to expand users' horizons of niche content (Long Tail Theory).
- It was seen as the responsibility of Public Service Broadcasters to facilitate the funding for innovative, interactive media (including non-linear broadcasting) that engaged the community, and therefore, wider audiences.
- Digital audiences were active participants, not passive consumers. Examples include in National Theatre's *Stagework* and Watershed's *DShed* platform.

85 The use of technology both on and off site; more specifically how venues extend their reach and role using digital technology such as virtual business networks, online audience development, digital programming, and digital art works.

Holmes, John. *Opera in cinemas – audiences outside London.* English Touring Opera: 2014.

This report examined the demographics, motivations, and experiences of opera audiences – in cinemas and in theatres – outside of London. The report assessed the experiences of 228 participants from several regions of England. The key factor for encouraging more attendance at live opera for cinema-goers was greater availability near where they lived, followed by ticket prices.

Key Findings:

- Opera audiences skewed older (age group 60-69).
- Authors stated that based on the analysis, cinema is not creating a new audience for opera outside London. There was no evidence that cinema brought new audiences to opera *just because it was in a cinema*.
- Unlike London, there was no meaningful relationship between attending opera in cinema and opera in theatre outside London. While London cinema-goers also tended to attend live opera very frequently, outside London the typical cinema-goer attended live opera every 1 to 3 years.
- More than half of survey participants belonged to a membership scheme – notably Picturehouse. This selection of participants watched cinema broadcasts exclusively; a testament to the benefit of brand loyalty, and improvement of the Event Cinema experience.
- Accessibility was the most important factor in influencing regional attendees to attend in cinema, as opposed to value for money in London. However, value for money was still important for regional audiences.
- Participants were slightly but significantly more motivated to attend cinema broadcasts over live theatre opera, due in large to practical concerns, including comfort, convenience, and value for money.
- Frequent opera attendees (in both cinema and theatre) requested less well known titles, while infrequent opera attendees requested more mainstream titles.

Live Cinema Ltd. *Live Cinema in the UK.* 2016.

This report analysed the current state of the 'Live Cinema' sector (as defined in the glossary of the full Live-to-Digital report) with respect to Live Cinema stakeholders, audiences, and infrastructure in the UK. The report identified key challenges facing Live Cinema producers, artists, exhibitors, and distributors, as well as opportunities for further collaboration and research. The report explicitly acknowledged the difficulty in evaluating the box office success of Live Cinema, as well as level of audience engagement, due to lack of substantial, consolidated data and limited sampling.

Key Findings:

- There was a lack of perceived differentiation among audiences between 'Live', 'Event', and 'Outdoor' Cinema. Educating audiences and building brand awareness for Live Cinema events, specifically online, is suggested. Although the number of Live Cinema Events was growing, the 'conversation' was not.
- Licensing content was a major barrier to the curation of more varied content, on a more frequent basis. The Report proposed a 'Licensing

Flow Chart' that encouraged early and frequent communication between content holders and distributors, so as to expose the financial and artistic benefit of launching more Live Cinema events.
- Exhibitors, artists, and producers alike benefited financially and artistically from participation in Live Cinema events. Greater participation and collaboration with local organisations, heritage sites, and festivals was recommended. Touring models and multi-purpose Live Cinema events were encouraged to mitigate high start-up costs.
- The Live Cinema Network was making a significant contribution to the training and development of Live Cinema stakeholders, and to the growth and differentiation of the sector.

MTM London. *Exploring the Market for Live-to-Digital Arts.* Riverside Studios and HOME: 2015

Drawing on surveys and interviews from arts organisations, audiences, and industry experts alike, this study evaluated how small and medium sized arts organisations relate to digital technology, present and future. The research set forth solutions to overcome the nascent markets' biggest hurdles – chiefly lack of funding, lack of skills, and complexity of rights. Particular attention was paid to managing production and upfront costs, understanding consumer demand, and navigating the disjointed infrastructure of the Event Cinema value chain.

Key Findings:

- Live-to-Digital was used for audience development and archiving, not revenue generation. A future-oriented focus on audience diversification was suggested.
- Numerous distribution models existed, though none guaranteed ROI. Due in part to its infancy, Event Cinema was not yet wholly profitable, though it was forecasted to become profitable in the coming years.
- Similar to the film industry, developing a production 'package', along with a windowing strategy, was critical to long-term revenue generation and audience development.
- At a general disadvantage, it was suggested that smaller organisations must think strategically, paying special attention to partnerships, 'brand' development, and brand loyalty.
- Smaller organisations were at a particular disadvantage regarding rights clearance, and must consider this hurdle early.
- Consumers of Live-to-Digital tended to be earlier adopters of technology, though also skewing older. Findings among Live-to-Digital audiences were at times confounding, requiring further analysis and a more robust sample size.
- Productions usually operated under a mixed model of in-house and external support.
- Consumers were aware that Live-to-Digital arts exist, but were generally uninformed of its range and breadth.

The National Theatre. *Digital Broadcast of Theatre: Learning from the Pilot Season of NT Live.* Nesta and Arts Council England: 2011

This publication shared lessons learned through NT Live, and gave an overview of how the National Theatre developed the project. It highlighted some of the key issues to consider, and asked what the future would be for this kind of digital delivery.

Key findings:

Artistic

- 'Liveness' could be communicated successfully through satellite transmission of live theatre, and audiences valued this unique atmosphere.
- Capturing the sense of event and the atmosphere of the live performance may have enhanced the audience's experience.
- Cinemacasts could achieve very high quality, and in certain specific ways could surpass the theatre experience.
- Cinemacasts and live theatre were two distinct experiences – there was no evidence that one audience takes from the other.
- NT Live's production process was geared to making a high-quality screened product, and for the night of the screening, this was the priority – the audience in the theatre was not a normal-paying public whom the cameras must avoid disrupting.

Rights

- Very early conversations on rights were essential.
- NT Live negotiations benefited from being open about the experimental nature of the project, and by putting an emphasis on quality.
- Having ambassadors supporting the programme was key, both from within the organisation and for participants involved.
- There was a spirit of adventure about NT Live that had seen it willing to work in different ways, find new partners, employ new financial models, and take new artistic approaches.
- It was important to distinguish between commercial and mission-related activities; however, the pursuit of not-for-profit mission and commercial exploitation needed not be mutually exclusive.
- Currently, each arts organisation would have to negotiate its own partnerships. Other examples of rights models were provided in the further resources section. In the future, there may be a role for a universal framework relating to legal rights and digital delivery.

Logistics

- While NT Live had chosen to manage production logistics in-house, it had also drawn on external expertise brought in for the preparation and for the night of the screening.
- Each show needed a slightly different approach, but this was best managed following a process template.
- A collaborative approach was the key to success. It was important the broadcast team worked seamlessly with the theatre staff.
- There were a large number of people working on a live broadcast with a wide range of responsibilities; communication was critical and a strong overseeing organisation was needed to ensure nothing slipped through the cracks.

Marketing

- Touring companies would recognise NT Live's process of producing marketing assets and liaising with partners. The main challenge that NT Live had to address was in building a new brand and marketing to so many venues at one time.
- International distribution had required NT Live to take a second look at how its brand worked abroad, and to assert the key benefits in different terms.
- Digital distribution of theatre lent itself to promotion through digital marketing tools, such as web, social media and email.

Audience

- NT Live had generated larger audiences for individual performances, and reached new audiences for the National Theatre's work.
- The quality of NT Live was considered high, and some aspects of the screened performance were more emotionally engaging than the stage performance.
- There may be limitations to the 'anytime, anywhere' attitude to the consumption of content. The response to the live aspect of NT Live suggested that there is a right time and a right place for some cultural experiences.

Financial Sustainability

- Bringing together specialist freelancers and existing theatre staff had proved a cost-effective approach.
- A global distribution network had been essential to financial feasibility.
- Initiatives such as NT Live had the potential to attract sponsorship, offering benefits relating to access, wide brand awareness and innovation.
- NT Live had produced and distributed performances originated by other producing companies (Complicite and Donmar Warehouse). Collaborative working helped to contain costs and made the project achievable by working as a co-production, whereby partners shared the costs and risks

Nesta et al. *A Manual for Bringing Theatre to the Screen.* Miracle Theatre: 2015
The manual complements Miracle Theatre's Research and Development study: Scott, Bill; Ukleja, Annie, et al. *Miracle Theatre: Live & Digital, Research & Development Report.* Digital R&D Fund for the Arts: 2015

The 'manual', created by the rural touring company, Miracle Theatre, was the result of a period of experimentation and exploration of the interface between live and digital carried out by Miracle Theatre in partnership with Dogbite Film Crew, Golant Media Ventures, Cinegi and Falmouth University. Through two case studies, the manual sought to define a sustainable yet innovative business model for the production and distribution of theatrical recordings, for cinema and digital broadcast, to a network of rural audiences. The manual provides significant detail regarding the logistics and creative decision-making behind the technical production of recording a digital version. The manual is likely particularly useful for producers and venues in taking theatre to screen.

Key Findings:

- There was significantly higher audience engagement in 'made for screen' versions in comparison to 'as live' versions. 'As Live' screenings received the lowest overall ratings
- The case for live streaming small-scale theatre performances via broadband to community venues still had to be made. The technological demands seemed disproportionately high compared to the quality of the experience.
- The case appeared to be stronger for exploiting the technology to connect special one-off community events across a number of venues.
- In their experience, the costs outweighed the benefits for live streaming small-scale theatre performances to rural community venues. A new business model was needed.
- Several film industry concepts were suggested for application. Notably, attention to the master recording rights and equity-sharing by cast and crew.

Digital

- Recording and broadcasting digital versions of productions extended the life and reach of work, inviting a wider, potentially global audience, and generating additional income.
- The film sector's most applicable methods of distribution (theatrical and digital) and social media marketing were reviewed in two rural touring recordings' case studies.
- The enhanced production value of a 'Made for Screen' theatrical version may have contributed to a perceived loss of the 'sense of a theatrical event'. This can be mitigated in several ways. Supplemental offerings such as hosts and Q&As emphasise the 'live' nature of the event.

OFCOM. "On-demand and Online Research: Consumption and Concerns." 2016.

Research from Ofcom examined the 2015 trends surrounding consumption of online and VoD content in adults and teens in the UK. The report comprised data taken in the form of online and in-person surveys, from 1,453 adults and 500 teens that used on-demand and online services. The type of on-demand and online service content most frequently streamed and/or downloaded was not specified.

Key Findings:

- With the exception of TV catch-up services, on-demand and online service consumption among 16-24 year olds was nearly universal.
- Adult use of VoD services increased from 71% to 74% from 2014 to 2015.
- TV catch-up services, such as BBC iPlayer and ITV Player, were the most commonly used online media services among 55+ users. However, males, ABC1 socio-economic groups, and parents were more likely to use VoD services. This statistic may be of interest in determining how and where Live Cinema broadcasts are made available online.
- From 2014 to 2015, there was a significant increase in the use of on-demand and online services among older age groups and people in C2DE

socio-economic groups. The preceding statistics represented socio-economic trends in viewership, highlighting current emerging markets for Live Cinema online and on-demand.

Petrie, Matthew, Schutt, Becky and Hadida, Allegre. *A smooth sea never made a skilled sailor – Dero Project: Research Findings and Insights Final Report.* Fusion Research and University of Cambridge Judge Business School: 2012

Established in Autumn 2011, DERO was a multi-sided network of UK orchestras, concert halls, Mixed Arts Venues and technology partners. They collectively aimed to coproduce and distribute high-quality classical music experiences live and on-demand via cinema and online to audiences in the UK and overseas. By working as a network, rather than sole-producer, DERO aimed to be innovative in its complexity and in the uniqueness of the nature of its alliance, which combined scale with complementarity. Collectively, the DERO network was attempting to access new markets and revenue streams through new digital platforms.

Defined in the first year by three concerts staged in the UK between February and May 2012, DERO's participating orchestras were Northern Sinfonia, Orchestra of The Sage Gateshead, Manchester Camerata in residence at the Royal Northern College of Music (RNCM), and London-based Aurora Orchestra, performing from Roundhouse. Concerts were streamed to participating Mixed Arts Venues, namely Alnwick Playhouse, Northumberland, The Maltings Theatre and Cinema, Berwick-upon-Tweed, Gala Theatre, Durham and Otley Courthouse.

The DERO project was one of eight schemes selected for the pilot Digital R&D Fund for Arts and Culture, launched by Arts Council England, the Arts and Humanities Research Council, and the National Endowment of Science Technology and the Arts (Nesta) in autumn 2011.

Key questions:

- Do digital platforms (live streams) attract a new and different audience?
- Do digital platforms deliver an enhanced experience on par with (or even superior to) that of live performances?
- Are orchestras and venues provided with adequate support to set up and implement digital platforms?
- What could be a viable business?

Key findings:

- Digital platforms attracted a new and different audience; location of the venue, price and the ambience of the venue were the key attendance drivers
- Digital platforms did not deliver an enhanced performance on par with live screening – the emotional and immersive experience gap between the live performance and the streaming was significant
- Programme was not based on popularity or audience demand, but from available inventory of participating venues' scheduled event
- Technology was a real barrier – public broadband network was not sufficiently reliable to deliver live streaming to rural and remote locations.
- Marketing of live streams did not produce desired outcomes resulting in low attendance

- A viable (i.e. profitable) business model was not determined with likely subsidy required to bridge the gap in funding

Richardson, John M. "Live Theatre in the Age of Digital Technology: 'Digital Habitus' and the Youth Live Theatre Audience." *Journal of Audience & Reception Studies* 12.1 (2015): 206-21.

This article investigated the results of a 2-year qualitative study that assessed how youth audiences experienced live theatre, given their inherent attachment to the digital world. More specifically, the study's findings drew upon how students, aged 16-18, interpret a 4-play theatre series. Student response was measured using anonymous, online surveys and a focus group comprised of four students. The lead researcher, John M. Richardson, acknowledged the limitation of the findings with respect to the sample size and audience focus (students' shared upper-middle class background as well as the traditional nature of the plays selected). However, the outcome of the study was optimistic – youth audiences represented an untapped market, who can benefit emotionally and intellectually from live theatre.

Key Findings:

- Youth audiences expressed a fear of getting bored in theatre venues, due to their cyber-induced, short attention spans.
- Live theatre was viewed as a reprieve from the cyber world for youth audiences. They were seeking tangible connection, heightened emotional response, and stress relief – all of which can be found on the stage.
- Theatre administrators and educators alike could capitalise on these results through the addition of educational initiatives that utilise live theatre.
- Though not fully assessed, avant-garde live theatre may represent an even bigger sub-genre of interest to youth audiences.

Tuck, Fiona and Abrahams, Mitra, TBR. *Understanding the Impact of Event Cinema – an Evidence Review.* Arts Council England and British Film Institute: 2016

This research delineated the current landscape of Event Cinema in England, taking a holistic overview of how stakeholders are impacted – positively and negatively – by the sub-sector's emergence and forecasted growth. Due to Event Cinema's relative infancy, and accompanying fragmented means of data collection and sharing, the report was designed to 'inform discussion, rather than present firm evidence'. The report painted a positive future for Event Cinema, expecting it to diversify and contribute to the world box office significantly, if not guaranteeing its survival. The report also reaffirmed the necessity for collaboration among stakeholders, data transparency, and brand development for continued success.

Key Findings:

General

- The research found no evidence to suggest that film/theatre audiences were being displaced by Event Cinema. There appeared to be a growing appetite for more Event Cinema screenings, but not for live theatre.

- Opera and theatre were the cash cows of Event Cinema. Film/documentary and comedy were now also emerging as profitable genres. It would be useful to obtain data relating to Event Cinema screenings by cinema type and price to explore this in further detail.
- Event Cinema scheduling had a mixed effect on traditional film distributors and exhibitors.

Challenges

- The Event Cinema sector was dominated by big players; however, there were several notable small-scale successes.
- A lack of awareness persisted surrounding the 'Event Cinema' brand; this can be remedied through more unified and consistent marketing activities.
- Greater cooperation was needed between distributors, exhibitors and theatres for the scheduling of cinema slots to maximise financial return.
- Knowledge gaps still existed in nearly all aspects of Event Cinema, due largely to the multi-stakeholder nature of the sector. Notably, was Event Cinema a new art form? How could organisations in rural areas be effectively engaged? Was there any consistency in Event Cinema viewing patterns? How could small-scale venues be encouraged to enter the market?

UK Cinema Association (previously Cinema Exhibitors' Association), *Annual Reports 2013-2014*.

This 2014 report reviewed the current landscape of the UK cinema industry. On a whole, cinema admissions and revenues were slightly down from 2013, despite successes of digital 3D and the Event Cinema sub-sector. 2014 revenues from live theatre, ballet, and opera doubled from 2013, representing 3% of the total box office, or £36 million. Of particular interest to live and Event Cinema, the UK Cinema Association and factions were addressing legislation and industry trends that would preserve the 'unique nature of the cinema experience' that united local communities.

Key Findings:

- 'Zero hour contracts' - where employees are hired, but not guaranteed a minimum number of working hours - were strongly resisted by the Association, but to no avail. The job opportunities brought upon by more frequent Event Cinema could serve to allay this issue for cinema employees.
- Currently, live broadcast audiences do not pay VAT on cinema tickets, though their 'in-house' theatre/opera/ballet counterparts do. This had been raised as a contentious issue.
- The Association had attempted, but failed, to implement an Apprenticeship programme that would prepare entry-level cinema staff for higher-level, industry specific positions. If the programme were approved in the future, Event Cinema professionals could also benefit.

UK Film Council. *Bringing cinema to rural communities: the UK Film Council's Rural Cinema Pilot Scheme*. 2012.

The objective of the Rural Cinema Pilot Scheme was to bring a high-quality cinema experience to rural areas with an unmet demand. The scheme allocated £1.2million of lottery funding to three rural areas in need: Shropshire, Wiltshire, and North Yorkshire. The scheme strategically provided funding and support to a single organisation that represented an association of film bodies in a specific rural area. The umbrella organisation determined how to disseminate funds and equipment, and also strategically implement various area-wide development initiatives to ensure that the greatest benefit is achieved. The results of the Pilot Scheme were not included in the report.

Key Findings:

- The greatest barriers facing rural cinema organisations were quality of presentation, supply of content, and poor marketing.
- Rural cinemas must make an expensive, but necessary transition from DVD to digital projection. The scheme would mitigate this obstacle through the contribution of a 'touring version' of a DCI projector, which would serve multiple venues within each region.
- The scheme also planned to install the equipment required for digital 3D and satellite broadcast, due to increased interest.

van Eeden, Stephan, "The impact of "The Met: Live in HD" on local opera attendance." 2011

This thesis presented a quantitative analysis of the effect of 'The Met: Live in HD' on local live opera companies. The research examined audience behaviour, with respect to 'Live in HD' broadcast attendance, live professional opera attendance, and live amateur opera attendance (both midsize). The study was designed to inform how local live opera companies might respond to technologies like Live in HD to maintain and grow their audiences. The data drew from 187 e-survey respondents in a single major North American city. As such, the sample size was not robust, and does not reflect the potentially divergent behaviours of suburban, rural, or international audiences.

Key Findings:

Audience Crossover

- Live in HD did not cannibalise live opera attendance, but it also does not yield higher live opera attendance. Ultimately, the majority of participants prefer both (72.3%).
- For a portion of frequent HD attendees, HD may be a substitute for infrequent live opera attendance.
- Live in HD did not generate a newfound interest in opera.
- Many preferred Live in HD to amateur opera performances in regional theatres.
- Live in HD was generally considered comparable, not inferior, to live opera.
- Live in HD did not replicate the live opera experience. In contrast, HD broadcasts were now considered a uniquely hybrid experience,

borrowing from the tenets of established media formats. Live in HD replicated the communal atmosphere of live opera in the cinema space, while simulating the production principles of live sports casting.
- The Live in HD audience was generally similar to the live opera audience, with the exception of a more prevalent lower income audience. In fact, data suggested that Live in HD may lure away price-sensitive patrons who could not afford live opera.

Maturing Market

- Respondents most commonly cited 'previous attendance' as the most common reason to attend live in HD, implicating general audience satisfaction and brand loyalty. This also implicated Live in HD's position as a maturing market.
- Live in HD subscription did not have as strong an effect on Live in HD attendance as Live Opera subscription had on Live Opera attendance.
- Live in HD had catalysed the expansion and reach of Metropolitan Opera programming in theatres and in cinemas.

The Warwick Commission. *Enriching Britain: Culture, Creativity and Growth. The 2015 Report by the Warwick Commission on the Future of Cultural Value.* The University of Warwick: 2015

- The report stressed the importance of ensuring that national arts and heritage organisations deliver meaningful, accountable, national impacts felt in demonstrable ways in definable and measurable areas of benefits across the country.
- Watching something live-streamed in a cinema should not become the default baseline entitlement of local communities outside of major population centres.

Wise, Karen. *English Touring Opera in Cinemas Report.* Presentation to ETO Management. English Touring Opera and Guildhall School of Music and Drama in collaboration with the Barbican Cinema. 2014

Funded by Creativeworks, the project aimed to understand the appeal and audience experience of live cinema broadcasts of opera in London, in order to see whether lessons may be learned for live opera companies. Research took the form of two audience focus groups and a survey of 234 audience members attending opera at the cinema in October and December 2013.

Key findings:

- Existing opera audiences highly value the opportunity to see productions that are geographically and financially out of reach, often enjoying a sense of participation and shared experience similar to live events.
- 81% of cinema opera attendees were over 60 years old, with an age profile slightly older than that typically found at live opera.
- Attending a cinema broadcast of opera does not regularly inspire cinema-goers to attend live opera in a theatre, with 85% of respondents reporting no increased motivation to attend live after their cinema experience.

- The researcher reported that four themes emerged, expressing attitudes towards cinema opera in the context of its relationship with theatre. Views were split between the following:

  1. There is nothing like live opera and the theatre cinema can only ever be second best to this.
  2. Cinema is a good alternative to live theatre for those who cannot afford or access the opera house
  3. Cinema opera is a new art form, a genre in itself. It offers something different, equally valuable or better.
  4. The potential of cinema to be good for newcomers, overcoming stereotypical perceptions of opera, and break down barriers to attending

- Quantitative analysis further revealed that people's perceptions of the importance of value for money, affordability, accessibility, venue and time are systematically related to their level of theatre attendance: the higher the level of importance they attach to these, the less frequently they attend the theatre.

Appendix 4: Methodology

In order to answer the questions identified in the project brief and subsequent consultations, a variety of primary research tasks were undertaken, including:

- An online survey of theatre audiences;
- Bilateral follow-up phone interviews with theatre audience members who completed the online survey;
- An online survey of theatre organisations, including distributors and exhibitors;
- Focus groups with theatre directors, producers and exhibitors;
- Bilateral interviews with theatre professionals and industry experts; and
- A review of Live-to-Digital related social media.

The findings from this primary research were considered alongside relevant literature, including several recent reports that explore similar subjects. The full literature review may be found at Appendix 3.

Online Audience Survey

DISTRIBUTION

In order to generate in-depth data around Live-to-Digital audiences, an online survey was fielded to theatre audiences through a variety of 74 industry partners (see Figure 82 on following page for a list of partners). In addition, the survey was distributed to the mailing lists of Arts Council England, UK Theatre, Society of London Theatre and participating organisations in the Digital R&D Fund, advertised on social media (including in tweets from The *Guardian*'s Lyn Gardner) and in a blog post written about the study.

In all cases, the survey was distributed to a randomised subset of partners' lists. 1,393 surveys were returned by 18 May 2016, with 1,263 fully completed, for a completion rate of 91%. Assuming an evenly distributed survey and confidence level of 95%, this equates to a margin of error of approximately 3%.

FIGURE 82
Audience Survey Distribution Partners

Aran Dramatica
Babbling Vagabonds
Barn Cinema
Belarus Free Theatre
Belgrade Theatre
Bike Shed Theatre
Bishops Castle
Brewery Arts
Calestrad (music band)
CDET
Central Bedfordshire Council
Concert Theatre
Create London
Defnet Media
Digital Theatre
Eastern Angles
Eclipse Theatre
English Touring Theatre
Event Cinema Association
Falkirk Community Trust
Fiery Angel
Firestation Centre for Arts and Culture
Forum Cinema
Full House
Gecko Theatre
Grassington Festival
Haver Hill Arts Centre
Hoipolloi
Include Arts
ITC Arts
Jam Jar Cinema
Live Theatre, Newcastle
Miracle Theatre
Miss Nightingale
National Theatre
Northern Ballet
Northern Stage
Northumberland Theatre Company
Nunu Theatre
Orion Cinema
PCM creative
Pegasus Theatre
Pentabus Theatre
Platform 4
Proteus Theatre
Puppet Craft
Rambert
Riverside Studios
Royal Shakespeare Company
Saffron Screen
Scott Cinemas
Sheffield Theatres
Sight for Surrey
Stag Community Arts Centre
Stage Text
Strode College
Surrey County Council
Talking Birds
Tara Arts
The Regal Cinema
The Stables
The Yard Theatre
Theatre Royal, Newcastle
Theatre Royal, Winchester
Theatrical Niche
Time Won't Wait
Tyneside Cinema
Vincent Dance Theatre
Vocal Eyes
Vortex Jazz
Wales Millennium Centre
Wem Town Hall
Wotton Cinema
Young Vic Theatre

PROTOCOL

In consultation with the project steering committee, questions were generated around four categories:

- Demographic data;
- Live theatre participation;
- Event Cinema participation;
- Online and television streaming participation.

WEIGHTING AND SEGMENTATION

The robust size of the sample set allowed for segmentation by a variety of characteristics, including age, annual income, geography and past participation (Figure 83). For the purposes of segmentation, geography is characterised as either 'rural' or 'urban' following the rural-urban classification defined by the Office for National Statistics' 2011 Census Output Areas Rural-Urban Classifications, while participation is determined by whether a survey respondent self-reported participating in live theatre, Event Cinema, or online or television streaming. Individuals who had not participated in live theatre in the last five years were discarded from the data set.

FIGURE 83
Audience Survey Segmentation

Segment	# Responses
Age	
16-24	52
25-44	238
45-64	554
65-74	331
65+	362
Income	
Less than £20,000	204
£20,000 – £39,999	365
£40,000 – £59,000	202
£60,000 – £99,999	167
£100,000 and over	68
Participation	
Attended Event Cinema Screening	1077
Did Not Attend Event Cinema Screening	132
Attended Streamed Performance	393
Did Not Attend Streamed Performance	755
Geography	
Urban	854
Rural	279

In order to reduce skew in the analysis, responses were weighted to align with theatre demographics as reported by the 2015 Taking Part Survey. It was also the intention to align urban and rural geographic characteristics to that survey, but as the survey results matched that distribution already within the margin of error, no additional weighting was performed.

Detailed question-by-question survey results may be found at Appendix 6.

AUDIENCE INTERVIEWS

One-on-one phone interviews were then conducted with a randomised selection of online survey participants who indicated they would be willing to participate. The interviews delved deeper into the initial answers provided in the surveys, particularly around motivations for participating in Live-to-Digital theatre; barriers to participation; and future interests. 21 individuals were interviewed (Figure 84).

FIGURE 84
Audience Interviews Segmentation

Segment	# Responses
Age	
16-24	4
25-44	5
45-64	9
65+	3
Participation	
Attended Event Cinema Screening	15
Did Not Attend Event Cinema Screening	6
Attended Streamed Performance	8
Did Not Attend Streamed Performance	13
Geography	
East England	2
East Midlands	2
Greater London	4
North East	2
North West	2
South East	2
South West	2
West Midlands	3
Yorkshire & Humberside	2

Online Organisation Survey

DISTRIBUTION

In order to generate in-depth data around Live-to-Digital suppliers, an online survey was fielded to theatre organisation managers through a variety of industry partners, including:

- Arts Council England
- Cinegi
- Event Cinema Association
- National Rural Touring Forum
- Nesta / Arts Council England Digital Culture List
- Picturehouse Entertainment
- Society of London Theatre
- UK Cinema Association
- UK Theatre

245 complete responses were returned. This was lower turnout than desired, but was sufficient for analysis. As noted by several stakeholders, there is a level of 'survey fatigue' among this cohort, as a handful of other sector surveys took place at the same time or soon before this research began.

PROTOCOL

In consultation with the project steering committee, questions were generated around a variety of modules.

- Live-to-Digital Producers
- Drivers and motivations
- Producing Live-to-Digital
- The audience experience
- Outcomes
- Live-to-Digital Non-producers
- Barriers to producing
- Future prospects
- Exhibiting Live-to-Digital
- Distributing Live-to-Digital
- Marketing and general feelings
- Organisation and respondent demographics

SEGMENTATION

As with the online audience survey, the supplier survey segment responses into a variety of categories including budget size, kind of activity, and geography. Organisations who did not indicate that they produce, exhibit, or distribute theatre at all were discarded from the dataset (Figure 85).

FIGURE 85
Supplier Survey Segmentation

Segment	# Responses
Supplier Activity	
Theatre Producer	175
Exhibitor	49
Budget	
Less than £200,000	114
£200,000 – £999,999	77
£1,000,000 and over	46
Participation	
Has Produced Live-to-Digital	58
Has Not Produced Live-to-Digital	111
Geography	
Urban	207
Rural	30

Based on the forthcoming study, Theatre in England, the 175 producers surveyed represents 15% of the English market's total producing theatres. Respondents identifying as distributors (5% of respondents) were too few to comprise a segment of their own within the Supplier Activity category. While exhibitors were examined as their own segment (49 total responses), we have been conservative in drawing any conclusions about them as that sample size is relatively low compared to the estimated total number of exhibitors nationally.

Detailed question-by-question survey results may be found at Appendix 6.

ORGANISATION FOCUS GROUPS

Supply-side focus groups were employed to explore complex behaviours that could not have been easily assessed through the organisational survey tool. The focus groups provided a qualitative data set that acted as a counterpoint to the more quantitatively-focused online surveys. All conversations were recorded, transcribed and analysed.

Focus groups were kept to a protocol covering the following key issues:

- Establishing context
- Opportunities
- Challenges
- Platforms
- Programming
- The experience
- Marketing
- Touring circuit and displacement
- Resource and investment

During each focus group, there were two facilitators in the room, one that primarily led the conversation and the other who focused on tracking body language and other forms of non-verbal response, so that layer of data were not lost in the transcription. To ensure equitable geographical representation, three focus groups were facilitated with arts organisations representatives from the wider catchment of Birmingham, London and Newcastle; rural and urban organisations were invited to attend these focus groups. Those that were not available to attend but expressed interest in the study were encouraged to complete the survey and take part in an individual interview. On average, each focus group was comprised of seven individuals.

Personal email invitations were sent to identified prospective participants via AEA Consulting. Participants were selected with an objective of ensuring a data sample representative of the broader theatre ecology. Selection was guided by the following parameters:

- Geographical location (urban / rural)
- Artistic programme
- Business model
- Scale (budget, staff, seating capacity)
- Invitee job title

THEATRE PROFESSIONAL AND INDUSTRY EXPERT INTERVIEWS

In order to inform the research, a series of theatre professional and industry expert interviews were conducted. The majority of these interviews took place before survey and focus group protocols were developed, so that the interviews informed their creation. The list of interviews was developed in close consultation with the study commissioners, with an aim to represent a broad diversity of opinions and expertise. In all, 34 interviews were conducted; a list of interviews may be found at Appendix 5.

Live-to-Digital subject areas covered in the course of interviews includes:

- Current work
- Market opportunities
- UK Market understanding
- International Market understanding
- Live-to-Digital and the UK Touring Market; Live-to-Digital and Independent Cinema
- Business models
- Marketing
- The Infrastructure
- Challenges
- UK research and policy context

Social Media Analysis

DESIGN AND DATA

Social media around a specific Live-to-Digital production – Complicite's *The Encounter* – was captured and analysed in an attempt to understand consumer sentiments and reactions. The social media was restricted to Twitter and focused on a variety of themes:

- Comparisons of live vs. digital experience (including regret at not seeing live)
- Personal anticipation of viewing
- Reflections following viewing (including citing quotes from the production, recommendations that include what seem to be personal observations - "catch the astonishing..." AND "If you do one thing tonight" – although these may be marketing messages, too difficult to parse. However, if they said something about "go to our website," that was not marked as reflective.)
- Motivation for viewing via digital
- Price
- Mention of technical issue
- Repeat viewing (intent or claimed)
- International location of viewer
- Accessibility

The production was being shown in the theatre, with paid tickets required, and streamed for free during an overlapping period of time. Three runs of the production took place during the capture period of 9 March – 23 March 2016.

- Live performances at The Barbican 12 February - 6 March 2016
- Live stream free online via YouTube 1 - 8 March 2016
- Live performances at Manchester HOME 16 - 19 March 2016

A total of 1,814 unique tweets were captured and studied.

ANALYSIS

It is often not possible to distinguish between audience tweets and those with some supply-side affiliation, particularly when it comes to recommending a production to others. Marketing language bleeds across supply and demand, just as commenters may simultaneously be playing both roles. Accordingly, tweets were categorised conservatively where context or meaning is unclear. For most statistics, a personal statement of reflection about the work or anticipation of viewing was required, in order for the tweet to be counted.

Mention of a foreign country within a tweet or in the user location metadata were categorised as 'International'. No distinction between England and the rest of the UK was made, due to lack of detailed location information.

Those tweets for which it was impossible to determine whether the content referred directly to the production, or where the meaning of the tweet was unclear were excluded.

In summary, the findings include:

- Audience reaction to the performance as expressed on Twitter is uniformly positive or neutral, regardless of viewing in theatre or live streaming. Audience members are almost three times more likely to comment about their experience if they had viewed online than on theatre viewing. However, the majority of comments do not specify whether the viewer was in the theatre or watching online.
- 6% of all tweets mention an obstacle to attending a live performance (difficulty of obtaining tickets, location outside of UK, accessibility).
- 2% of people report viewing the performance more than once, either both live and online or exclusively online.
- The price of live theatre tickets is not mentioned in any tweets. However, about 2% of tweets mention that the live stream is free.
- 'Star power' has a limited impact on audience behaviour, as observable for this production on Twitter; promotional videos and promotional tweets by Gillian Anderson and Benedict Cumberbatch are discussed in tweets about 1% of the time.
- Very few comments mention technical difficulties.

The analysis is referred to in the study where appropriate; however, as this is an in-depth examination of a single company's production, no conclusions about the field in general are drawn from it.

Appendix 5: Stakeholders Consulted

*denotes Case Study interviewee

Marc Allenby, Director of Distribution, Picturehouse Entertainment

Sara Aspley, Director of Commercial Services, Royal Shakespeare Company

Dr. Sarah Atkinson, Senior Lecturer in Digital Cultures, Kings College London

Afroditi Barmparousi, Cinema Arts Network

Jon Bath, Head of Production, Fiery Angel*

Philip Bernays, Chief Executive, Theatre Royal Newcastle*

Mandy Berry, Chair, Miracle Theatre

Don Boyd, Founder, HiBrow*

Johnny Carr, Alternative Content Manager, Vue Entertainment

Gez Casey, Literary Manager, Live Theatre

Phil Clapp, Chief Executive, Cinema Exhibitors Association

Melissa Cogavin, Managing Director, Event Cinema Association

Justin Cooke, Chairman, Big Clever Learning (Digital Theatre)

Ed Corn, Senior Consultant, MTM

Christine Costello, Creative Director and Co-Founder, More2Screen

Rishi Coupland, Head of Data Intelligence, The National Theatre

Joshua Dachs, President, Fisher Dachs Associates

Mark Dobson, Chief Executive, Tyneside Cinema

Sarah Ellis, Head of Digital Development, Royal Shakespeare Company

Amy Fawdington, Director of Communications and Sales, Northern Stage

Holly Foulds, Communications Manager, Complicite*

Elizabeth Freestone, Artistic Director, Pentabus Theatre

Lyn Gardner, Theatre Critic, Guardian

Lyn Goleby, Chief Executive, Picturehouse

Briony Hansen, Director, Film, British Council

Jill Heslop, Open Clasp Theatre Company

Kirsty Hoyle, Director, Include Arts

Johnathan Ilott, Associate Director, The Dukes Theatre*

Lucy Jones, Executive Director, UK/Italy/South Africa/ME, comScore Inc. (previously Rentrak)

Zulfi Karim, Founder, World Curry Festival & Cultural & Destination Marketing Agency

Poppy Keeling, Associate Producer, Complicite*

Emma Keith, Head of Broadcast and National Theatre Live

Jonathan Kennedy, Executive Director, Tara Arts

Michael Kenyon, Theatre Programme Manager, Vocal Eyes

Dominic Lake, Deputy Director, Head of Arts, Libraries & Cultural Property, Department of Culture, Media and Sport

Ralph Lister, Development Director, National Rural Touring Association

Liv Lorent, Artistic Director, balletLORENT

David Luff, Producer, Soho Theatre

Tamiko Mackie, Group Head of Content Development, Odeon UCI Cinema Groups

Penny Mills, Area Director, London, Audience Agency

Fiona Morris, Chief Executive, The Space

Sally Noonan, Director of Development, Almeida Theatre

Michael Peers, Digital Manager, Old Vic Theatre

Tim Plyming, Director of Digital Arts and Media, Nesta

Joanna Reid, Executive Director, Belgrade Theatre

Clare Robertson, General Manager, Belarus Free Theatre*

Stuart Rogers, Executive Director, Birmingham Repertory Theatre

Marcus Romer, Creative Director, Arts Beacon

David Sabel, Producer, London Theatre Company

Susannah Simons, Head of Arts, Canvas, Brave Bison (formerly Rightster)

Chloe Stott, Producer, Alphabetti Theatre

Joe Sumsion, Artistic Director, The Dukes Theatre*

Nick Sweeting, Producer, Mark Bruce Company and co-Founder, Improbable

Howard Tait, Trustee, Theatre Royal Newcastle*

Patrick Towell, Chief Executive, Golant (Cinegi)

Rebecca Vaughan, Director / Producer, Dyad Productions

Ivan Wadeson, Executive Director; The Dukes Theatre*

Neil Webb, Director, Theatre, British Council

Ashleigh Wheeler, Producer, The Yard Theatre

Denise Wood, Executive Director, Almeida Theatre

Appendix 6: Detailed Survey Results

TABLE 1

Audience Survey: Responses

		weighted n	Age: 16-24	Age: 25-44	Age: 45-64	Age: 65-74	Age: 75+	Income: Less than £20,000	Income: £20,000 – £39,999	Income: £40,000 – £59,000	Income: £60,000 – £99,999	Income: £100,000 and over	Participation: Live Theatre	Participation: Event Cinema	Participation: Streamed Performance	Participation: No Streamed Performance	Location: Urban	Location: Rural
A1	**Age**																	
	16-24	**152**	152	-	-	-	-	54	48	24	9	-	152	131	107	45	125	15
	25-44	**372**	-	372	-	-	-	77	113	58	62	21	372	312	202	164	284	41
	45-64	**415**	-	-	415	-	-	47	104	74	70	35	415	370	116	299	280	101
	65-74	**157**	-	-	-	157	-	25	53	27	14	4	157	149	39	116	105	42
	75	**91**	-	-	-	-	91	13	38	9	6	-	91	88	17	73	65	25
A2	**Income**																	
	Less than £20,000	**216**	54	77	47	25	13	216	-	-	-	-	216	173	104	110	165	26
	£20,000 – £39,999	**355**	48	113	104	53	38	-	355	-	-	-	355	321	142	208	279	59
	£40,000 – £59,000	**191**	24	58	74	27	9	-	-	191	-	-	191	168	78	113	135	43
	£60,000 – £99,999	**161**	9	62	70	14	6	-	-	-	161	-	161	146	64	97	112	30
	£100,000 and over	**59**	-	21	35	4	-	-	-	-	-	59	59	56	19	39	36	16
A3	**Participation**																	
	Attended Event Cinema Screening	**1050**	131	312	370	149	88	173	321	168	146	56	1050	1050	424	618	763	197
	Did Not Attend Event Cinema Screening	**135**	21	60	45	7	3	42	33	23	15	3	135	-	58	78	95	27
	Attended Streamed Performance	**482**	107	202	116	39	17	104	142	78	64	19	482	424	482	-	358	64
	Did Not Attend Streamed Performance	**697**	45	164	299	116	73	110	208	113	97	39	697	618	-	697	496	158
A4	**Location**																	
	Urban	**859**	125	284	280	105	65	165	279	135	112	36	859	763	358	496	859	-
	Rural	**224**	15	41	101	42	25	26	59	43	30	16	224	197	64	158	-	224
A5	**Gender**																	
	Male	**272**	21	80	92	50	29	48	80	53	42	18	272	234	127	144	209	43
	Female	**899**	128	288	320	104	59	167	270	135	119	40	899	800	344	548	637	178
	Other	**5**	-	2	1	1	1	-	2	2	-	-	5	5	4	0	5	-
A6	**Employment Status**																	
	In education	**88**	71	12	5	-	-	34	14	17	6	1	88	76	50	39	58	16
	Employed full-time	**439**	57	235	145	3	-	47	150	80	92	22	439	375	231	208	348	56
	Employed part-time	**116**	3	41	62	10	-	28	27	17	22	3	116	102	34	80	81	26
	Full-time parent/ caretaker	**34**	-	12	22	-	-	5	4	4	4	4	34	28	11	23	18	11
	Self-employed	**148**	9	57	63	16	4	44	39	19	15	14	148	133	73	73	112	23
	Unemployed	**25**	12	7	6	0	-	7	7	5	-	-	25	21	14	10	19	2
	Retired	**324**	-	2	108	126	87	51	112	47	23	13	324	305	62	257	217	86

			Age					Income					Participation				Location	
		weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
A7	**Choose one option that best describes your ethnic group or background**																	
	White British	**1007**	119	293	372	143	80	156	313	168	142	50	1007	900	373	628	729	208
	Non-White British	**155**	33	68	37	9	7	54	33	20	19	8	155	128	100	53	112	11
Cultural Participation																		
A8	**How close do you live to the nearest theatre?**																	
	Within walking distance	**291**	57	130	59	27	19	70	101	40	38	10	291	248	145	144	256	11
	Less than ten minutes by vehicle	**156**	18	57	52	18	12	30	54	28	19	8	156	138	67	89	127	17
		503	71	127	199	67	39	76	140	84	83	23	503	449	196	303	363	101
	30-60 minutes by vehicle	**245**	15	65	97	44	23	36	68	43	25	16	245	222	82	160	134	88
	More than one hour by vehicle	**28**	3	5	14	4	1	4	11	3	1	3	28	24	12	14	12	10
	I don't know	**5**	3	-	2	-	-	1	-	-	4	-	5	5	3	2	2	-
A9	**Which of the following can you see at the theatre nearest to you? Please tick all that apply.**																	
	Drama	**1107**	128	349	392	151	87	196	332	177	153	54	1107	982	440	659	796	211
	Stand-up comedy	**736**	86	241	278	89	41	129	211	127	106	36	736	653	300	430	536	154
	Musical	**916**	92	284	337	126	75	144	276	153	123	51	916	815	359	551	659	185
	Family theatre	**928**	119	296	330	122	61	168	279	150	125	46	928	820	374	547	669	183
	Pantomime	**802**	77	224	311	118	71	129	239	129	106	42	802	705	282	512	577	174
	I don't know	**29**	9	9	7	2	3	13	8	4	2	1	29	28	15	15	21	7
A10	**Are you a season ticket holder at any of the following? Please tick all that apply**																	
	Theatre organisation	**120**	6	26	48	18	22	13	37	17	12	10	120	111	51	69	83	29
	Dance company	**11**	-	7	3	1	-	3	4	3	-	0	11	11	8	3	10	0
	Opera company	**16**	-	3	6	2	4	2	2	4	2	-	16	15	9	8	13	2
	Cinema	**120**	9	45	40	18	9	32	23	18	14	9	120	114	58	60	96	19
	Sport	**43**	3	15	11	9	4	3	9	5	11	5	43	33	15	28	32	8
	I do not hold a season ticket of any kind	**881**	134	277	308	108	54	173	266	147	122	33	881	769	358	518	639	159
A11	**How many live cultural performances of any kind have you attended in the past 12 months?** *Do not count popular music concerts for the purposes of this question.*																	
	None	**5**	3	-	1	1	-	0	1	-	-	-	5	4	4	1	1	0
	1 time	**41**	3	9	19	3	7	10	8	10	1	4	41	32	13	28	29	8
	2-5 times	**368**	30	120	144	49	25	73	94	56	52	18	368	307	111	254	241	95
	6-11 times	**367**	45	98	129	54	42	46	120	60	58	19	367	347	136	228	265	72
	12+ times	**406**	71	146	123	49	17	86	131	65	51	18	406	360	218	186	324	48
A12	**What type(s) of performances have you attended in the past 12 months? Please tick all that apply.**																	
	Drama	**1049**	131	322	372	143	81	184	316	170	145	53	1049	944	445	596	771	189
	Stand-up comedy	**367**	66	171	106	21	3	77	116	45	60	18	367	320	178	187	283	59
	Musical	**621**	113	224	193	56	35	116	187	92	92	33	621	558	285	330	471	97
	Physical theatre and circus	**243**	63	103	60	13	4	51	88	37	29	16	243	214	135	108	196	30
	Family theatre	**336**	57	128	102	33	16	70	90	54	51	23	336	297	167	168	245	58
	Pantomime	**207**	36	70	66	24	10	34	73	38	16	17	207	179	93	113	164	32

	weighted n	Age: 16-24	25-44	45-64	65-74	75+	Income: Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Participation: Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Location: Urban	Rural
Improvisational theatre	**114**	36	38	32	9	-	28	44	14	11	3	114	101	75	39	83	15
Experimental theatre	**257**	74	94	64	17	7	60	99	45	29	5	257	225	158	99	204	31
Cabaret	**91**	18	45	21	3	4	25	20	17	15	4	91	78	60	31	71	9
Dance – Ballet	**378**	45	113	129	55	36	52	131	66	45	21	378	344	153	221	277	71
Dance – Contemporary	**235**	57	79	70	18	12	36	81	49	27	11	235	212	130	105	192	26
Dance – Other	**125**	21	48	44	11	1	23	43	20	16	7	125	110	76	48	91	19
Opera	**321**	30	79	116	56	41	52	111	51	31	13	321	297	127	192	225	61
Music – Classical	**403**	27	108	150	68	49	56	126	65	62	18	403	366	155	246	293	77
Music – Rock/pop	**301**	30	132	118	22	-	52	88	43	50	22	301	254	124	174	233	40
Music – Contemporary	**240**	27	89	93	23	9	39	75	36	32	15	240	214	123	116	179	39
Exhibitions – Visual Arts	**628**	71	209	214	89	44	115	200	94	81	33	628	567	274	351	459	124
Exhibitions – Heritage	**468**	57	149	166	61	35	83	148	68	67	20	468	413	204	260	355	80
Live Theatre																	
A13 How many live theatre performances have you attended in the past 12 months?																	
None	**24**	3	5	13	3	-	5	9	3	3	-	24	21	1	23	17	6
1 time	**90**	9	24	34	10	13	19	21	14	11	6	90	66	24	66	60	20
2-5 times	**511**	33	158	196	78	46	82	150	73	84	24	511	447	171	336	346	119
6-11 times	**273**	48	70	97	37	22	42	78	59	35	15	273	261	109	162	202	44
12+ times	**288**	60	115	75	28	10	67	97	41	28	14	288	254	177	110	233	33
A14 In the past 12 months, what was the furthest you traveled to attend a live theatre performance?																	
Within walking distance	**20**	3	7	6	2	1	8	0	4	1	-	20	13	3	17	17	-
Less than ten minutes by vehicle	**15**	-	2	5	3	6	4	3	2	1	1	15	14	1	14	13	2
10-30 minutes by vehicle	**111**	15	29	40	16	10	21	29	23	12	5	111	97	40	67	73	25
30-60 minutes by vehicle	**306**	33	99	99	49	26	47	98	48	48	14	306	262	120	185	227	44
More than one hour by vehicle	**709**	95	228	255	85	46	131	215	110	95	40	709	639	312	394	513	147
A15 With how many people did you attend your most recent theatre event?																	
Myself only	**175**	27	62	53	18	16	55	69	12	7	6	175	159	78	94	121	38
2 people (1 other)	**661**	74	217	225	93	51	110	178	108	106	34	661	591	258	399	490	113
3-4 people	**260**	36	72	107	31	15	35	83	54	33	15	260	223	113	147	191	50
5 or more people	**65**	9	15	18	12	10	11	15	14	12	4	65	54	28	36	42	16
A16 Over the past 12 months, approximately how much did you pay on average for each ticket to attend a live theatre performance?																	
Nothing	**8**	-	7	1	0	-	0	3	-	2	-	8	6	3	5	7	1
£1- 10	**65**	33	21	8	2	1	35	19	4	4	3	65	47	40	24	49	6
£11-20	**295**	51	111	81	29	23	80	107	43	30	5	295	258	147	146	215	52
£21-30	**383**	48	98	138	58	41	53	118	67	48	17	383	344	151	226	282	78
£31-50	**324**	12	103	137	51	22	34	91	54	60	24	324	295	98	227	240	61
More than £50	**85**	3	24	40	13	4	8	8	20	11	11	85	77	39	45	49	22

			Age					Income					Participation				Location	
		weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
	Event Cinema																	
A17	**Which types of Event Cinema have you attended? Please tick all that apply**																	
	Orchestral music	**39**	6	7	13	6	7	7	9	7	7	1	39	38	17	22	30	7
	Opera	**292**	15	55	100	68	55	49	97	44	28	10	292	292	105	186	191	68
	Theatre	**997**	119	291	359	144	83	162	302	164	141	50	997	995	396	592	723	188
	Dance	**221**	18	36	92	39	36	30	82	27	25	12	221	221	80	141	150	51
	Museum exhibi-tion tour	**115**	3	21	41	28	22	16	38	15	16	4	115	115	39	76	77	32
	TV programme special	**77**	30	31	11	5	-	22	27	11	8	3	77	76	51	26	71	5
	Sporting event	**12**	-	7	5	0	-	2	-	2	5	3	12	12	2	10	9	2
	Lecture	**45**	6	15	9	4	10	7	12	-	8	3	45	45	24	21	31	11
	I can't remember	**3**	-	-	1	1	1	-	0	2	-	-	3	3	1	2	3	-
	Other	**21**	3	9	6	3	-	10	2	2	2	2	21	20	11	10	15	5
A18	**In what types of venues have you attended Event Cinema for a performance/cultural event (theatre, opera, etc.)? Please tick all that apply.**																	
	Theatre	**227**	30	51	74	36	36	47	74	29	23	11	227	227	90	136	146	58
	Traditional cinema	**792**	92	235	283	115	68	129	248	120	111	33	792	790	312	475	583	150
	Art-house cinema	**395**	51	130	140	49	25	64	124	66	58	20	395	394	188	207	291	63
	Arts centre	**85**	9	22	27	18	9	13	34	13	6	2	85	85	38	47	59	15
	School	**34**	12	10	9	2	-	2	7	10	4	2	34	34	20	14	22	11
	Library	**6**	-	2	2	1	1	3	-	-	-	-	6	6	2	4	3	1
	Hotel/Pub/Res-taurant/Café	**9**	-	3	5	1	-	-	3	1	3	1	9	9	2	7	5	2
	Church hall	**7**	-	3	2	1	-	2	3	1	-	-	7	7	2	5	3	4
	Community centre	**18**	-	5	6	4	3	4	4	3	2	-	18	18	1	17	8	9
	Gallery	**13**	6	2	2	3	-	5	3	0	-	2	13	13	6	6	10	1
	Outdoor public space	**37**	6	17	9	3	1	9	9	6	5	3	37	37	22	14	25	6
	Other	**43**	12	14	11	2	4	11	10	7	3	2	43	43	21	23	37	5
A19	**What types of theatre Event Cinema screenings have you seen? Please tick all that apply.**																	
	Drama	**975**	113	281	351	145	86	164	294	159	138	48	975	975	389	578	711	184
	Musical	**211**	18	58	70	29	36	36	57	27	23	8	211	210	81	128	152	38
	Physical theatre and circus	**30**	3	12	10	2	3	4	6	6	6	2	30	30	14	16	17	10
	Family theatre	**54**	9	14	17	9	6	16	14	7	7	2	54	54	12	41	36	12
	Pantomime	**11**	-	3	2	1	4	3	4	-	2	-	11	11	3	8	9	2
	Other	**85**	6	21	27	18	13	18	31	10	9	3	85	84	32	52	66	16
A20	**Thinking back to the most recent Event Cinema performance you saw would you have seen it live if it was not screened in the cinema?**																	
	Yes	**163**	30	65	41	19	7	40	45	16	24	8	163	163	82	79	121	22
	No	**777**	89	202	298	119	68	125	238	136	110	40	777	775	287	485	559	158
	I don't know	**106**	12	41	31	12	10	9	37	14	10	7	106	106	52	52	80	16
A21	**Have you decided to see Event Cinema rather than a production in person for any of the following reasons? Please tick all that apply.**																	
	Saved me travel	**708**	74	161	280	119	74	116	205	112	105	33	708	707	247	456	491	157

		Age					Income					Participation				Location	
	weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Ticket price (excluding travel) was cheaper	**424**	63	98	147	75	42	75	133	71	61	21	424	423	160	262	304	89
Ticket price (including travel) was cheaper	**586**	86	146	203	89	61	109	176	96	82	28	586	586	227	356	424	119
Prefer the Event Cinema experience	**83**	9	21	28	14	12	18	26	5	14	4	83	83	20	61	63	12
Already seen the live performance	**145**	12	45	55	19	15	18	55	19	23	4	145	145	72	73	112	20
Live performance was sold out	**405**	57	151	150	37	10	49	124	73	61	27	405	405	191	211	313	66
Live performance was not shown concurrently	**112**	15	36	42	10	9	16	37	19	19	6	112	111	58	54	84	16
Disability that precludes travel	**20**	3	2	8	1	6	4	8	2	3	-	20	19	3	17	16	3
Other	**94**	6	29	36	13	10	13	36	12	6	8	94	94	43	51	59	17
A22 **How strongly do agree with the following statements about Event Cinema screenings, based on the last time you attended?**																	
Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%																	
I was totally absorbed																	
not at all important	**30**	-	12	14	4	-	5	8	6	6	1	30	30	10	20	21	7
not very much	**26**	12	9	4	1	-	11	5	6	0	1	26	26	16	10	25	0
somewhat important	**45**	12	15	13	4	-	9	6	11	11	6	45	45	26	19	33	11
fairly strongly	**327**	48	115	99	42	23	57	101	49	46	16	327	327	140	181	232	60
very strongly	**619**	60	158	239	98	65	91	200	96	82	31	619	617	228	388	450	118
I don't know	**1**	-	-	1	-	-	-	-	1	-	-	1	1	-	1	-	-
I felt an emotional response to the performance																	
not at all important	**31**	-	14	13	4	-	5	10	4	6	1	31	31	12	19	20	8
not very much	**21**	3	12	4	2	-	1	6	9	1	3	21	21	16	5	18	2
somewhat important	**49**	12	9	20	8	1	13	5	12	8	3	49	49	22	27	35	13
fairly strongly	**376**	57	115	125	49	30	60	124	49	53	18	376	376	164	207	270	72
very strongly	**561**	60	156	205	87	54	91	169	95	78	28	561	559	203	355	410	100
I don't know	**3**	-	2	1	0	-	1	2	-	-	-	3	3	2	1	3	-
Watching the performance on screen gave me a good sense of what experiencing it live in a theatre would be like																	
not at all important	**38**	6	14	14	4	-	5	8	11	5	1	38	38	17	21	20	11
not very much	**65**	12	31	13	7	1	12	28	3	5	6	65	65	37	26	57	6

	weighted n	Age: 16-24	25-44	45-64	65-74	75+	Income: Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Participation: Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Location: Urban	Rural
somewhat important	**124**	30	43	27	14	10	27	35	19	18	4	124	124	60	64	94	24
fairly strongly	**446**	60	134	164	57	32	73	142	76	67	26	446	445	199	241	323	81
very strongly	**360**	24	84	146	64	42	55	103	57	49	17	360	359	107	253	260	69
I don't know	**8**	-	2	3	2	1	0	3	1	2	1	8	8	1	7	4	2
Broadcasting live theatre to a cinema screen opens up new ways of seeing this artform																	
not at all important	**29**	-	12	15	2	-	3	11	5	5	1	29	29	11	18	19	7
not very much	**16**	6	3	5	0	1	6	5	2	1	1	16	16	9	7	14	2
somewhat important	**43**	6	12	11	8	6	7	12	5	5	1	43	43	21	21	32	7
fairly strongly	**238**	33	74	78	36	19	46	73	50	32	8	238	238	115	120	172	45
very strongly	**694**	86	202	251	97	58	109	211	103	100	43	694	693	254	436	506	129
I don't know	**21**	-	5	9	6	1	3	5	3	3	1	21	21	8	13	16	3
Being in the cinema or other venue was more engaging than if I had been there live in the audience																	
not at all important	**196**	36	65	59	23	13	37	56	25	27	15	196	195	102	94	140	39
not very much	**439**	54	127	161	62	36	71	131	85	61	19	439	439	163	272	318	86
somewhat important	**291**	33	86	106	44	22	49	95	40	45	14	291	290	110	177	214	48
fairly strongly	**66**	9	14	23	10	10	12	23	10	4	3	66	66	23	43	56	8
very strongly	**30**	-	9	13	6	3	1	8	3	6	2	30	30	13	17	18	8
I don't know	**16**	-	9	4	2	1	4	3	2	3	-	16	16	8	9	9	5
Being in the cinema or other venue was a very different experience from attending a live performance																	
not at all important	**18**	-	7	9	2	-	2	7	2	2	2	18	17	11	7	14	3
not very much	**81**	6	22	32	16	6	7	25	22	13	1	81	81	23	59	57	16
somewhat important	**221**	18	67	87	32	17	29	79	35	31	12	221	221	85	136	156	50
fairly strongly	**489**	77	139	169	68	36	80	149	78	71	28	489	489	195	287	358	89
very strongly	**200**	27	62	66	25	20	45	52	23	28	10	200	199	93	106	152	30
I don't know	**30**	3	10	4	7	6	11	4	6	1	1	30	30	12	18	19	8
The experience met my expectations	**988**	131	298	351	138	71	165	299	165	138	50	988	987	411	569	717	184
not at all important	**32**	-	14	15	3	-	8	9	4	5	1	32	32	10	21	20	8

		Age					Income					Participation				Location	
	weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
not very much	**13**	3	5	1	3	1	4	5	3	-	-	13	13	9	4	11	2
somewhat important	**55**	6	14	25	8	3	6	15	5	11	5	55	55	25	30	41	12
fairly strongly	**423**	86	140	128	48	20	79	131	65	60	16	423	423	208	210	311	72
very strongly	**466**	36	125	182	77	46	69	139	88	62	28	466	465	159	304	334	90
I don't know	**53**	-	10	17	10	16	8	16	3	7	4	53	53	9	44	38	13
I felt real excitement because I knew that the performance was captured as a live event																	
not at all important	**33**	-	21	9	3	-	8	9	5	7	-	33	33	18	16	26	4
not very much	**77**	21	21	21	11	4	19	22	12	10	5	77	77	39	37	57	14
somewhat important	**223**	27	70	85	25	16	36	63	45	23	8	223	223	100	122	153	46
fairly strongly	**322**	57	103	108	44	12	51	106	50	53	19	322	322	139	180	236	57
very strongly	**343**	27	89	120	59	48	53	105	51	47	19	343	342	116	224	257	62
I don't know	**42**	-	5	21	9	7	7	11	4	4	2	42	42	9	34	27	12
Based on the event, I would recommend this experience to other people																	
not at all important	**29**	-	14	12	3	-	5	11	5	4	1	29	29	11	18	20	6
not very much	**8**	-	2	5	2	-	0	2	2	1	1	8	8	6	2	7	-
somewhat important	**34**	12	12	3	6	1	10	12	2	1	-	34	34	19	15	28	3
fairly strongly	**250**	39	92	83	26	10	45	73	40	39	16	250	249	120	128	185	45
very strongly	**638**	80	178	232	95	52	103	189	108	93	32	638	637	244	390	459	122
I don't know	**80**	-	9	34	16	22	11	27	8	7	4	80	80	18	62	57	20
A23 With how many people did you attend this Event Cinema performance?																	
Myself only	**208**	36	75	59	23	16	54	78	26	15	8	208	208	97	110	161	34
2 people (1 other)	**541**	54	142	214	90	42	78	162	84	86	25	541	541	183	353	399	100
3-4 people	**244**	24	79	84	30	28	35	73	40	32	19	244	243	110	133	165	51
5 or more people	**51**	18	12	13	5	3	6	8	16	12	2	51	51	30	21	34	11
A24 Approximately how far away is the venue where you have most regularly seen Event Cinema?																	
Within walking distance	**171**	21	58	51	26	15	43	47	29	22	9	171	171	68	101	156	6
Less than ten minutes by vehicle	**175**	24	51	66	20	15	24	53	38	28	12	175	174	51	125	141	22
10-30 minutes by vehicle	**517**	63	125	199	80	49	60	171	74	76	27	517	516	211	302	358	121
30-60 minutes by vehicle	**159**	18	63	45	22	10	40	43	20	19	6	159	159	78	78	91	40
More than one hour by vehicle	**22**	3	10	7	1	-	6	5	6	2	0	22	22	10	12	12	7

	weighted n	Age: 16-24	25-44	45-64	65-74	75+	Income: Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Participation: Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Location: Urban	Rural
A25 How important is it to you that the event in the cinema is live (i.e. knowing that a performance is happening in real time)? *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
Not at all important	**95**	4	22	44	20	5	20	24	20	12	8	95	95	34	61	65	17
Not very important	**236**	13	44	111	61	7	33	88	37	30	10	236	236	77	155	175	37
Neutral	**204**	8	37	82	67	10	28	61	35	29	10	204	201	71	131	142	45
Somewhat important	**352**	13	59	154	105	21	49	87	54	56	20	352	352	115	237	239	92
Very important	**183**	6	18	77	64	18	23	61	30	21	12	183	183	53	129	128	44
A26 What types of supplementary content would you like to see as part of an Event Cinema screening? Tick all that apply.																	
Digital programme sent before the performance	**535**	69	166	191	74	36	89	156	90	81	29	535	535	233	298	393	94
Digital programme made available during the performance	**211**	57	77	51	13	13	24	75	27	33	12	211	211	115	93	155	38
Documentary about the play sent before the performance	**373**	51	111	137	46	28	67	120	60	44	22	373	373	164	209	267	77
Documentary about the play made available during the performance	**258**	45	80	82	27	23	39	79	49	41	12	258	258	111	146	180	56
Interviews with actors	**654**	86	193	238	87	49	92	211	99	103	36	654	654	269	378	467	128
Interviews with directors	**623**	83	178	222	87	52	98	195	92	93	39	623	621	266	351	440	125
Interviews with audience members	**39**	9	7	20	2	1	4	9	5	9	2	39	39	22	18	23	10
"Behind the scenes" tours	**499**	80	151	162	62	44	84	158	71	72	24	499	498	203	296	378	83
Printed programme	**416**	66	110	131	65	45	79	130	63	42	16	416	416	166	247	289	91
Other	**37**	3	7	11	6	10	7	9	6	6	-	37	37	11	25	26	8
A27 What type of theatre are you most interested to see broadcasted in the cinema in the future? Please tick all that apply																	
Drama	**992**	119	283	358	147	84	166	305	159	138	48	992	990	385	600	719	188
Stand-up Comedy	**146**	18	62	53	10	3	20	42	25	26	10	146	145	63	83	108	25
Musical	**508**	66	171	165	62	44	90	154	87	73	20	508	507	200	304	368	93
Physical theatre and circus	**143**	36	46	45	9	7	38	45	20	20	2	143	143	68	75	110	23
Family theatre	**204**	36	60	69	23	16	42	64	35	24	9	204	203	77	127	148	40
Pantomime	**40**	6	10	17	5	1	7	6	5	8	1	40	39	17	23	28	7
Other	**98**	12	15	26	18	26	17	42	8	7	6	98	98	39	58	71	23
A28 What factors have prevented you from attending an Event Cinema screening of a theatre performance, to date? Please tick all that apply.																	
Not interested	**14**	6	3	2	1	1	4	3	3	1	-	14	-	7	7	8	3
Prefer live theatre	**73**	15	34	19	2	3	24	17	18	6	1	73	-	38	35	53	10

		weighted n	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
	Tickets are too expensive	**25**	3	14	6	1	1	10	2	7	3	-	25	-	7	18	22	3
	Don't live near a cinema showing live broadcasts	**19**	6	7	4	0	1	6	2	5	-	1	19	-	13	5	10	3
	Unaware of live broadcasts of theatre in the cinema	**11**	-	-	9	0	1	2	3	2	1	2	11	-	3	9	5	4
	Cannot get to the cinema easily	**17**	3	9	4	-	1	3	3	1	-	2	17	-	5	12	8	6
	Timing has not been right	**52**	6	21	20	4	1	17	9	8	7	3	52	-	18	33	34	16
	Prefer to watch theatre at home on TV and/or online	**17**	6	5	6	-	-	5	6	3	1	-	17	-	14	2	14	1
	Disability that precludes travel	**1**	-	-	1	-	-	-	-	1	-	-	1	-	1	-	1	-
	None of the above	**11**	-	7	4	0	-	3	4	1	-	-	11	-	3	9	10	1
A29	**What factors might make you more likely to attend an Event Cinema screening in the future? Tick all that apply.**																	
	Greater / more varied selection of productions	**58**	15	24	16	3	-	18	13	10	3	3	58	-	33	24	38	13
	Less expensive ticket prices	**54**	9	29	13	1	1	25	10	9	5	1	54	-	23	31	35	10
	Increase in disposable income	**29**	9	17	3	-	-	15	7	1	-	-	29	-	12	17	15	9
	Increased availability of screenings nearer to home	**46**	6	24	14	2	-	19	6	7	6	3	46	-	21	26	26	13
	More publicity	**66**	12	29	20	3	1	17	13	12	6	3	66	-	28	37	40	17
	Improved public transportation to venues screening Event Cinema	**8**	3	2	3	-	-	-	1	-	-	-	8	-	2	6	3	4
	Screenings at more times	**68**	9	33	21	3	1	23	12	11	5	3	68	-	21	47	49	13
	Nothing will make me more likely to attend	**18**	3	7	8	-	-	5	4	3	5	-	18	-	12	6	14	2
	Other	**9**	-	3	6	0	-	3	0	2	-	-	9	-	2	7	9	1
A30	**How much would you be willing to pay for a ticket to an Event Cinema screening?**																	
	Nothing	**10**	3	3	3	0	-	5	4	-	-	-	10	0	6	4	8	-
	£1-10	**225**	57	96	55	12	6	74	65	34	27	5	225	147	118	107	180	28
	£10-20	**860**	86	253	321	124	75	124	266	148	111	46	860	818	325	527	612	174
	£20-35	**86**	6	17	34	19	10	12	19	9	21	6	86	80	29	57	55	22
	£35-50	**4**	-	2	2	1	-	-	-	-	1	2	4	4	3	1	3	-
	More than £50	**1**	-	-	1	-	-	-	-	-	-	-	1	-	-	1	1	-

		weighted n	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Streaming																	
A31	**Which types of live or on-demand streaming performances/cultural events have you seen online or on the television? Please tick all that apply.**																	
	Orchestral music	**73**	12	19	23	11	9	15	18	12	12	2	73	65	71	2	48	18
	Opera	**93**	18	33	23	12	7	18	35	11	5	2	93	85	92	-	58	13
	Theatre	**413**	89	178	95	32	19	97	121	60	56	16	413	371	405	3	307	52
	Dance	**116**	33	45	24	9	6	30	37	15	8	11	116	95	110	4	82	17
	Museum exhibition tour	**37**	9	10	8	4	6	7	11	3	10	1	37	36	36	-	23	10
	I can't remember	**15**	3	9	2	-	1	4	3	2	4	1	15	13	6	7	11	3
	Other	**33**	6	12	9	4	1	8	12	7	2	3	33	25	31	1	24	7
A32	**Which theatre companies' live or on-demand streaming performances have you seen online or on TV?**																	
	Royal Exchange Theatre	**14**	6	5	2	1	-	5	5	3	0	-	14	14	14	-	12	2
	Tricycle Theatre	**5**	3	2	-	-	-	-	-	5	-	-	5	5	5	-	5	-
	The Old Vic	**73**	18	36	13	6	-	17	28	7	5	4	73	65	73	-	43	10
	Chichester Festival Theatre	**21**	3	12	4	2	-	4	10	1	3	-	21	18	21	-	15	1
	Almeida Theatre	**40**	6	17	12	3	1	14	13	4	3	0	40	38	39	1	28	4
	Young Vic	**32**	6	14	9	2	1	11	8	6	2	1	32	30	32	-	17	8
	Liverpool Everyman Playhouse	**7**	3	2	2	0	-	5	-	1	0	-	7	6	7	-	4	2
	Royal Shakespeare Company	**251**	57	99	56	25	15	40	86	42	28	14	251	230	246	2	189	38
	English Touring Theatre	**5**	-	2	2	1	-	-	1	1	1	2	5	4	5	-	3	2
	Northern Ballet	**38**	6	21	10	1	-	5	11	9	5	3	38	32	38	-	29	6
	Frantic Assembly	**24**	12	9	4	-	-	6	7	9	1	-	24	21	24	-	20	1
	Regent's Park Open Air Theatre	**36**	15	15	4	1	-	13	15	4	1	-	36	35	36	-	28	4
	Royal Court	**32**	9	15	6	1	-	10	11	3	8	1	32	28	30	-	20	3
	Unicorn Theatre	**-**	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Shakespeare's Globe	**162**	21	84	30	17	10	48	46	20	13	9	162	151	157	-	119	21
	National Theatre On Demand in Schools	**19**	-	12	6	0	-	-	8	8	1	-	19	17	19	-	15	2
	National Jewish Theatre	**4**	-	2	2	1	-	-	3	-	-	0	4	4	4	-	3	-
	Theatre Royal Newcastle	**4**	-	2	1	-	1	-	-	-	-	3	4	4	4	-	1	3
	Other	**176**	45	80	40	8	3	49	56	23	21	3	176	153	173	3	141	15
A33	**What types of theatrical performances have you streamed live or on-demand? Please tick all that apply.**																	
	Drama	**395**	74	176	93	34	17	88	117	54	55	16	395	360	387	3	292	55
	Stand-up Comedy	**38**	12	19	4	1	1	9	9	6	5	2	38	24	38	-	27	3
	Musical	**121**	33	58	21	6	3	31	40	12	10	4	121	104	119	-	91	13
	Physical theatre and circus	**32**	12	9	8	2	1	12	7	8	2	-	32	21	32	-	25	3
	Family theatre	**16**	-	7	6	2	1	4	2	2	2	3	16	11	16	-	9	5

	weighted n	Age: 16-24	25-44	45-64	65-74	75+	Income: Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Participation: Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Location: Urban	Rural
Pantomime	**1**	-	-	1	-	-	-	-	-	-	-	1	-	1	-	1	-
Other	**54**	21	17	11	5	-	13	15	11	2	2	54	47	53	-	39	6
A34 Are any of the following reasons you have streamed a theare performance online or on TV, rather than going in person? Please tick all that apply.																	
Not enough time and streaming was faster	**151**	51	58	29	9	4	49	24	25	18	10	151	130	150	-	107	25
Cost too much to get to the venue	**182**	57	62	40	13	10	61	40	23	19	3	182	162	177	4	118	35
Cheaper to stream than buy a ticket	**158**	51	67	28	10	3	49	35	30	15	4	158	139	158	-	121	20
Prefer the streaming experience	**16**	3	10	2	-	-	6	3	2	2	3	16	13	16	-	11	1
Seen the live performance	**80**	18	38	21	3	1	15	25	7	14	3	80	75	80	-	62	6
Live performance was sold out	**154**	36	72	36	9	1	18	56	23	19	5	154	141	154	-	125	17
Not aware a live performance was occurring	**51**	27	9	11	4	-	13	17	4	5	2	51	51	49	-	41	5
No live performances at the time, streaming past performance	**231**	63	103	45	15	6	54	65	33	29	8	231	216	231	-	167	34
Disability that precludes travel	**4**	-	3	-	0	-	2	0	-	2	-	4	3	4	-	2	-
Other	**42**	12	10	15	3	1	7	12	13	8	-	42	33	42	-	29	2
A35 How strongly do agree with the following statements about streaming theatre online or on TV, based on the last production you watched? *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
I was totally absorbed																	
not at all important	**56**	12	27	13	2	1	14	9	15	12	2	56	50	54	-	41	8
not very much	**66**	15	26	13	8	4	16	15	15	9	3	66	56	66	-	53	9
somewhat important	**233**	63	96	50	18	7	43	79	28	28	10	233	214	230	-	176	32
fairly strongly	**97**	15	43	27	8	4	26	30	11	11	5	97	83	97	-	68	8
very strongly	**9**	3	2	2	2	-	3	4	1	-	-	9	5	8	-	7	2
I don't know	**461**	104	197	105	36	19	100	136	70	63	19	461	410	456	-	345	59
I felt an emotional response to the performance																	
not at all important	**40**	9	19	9	3	-	6	4	14	9	2	40	31	38	-	30	4
not very much	**79**	18	31	21	6	3	23	15	15	11	3	79	65	79	-	63	10
somewhat important	**240**	54	104	50	19	13	50	84	29	26	10	240	220	237	-	184	32
fairly strongly	**94**	21	39	25	7	3	22	27	12	16	3	94	86	94	-	61	13
very strongly	**9**	3	2	2	2	-	3	3	1	-	-	9	4	8	-	6	1
I don't know	**2%**	3%	1%	2%	7%	-	3%	3%	2%	-	-	1%	9%	2%		2%	2%

		Age					Income					Participation				Location	
	weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Streaming gave me a good sense of what experiencing it live in a theatre would be like																	
not at all important	**21**	6	9	5	1	-	5	8	3	2	-	21	15	21	-	14	1
not very much	**110**	27	60	17	6	1	25	32	19	13	5	110	101	107	-	90	11
somewhat important	**101**	27	33	27	10	4	19	20	24	19	7	101	88	100	-	73	19
fairly strongly	**188**	48	77	40	14	9	45	61	19	27	5	188	166	188	-	140	23
very strongly	**42**	-	19	15	4	4	9	13	5	3	3	42	38	42	-	28	7
I don't know	**6**	-	2	2	2	-	0	3	1	-	1	6	4	5	-	4	1
Streaming theatre opens up new ways of seeing this artform																	
not at all important	**7**	-	3	3	-	-	1	4	2	-	-	7	4	7	-	4	1
not very much	**21**	6	9	5	2	-	6	2	5	4	1	21	15	19	-	17	-
somewhat important	**40**	6	15	11	3	4	5	10	11	7	1	40	32	39	-	30	8
fairly strongly	**227**	66	89	45	20	7	49	70	32	34	9	227	205	226	-	177	31
very strongly	**163**	30	79	40	10	4	43	49	20	18	7	163	149	163	-	115	19
I don't know	**8**	-	2	2	2	1	0	4	1	-	-	8	6	7	-	4	3
Streaming was more engaging than attending a live performance																	
not at all important	**156**	51	60	33	9	3	46	49	24	15	8	156	129	154	-	115	26
not very much	**193**	36	80	50	17	10	35	45	33	36	7	193	173	190	-	146	22
somewhat important	**82**	15	43	16	7	1	16	29	11	9	2	82	77	82	-	62	5
fairly strongly	**19**	6	7	4	1	1	4	8	1	2	1	19	18	19	-	15	4
very strongly	**5**	-	2	2	0	1	-	3	0	-	-	5	5	5	-	3	3
I don't know	**11**	-	5	3	3	-	2	6	1	-	-	11	9	10	-	9	1
Streaming was a very different experience from attending a live performance																	
not at all important	**5**	-	3	2	0	-	-	2	3	-	-	5	3	5	-	4	2
not very much	**20**	3	5	7	2	3	2	4	8	5	1	20	17	20	-	12	3
somewhat important	**62**	3	31	20	6	3	7	21	9	8	4	62	56	62	-	49	7
fairly strongly	**231**	63	98	46	16	9	55	75	28	25	7	231	211	228	-	177	22
very strongly	**125**	39	48	27	9	3	32	32	17	23	6	125	106	124	-	91	24
I don't know	**23**	-	12	5	5	1	6	6	6	2	0	23	17	22	-	17	3

	weighted n	Age					Income					Participation				Location	
		16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
The experience met my expectations																	
not at all important	**13**	6	5	2	0	-	1	8	4	-	-	13	11	13	-	7	2
not very much	**20**	-	14	4	1	1	-	1	6	8	2	20	18	20	-	15	4
somewhat important	**93**	21	27	28	10	6	18	25	19	12	5	93	76	92	-	83	5
fairly strongly	**233**	66	103	45	14	6	53	74	26	31	7	233	213	232	-	167	34
very strongly	**92**	12	41	24	9	6	26	26	13	10	3	92	87	90	-	65	14
I don't know	**16**	3	7	3	3	-	7	6	1	2	-	16	6	15	-	12	2
I felt real excitement because I knew that the performance was captured as a live event																	
not at all important	**28**	9	10	6	3	-	12	6	4	3	1	28	22	28	-	24	2
not very much	**71**	12	36	20	2	1	15	17	15	10	2	71	65	70	-	59	5
somewhat important	**156**	27	75	34	11	9	32	45	23	25	8	156	141	153	-	119	23
fairly strongly	**127**	51	36	26	10	4	28	47	17	13	2	127	109	127	-	84	19
very strongly	**51**	3	21	17	8	3	7	18	7	6	0	51	49	51	-	43	5
I don't know	**33**	6	19	4	4	-	9	6	5	4	3	33	24	32	-	19	7
Based on the event, I would recommend this experience to other people																	
not at all important	**8**	-	5	2	1	-	-	4	3	2	-	8	5	8	-	4	1
not very much	**26**	6	10	9	0	-	3	6	6	5	3	26	25	26	-	18	3
somewhat important	**77**	24	21	18	8	7	17	18	21	11	2	77	66	76	-	65	7
fairly strongly	**184**	33	94	40	14	3	40	55	17	30	10	184	165	180	-	132	32
very strongly	**149**	33	63	35	11	7	36	50	20	15	2	149	137	149	-	111	15
I don't know	**24**	12	3	3	4	1	9	7	4	-	0	24	14	23	-	20	3
A36 How important is it to you that the streamed performance online or on TV is live (i.e. taking place in real time)?																	
Not at all important	**91**	18	39	21	8	4	30	16	15	10	7	91	81	91	-	58	13
Not very important	**139**	36	67	27	9	1	31	39	17	23	7	139	126	135	-	105	18
Neutral	**107**	27	41	24	8	7	24	32	18	13	4	107	89	106	-	88	13
Somewhat important	**95**	24	33	27	9	3	7	40	14	15	2	95	91	95	-	72	12
Very important	**44**	3	21	13	4	3	12	15	11	1	-	44	31	44	-	32	6
A37 With how many people did you stream the most recent theatre performance online or on television that you viewed?																	
Myself only	**285**	69	128	61	20	7	78	90	39	34	6	285	257	284	-	217	28
2 people (1 other)	**120**	21	45	32	15	7	18	31	13	21	8	120	110	118	-	89	18
3-4 people	**23**	3	9	6	1	4	-	6	6	3	4	23	19	21	-	13	9

			Age					Income					Participation				Location	
		weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	5 or more people	**11**	3	5	2	0	-	0	3	6	1	-	11	9	11	-	10	1
A38	**On what platforms do you most often stream theatre performances? Please tick all that apply.**																	
	Digital Theatre	**143**	39	70	26	5	3	44	40	16	17	2	143	135	141	-	107	12
	The Space	**19**	6	9	4	0	-	11	2	4	2	-	19	16	19	-	14	3
	Sky Arts	**102**	30	43	19	9	1	20	28	15	8	6	102	96	100	-	86	14
	BBC iplayer	**290**	63	113	66	30	19	59	87	48	36	14	290	267	287	-	224	45
	Curzon Home Cinema	**11**	-	2	6	3	-	-	3	2	2	2	11	10	11	-	6	4
	Periscope	**12**	-	10	2	-	-	3	3	3	-	2	12	10	12	-	12	-
	YouTube	**213**	69	94	35	9	6	66	62	32	25	8	213	180	213	-	159	20
	Vimeo	**30**	3	17	9	-	-	8	12	2	2	3	30	24	30	-	21	2
	Canvas	**6**	6	-	-	-	-	3	-	3	-	-	6	6	6	-	6	-
	Other	**56**	12	29	11	3	1	12	18	10	7	2	56	51	56	-	49	4
A39	**Where have you watched streamed theatre performances online or on television in the past 12 months? Please tick all that apply.**																	
	At home	**428**	95	180	98	36	19	97	127	61	58	17	428	383	423	-	320	56
	At work	**48**	3	36	9	0	-	3	19	13	8	-	48	41	48	-	38	5
	At school/university	**41**	27	9	5	0	-	12	4	9	6	-	41	41	41	-	29	8
	At a friend or family member's house	**35**	18	10	6	1	-	12	13	2	1	1	35	32	35	-	31	3
	In transit	**20**	9	9	2	0	-	7	6	2	1	-	20	20	20	-	18	3
	At the hospital	**-**	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-
	Other	**56**	12	29	11	3	1	12	18	10	7	2	56	51	56	-	49	4
A40	**Is your home Internet access fast enough to allow you to watch video without interruptions (the screen freezing, audio and video out of sync, etc.)?**																	
	Never falters	**101**	24	50	18	7	3	20	45	7	13	5	101	83	98	-	80	14
	Occasional isues	**314**	63	134	77	27	15	66	85	51	45	12	314	292	310	-	241	33
	Usually have interruptions	**34**	9	5	13	6	1	13	5	9	2	2	34	29	34	-	16	12
	I don't know	**1**	-	-	1	0	-	1	0	-	-	-	1	1	1	-	-	-
A41	**Are any of the following reasons you have not streamed a theatre performance online or on television before? Please tick all that apply.**																	
	Not interested in the performances offered	**18**	-	9	6	3	1	4	5	3	1	4	18	11	-	18	12	6
	Prefer live theatre	**248**	24	57	96	43	29	50	68	35	30	15	248	215	-	248	182	52
	Don't want to watch without the company of an audience	**113**	6	26	50	19	13	17	43	12	16	6	113	100	-	113	90	19
	Don't know where to find online	**239**	24	63	97	29	26	41	75	35	40	16	239	212	-	239	173	51
	Don't have a computer or mobile device at home	**3**	-	-	2	0	-	1	2	-	-	-	3	3	-	3	1	2
	Don't have a television at home	**18**	3	3	5	4	3	8	4	1	1	-	18	14	-	18	13	3
	Television does not support on-demand viewing	**144**	15	26	50	29	25	24	57	23	13	2	144	127	3	141	89	41

			Age					Income					Participation				Location	
		weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Internet access is too slow / nonexistent	**106**	3	15	53	21	13	21	25	15	13	3	106	97	-	106	53	44
	Unaware content online or on television	**298**	18	65	132	47	36	47	93	49	43	16	298	269	-	298	213	64
	Don't know how to pay for content I want to view	**87**	3	15	41	14	13	17	31	12	10	6	87	74	-	87	61	20
	Prefer not to pay for content I want to view	**165**	15	34	72	25	19	27	52	23	21	8	165	144	-	165	120	36
	Haven't had the chance yet	**98**	3	38	42	9	7	15	21	19	22	9	98	88	-	98	76	17
	Other	**56**	12	29	11	3	1	12	18	10	7	2	56	51	56	-	49	4
A42	**How much would you be willing to pay to view a streaming theatre performance online or on television?**																	
	Nothing	**398**	60	113	130	61	35	83	115	71	48	10	398	333	140	256	287	81
	£1-5	**428**	77	135	149	49	17	77	138	68	57	24	428	389	193	230	332	71
	£5-10	**263**	9	92	105	32	25	43	73	40	43	13	263	240	121	142	179	51
	£10-20	**71**	6	27	21	9	7	11	23	11	9	8	71	64	21	50	47	14
	£20-35	**9**	-	2	4	2	1	-	2	-	4	1	9	7	5	4	3	2
	£35-50	**3**	-	2	1	0	-	-	0	-	-	2	3	3	-	1	0	3
	More than £50	**1**	-	-	1	-	-	-	-	-	-	-	1	1	1	-	-	-
A43	**How much would you be willing to pay for subscription to enable you to stream theatre and other arts performances online or on television for a monthly fee with unlimited access?**																	
	Not interested	**546**	27	144	216	97	62	98	157	87	76	24	546	470	164	380	390	116
	£1-5 per month	**386**	86	139	109	38	13	65	109	66	57	25	386	345	197	186	282	74
	£5-10 per month	**207**	39	72	69	17	10	47	72	32	22	8	207	187	102	103	160	25
	£10-20 per month	**35**	-	14	16	3	3	5	15	5	4	1	35	34	18	17	18	5
	£20+ per month	**2**	-	2	-	-	-	-	-	-	2	-	2	2	-	2	2	-
A44	**Would you say that streaming theatre online or on television and/or Event Cinema has made you more likely to visit the theatre in person?**																	
	No impact	**823**	101	253	291	109	68	158	243	133	115	41	823	711	342	474	590	168
	I see more of live theatre because of it	**195**	36	68	67	18	6	27	55	40	26	9	195	191	95	100	144	30
	I see less of live theatre because of it	**25**	-	5	7	9	4	4	8	3	3	4	25	25	5	20	20	4
	I'm not sure	**122**	15	41	40	18	7	24	41	12	17	4	122	106	36	86	88	19
	Disability & Accessibility																	
A45	**Are you disabled or do you attend performances with someone who is a disabled person?**																	
	Yes	**141**	21	39	44	18	19	34	44	13	16	2	141	122	47	94	111	20
	No	**1043**	131	332	370	137	73	181	310	177	144	58	1043	926	435	601	746	203
A46	**Which of the following services are currently made available in Live-to-Digital arts content that you view in the cinema or stream online or on television?**																	
	Audio description	**28**	6	9	7	4	3	8	8	1	3	-	28	18	14	14	25	3
	Stage-text performances	**18**	6	5	2	2	3	6	8	-	2	-	18	16	11	7	16	2
	Signed performances	**7**	3	2	2	0	-	-	5	-	2	-	7	7	5	1	7	-

		Age					Income					Participation				Location	
	weighted n	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Relaxed performances	**13**	3	5	4	1	-	1	7	-	5	-	13	12	8	5	11	2
Visual story	**8**	3	3	1	1	-	3	0	-	4	-	8	8	6	2	8	-
I don't know	**81**	9	21	28	13	10	18	25	12	9	2	81	77	21	60	60	14
Other	**13**	-	7	2	0	4	4	5	-	-	-	13	9	2	12	11	2

TABLE 2

Audience Survey: Proportionate Responses

		All	Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
A1	**Age**																	
	16-24	**13%**	100%	-	-	-	-	25%	13%	12%	6%	-	12%	15%	22%	6%	15%	7%
	25-44	**31%**	-	100%	-	-	-	36%	32%	31%	38%	35%	30%	44%	42%	24%	33%	18%
	45-64	**35%**	-	-	100%	-	-	22%	29%	39%	44%	59%	35%	33%	24%	43%	33%	45%
	65-74	**13%**	-	-	-	100%	-	11%	15%	14%	9%	6%	14%	5%	8%	17%	12%	19%
	75	**8%**	-	-	-	-	100%	6%	11%	5%	4%	-	8%	2%	4%	10%	8%	11%
A2	**Income**																	
	Less than £20,000	**22%**	40%	23%	14%	20%	20%	100%	-	-	-	-	20%	36%	26%	19%	23%	15%
	£20,000 – £39,999	**36%**	36%	34%	31%	43%	58%	-	100%	-	-	-	37%	28%	35%	37%	38%	34%
	£40,000 – £59,000	**19%**	18%	18%	22%	22%	13%	-	-	100%	-	-	19%	20%	19%	20%	19%	25%
	£60,000 – £99,999	**16%**	7%	19%	21%	12%	9%	-	-	-	100%	-	17%	13%	16%	17%	15%	17%
	£100,000 and over	**6%**	-	6%	11%	3%	-	-	-	-	-	100%	6%	3%	5%	7%	5%	9%
A3	**Participation**																	
	Attended Event Cinema Screening	**89%**	86%	84%	89%	96%	97%	80%	91%	88%	90%	94%	100%	-	88%	89%	89%	88%
	Did Not Attend Event Cinema Screening	**11%**	14%	16%	11%	4%	3%	20%	9%	12%	10%	6%	-	100%	12%	11%	11%	12%
	Attended Streamed Performance	**41%**	71%	55%	28%	25%	19%	49%	41%	41%	40%	32%	41%	42%	100%	-	42%	29%
	Did Not Attend Streamed Performance	**59%**	29%	45%	72%	75%	81%	51%	59%	59%	60%	68%	59%	58%	-	100%	58%	71%
A4	**Location**																	
	Urban	**79%**	89%	87%	73%	72%	73%	86%	83%	76%	79%	70%	79%	78%	85%	76%	100%	-
	Rural	**21%**	11%	13%	27%	28%	27%	14%	17%	24%	21%	30%	21%	22%	15%	24%	-	100%
A5	**Gender**																	
	Male	**23%**	14%	22%	22%	32%	32%	22%	23%	28%	26%	31%	22%	28%	27%	21%	25%	20%
	Female	**76%**	86%	78%	78%	67%	66%	78%	77%	71%	74%	69%	77%	72%	72%	79%	75%	80%
	Other	**0%**	-	0%	0%	1%	2%	-	0%	1%	-	-	0%	-	1%	0%	1%	-
A6	**Employment Status**																	
	In education	**8%**	47%	3%	1%	-	-	16%	4%	9%	4%	1%	7%	9%	10%	6%	7%	7%
	Employed full-time	**37%**	37%	64%	35%	2%	-	22%	42%	42%	57%	39%	36%	48%	49%	30%	41%	25%
	Employed part-time	**10%**	2%	11%	15%	6%	-	13%	8%	9%	13%	6%	10%	11%	7%	12%	9%	12%
	Full-time parent/ caretaker	**3%**	-	3%	5%	-	-	2%	1%	2%	3%	7%	3%	4%	2%	3%	2%	5%
	Self-employed	**13%**	6%	15%	15%	10%	5%	20%	11%	10%	9%	24%	13%	12%	15%	11%	13%	10%
	Unemployed	**2%**	8%	2%	1%	0%	-	3%	2%	3%	-	-	2%	2%	3%	2%	2%	1%
	Retired	**28%**	-	0%	26%	81%	95%	24%	32%	25%	14%	23%	29%	13%	13%	37%	26%	39%
A7	**Choose one option that best describes your ethnic group or background**																	
	White British	**87%**	78%	81%	91%	94%	92%	74%	90%	89%	88%	86%	88%	79%	79%	92%	87%	95%

			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Non-White British	**13%**	22%	19%	9%	6%	8%	26%	10%	11%	12%	14%	12%	21%	21%	8%	13%	5%
Cultural Participation																		
A8	**How close do you live to the nearest theatre?**																	
	Within walking distance	**24%**	34%	34%	14%	17%	20%	32%	27%	20%	22%	17%	23%	31%	29%	20%	29%	5%
	Less than ten minutes by vehicle	**13%**	11%	15%	12%	11%	12%	14%	15%	14%	11%	14%	13%	12%	13%	13%	14%	8%
	10-30 minutes by vehicle	**41%**	43%	33%	47%	42%	42%	35%	37%	43%	49%	38%	41%	38%	39%	43%	41%	44%
	30-60 minutes by vehicle	**20%**	9%	17%	23%	28%	25%	17%	18%	22%	15%	26%	20%	16%	16%	22%	15%	39%
	More than one hour by vehicle	**2%**	2%	1%	3%	2%	2%	2%	3%	1%	0%	5%	2%	2%	2%	2%	1%	4%
	I don't know	**0%**	2%	-	0%	-	-	0%	-	-	2%	-	0%	-	1%	0%	0%	-
A9	**Which of the following can you see at the theatre nearest to you? Please tick all that apply.**																	
	Drama	**93%**	84%	94%	94%	96%	95%	91%	94%	93%	95%	92%	94%	91%	91%	94%	93%	94%
	Stand-up comedy	**62%**	57%	65%	67%	57%	44%	60%	59%	66%	66%	61%	62%	60%	62%	62%	62%	69%
	Musical	**77%**	61%	76%	81%	81%	83%	67%	78%	80%	76%	86%	78%	73%	74%	79%	77%	83%
	Family theatre	**78%**	78%	80%	79%	78%	67%	78%	79%	79%	78%	77%	78%	78%	78%	78%	78%	82%
	Pantomime	**68%**	51%	60%	75%	75%	78%	60%	67%	68%	66%	72%	67%	70%	59%	73%	67%	78%
	I don't know	**2%**	6%	2%	2%	1%	3%	6%	2%	2%	1%	1%	3%	1%	3%	2%	2%	3%
A10	**Are you a season ticket holder at any of the following? Please tick all that apply**																	
	Theatre organisation	**10%**	4%	7%	12%	12%	24%	6%	10%	9%	8%	17%	11%	6%	11%	10%	10%	13%
	Dance company	**1%**	-	2%	1%	1%	-	1%	1%	1%	-	1%	1%	1%	2%	0%	1%	0%
	Opera company	**1%**	-	1%	2%	2%	5%	1%	1%	2%	1%	-	1%	1%	2%	1%	1%	1%
	Cinema	**10%**	6%	12%	10%	12%	10%	15%	6%	10%	8%	15%	11%	5%	12%	9%	11%	8%
	Sport	**4%**	2%	4%	3%	6%	5%	2%	3%	3%	7%	9%	3%	7%	3%	4%	4%	4%
	I do not hold a season ticket of any kind	**74%**	88%	75%	74%	69%	59%	80%	75%	77%	76%	56%	73%	82%	74%	74%	74%	71%
A11	**How many live cultural performances of any kind have you attended in the past 12 months?** ***Do not count popular music concerts for the purposes of this question.***																	
	None	**0%**	2%	-	0%	1%	-	0%	0%	-	-	-	0%	1%	1%	0%	0%	0%
	1 time	**3%**	2%	2%	5%	2%	8%	4%	2%	5%	0%	7%	3%	7%	3%	4%	3%	4%
	2-5 times	**31%**	20%	32%	35%	31%	27%	34%	27%	29%	32%	30%	29%	44%	23%	36%	28%	42%
	6-11 times	**31%**	29%	26%	31%	34%	46%	21%	34%	32%	36%	32%	33%	15%	28%	33%	31%	32%
	12+ times	**34%**	47%	39%	30%	31%	19%	40%	37%	34%	32%	31%	34%	33%	45%	27%	38%	21%
A12	**What type(s) of performances have you attended in the past 12 months? Please tick all that apply.**																	
	Drama	**88%**	86%	87%	90%	91%	89%	85%	89%	89%	90%	89%	90%	76%	92%	86%	90%	84%
	Stand-up comedy	**31%**	43%	46%	26%	13%	3%	36%	33%	24%	38%	31%	30%	34%	37%	27%	33%	27%
	Musical	**52%**	75%	60%	46%	36%	38%	54%	53%	48%	57%	55%	53%	46%	59%	47%	55%	43%
	Physical theatre and circus	**20%**	41%	28%	14%	8%	5%	23%	25%	19%	18%	27%	20%	22%	28%	15%	23%	13%
	Family theatre	**28%**	37%	35%	25%	21%	17%	33%	26%	28%	32%	39%	28%	28%	35%	24%	28%	26%
	Pantomime	**17%**	24%	19%	16%	15%	11%	16%	21%	20%	10%	28%	17%	20%	19%	16%	19%	14%
	Improvisational theatre	**10%**	24%	10%	8%	6%	-	13%	12%	7%	7%	5%	10%	10%	16%	6%	10%	7%

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Experimental theatre	**22%**	49%	25%	15%	11%	8%	28%	28%	23%	18%	9%	21%	24%	33%	14%	24%	14%
Cabaret	**8%**	12%	12%	5%	2%	5%	11%	6%	9%	10%	6%	7%	10%	12%	4%	8%	4%
Dance – Ballet	**32%**	29%	30%	31%	35%	40%	24%	37%	35%	28%	35%	33%	24%	32%	32%	32%	32%
Dance – Contemporary	**20%**	37%	21%	17%	11%	13%	17%	23%	26%	17%	18%	20%	17%	27%	15%	22%	12%
Dance – Other	**11%**	14%	13%	10%	7%	2%	10%	12%	11%	10%	13%	10%	11%	16%	7%	11%	9%
Opera	**27%**	20%	21%	28%	36%	44%	24%	31%	27%	20%	22%	28%	18%	26%	28%	26%	27%
Music – Classical	**34%**	18%	29%	36%	44%	54%	26%	36%	34%	38%	31%	35%	26%	32%	35%	34%	34%
Music – Rock/pop	**25%**	20%	35%	28%	14%	-	24%	25%	23%	31%	37%	24%	34%	26%	25%	27%	18%
Music – Contemporary	**20%**	18%	24%	22%	15%	10%	18%	21%	19%	20%	26%	20%	19%	26%	17%	21%	18%
Exhibitions – Visual Arts	**53%**	47%	56%	52%	57%	48%	53%	56%	49%	50%	55%	54%	45%	57%	50%	53%	55%
Exhibitions – Heritage	**39%**	37%	40%	40%	39%	38%	38%	42%	36%	42%	33%	39%	40%	42%	37%	41%	36%
Live Theatre																	
A13 How many live theatre performances have you attended in the past 12 months?																	
None	**2%**	2%	1%	3%	2%	-	2%	3%	2%	2%	-	2%	3%	0%	3%	2%	3%
1 time	**8%**	6%	6%	8%	7%	14%	9%	6%	8%	7%	10%	6%	17%	5%	9%	7%	9%
2-5 times	**43%**	22%	42%	47%	50%	51%	38%	42%	38%	52%	40%	43%	47%	35%	48%	40%	53%
6-11 times	**23%**	31%	19%	23%	24%	24%	19%	22%	31%	22%	26%	25%	9%	23%	23%	24%	20%
12+ times	**24%**	39%	31%	18%	18%	11%	31%	27%	21%	17%	24%	24%	25%	37%	16%	27%	15%
A14 In the past 12 months, what was the furthest you traveled to attend a live theatre performance?																	
Within walking distance	**2%**	2%	2%	2%	2%	2%	4%	0%	2%	1%	-	1%	5%	1%	2%	2%	-
Less than ten minutes by vehicle	**1%**	-	0%	1%	2%	6%	2%	1%	1%	1%	1%	1%	1%	0%	2%	1%	1%
10-30 minutes by vehicle	**10%**	10%	8%	10%	10%	11%	10%	8%	12%	7%	8%	9%	10%	8%	10%	9%	12%
30-60 minutes by vehicle	**26%**	22%	27%	24%	31%	29%	22%	28%	26%	31%	23%	26%	32%	25%	27%	27%	20%
More than one hour by vehicle	**61%**	65%	62%	63%	55%	52%	62%	62%	59%	61%	68%	62%	52%	66%	58%	61%	67%
A15 With how many people did you attend your most recent theatre event?																	
Myself only	**15%**	18%	17%	13%	12%	17%	26%	20%	6%	5%	11%	15%	13%	16%	14%	14%	17%
2 people (1 other)	**57%**	51%	59%	56%	60%	56%	52%	51%	57%	67%	57%	58%	52%	54%	59%	58%	52%
3-4 people	**22%**	24%	20%	27%	20%	16%	17%	24%	29%	21%	26%	22%	28%	24%	22%	23%	23%
5 or more people	**6%**	6%	4%	5%	8%	11%	5%	4%	7%	8%	6%	5%	8%	6%	5%	5%	7%
A16 Over the past 12 months, approximately how much did you pay on average for each ticket to attend a live theatre performance?																	
Nothing	**1%**	-	2%	0%	0%	-	0%	1%	-	1%	-	1%	1%	1%	1%	1%	0%
£1- 10	**6%**	22%	6%	2%	1%	2%	17%	5%	2%	3%	4%	5%	14%	8%	4%	6%	3%
£11-20	**25%**	35%	31%	20%	19%	25%	38%	31%	23%	19%	9%	25%	27%	31%	22%	26%	24%
£21-30	**33%**	33%	27%	34%	38%	44%	25%	34%	36%	31%	28%	33%	30%	32%	34%	33%	36%
£31-50	**28%**	8%	28%	34%	33%	24%	16%	26%	29%	39%	41%	29%	22%	20%	34%	28%	28%

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	More than £50	**7%**	2%	7%	10%	9%	5%	4%	2%	11%	7%	18%	8%	6%	8%	7%	6%	10%
	Event Cinema																	
A17	**Which types of Event Cinema have you attended? Please tick all that apply**																	
	Orchestral music	**4%**	5%	2%	4%	4%	8%	4%	3%	4%	5%	1%	4%	NA	4%	4%	4%	4%
	Opera	**28%**	11%	18%	27%	45%	62%	28%	30%	26%	19%	18%	28%	NA	25%	30%	25%	35%
	Theatre	**95%**	91%	93%	97%	97%	93%	93%	94%	97%	97%	89%	95%	NA	94%	96%	95%	96%
	Dance	**21%**	14%	12%	25%	26%	41%	17%	26%	16%	17%	21%	21%	NA	19%	23%	20%	26%
	Museum exhibition tour	**11%**	2%	7%	11%	19%	25%	9%	12%	9%	11%	8%	11%	NA	9%	12%	10%	16%
	TV programme special	**7%**	23%	10%	3%	3%	-	13%	9%	7%	5%	4%	7%	NA	12%	4%	9%	2%
	Sporting event	**1%**	-	2%	1%	0%	-	1%	-	1%	3%	4%	1%	NA	0%	2%	1%	1%
	Lecture	**4%**	5%	5%	3%	3%	11%	4%	4%	-	6%	4%	4%	NA	6%	3%	4%	5%
	I can't remember	**0%**	-	-	0%	1%	2%	-	0%	1%	-	-	0%	NA	0%	0%	0%	-
	Other	**2%**	2%	3%	2%	2%	-	6%	1%	1%	1%	3%	2%	NA	3%	2%	2%	3%
A18	**In what types of venues have you attended Event Cinema for a performance/cultural event (theatre, opera, etc.)? Please tick all that apply.**																	
	Theatre	**22%**	23%	16%	20%	24%	41%	27%	23%	17%	15%	19%	22%	NA	21%	22%	19%	30%
	Traditional cinema	**75%**	70%	75%	76%	77%	77%	75%	77%	71%	76%	59%	75%	NA	74%	77%	76%	76%
	Art-house cinema	**38%**	39%	42%	38%	33%	28%	37%	38%	39%	40%	37%	38%	NA	44%	34%	38%	32%
	Arts centre	**8%**	7%	7%	7%	12%	10%	7%	11%	8%	4%	4%	8%	NA	9%	8%	8%	8%
	School	**3%**	9%	3%	3%	1%	-	1%	2%	6%	3%	4%	3%	NA	5%	2%	3%	6%
	Library	**1%**	-	1%	0%	1%	2%	2%	-	-	-	-	1%	NA	1%	1%	0%	0%
	Hotel/Pub/Restaurant/Café	**1%**	-	1%	1%	1%	-	-	1%	1%	2%	1%	1%	NA	0%	1%	1%	1%
	Church hall	**1%**	-	1%	1%	1%	-	1%	1%	0%	-	-	1%	NA	1%	1%	0%	2%
	Community centre	**2%**	-	2%	2%	3%	3%	2%	1%	1%	2%	-	2%	NA	0%	3%	1%	5%
	Gallery	**1%**	5%	1%	1%	2%	-	3%	1%	0%	-	3%	1%	NA	2%	1%	1%	1%
	Outdoor public space	**3%**	5%	5%	2%	2%	2%	5%	3%	3%	3%	6%	3%	NA	5%	2%	3%	3%
	Other	**4%**	9%	4%	3%	2%	5%	6%	3%	4%	2%	3%	4%	NA	5%	4%	5%	3%
A19	**What types of theatre Event Cinema screenings have you seen? Please tick all that apply.**																	
	Drama	**93%**	86%	90%	95%	97%	97%	94%	91%	95%	95%	85%	93%	NA	92%	94%	93%	93%
	Musical	**20%**	14%	19%	19%	19%	41%	21%	18%	16%	16%	15%	20%	NA	19%	21%	20%	19%
	Physical theatre and circus	**3%**	2%	4%	3%	1%	3%	2%	2%	4%	4%	3%	3%	NA	3%	3%	2%	5%
	Family theatre	**5%**	7%	4%	4%	6%	7%	9%	4%	4%	5%	3%	5%	NA	3%	7%	5%	6%
	Pantomime	**1%**	-	1%	0%	1%	5%	2%	1%	-	1%	-	1%	NA	1%	1%	1%	1%
	Other	**8%**	5%	7%	7%	12%	15%	11%	10%	6%	6%	6%	8%	NA	8%	8%	9%	8%
A20	**Thinking back to the most recent Event Cinema performance you saw would you have seen it live if it was not screened in the cinema?**																	
	Yes	**16%**	23%	21%	11%	13%	8%	23%	14%	10%	17%	15%	16%	NA	19%	13%	16%	11%
	No	**74%**	68%	66%	81%	79%	80%	72%	75%	82%	76%	73%	74%	NA	68%	79%	74%	81%
	I don't know	**10%**	9%	13%	8%	8%	12%	5%	11%	8%	7%	12%	10%	NA	12%	8%	11%	8%
A21	**Have you decided to see Event Cinema rather than a production in person for any of the following reasons? Please tick all that apply.**																	
	Saved me travel	**67%**	57%	52%	76%	80%	84%	67%	64%	67%	72%	58%	67%	NA	58%	74%	64%	80%

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Ticket price (excluding travel) was cheaper	**40%**	48%	31%	40%	50%	48%	43%	41%	42%	42%	38%	40%	NA	38%	42%	40%	45%
Ticket price (including travel) was cheaper	**56%**	66%	47%	55%	60%	69%	63%	55%	57%	56%	51%	56%	NA	54%	58%	56%	61%
Prefer the Event Cinema experience	**8%**	7%	7%	8%	9%	13%	10%	8%	3%	10%	7%	8%	NA	5%	10%	8%	6%
Already seen the live performance	**14%**	9%	14%	15%	13%	16%	11%	17%	11%	16%	7%	14%	NA	17%	12%	15%	10%
Live performance was sold out	**39%**	43%	48%	41%	25%	11%	28%	38%	43%	42%	49%	39%	NA	45%	34%	41%	33%
Live performance was not shown concurrently	**11%**	11%	12%	11%	7%	10%	9%	12%	11%	13%	11%	11%	NA	14%	9%	11%	8%
Disability that precludes travel	**2%**	2%	1%	2%	1%	7%	3%	2%	1%	2%	-	2%	NA	1%	3%	2%	2%
Other	**9%**	5%	9%	10%	9%	11%	8%	11%	7%	4%	15%	9%	NA	10%	8%	8%	9%
A22 **How strongly do agree with the following statements about Event Cinema screenings, based on the last time you attended?** *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
I was totally absorbed	**85%**	80%	82%	87%	88%	93%	82%	87%	83%	84%	85%	85%	NA	83%	87%	85%	86%
not at all important	**3%**	-	4%	4%	3%	-	3%	3%	3%	4%	1%	3%		2%	3%	3%	4%
not very much	**2%**	9%	3%	1%	1%	-	6%	1%	4%	0%	1%	2%		4%	2%	3%	0%
somewhat important	**4%**	9%	5%	4%	3%	-	5%	2%	6%	8%	11%	4%		6%	3%	4%	5%
fairly strongly	**29%**	36%	37%	27%	28%	26%	33%	32%	29%	32%	29%	31%		33%	29%	31%	31%
very strongly	**62%**	45%	51%	65%	65%	74%	53%	62%	57%	56%	57%	59%		54%	63%	59%	60%
I don't know	**0%**	-	-	0%	-	-	-	-	0%	-	-	0%		-	0%	-	-
I felt an emotional response to the performance	**84%**	83%	82%	84%	86%	90%	84%	85%	83%	84%	82%	84%	NA	82%	86%	84%	83%
not at all important	**3%**	-	4%	4%	3%	-	3%	3%	2%	4%	2%	3%		3%	3%	3%	4%
not very much	**2%**	2%	4%	1%	1%	-	1%	2%	5%	1%	6%	2%		4%	1%	2%	1%
somewhat important	**5%**	9%	3%	5%	5%	2%	8%	2%	7%	6%	5%	5%		5%	4%	5%	6%
fairly strongly	**35%**	43%	38%	34%	33%	36%	35%	40%	29%	37%	34%	36%		39%	34%	36%	37%
very strongly	**56%**	45%	51%	56%	58%	63%	53%	54%	56%	53%	52%	54%		49%	58%	54%	51%
I don't know	**0%**	-	1%	0%	0%	-	1%	1%	-	-	-	0%		0%	0%	0%	-
Watching the performance on screen gave me a good sense of what experiencing it live in a theatre would be like	**75%**	66%	70%	78%	79%	83%	74%	74%	75%	76%	75%	75%	NA	70%	78%	75%	75%
not at all important	**3%**	5%	4%	4%	3%	-	3%	2%	7%	3%	1%	4%		4%	3%	3%	5%
not very much	**5%**	9%	10%	4%	5%	2%	7%	9%	2%	3%	11%	6%		9%	4%	8%	3%

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
somewhat important	**10%**	23%	14%	7%	10%	12%	16%	11%	11%	12%	7%	12%		14%	11%	12%	13%
fairly strongly	**43%**	45%	44%	45%	39%	37%	43%	45%	46%	47%	49%	43%		48%	40%	43%	42%
very strongly	**39%**	18%	28%	40%	44%	49%	32%	33%	34%	34%	31%	35%		25%	42%	34%	36%
I don't know	**1%**	-	1%	1%	1%	2%	0%	1%	0%	1%	1%	1%		0%	1%	0%	1%
Broadcasting live theatre to a cinema screen opens up new ways of seeing this artform	**88%**	88%	87%	88%	89%	90%	87%	88%	87%	89%	93%	88%	NA	86%	89%	88%	88%
not at all im-portant	**3%**	-	4%	4%	1%	-	2%	4%	3%	4%	1%	3%		3%	3%	3%	4%
not very much	**1%**	5%	1%	1%	0%	2%	3%	1%	1%	1%	1%	2%		2%	1%	2%	1%
somewhat important	**4%**	5%	4%	3%	6%	7%	4%	4%	3%	4%	1%	4%		5%	4%	4%	4%
fairly strongly	**23%**	25%	24%	22%	25%	22%	27%	23%	30%	22%	15%	23%		28%	20%	23%	24%
very strongly	**69%**	66%	67%	70%	68%	69%	64%	68%	63%	70%	80%	68%		62%	72%	68%	68%
I don't know	**3%**	-	2%	2%	4%	2%	2%	2%	2%	2%	1%	2%		2%	2%	2%	2%
Being in the cinema or other venue was more engaging than if I had been there live in the audi-ence	**33%**	28%	31%	34%	35%	36%	31%	34%	32%	33%	31%	33%	NA	31%	34%	33%	32%
not at all im-portant	**18%**	27%	22%	16%	16%	16%	22%	18%	15%	19%	29%	19%		25%	16%	19%	20%
not very much	**43%**	41%	42%	44%	42%	43%	42%	42%	52%	43%	35%	43%		40%	45%	43%	46%
somewhat important	**29%**	25%	29%	29%	31%	26%	29%	30%	24%	32%	26%	28%		27%	29%	29%	25%
fairly strongly	**7%**	7%	5%	6%	7%	12%	7%	7%	6%	3%	6%	6%		6%	7%	7%	4%
very strongly	**3%**	-	3%	4%	4%	3%	1%	3%	2%	4%	4%	3%		3%	3%	2%	4%
I don't know	**2%**	-	3%	1%	2%	2%	2%	1%	1%	2%	-	2%		2%	1%	1%	3%
Being in the cinema or other venue was a very different experience from attending a live performance	**69%**	74%	69%	67%	67%	72%	74%	67%	65%	69%	71%	69%	NA	71%	68%	70%	67%
not at all im-portant	**2%**	-	2%	3%	1%	-	1%	2%	1%	1%	3%	2%		3%	1%	2%	2%
not very much	**9%**	5%	8%	9%	11%	7%	4%	8%	14%	9%	1%	8%		6%	10%	8%	9%
somewhat important	**23%**	14%	23%	24%	23%	22%	18%	25%	22%	22%	23%	22%		21%	23%	21%	26%
fairly strongly	**47%**	60%	47%	47%	48%	45%	49%	48%	49%	49%	53%	48%		48%	48%	49%	47%
very strongly	**19%**	21%	21%	18%	17%	25%	28%	17%	15%	19%	19%	20%		23%	18%	21%	16%
I don't know	**3%**	2%	3%	1%	5%	7%	7%	1%	4%	1%	2%	3%		3%	3%	3%	4%
The experience met my expecta-tions	**82%**	80%	80%	83%	85%	89%	80%	82%	85%	82%	85%	82%	NA	80%	84%	82%	82%
not at all im-portant	**3%**	-	5%	4%	2%	-	5%	3%	2%	4%	2%	3%		3%	4%	3%	5%

	All	Age: 16-24	Age: 25-44	Age: 45-64	Age: 65-74	Age: 75+	Income: Less than £20,000	Income: £20,000 – £39,999	Income: £40,000 – £59,000	Income: £60,000 – £99,999	Income: £100,000 and over	Participation: Event Cinema	Participation: No Event Cinema	Participation: Streamed Performance	Participation: No Streamed Performance	Location: Urban	Location: Rural
not very much	**1%**	2%	2%	0%	2%	2%	2%	2%	2%	-	-	1%		2%	1%	2%	1%
somewhat important	**6%**	5%	5%	7%	5%	4%	4%	5%	3%	8%	11%	6%		6%	5%	6%	6%
fairly strongly	**39%**	66%	47%	37%	35%	29%	48%	44%	39%	44%	31%	43%		51%	37%	43%	39%
very strongly	**51%**	27%	42%	52%	56%	65%	42%	46%	54%	45%	56%	47%		39%	53%	47%	49%
I don't know	**6%**	-	3%	5%	7%	22%	5%	5%	2%	5%	7%	5%		2%	8%	5%	7%
I felt real excitement because I knew that the performance was captured as a live event	**72%**	67%	68%	72%	75%	82%	68%	73%	70%	72%	75%	72%	NA	68%	74%	72%	72%
not at all important	**3%**	-	7%	3%	2%	-	5%	3%	3%	5%	-	3%		4%	3%	4%	2%
not very much	**7%**	16%	7%	6%	8%	5%	11%	7%	8%	7%	11%	8%		9%	6%	8%	8%
somewhat important	**22%**	20%	23%	25%	17%	20%	22%	21%	27%	16%	16%	22%		24%	21%	21%	25%
fairly strongly	**31%**	43%	34%	31%	31%	15%	30%	35%	31%	38%	36%	32%		34%	31%	32%	31%
very strongly	**37%**	20%	29%	35%	42%	60%	32%	34%	31%	34%	37%	34%		28%	39%	35%	34%
I don't know	**5%**	-	2%	6%	6%	9%	4%	4%	2%	3%	4%	4%		2%	6%	4%	6%
Based on the event, I would recommend this experience to other people	**88%**	88%	85%	89%	89%	95%	87%	87%	89%	89%	89%	88%	NA	86%	89%	88%	89%
not at all important	**3%**	-	5%	4%	3%	-	3%	4%	3%	3%	2%	3%		3%	3%	3%	3%
not very much	**1%**	-	1%	1%	1%	-	0%	1%	1%	1%	2%	1%		2%	0%	1%	-
somewhat important	**3%**	9%	4%	1%	4%	2%	6%	4%	1%	1%	-	4%		5%	3%	4%	2%
fairly strongly	**24%**	30%	31%	25%	20%	16%	28%	26%	26%	29%	32%	26%		30%	23%	26%	26%
very strongly	**69%**	61%	60%	69%	72%	82%	63%	66%	69%	67%	65%	67%		61%	71%	66%	69%
I don't know	**10%**	-	3%	10%	12%	34%	7%	10%	5%	5%	8%	8%		5%	11%	8%	11%
A23 With how many people did you attend this Event Cinema performance?																	
Myself only	**20%**	27%	24%	16%	15%	18%	31%	24%	16%	10%	15%	20%	NA	23%	18%	21%	17%
2 people (1 other)	**52%**	41%	46%	58%	61%	48%	45%	50%	50%	59%	47%	52%	NA	44%	57%	52%	51%
3-4 people	**23%**	18%	26%	23%	20%	31%	20%	23%	24%	22%	35%	23%	NA	26%	22%	22%	26%
5 or more people	**5%**	14%	4%	4%	4%	3%	4%	3%	10%	8%	3%	5%	NA	7%	3%	5%	6%
A24 Approximately how far away is the venue where you have most regularly seen Event Cinema?																	
Within walking distance	**16%**	16%	19%	14%	17%	16%	25%	15%	17%	15%	16%	16%	NA	16%	16%	21%	3%
Less than ten minutes by vehicle	**17%**	19%	17%	18%	13%	16%	14%	17%	23%	19%	22%	17%	NA	12%	20%	19%	11%
10-30 minutes by vehicle	**50%**	49%	41%	54%	54%	56%	35%	54%	44%	52%	51%	50%	NA	50%	49%	47%	62%
30-60 minutes by vehicle	**15%**	14%	21%	12%	15%	11%	23%	13%	12%	13%	11%	15%	NA	19%	13%	12%	20%
More than one hour by vehicle	**2%**	2%	3%	2%	1%	-	3%	2%	4%	1%	1%	2%	NA	2%	2%	2%	3%
A25 How important is it to you that the event in the cinema is live (i.e. knowing that a performance is happening in real time)?																	
Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%																	

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	57%	52%	51%	56%	60%	66%	54%	56%	55%	57%	58%	57%	NA	55%	58%	56%	62%
Not at all important	**9%**	9%	12%	9%	6%	8%	13%	7%	11%	8%	13%	9%	9%	10%	9%	9%	7%
Not very important	**22%**	30%	24%	24%	19%	11%	22%	27%	21%	20%	17%	22%	22%	22%	22%	23%	16%
Neutral	**19%**	18%	21%	18%	21%	16%	18%	19%	20%	20%	17%	19%	19%	20%	18%	19%	19%
Somewhat important	**33%**	30%	33%	33%	33%	34%	32%	27%	31%	38%	33%	33%	33%	33%	33%	32%	39%
Very important	**17%**	14%	10%	16%	20%	30%	15%	19%	17%	14%	20%	17%	17%	15%	18%	17%	19%
A26 What types of supplementary content would you like to see as part of an Event Cinema screening? Tick all that apply.																	
Digital programme sent before the performance	**51%**	52%	53%	52%	50%	41%	51%	48%	54%	56%	52%	51%	NA	55%	48%	51%	48%
Digital programme made available during the performance	**20%**	43%	25%	14%	9%	15%	14%	23%	16%	23%	22%	20%	NA	27%	15%	20%	19%
Documentary about the play sent before the performance	**36%**	39%	36%	37%	31%	31%	39%	37%	35%	30%	40%	36%	NA	39%	34%	35%	39%
Documentary about the play made available during the performance	**25%**	34%	26%	22%	18%	26%	22%	25%	29%	28%	21%	25%	NA	26%	24%	24%	28%
Interviews with actors	**62%**	66%	62%	64%	58%	56%	53%	66%	59%	71%	65%	62%	NA	63%	61%	61%	65%
Interviews with directors	**59%**	64%	57%	60%	58%	59%	57%	61%	55%	64%	71%	59%	NA	63%	57%	58%	63%
Interviews with audience members	**4%**	7%	2%	5%	2%	2%	2%	3%	3%	6%	3%	4%	NA	5%	3%	3%	5%
"Behind the scenes" tours	**48%**	61%	48%	44%	42%	49%	49%	49%	42%	49%	43%	47%	NA	48%	48%	50%	42%
Printed programme	**40%**	50%	35%	35%	44%	51%	46%	40%	37%	29%	29%	40%	NA	39%	40%	38%	46%
Other	**3%**	2%	2%	3%	4%	11%	4%	3%	4%	4%	-	3%	NA	3%	4%	3%	4%
A27 What type of theatre are you most interested to see broadcasted in the cinema in the future? Please tick all that apply																	
Drama	**94%**	91%	91%	97%	99%	95%	96%	95%	94%	95%	87%	94%	NA	91%	97%	94%	96%
Stand-up Comedy	**14%**	14%	20%	14%	7%	3%	11%	13%	15%	18%	18%	14%	NA	15%	13%	14%	13%
Musical	**48%**	50%	55%	45%	42%	49%	52%	48%	52%	50%	35%	48%	NA	47%	49%	48%	47%
Physical theatre and circus	**14%**	27%	15%	12%	6%	8%	22%	14%	12%	13%	4%	14%	NA	16%	12%	14%	12%
Family theatre	**19%**	27%	19%	19%	16%	18%	24%	20%	21%	17%	17%	19%	NA	18%	21%	19%	20%
Pantomime	**4%**	5%	3%	4%	3%	2%	4%	2%	3%	6%	1%	4%	NA	4%	4%	4%	4%
Other	**9%**	9%	5%	7%	12%	30%	10%	13%	5%	5%	11%	9%	NA	9%	9%	9%	12%
A28 What factors have prevented you from attending an Event Cinema screening of a theatre performance, to date? Please tick all that apply.																	
Not interested	**10%**	29%	6%	5%	14%	50%	9%	9%	14%	5%	-	NA	10%	12%	9%	9%	13%
Prefer live theatre	**54%**	71%	57%	42%	29%	100%	56%	53%	81%	41%	24%	NA	54%	65%	45%	56%	39%

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Tickets are too expensive	**18%**	14%	23%	12%	14%	50%	25%	7%	30%	22%	-	NA	18%	12%	23%	23%	9%
	Don't live near a cinema showing live broadcasts	**14%**	29%	11%	9%	7%	50%	15%	7%	24%	-	24%	NA	14%	23%	7%	11%	11%
	Unaware of live broadcasts of theatre in the cinema	**8%**	-	-	21%	7%	50%	6%	8%	7%	5%	48%	NA	8%	5%	11%	6%	15%
	Cannot get to the cinema easily	**13%**	14%	14%	9%	-	50%	8%	9%	3%	-	52%	NA	13%	9%	15%	9%	24%
	Timing has not been right	**38%**	29%	34%	44%	57%	50%	40%	28%	37%	46%	76%	NA	38%	32%	43%	36%	59%
	Prefer to watch theatre at home on TV and/or online	**12%**	29%	9%	12%	-	-	12%	19%	13%	5%	-	NA	12%	25%	3%	15%	3%
	Disability that precludes travel	**1%**	-	-	2%	-	-	-	-	3%	-	-	NA	1%	1%	-	1%	-
	None of the above	**8%**	-	11%	9%	7%	-	8%	12%	3%	-	-	NA	8%	4%	11%	11%	3%
A29	**What factors might make you more likely to attend an Event Cinema screening in the future? Tick all that apply.**																	
	Greater / more varied selection of productions	**42%**	71%	40%	35%	43%	-	43%	39%	44%	21%	100%	NA	42%	58%	31%	40%	51%
	Less expensive ticket prices	**40%**	43%	49%	28%	21%	50%	58%	30%	37%	33%	24%	NA	40%	40%	39%	37%	39%
	Increase in disposable income	**22%**	43%	29%	7%	-	-	36%	21%	3%	-	-	NA	22%	21%	22%	16%	33%
	Increased availability of screenings nearer to home	**34%**	29%	40%	32%	29%	-	45%	19%	29%	39%	76%	NA	34%	36%	33%	28%	50%
	More publicity	**48%**	57%	49%	44%	50%	50%	41%	40%	51%	41%	76%	NA	48%	49%	48%	42%	64%
	Improved public transportation to venues screening Event Cinema	**6%**	14%	3%	7%	-	-	-	2%	-	-	-	NA	6%	3%	8%	3%	14%
	Screenings at more times	**50%**	43%	54%	47%	50%	50%	54%	36%	48%	30%	76%	NA	50%	36%	60%	52%	49%
	Nothing will make me more likely to attend	**13%**	14%	11%	18%	-	-	11%	13%	14%	32%	-	NA	13%	21%	7%	14%	6%
	Other	**7%**	-	6%	12%	7%	-	8%	1%	7%	-	-	NA	7%	4%	9%	9%	3%
A30	**How much would you be willing to pay for a ticket to an Event Cinema screening?**																	
	Nothing	**1%**	2%	1%	1%	0%	-	2%	1%	-	-	-	0%	7%	1%	1%	1%	-
	£1-10	**19%**	37%	26%	13%	8%	6%	34%	18%	18%	17%	8%	14%	58%	24%	15%	21%	12%
	£10-20	**72%**	57%	68%	77%	79%	83%	58%	75%	77%	69%	77%	78%	30%	68%	76%	71%	78%
	£20-35	**7%**	4%	5%	8%	12%	11%	6%	5%	5%	13%	11%	8%	5%	6%	8%	6%	10%
	£35-50	**0%**	-	0%	0%	1%	-	-	-	-	1%	4%	0%	-	1%	0%	0%	-
	More than £50	**0%**	-	-	0%	-	-	-	-	-	-	-	-	-	-	0%	0%	-

			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Streaming																	
A31	**Which types of live or on-demand streaming performances/cultural events have you seen online or on the television? Please tick all that apply.**																	
	Orchestral music	**15%**	11%	9%	20%	28%	50%	14%	12%	15%	19%	13%	15%	15%	15%	NA	13%	28%
	Opera	**19%**	17%	16%	20%	32%	42%	17%	24%	14%	7%	9%	20%	13%	19%	NA	16%	21%
	Theatre	**86%**	83%	88%	82%	83%	108%	93%	85%	77%	88%	89%	88%	72%	84%	NA	86%	82%
	Dance	**24%**	31%	22%	20%	23%	33%	29%	26%	19%	13%	58%	23%	35%	23%	NA	23%	26%
	Museum exhibition tour	**8%**	8%	5%	7%	10%	33%	7%	8%	3%	16%	4%	8%	1%	8%	NA	6%	16%
	I can't remember	**3%**	3%	4%	2%	-	8%	4%	2%	2%	7%	4%	3%	4%	1%	NA	3%	5%
	Other	**7%**	6%	6%	8%	10%	8%	8%	8%	10%	2%	14%	6%	14%	6%	NA	7%	11%
A32	**Which theatre companies' live or on-demand streaming performances have you seen online or on TV?**																	
	Royal Exchange Theatre	**3%**	6%	3%	1%	2%	-	4%	4%	4%	1%	-	3%	-	3%	NA	3%	3%
	Tricycle Theatre	**1%**	3%	1%	-	-	-	-	-	6%	-	-	1%	-	1%	NA	1%	-
	The Old Vic	**15%**	17%	18%	12%	15%	-	16%	20%	9%	8%	21%	15%	13%	15%	NA	12%	15%
	Chichester Festival Theatre	**4%**	3%	6%	3%	5%	-	4%	7%	1%	4%	-	4%	4%	4%	NA	4%	1%
	Almeida Theatre	**8%**	6%	8%	10%	9%	8%	13%	9%	5%	5%	3%	9%	3%	8%	NA	8%	6%
	Young Vic	**7%**	6%	7%	7%	5%	8%	11%	6%	8%	4%	7%	7%	3%	7%	NA	5%	12%
	Liverpool Everyman Playhouse	**1%**	3%	1%	1%	1%	-	5%	-	1%	1%	-	1%	1%	1%	NA	1%	3%
	Royal Shakespeare Company	**52%**	53%	49%	48%	63%	83%	39%	61%	54%	44%	74%	54%	36%	51%	NA	53%	60%
	English Touring Theatre	**1%**	-	1%	2%	2%	-	-	1%	1%	1%	9%	1%	2%	1%	NA	1%	3%
	Northern Ballet	**8%**	6%	10%	9%	4%	-	4%	8%	12%	8%	18%	8%	11%	8%	NA	8%	9%
	Frantic Assembly	**5%**	11%	4%	3%	-	-	6%	5%	11%	1%	-	5%	6%	5%	NA	6%	1%
	Regent's Park Open Air Theatre	**7%**	14%	8%	3%	4%	-	12%	11%	5%	1%	-	8%	2%	7%	NA	8%	6%
	Royal Court	**7%**	8%	8%	5%	2%	-	9%	8%	3%	12%	4%	7%	7%	6%	NA	6%	5%
	Unicorn Theatre	**-**	-	-	-	-	-	-	-	-	-	-	-	-	-	NA	-	-
	Shakespeare's Globe	**34%**	19%	42%	26%	43%	58%	46%	32%	25%	20%	48%	36%	17%	33%	NA	33%	32%
	National Theatre On Demand in Schools	**4%**	-	6%	5%	1%	-	-	5%	10%	1%	-	4%	3%	4%	NA	4%	4%
	National Jewish Theatre	**1%**	-	1%	1%	2%	-	-	2%	-	-	3%	1%	-	1%	NA	1%	-
	Theatre Royal Newcastle	**1%**	-	1%	1%	-	8%	-	-	-	-	13%	1%	-	1%	NA	0%	5%
	Other	**37%**	42%	40%	35%	20%	17%	47%	39%	29%	33%	16%	36%	41%	36%	NA	39%	24%
A33	**What types of theatrical performances have you streamed live or on-demand? Please tick all that apply.**																	
	Drama	**82%**	69%	87%	80%	87%	100%	84%	82%	69%	85%	85%	85%	60%	80%	NA	82%	86%
	Stand-up Comedy	**8%**	11%	9%	3%	4%	8%	9%	6%	8%	7%	9%	6%	24%	8%	NA	8%	5%
	Musical	**25%**	31%	29%	18%	16%	17%	29%	28%	15%	16%	20%	24%	30%	25%	NA	25%	21%
	Physical theatre and circus	**7%**	11%	4%	7%	5%	8%	11%	5%	10%	4%	-	5%	18%	7%	NA	7%	4%
	Family theatre	**3%**	-	3%	5%	5%	8%	4%	2%	2%	4%	13%	3%	7%	3%	NA	2%	8%

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Pantomime	**0%**	-	-	1%	-	-	-	-	-	-	-	-	1%	0%	NA	0%	-
Other	**11%**	19%	8%	10%	12%	-	12%	10%	15%	3%	9%	11%	12%	11%	NA	11%	9%
A34 Are any of the following reasons you have streamed a theare performance online or on TV, rather than going in person? Please tick all that apply.																	
Not enough time and streaming was faster	**31%**	47%	29%	25%	23%	25%	47%	17%	32%	27%	55%	31%	37%	31%	NA	30%	39%
Cost too much to get to the venue	**38%**	53%	31%	35%	33%	58%	59%	28%	30%	30%	19%	38%	34%	37%	NA	33%	55%
Cheaper to stream than buy a ticket	**33%**	47%	33%	24%	26%	17%	47%	25%	39%	24%	24%	33%	33%	33%	NA	34%	31%
Prefer the streaming experience	**3%**	3%	5%	2%	-	-	6%	2%	2%	3%	13%	3%	4%	3%	NA	3%	1%
Seen the live performance	**17%**	17%	19%	18%	7%	8%	15%	18%	9%	22%	13%	18%	9%	17%	NA	17%	10%
Live performance was sold out	**32%**	33%	36%	31%	23%	8%	17%	39%	30%	29%	29%	33%	23%	32%	NA	35%	27%
Not aware a live performance was occurring	**11%**	25%	4%	10%	11%	-	12%	12%	5%	8%	9%	12%	-	10%	NA	11%	8%
No live performances at the time, streaming past performance	**48%**	58%	51%	39%	39%	33%	51%	46%	43%	45%	46%	51%	27%	48%	NA	47%	53%
Disability that precludes travel	**1%**	-	2%	-	1%	-	2%	0%	-	3%	-	1%	-	1%	NA	1%	-
Other	**9%**	11%	5%	13%	7%	8%	7%	8%	17%	12%	-	8%	15%	9%	NA	8%	2%
A35 How strongly do agree with the following statements about streaming theatre online or on TV, based on the last production you watched? *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
I was totally absorbed																	
not at all important	**2%**	-	3%	2%	3%	-	1%	2%	2%	5%	-	1%	5%	2%		2%	1%
not very much	**11%**	11%	14%	13%	5%	8%	14%	7%	21%	20%	8%	12%	12%	12%		12%	14%
somewhat important	**15%**	14%	13%	12%	22%	25%	16%	11%	22%	14%	17%	14%	19%	14%		15%	15%
fairly strongly	**49%**	60%	49%	48%	48%	42%	43%	58%	39%	44%	49%	53%	36%	51%		51%	55%
very strongly	**23%**	14%	22%	26%	22%	25%	26%	22%	16%	17%	26%	20%	28%	21%		20%	14%
I don't know	**3%**	3%	1%	2%	6%	-	3%	3%	2%	-	-	1%	9%	2%		2%	3%
I felt an emotional response to the performance																	
not at all important	**2%**	3%	2%	-	4%	-	-	4%	1%	3%	-	2%	-	2%		2%	-
not very much	**9%**	9%	10%	9%	8%	-	6%	3%	20%	14%	12%	8%	18%	8%		9%	7%
somewhat important	**17%**	17%	16%	20%	16%	15%	22%	11%	21%	17%	17%	16%	26%	17%		18%	17%
fairly strongly	**52%**	51%	53%	47%	54%	69%	50%	62%	42%	41%	53%	54%	39%	52%		53%	54%
very strongly	**21%**	20%	20%	23%	18%	15%	22%	20%	16%	25%	18%	21%	17%	21%		18%	22%
I don't know	**2%**	3%	1%	2%	7%	-	3%	3%	2%	-	-	1%	9%	2%		2%	2%

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Streaming gave me a good sense of what experiencing it live in a theatre would be like																	
not at all important	**4%**	6%	4%	5%	4%	-	5%	6%	4%	3%	-	4%	11%	5%		4%	2%
not very much	**21%**	25%	30%	16%	16%	8%	24%	24%	27%	21%	25%	25%	17%	23%		26%	18%
somewhat important	**24%**	25%	17%	26%	29%	23%	19%	15%	35%	30%	35%	22%	24%	22%		21%	31%
fairly strongly	**40%**	44%	39%	39%	39%	46%	44%	45%	28%	42%	26%	41%	40%	41%		41%	38%
very strongly	**11%**	-	10%	15%	12%	23%	9%	10%	7%	5%	13%	9%	8%	9%		8%	12%
I don't know	**2%**	-	1%	2%	5%	-	0%	3%	2%	-	4%	1%	3%	1%		1%	2%
Streaming theatre opens up new ways of seeing this artform																	
not at all important	**2%**	-	2%	3%	-	-	1%	3%	2%	-	-	1%	5%	1%		1%	1%
not very much	**5%**	6%	4%	5%	5%	-	5%	1%	7%	6%	7%	4%	11%	4%		5%	-
somewhat important	**10%**	6%	8%	11%	9%	27%	5%	8%	15%	11%	4%	8%	16%	9%		9%	13%
fairly strongly	**49%**	61%	46%	44%	57%	45%	47%	52%	46%	54%	50%	51%	43%	50%		51%	53%
very strongly	**36%**	28%	40%	38%	29%	27%	42%	36%	29%	28%	38%	37%	26%	36%		34%	33%
I don't know	**3%**	-	1%	2%	7%	9%	0%	3%	2%	-	-	2%	3%	2%		1%	6%
Streaming was more engaging than attending a live performance																	
not at all important	**32%**	47%	31%	32%	27%	17%	46%	36%	35%	24%	47%	32%	51%	34%		34%	44%
not very much	**45%**	33%	42%	48%	49%	58%	34%	33%	47%	58%	37%	43%	38%	42%		43%	37%
somewhat important	**18%**	14%	22%	15%	20%	8%	16%	22%	16%	15%	12%	19%	10%	18%		18%	8%
fairly strongly	**4%**	6%	4%	4%	3%	8%	4%	6%	1%	3%	4%	5%	1%	4%		4%	6%
very strongly	**1%**	-	1%	2%	1%	8%	-	2%	1%	-	-	1%	-	1%		1%	5%
I don't know	**4%**	-	3%	3%	8%	-	2%	5%	2%	-	-	2%	5%	2%		3%	2%
Streaming was a very different experience from attending a live performance																	
not at all important	**1%**	-	2%	2%	1%	-	-	1%	5%	-	-	1%	5%	1%		1%	3%
not very much	**5%**	3%	3%	7%	6%	17%	2%	3%	12%	8%	5%	4%	7%	5%		4%	6%
somewhat important	**16%**	3%	17%	20%	17%	17%	7%	16%	13%	14%	21%	14%	12%	14%		15%	12%
fairly strongly	**50%**	58%	53%	45%	49%	50%	57%	56%	43%	42%	41%	54%	40%	52%		53%	38%
very strongly	**27%**	36%	26%	27%	27%	17%	33%	24%	27%	37%	34%	27%	37%	28%		27%	42%
I don't know	**7%**	-	6%	5%	14%	8%	7%	5%	9%	4%	3%	4%	11%	5%		5%	5%

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	The experience met my expectations																	
	not at all important	**2%**	6%	3%	2%	1%	-	1%	6%	6%	-	-	3%	5%	3%		2%	3%
	not very much	**4%**	-	7%	4%	3%	8%	-	1%	9%	13%	10%	4%	5%	4%		5%	7%
	somewhat important	**23%**	20%	14%	28%	30%	31%	18%	18%	28%	20%	29%	19%	36%	21%		25%	9%
	fairly strongly	**48%**	63%	54%	44%	41%	31%	54%	55%	38%	51%	42%	53%	42%	52%		50%	58%
	very strongly	**22%**	11%	22%	23%	26%	31%	27%	19%	19%	16%	19%	21%	11%	20%		19%	24%
	I don't know	**4%**	3%	4%	3%	9%	-	7%	4%	2%	3%	-	2%	21%	3%		4%	3%
	I felt real excitement because I knew that the performance was captured as a live event																	
	not at all important	**6%**	9%	6%	5%	8%	-	13%	4%	6%	5%	9%	6%	12%	6%		7%	4%
	not very much	**16%**	12%	20%	19%	7%	8%	16%	13%	23%	17%	17%	17%	14%	16%		18%	9%
	somewhat important	**36%**	26%	42%	33%	32%	50%	34%	34%	35%	44%	55%	37%	31%	36%		36%	42%
	fairly strongly	**27%**	50%	20%	26%	30%	25%	30%	35%	26%	23%	17%	28%	38%	30%		25%	35%
	very strongly	**15%**	3%	12%	16%	23%	17%	7%	14%	11%	11%	3%	13%	5%	12%		13%	10%
	I don't know	**7%**	6%	11%	4%	11%	-	10%	4%	7%	7%	24%	6%	19%	7%		6%	12%
	Based on the event, I would recommend this experience to other people																	
	not at all important	**2%**	-	3%	2%	4%	-	-	3%	4%	3%	-	1%	7%	2%		1%	2%
	not very much	**6%**	6%	5%	9%	1%	-	3%	5%	9%	8%	19%	6%	2%	6%		6%	6%
	somewhat important	**18%**	25%	11%	18%	22%	42%	17%	13%	31%	17%	12%	16%	26%	17%		20%	12%
	fairly strongly	**41%**	34%	49%	38%	41%	17%	42%	41%	25%	48%	57%	41%	39%	41%		40%	55%
	very strongly	**33%**	34%	33%	34%	32%	42%	38%	38%	30%	24%	12%	34%	27%	34%		34%	25%
	I don't know	**5%**	13%	2%	3%	11%	8%	9%	5%	6%	-	3%	3%	22%	5%		6%	5%
A36	**How important is it to you that the streamed performance online or on TV is live (i.e. taking place in real time)?**																	
	Not at all important	**19%**	17%	20%	19%	20%	23%	29%	11%	20%	17%	35%	19%	19%	19%	NA	16%	21%
	Not very important	**29%**	33%	33%	24%	23%	8%	30%	28%	23%	36%	36%	29%	30%	29%	NA	30%	29%
	Neutral	**22%**	25%	21%	21%	22%	38%	23%	23%	24%	21%	19%	22%	21%	23%	NA	25%	20%
	Somewhat important	**20%**	22%	16%	24%	24%	15%	6%	28%	19%	24%	10%	20%	22%	20%	NA	20%	19%
	Very important	**9%**	3%	10%	12%	11%	15%	12%	10%	15%	2%	-	9%	7%	9%	NA	9%	10%
A37	**With how many people did you stream the most recent theatre performance online or on television that you viewed?**																	
	Myself only	**65%**	72%	69%	60%	56%	38%	81%	69%	61%	58%	34%	65%	64%	65%	NA	66%	50%
	2 people (1 other)	**27%**	22%	24%	32%	40%	38%	19%	24%	20%	36%	43%	28%	23%	27%	NA	27%	32%
	3-4 people	**5%**	3%	5%	6%	3%	23%	-	5%	9%	5%	23%	5%	9%	5%	NA	4%	17%

			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
	5 or more people	**2%**	3%	3%	2%	1%	-	0%	2%	10%	1%	-	2%	4%	3%	NA	3%	1%
A38	**On what platforms do you most often stream theatre performances? Please tick all that apply.**																	
	Digital Theatre	**30%**	36%	35%	22%	12%	17%	42%	28%	20%	26%	12%	32%	13%	29%	NA	30%	18%
	The Space	**4%**	6%	4%	3%	1%	-	10%	1%	5%	3%	-	4%	4%	4%	NA	4%	4%
	Sky Arts	**21%**	28%	21%	16%	23%	8%	19%	20%	20%	13%	32%	23%	10%	21%	NA	24%	21%
	BBC iplayer	**60%**	58%	56%	56%	77%	108%	56%	61%	62%	56%	77%	63%	40%	60%	NA	63%	71%
	Curzon Home Cinema	**2%**	-	1%	5%	7%	-	-	2%	3%	3%	9%	2%	1%	2%	NA	2%	6%
	Periscope	**2%**	-	5%	1%	-	-	3%	2%	3%	-	9%	2%	3%	2%	NA	3%	-
	YouTube	**44%**	64%	47%	30%	24%	33%	63%	44%	41%	40%	40%	43%	57%	44%	NA	45%	32%
	Vimeo	**6%**	3%	8%	8%	-	-	8%	8%	3%	3%	13%	6%	10%	6%	NA	6%	2%
	Canvas	**1%**	6%	-	-	-	-	3%	-	4%	-	-	1%	-	1%	NA	2%	-
	Other	**12%**	11%	14%	10%	7%	8%	11%	13%	13%	10%	9%	12%	10%	12%	NA	14%	7%
A39	**Where have you watched streamed theatre performances online or on television in the past 12 months? Please tick all that apply.**																	
	At home	**89%**	89%	89%	84%	91%	108%	93%	90%	79%	91%	91%	90%	77%	88%	NA	89%	88%
	At work	**10%**	3%	18%	7%	1%	-	3%	14%	17%	13%	-	10%	13%	10%	NA	11%	8%
	At school/uni-versity	**8%**	25%	4%	4%	1%	-	12%	3%	12%	10%	-	10%	-	8%	NA	8%	12%
	At a friend or family member's house	**7%**	17%	5%	5%	2%	-	12%	9%	3%	1%	4%	8%	5%	7%	NA	9%	5%
	In transit	**4%**	8%	4%	2%	1%	-	7%	5%	2%	2%	-	5%	-	4%	NA	5%	4%
	At the hospital	**-**	-	-	-	-	-	-	-	-	-	-	-	-	-	NA	-	-
	Other	**12%**	11%	14%	10%	7%	8%	11%	13%	13%	10%	9%	12%	10%	12%	NA	14%	7%
A40	**Is your home Internet access fast enough to allow you to watch video without interruptions (the screen freezing, audio and video out of sync, etc.)?**																	
	Never falters	**22%**	25%	26%	17%	17%	15%	20%	33%	10%	21%	28%	21%	39%	22%	NA	24%	24%
	Occasional isues	**70%**	66%	71%	71%	68%	77%	66%	63%	77%	75%	64%	72%	50%	70%	NA	72%	55%
	Usually have interruptions	**8%**	9%	3%	12%	14%	8%	13%	3%	13%	3%	9%	7%	10%	8%	NA	5%	21%
	I don't know	**0%**	-	-	1%	1%	-	1%	0%	-	-	-	0%	1%	0%	NA	-	-
A41	**Are any of the following reasons you have not streamed a theatre performance online or on television before? Please tick all that apply.**																	
	Not interested in the performances offered	**3%**	-	5%	2%	2%	2%	4%	2%	3%	1%	10%	2%	10%	NA	3%	2%	4%
	Prefer live theatre	**36%**	53%	34%	32%	37%	40%	45%	33%	31%	31%	38%	35%	43%	NA	36%	37%	33%
	Don't want to watch without the company of an audience	**16%**	13%	16%	17%	16%	18%	15%	20%	10%	16%	15%	16%	17%	NA	16%	18%	12%
	Don't know where to find online	**34%**	53%	39%	32%	25%	36%	37%	36%	31%	41%	41%	34%	33%	NA	34%	35%	32%
	Don't have a com-puter or mobile device at home	**0%**	-	-	1%	0%	-	1%	1%	-	-	-	0%	-	NA	0%	0%	1%
	Don't have a tele-vision at home	**3%**	7%	2%	2%	3%	4%	7%	2%	1%	1%	-	2%	4%	NA	3%	3%	2%
	Television does not support on-demand viewing	**21%**	33%	16%	17%	25%	34%	22%	27%	21%	14%	4%	21%	21%	NA	20%	18%	26%

			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
	Internet access is too slow / nonex-istent	**15%**	7%	9%	18%	18%	18%	19%	12%	13%	14%	7%	16%	11%	NA	15%	11%	28%
	Unaware content online or on television	**43%**	40%	40%	44%	40%	50%	43%	45%	43%	45%	42%	44%	36%	NA	43%	43%	40%
	Don't know how to pay for content I want to view	**12%**	7%	9%	14%	12%	18%	16%	15%	10%	11%	17%	12%	16%	NA	12%	12%	12%
	Prefer not to pay for content I want to view	**24%**	33%	21%	24%	21%	26%	25%	25%	20%	22%	20%	23%	26%	NA	24%	24%	23%
	Haven't had the chance yet	**14%**	7%	23%	14%	7%	10%	14%	10%	16%	22%	23%	14%	13%	NA	14%	15%	11%
	Other	**8%**	27%	18%	4%	2%	2%	11%	9%	9%	7%	4%	8%	7%	NA	-	10%	3%
A42	**How much would you be willing to pay to view a streaming theatre performance online or on television?**																	
	Nothing	**34%**	39%	30%	32%	40%	41%	39%	33%	37%	30%	17%	32%	48%	29%	37%	34%	37%
	£1-5	**36%**	51%	36%	36%	32%	20%	36%	39%	36%	35%	41%	37%	29%	40%	34%	39%	32%
	£5-10	**22%**	6%	25%	26%	21%	29%	20%	21%	21%	27%	23%	23%	17%	25%	21%	21%	23%
	£10-20	**6%**	4%	7%	5%	6%	8%	5%	7%	6%	6%	14%	6%	5%	4%	7%	6%	6%
	£20-35	**1%**	-	0%	1%	1%	2%	-	1%	-	2%	2%	1%	1%	1%	1%	0%	1%
	£35-50	**0%**	-	0%	0%	0%	-	-	0%	-	-	3%	0%	-	-	0%	0%	1%
	More than £50	**0%**	-	-	0%	-	-	-	-	-	-	-	0%	-	0%	-	-	-
A43	**How much would you be willing to pay for subscription to enable you to stream theatre and other arts performances online or on television for a monthly fee with unlimited access?**																	
	Not interested	**46%**	18%	39%	53%	63%	70%	46%	44%	46%	47%	41%	45%	56%	34%	55%	46%	53%
	£1-5 per month	**33%**	57%	38%	27%	25%	15%	30%	31%	35%	36%	43%	33%	30%	41%	27%	33%	33%
	£5-10 per month	**18%**	25%	19%	17%	11%	11%	22%	20%	17%	14%	13%	18%	14%	21%	15%	19%	12%
	£10-20 per month	**3%**	-	4%	4%	2%	3%	2%	4%	2%	2%	2%	3%	1%	4%	2%	2%	2%
	£20+ per month	**0%**	-	0%	-	-	-	-	-	-	1%	-	0%	-	-	0%	0%	-
A44	**Would you say that streaming theatre online or on television and/or Event Cinema has made you more likely to visit the theatre in person?**																	
	No impact	**71%**	67%	69%	72%	71%	80%	74%	70%	71%	71%	70%	69%	85%	72%	70%	70%	76%
	I see more of live theatre because of it	**17%**	24%	19%	17%	11%	7%	13%	16%	21%	16%	16%	18%	3%	20%	15%	17%	13%
	I see less of live theatre because of it	**2%**	-	1%	2%	6%	5%	2%	2%	1%	2%	7%	2%	-	1%	3%	2%	2%
	I'm not sure	**10%**	10%	11%	10%	12%	8%	11%	12%	7%	11%	7%	10%	12%	8%	13%	10%	9%
	Disability & Accessibility																	
A45	**Are you disabled or do you attend performances with someone who is a disabled person?**																	
	Yes	**12%**	14%	11%	11%	11%	21%	16%	12%	7%	10%	3%	12%	13%	10%	14%	13%	9%
	No	**88%**	86%	89%	89%	89%	79%	84%	88%	93%	90%	97%	88%	87%	90%	86%	87%	91%
A46	**Which of the following services are currently made available in Live-to-Digital arts content that you view in the cinema or stream online or on television?**																	
	Audio description	**20%**	29%	22%	16%	22%	15%	23%	18%	6%	21%	-	15%	50%	31%	15%	22%	12%
	Stage-text perfor-mances	**13%**	29%	13%	5%	11%	15%	17%	17%	-	13%	-	13%	12%	25%	7%	14%	11%
	Signed perfor-mances	**5%**	14%	4%	4%	3%	-	-	11%	-	10%	-	6%	-	12%	1%	6%	-

		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Event Cinema	No Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
Relaxed performances	**9%**	14%	13%	9%	5%	-	2%	15%	-	32%	-	10%	4%	17%	5%	10%	8%
Visual story	**6%**	14%	9%	2%	5%	-	10%	1%	-	27%	-	6%	3%	14%	2%	7%	-
I don’t know	**57%**	43%	52%	64%	73%	54%	52%	57%	88%	55%	100%	63%	21%	44%	64%	54%	68%
Other	**9%**	-	17%	4%	3%	23%	13%	11%	-	-	-	7%	23%	4%	12%	10%	9%

TABLE 3

Differential Proportions

		All	Age: 16-24	Age: 25-44	Age: 45-64	Age: 65-74	Age: 75+	Income: Less than £20,000	Income: £20,000 – £39,999	Income: £40,000 – £59,000	Income: £60,000 – £99,999	Income: £100,000 and over	Participation: Live Theatre	Participation: Event Cinema	Participation: Streamed Performance	Participation: No Streamed Performance	Location: Urban	Location: Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
A1	**Age**																	
	16-24	**13%**						12%	1%	-0%	-7%	NA	-	-0%	9%	-6%	2%	-6%
	25-44	**31%**						4%	1%	-1%	7%	3%	-	-2%	11%	-8%	2%	
	45-64	**35%**						-13%	-6%	4%	9%	24%	-	0%	-11%	8%	-2%	
	65-74	**13%**						-2%	2%	1%	-4%	-7%	-	1%	-5%	4%	-1%	5%
	75	**8%**						-2%	3%	-3%	-4%	NA	-	1%	-4%	3%	-0%	3%
A2	**Income**																	
	Less than £20,000	**22%**	18%	1%	-8%	-2%	-2%						-	-2%	4%	-3%	1%	-7%
	£20,000 – £39,999	**36%**	-1%	-2%	-5%	7%	22%						-	1%	-1%	1%	2%	-2%
	£40,000 – £59,000	**19%**	-2%	-2%	3%	2%	-6%						-	-0%	-0%	1%	-1%	5%
	£60,000 – £99,999	**16%**	-10%	2%	5%	-5%	-8%						-	0%	-1%	1%	-1%	1%
	£100,000 and over	**6%**	NA	0%	5%	-3%	NA						-	0%	-1%	1%	-1%	3%
A3	**Participation**																	
	Attended Event Cinema Screening	**89%**	-2%	-5%	1%	7%	8%	-8%	2%	-1%	2%	6%	-	11%	-1%	0%	0%	-0%
	Did Not Attend Event Cinema Screening	**11%**	2%	5%	-1%	-7%	-8%	8%	-2%	1%	-2%	-6%	-	NA	1%	-0%	-0%	0%
	Attended Streamed Performance	**41%**	30%	14%	-13%	-16%	-22%	8%	-0%	-0%	-1%	-9%	-	-0%	59%	NA	1%	
	Did Not Attend Streamed Performance	**59%**	-30%	-14%	13%	16%	22%	-8%	0%	0%	1%	9%	-	0%	NA	41%	-1%	
A4	**Location**																	
	Urban	**79%**	10%	8%	-6%	-8%	-7%	7%	3%	-3%	-0%	-9%	-	0%	6%	-4%		
	Rural	**21%**	-10%	-8%	6%	8%	7%	-7%	-3%	3%	0%	9%	-	-0%	-6%	4%		
A5	**Gender**																	
	Male	**23%**	-9%	-1%	-1%	9%	9%	-1%	-0%	5%	3%	8%	-	-1%	4%	-2%	1%	-4%
	Female	**76%**	10%	1%	1%	-9%	-10%	1%	0%	-5%	-3%	-7%	-	1%	-4%	3%	-2%	4%
	Other	**0%**	NA	0%	-0%	0%	1%	NA	0%	1%	NA	NA	-	0%	1%	-0%	0%	NA
A6	**Employment Status**																	
	In education	**8%**	40%	-4%	-6%	NA	NA	8%	-3%	2%	-4%	-6%	-	-0%	3%	-2%	-1%	-0%
	Employed full-time	**37%**	-0%	27%	-2%	-36%	NA	-15%	5%	4%	19%	1%	-	-1%	11%	-7%	3%	
	Employed part-time	**10%**	-8%	1%	5%	-3%	NA	3%	-2%	-1%	4%	-4%	-	-0%	-3%	2%	-0%	2%
	Full-time parent/caretaker	**3%**	NA	0%	2%	NA	NA	-1%	-2%	-1%	-0%	5%	-	-0%	-0%	0%	-1%	2%
	Self-employed	**13%**	-7%	3%	3%	-3%	-8%	8%	-1%	-2%	-3%	11%	-	0%	3%	-2%	0%	-2%
	Unemployed	**2%**	6%	-0%	-1%	-2%	NA	1%	-0%	1%	NA	NA	-	-0%	1%	-1%	0%	-1%

Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.

			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Retired	**28%**	NA	-27%	-1%	54%	68%	-4%	4%	-3%	-13%	-5%	-	2%	-15%	10%	-2%	
A7	**Choose one option that best describes your ethnic group or background**																	
	White British	**87%**	-8%	-6%	4%	7%	5%	-12%	4%	3%	2%	-0%	-	1%	-8%	6%	-0%	8%
	Non-White British	**13%**	8%	6%	-4%	-7%	-5%	12%	-4%	-3%	-2%	0%	-	-1%	8%	-6%	0%	-8%
Cultural Participation																		
A8	**How close do you live to the nearest theatre?**																	
	Within walking distance	**24%**	10%	10%	-10%	-7%	-4%	8%	3%	-3%	-1%	-7%	-	-1%	5%	-3%	5%	
	Less than ten minutes by vehicle	**13%**	-2%	2%	-0%	-2%	-0%	1%	2%	1%	-2%	1%	-	0%	1%	-0%	2%	-5%
	10-30 minutes by vehicle	**41%**	2%	-8%	6%	1%	1%	-6%	-4%	2%	8%	-3%	-	0%	-2%	2%	-0%	3%
	30-60 minutes by vehicle	**20%**	-11%	-3%	3%	8%	5%	-3%	-2%	2%	-5%	6%	-	0%	-4%	3%	-5%	
	More than one hour by vehicle	**2%**	-0%	-1%	1%	0%	-1%	-0%	1%	-1%	-2%	3%	-	-0%	0%	-0%	-1%	2%
	I don't know	**0%**	1%	NA	0%	NA	NA	-0%	NA	NA	2%	NA	-	0%	0%	-0%	-0%	NA
A9	**Which of the following can you see at the theatre nearest to you? Please tick all that apply.**																	
	Drama	**93%**	-9%	1%	1%	3%	2%	-3%	0%	-0%	2%	-1%	-	0%	-2%	1%	-1%	1%
	Stand-up comedy	**62%**	-5%	3%	5%	-5%	-18%	-2%	-3%	4%	4%	-1%	-	0%	0%	-0%	0%	7%
	Musical	**77%**	-16%	-1%	4%	4%	5%	-10%	1%	3%	-1%	9%	-	0%	-3%	2%	-0%	6%
	Family theatre	**78%**	0%	2%	1%	-1%	-12%	-0%	1%	0%	-0%	-1%	-	-0%	-0%	0%	-0%	4%
	Pantomime	**68%**	-17%	-7%	7%	8%	10%	-8%	-0%	0%	-1%	4%	-	-0%	-9%	6%	-0%	
	I don't know	**2%**	3%	-0%	-1%	-1%	1%	4%	-0%	-1%	-1%	-1%	-	0%	1%	-0%	-0%	1%
A10	**Are you a season ticket holder at any of the following? Please tick all that apply**																	
	Theatre organisation	**10%**	-6%	-3%	1%	2%	14%	-4%	0%	-1%	-2%	7%	-	0%	1%	-0%	-0%	3%
	Dance company	**1%**	NA	1%	-0%	-0%	NA	0%	0%	0%	NA	-0%	-	0%	1%	-1%	0%	-1%
	Opera company	**1%**	NA	-0%	0%	0%	3%	-1%	-1%	0%	-0%	NA	-	0%	0%	-0%	0%	-0%
	Cinema	**10%**	-4%	2%	-1%	2%	-1%	5%	-4%	-1%	-2%	4%	-	1%	2%	-2%	1%	-2%
	Sport	**4%**	-2%	1%	-1%	2%	1%	-2%	-1%	-1%	4%	5%	-	-0%	-0%	0%	0%	0%
	I do not hold a season ticket of any kind	**74%**	14%	0%	-0%	-5%	-16%	6%	1%	3%	2%	-18%	-	-1%	0%	0%	0%	-3%
A11	**How many live cultural performances of any kind have you attended in the past 12 months?** ***Do not count popular music concerts for the purposes of this question.***																	
	None	**0%**	2%	NA	-0%	0%	NA	-0%	-0%	NA	NA	NA	-	-0%	0%	-0%	-0%	-0%
	1 time	**3%**	-2%	-1%	1%	-1%	4%	1%	-1%	2%	-3%	3%	-	-0%	-1%	1%	-0%	0%
	2-5 times	**31%**	-11%	1%	4%	0%	-4%	3%	-4%	-2%	1%	-1%	-	-2%	-8%	5%	-3%	
	6-11 times	**31%**	-2%	-5%	0%	3%	15%	-10%	3%	1%	5%	2%	-	2%	-3%	2%	-0%	1%
	12+ times	**34%**	13%	5%	-5%	-3%	-15%	6%	3%	-0%	-3%	-3%	-	0%	11%	-7%	4%	

	All	Age					Income					Participation				Location	
		16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
		Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
A12 What type(s) of performances have you attended in the past 12 months? Please tick all that apply.																	
Drama	**88%**	-2%	-2%	1%	3%	1%	-3%	1%	1%	2%	0%	-	2%	4%	-3%	1%	-4%
Stand-up comedy	**31%**	12%	15%	-5%	-18%	-28%	5%	2%	-7%	7%	-0%	-	-0%	6%	-4%	2%	-4%
Musical	**52%**	22%	8%	-6%	-17%	-14%	1%	0%	-4%	5%	3%	-	1%	7%	-5%	2%	-9%
Physical theatre and circus	**20%**	21%	7%	-6%	-12%	-16%	3%	4%	-1%	-2%	7%	-	-0%	8%	-5%	2%	-7%
Family theatre	**28%**	9%	6%	-4%	-7%	-11%	4%	-3%	-0%	3%	10%	-	-0%	6%	-4%	0%	-2%
Pantomime	**17%**	6%	1%	-1%	-2%	-6%	-2%	3%	2%	-8%	11%	-	-0%	2%	-1%	2%	-3%
Improvisational theatre	**10%**	14%	1%	-2%	-4%	NA	3%	3%	-2%	-3%	-4%	-	0%	6%	-4%	0%	-3%
Experimental theatre	**22%**	27%	4%	-6%	-11%	-14%	6%	6%	2%	-3%	-13%	-	-0%	11%	-7%	2%	-8%
Cabaret	**8%**	4%	4%	-3%	-6%	-3%	4%	-2%	1%	2%	-1%	-	-0%	5%	-3%	1%	-4%
Dance – Ballet	**32%**	-2%	-1%	-1%	3%	8%	-8%	5%	3%	-4%	4%	-	1%	-0%	-0%	0%	0%
Dance – Contemporary	**20%**	17%	1%	-3%	-8%	-7%	-3%	3%	6%	-3%	-2%	-	0%	7%	-5%	3%	-8%
Dance – Other	**11%**	3%	2%	-0%	-4%	-9%	-0%	2%	0%	-1%	2%	-	-0%	5%	-4%	0%	-2%
Opera	**27%**	-7%	-6%	1%	9%	17%	-3%	4%	-0%	-8%	-6%	-	1%	-1%	1%	-1%	0%
Music – Classical	**34%**	-16%	-5%	2%	10%	20%	-8%	2%	-0%	4%	-3%	-	1%	-2%	1%	0%	0%
Music – Rock/pop	**25%**	-6%	10%	3%	-11%	NA	-1%	-0%	-3%	5%	12%	-	-1%	0%	-0%	2%	-7%
Music – Contemporary	**20%**	-3%	4%	2%	-5%	-11%	-2%	1%	-2%	-1%	5%	-	0%	5%	-4%	1%	-3%
Exhibitions – Visual Arts	**53%**	-6%	3%	-1%	4%	-5%	0%	4%	-3%	-3%	3%	-	1%	4%	-3%	0%	3%
Exhibitions – Heritage	**39%**	-2%	1%	1%	-0%	-1%	-1%	2%	-4%	2%	-6%	-	-0%	3%	-2%	2%	-4%
Live Theatre																	
A13 How many live theatre performances have you attended in the past 12 months?																	
None	**2%**	-0%	-1%	1%	-0%	NA	0%	1%	-0%	-1%	NA	-	-0%	-2%	1%	-0%	1%
1 time	**8%**	-2%	-1%	1%	-1%	7%	1%	-2%	-0%	-1%	2%	-	-1%	-3%	2%	-1%	1%
2-5 times	**43%**	-21%	-1%	4%	7%	8%	-5%	-1%	-5%	9%	-3%	-	-0%	-8%	5%	-3%	
6-11 times	**23%**	8%	-4%	0%	1%	1%	-4%	-1%	8%	-1%	3%	-	2%	-0%	0%	1%	-3%
12+ times	**24%**	15%	7%	-6%	-6%	-13%	7%	3%	-3%	-7%	-1%	-	-0%	12%	-9%	3%	-9%
A14 In the past 12 months, what was the furthest you traveled to attend a live theatre performance?																	
Within walking distance	**2%**	-0%	-1%	1%	-0%	NA	0%	1%	-0%	-1%	NA	-	-0%	-2%	1%	-0%	1%
Less than ten minutes by vehicle	**8%**	-2%	-1%	1%	-1%	7%	1%	-2%	-0%	-1%	2%	-	-1%	-3%	2%	-1%	1%
10-30 minutes by vehicle	**43%**	-21%	-1%	4%	7%	8%	-5%	-1%	-5%	9%	-3%	-	-0%	-8%	5%	-3%	
30-60 minutes by vehicle	**23%**	8%	-4%	0%	1%	1%	-4%	-1%	8%	-1%	3%	-	2%	-0%	0%	1%	-3%

	All	Age: 16-24	Age: 25-44	Age: 45-64	Age: 65-74	Age: 75+	Income: Less than £20,000	Income: £20,000 – £39,999	Income: £40,000 – £59,000	Income: £60,000 – £99,999	Income: £100,000 and over	Participation: Live Theatre	Participation: Event Cinema	Participation: Streamed Performance	Participation: No Streamed Performance	Location: Urban	Location: Rural
		Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
More than one hour by vehicle	**24%**	15%	7%	-6%	-6%	-13%	7%	3%	-3%	-7%	-1%	-	-0%	12%	-9%	3%	-9%
A15 With how many people did you attend your most recent theatre event?																	
Myself only	**15%**	3%	2%	-2%	-3%	2%	11%	5%	-9%	-11%	-5%	-	0%	1%	-1%	-1%	2%
2 people (1 other)	**57%**	-6%	2%	-1%	4%	-1%	-5%	-5%	1%	10%	0%	-	1%	-3%	2%	1%	-5%
3-4 people	**22%**	2%	-3%	4%	-2%	-7%	-6%	2%	7%	-1%	3%	-	-1%	1%	-1%	0%	1%
5 or more people	**6%**	1%	-1%	-1%	2%	6%	-0%	-1%	2%	2%	1%	-	-0%	0%	-0%	-1%	2%
A16 Over the past 12 months, approximately how much did you pay on average for each ticket to attend a live theatre performance?																	
Nothing	**1%**	NA	1%	-1%	-0%	NA	-0%	0%	NA	0%	NA	-	-0%	-0%	0%	0%	-0%
£1- 10	**6%**	17%	0%	-4%	-4%	-4%	11%	-0%	-4%	-3%	-1%	-	-1%	3%	-2%	0%	-3%
£11-20	**25%**	9%	5%	-6%	-7%	-0%	12%	6%	-2%	-6%	-17%	-	-0%	5%	-4%	0%	-2%
£21-30	**33%**	-0%	-6%	1%	5%	11%	-8%	1%	3%	-2%	-5%	-	0%	-1%	1%	0%	3%
£31-50	**28%**	-20%	0%	6%	5%	-4%	-12%	-2%	1%	11%	13%	-	1%	-7%	6%	1%	-0%
More than £50	**7%**	-5%	-1%	3%	1%	-3%	-3%	-5%	3%	-0%	11%	-	0%	1%	-1%	-1%	3%
Event Cinema																	
A17 Which types of Event Cinema have you attended? Please tick all that apply																	
Orchestral music	**4%**	1%	-2%	-0%	0%	4%	0%	-1%	0%	1%	-2%	-	-0%	0%	-0%	0%	-0%
Opera	**28%**	-16%	-10%	-1%	18%	34%	0%	2%	-1%	-9%	-10%	-	-0%	-3%	2%	-3%	7%
Theatre	**95%**	-4%	-2%	2%	2%	-1%	-2%	-1%	3%	2%	-6%	-	-0%	-1%	1%	-0%	1%
Dance	**21%**	-7%	-10%	4%	5%	20%	-4%	4%	-5%	-4%	-0%	-	-0%	-2%	2%	-1%	5%
Museum exhibition tour	**11%**	-9%	-4%	0%	8%	14%	-2%	1%	-2%	0%	-3%	-	-	-2%	1%	-1%	6%
TV programme special	**7%**	15%	3%	-4%	-4%	NA	5%	1%	-1%	-2%	-3%	-	-0%	5%	-3%	2%	-5%
Sporting event	**1%**	NA	1%	0%	-1%	NA	-0%	NA	0%	2%	3%	-	-	-1%	1%	0%	-0%
Lecture	**4%**	0%	1%	-2%	-1%	7%	-0%	-0%	NA	2%	0%	-	-	1%	-1%	-0%	1%
I can't remember	**0%**	NA	NA	-0%	0%	1%	NA	-0%	1%	NA	NA	-	-	0%	-0%	0%	NA
Other	**2%**	0%	1%	-0%	-0%	NA	4%	-1%	-1%	-1%	1%	-	-0%	1%	-0%	0%	1%
A18 In what types of venues have you attended Event Cinema for a performance/cultural event (theatre, opera, etc.)? Please tick all that apply.																	
Theatre	**22%**	1%	-5%	-2%	2%	19%	6%	1%	-5%	-6%	-2%	-	-	-0%	0%	-2%	8%
Traditional cinema	**75%**	-5%	-0%	1%	1%	2%	-1%	2%	-4%	1%	-17%	-	-0%	-2%	1%	1%	1%
Art-house cinema	**38%**	1%	4%	0%	-5%	-10%	-1%	1%	2%	2%	-1%	-	-0%	7%	-4%	1%	-6%
Arts centre	**8%**	-1%	-1%	-1%	4%	2%	-1%	3%	-0%	-4%	-4%	-	-	1%	-0%	-0%	-1%
School	**3%**	6%	0%	-1%	-2%	NA	-2%	-1%	3%	-0%	1%	-	-	1%	-1%	-0%	3%
Library	**1%**	NA	0%	-0%	0%	1%	1%	NA	NA	NA	NA	-	-	-0%	0%	-0%	-0%
Hotel/Pub/Restaurant/Café	**1%**	NA	0%	0%	-0%	NA	NA	-0%	-0%	1%	1%	-	-	-0%	0%	-0%	0%
Church hall	**1%**	NA	0%	-0%	-0%	NA	1%	0%	-0%	NA	NA	-	-	-0%	0%	-0%	1%

Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.

		All	Age: 16-24	Age: 25-44	Age: 45-64	Age: 65-74	Age: 75+	Income: Less than £20,000	Income: £20,000 – £39,999	Income: £40,000 – £59,000	Income: £60,000 – £99,999	Income: £100,000 and over	Participation: Live Theatre	Participation: Event Cinema	Participation: Streamed Performance	Participation: No Streamed Performance	Location: Urban	Location: Rural
	Community centre	**2%**	NA	-0%	-0%	1%	2%	1%	-0%	-0%	-0%	NA	-	-	-2%	1%	-1%	3%
	Gallery	**1%**	3%	-1%	-1%	1%	NA	1%	-0%	-1%	NA	2%	-	-	0%	-0%	0%	-1%
	Outdoor public space	**3%**	1%	2%	-1%	-1%	-2%	2%	-1%	-0%	-0%	3%	-	-	2%	-1%	-0%	-0%
	Other	**4%**	5%	0%	-1%	-3%	1%	2%	-1%	-0%	-2%	-1%	-	-	1%	-0%	1%	-1%
A19	**What types of theatre Event Cinema screenings have you seen? Please tick all that apply.**																	
	Drama	**93%**	-7%	-3%	2%	5%	4%	1%	-2%	2%	2%	-8%	-	-0%	-1%	1%	0%	0%
	Musical	**20%**	-6%	-1%	-1%	-1%	21%	1%	-2%	-4%	-4%	-5%	-	-0%	-1%	1%	-0%	-1%
	Physical theatre and circus	**3%**	-1%	1%	-0%	-2%	0%	-1%	-1%	1%	1%	-0%	-	-0%	0%	-0%	-1%	2%
	Family theatre	**5%**	2%	-1%	-1%	1%	1%	4%	-1%	-1%	-0%	-2%	-	-	-2%	2%	-0%	1%
	Pantomime	**1%**	NA	0%	-1%	-0%	4%	1%	0%	NA	0%	NA	-	-	-0%	0%	0%	-0%
	Other	**8%**	-4%	-1%	-1%	4%	7%	2%	2%	-2%	-2%	-2%	-	-0%	-0%	0%	1%	-0%
A20	**Thinking back to the most recent Event Cinema performance you saw would you have seen it live if it was not screened in the cinema?**																	
	Yes	**16%**	7%	6%	-4%	-3%	-7%	7%	-2%	-6%	1%	-1%	-	0%	4%	-3%	0%	-4%
	No	**74%**	-6%	-9%	6%	5%	5%	-3%	0%	8%	2%	-1%	-	-0%	-6%	4%	-1%	6%
	I don't know	**10%**	-1%	3%	-2%	-2%	2%	-5%	1%	-2%	-3%	2%	-	0%	2%	-2%	0%	-2%
A21	**Have you decided to see Event Cinema rather than a production in person for any of the following reasons? Please tick all that apply.**																	
	Saved me travel	**67%**	-11%	-16%	8%	12%	16%	-1%	-4%	-1%	5%	-9%	-	-0%	-9%	6%	-3%	
	Ticket price (excluding travel) was cheaper	**40%**	7%	-9%	-1%	10%	7%	3%	1%	2%	2%	-2%	-	-0%	-3%	2%	-1%	5%
	Ticket price (including travel) was cheaper	**56%**	10%	-9%	-1%	4%	13%	7%	-1%	1%	1%	-5%	-	-	-2%	2%	-0%	5%
	Prefer the Event Cinema experience	**8%**	-1%	-1%	-0%	1%	5%	3%	0%	-5%	2%	-1%	-	-	-3%	2%	0%	-2%
	Already seen the live performance	**14%**	-5%	0%	1%	-1%	3%	-3%	3%	-2%	2%	-7%	-	-	3%	-2%	1%	-4%
	Live performance was sold out	**39%**	5%	10%	2%	-14%	-27%	-10%	-0%	5%	3%	10%	-	-0%	6%	-4%	2%	-5%
	Live performance was not shown concurrently	**11%**	1%	1%	1%	-4%	-1%	-1%	1%	0%	3%	1%	-	-0%	3%	-2%	0%	-2%
	Disability that precludes travel	**2%**	0%	-1%	0%	-1%	5%	1%	1%	-1%	0%	NA	-	-0%	-1%	1%	0%	-0%
	Other	**9%**	-4%	0%	1%	-0%	3%	-1%	2%	-2%	-5%	6%	-	-	1%	-1%	-1%	-0%
A22	**How strongly do agree with the following statements about Event Cinema screenings, based on the last time you attended?** *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
	I was totally absorbed	**85%**	-6%	-3%	2%	3%	8%	-4%	2%	-2%	-1%	-1%	-	-0%	-2%	1%	-0%	0%

	All	Age: 16-24	25-44	45-64	65-74	75+	Income: Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Participation: Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Location: Urban	Rural
		Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
I felt an emotional response to the performance	**84%**	-1%	-2%	0%	2%	6%	-1%	1%	-1%	-0%	-2%	-	-0%	-2%	2%	0%	-2%
Watching the performance on screen gave me a good sense of what experiencing it live in a theatre would be like	**75%**	-9%	-5%	4%	4%	9%	-1%	-1%	-0%	1%	-0%	-	-0%	-4%	3%	-0%	0%
Broadcasting live theatre to a cinema screen opens up new ways of seeing this artform	**88%**	0%	-1%	-0%	1%	2%	-1%	-0%	-1%	1%	5%	-	-0%	-2%	1%	0%	-0%
Being in the cinema or other venue was more engaging than if I had been there live in the audience	**33%**	-5%	-2%	1%	3%	3%	-2%	1%	-1%	-0%	-2%	-	0%	-2%	1%	0%	-1%
Being in the cinema or other venue was a very different experience from attending a live performance	**69%**	5%	-0%	-2%	-2%	3%	5%	-2%	-4%	-0%	2%	-	0%	2%	-1%	1%	-2%
The experience met my expectations	**82%**	-3%	-2%	1%	3%	7%	-3%	-0%	3%	-1%	3%	-	-0%	-2%	2%	0%	-1%
I felt real excitement because I knew that the performance was captured as a live event	**72%**	-5%	-4%	1%	4%	11%	-3%	1%	-2%	0%	3%	-	-0%	-4%	3%	0%	0%
Based on the event, I would recommend this experience to other people	**82%**	-3%	-2%	1%	3%	7%	-3%	-0%	3%	-1%	3%	-	-0%	-2%	2%	0%	-1%
A23 **With how many people did you attend this Event Cinema performance?**																	
Myself only	**20%**	7%	5%	-4%	-5%	-2%	11%	4%	-4%	-9%	-5%	-	-0%	3%	-2%	1%	-3%
2 people (1 other)	**52%**	-11%	-6%	6%	9%	-4%	-7%	-1%	-1%	8%	-5%	-	0%	-8%	5%	1%	-1%
3-4 people	**23%**	-5%	2%	-1%	-3%	8%	-3%	-1%	1%	-1%	11%	-	-0%	3%	-2%	-2%	3%
5 or more people	**5%**	9%	-1%	-1%	-1%	-2%	-1%	-2%	5%	3%	-2%	-	0%	2%	-1%	-0%	1%
A24 **Approximately how far away is the venue where you have most regularly seen Event Cinema?**																	
Within walking distance	**16%**	-0%	2%	-2%	1%	0%	8%	-2%	1%	-1%	-1%	-	0%	-0%	-0%	4%	

			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
	Less than ten minutes by vehicle	**17%**	2%	-0%	1%	-4%	-0%	-3%	-0%	6%	2%	5%	-	-0%	-5%	3%	2%	-5%
	10-30 minutes by vehicle	**50%**	-1%	-9%	5%	4%	6%	-15%	4%	-5%	2%	1%	-	0%	1%	-1%	-2%	
	30-60 minutes by vehicle	**15%**	-1%	5%	-3%	-0%	-4%	8%	-2%	-3%	-2%	-4%	-	0%	4%	-3%	-3%	5%
	More than one hour by vehicle	**2%**	0%	1%	-0%	-1%	NA	1%	-1%	2%	-1%	-1%	-	0%	0%	-0%	-1%	1%
A25	**How important is it to you that the event in the cinema is live (i.e. knowing that a performance is happening in real time)?** *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
		57%	-5%	-6%	-1%	4%	10%	-3%	-1%	-2%	1%	1%	-	0%	-1%	1%	-0%	5%
A26	**What types of supplementary content would you like to see as part of an Event Cinema screening? Tick all that apply.**																	
	Digital pro-gramme sent before the performance	**51%**	1%	2%	1%	-1%	-10%	0%	-3%	3%	5%	1%	-	-0%	4%	-3%	0%	-3%
	Digital programme made available during the performance	**20%**	23%	5%	-6%	-11%	-5%	-6%	3%	-4%	2%	2%	-	-	7%	-5%	0%	-1%
	Documentary about the play sent before the performance	**36%**	3%	0%	2%	-4%	-4%	3%	2%	-0%	-6%	5%	-	-	3%	-2%	-0%	4%
	Documentary about the play made available during the performance	**25%**	10%	1%	-2%	-6%	2%	-2%	0%	5%	4%	-4%	-	-	2%	-1%	-1%	4%
	Interviews with actors	**62%**	4%	-0%	2%	-4%	-7%	-9%	3%	-3%	8%	3%	-	-0%	1%	-1%	-1%	3%
	Interviews with directors	**59%**	4%	-2%	1%	-1%	-0%	-3%	1%	-4%	5%	11%	-	-0%	3%	-2%	-2%	4%
	Interviews with audience members	**4%**	3%	-2%	2%	-2%	-2%	-2%	-1%	-1%	3%	-1%	-	-	1%	-1%	-1%	2%
	"Behind the scenes" tours	**48%**	14%	1%	-4%	-6%	2%	1%	2%	-5%	2%	-4%	-	-0%	0%	0%	2%	-5%
	Printed pro-gramme	**40%**	10%	-4%	-4%	4%	11%	6%	1%	-2%	-11%	-10%	-	-0%	-0%	0%	-2%	7%
	Other	**3%**	-1%	-1%	-1%	0%	8%	0%	-1%	0%	0%	NA	-	-	-1%	1%	-0%	1%
A27	**What type of theatre are you most interested to see broadcasted in the cinema in the future? Please tick all that apply**																	
	Drama	**94%**	-4%	-4%	3%	4%	1%	1%	1%	-0%	0%	-8%	-	-0%	-3%	3%	-0%	1%
	Stand-up Comedy	**14%**	-0%	6%	0%	-7%	-11%	-3%	-1%	1%	4%	4%	-	-0%	1%	-1%	0%	-1%
	Musical	**48%**	2%	7%	-4%	-7%	1%	3%	-0%	3%	2%	-13%	-	-0%	-1%	1%	-0%	-1%
	Physical thea-tre and circus	**14%**	14%	1%	-1%	-8%	-5%	8%	0%	-2%	-0%	-9%	-	-0%	2%	-2%	1%	-2%
	Family theatre	**19%**	8%	-0%	-1%	-4%	-1%	5%	0%	1%	-3%	-2%	-	-0%	-1%	1%	0%	1%
	Pantomime	**4%**	1%	-0%	1%	-0%	-2%	0%	-2%	-1%	2%	-2%	-	-0%	0%	-0%	-0%	-0%

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Perfor-mance	No Streamed Performance	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
	Other	**9%**	-0%	-4%	-2%	3%	20%	0%	4%	-5%	-4%	1%	-	-	0%	0%	-0%	2%
A28	**What factors have prevented you from attending an Event Cinema screening of a theatre performance, to date? Please tick all that apply.**																	
	Not interested	**10%**	18%	-5%	-5%	4%	40%	-2%	-1%	3%	-5%	NA	-	NA	1%	-1%	-2%	3%
	Prefer live theatre	**54%**	18%	3%	-12%	-25%	46%	2%	-0%	27%	-13%	-30%	-	NA	11%	-8%	2%	
	Tickets are too expensive	**18%**	-4%	5%	-6%	-4%	32%	7%	-11%	12%	4%	NA	-	NA	-6%	5%	5%	-9%
	Don't live near a cinema showing live broadcasts	**14%**	15%	-2%	-5%	-7%	36%	1%	-7%	10%	NA	10%	-	NA	10%	-7%	-3%	-3%
	Unaware of live broadcasts of theatre in the cinema	**8%**	NA	NA	13%	-1%	42%	-3%	-0%	-2%	-3%	40%	-	NA	-3%	3%	-3%	6%
	Cannot get to the cinema easily	**13%**	2%	2%	-4%	NA	37%	-4%	-3%	-9%	NA	39%	-	NA	-4%	3%	-4%	
	Timing has not been right	**38%**	-9%	-4%	6%	19%	12%	2%	-10%	-1%	8%	38%	-	NA	-6%	5%	-2%	
	Prefer to watch theatre at home on TV and/or online	**12%**	16%	-4%	-0%	NA	NA	-0%	7%	1%	-7%	NA	-	NA	13%	-9%	3%	-9%
	Disability that precludes travel	**1%**	NA	NA	1%	NA	NA	NA	NA	3%	NA	NA	-	NA	1%	NA	0%	NA
	None of the above	**8%**	NA	3%	0%	-1%	NA	-1%	4%	-5%	NA	NA	-	NA	-4%	3%	3%	-5%
A29	**What factors might make you more likely to attend an Event Cinema screening in the future? Tick all that apply.**																	
	Greater / more varied selection of productions	**42%**	29%	-2%	-7%	0%	NA	0%	-4%	1%	-21%	58%	-	NA	15%	-11%	-2%	8%
	Less expensive ticket prices	**40%**	3%	9%	-11%	-18%	10%	18%	-10%	-2%	-7%	-16%	-	NA	0%	-0%	-2%	-0%
	Increase in disposable income	**22%**	21%	7%	-15%	NA	NA	14%	-1%	-18%	NA	NA	-	NA	-1%	1%	-6%	
	Increased availability of screenings nearer to home	**34%**	-5%	6%	-2%	-5%	NA	11%	-15%	-5%	5%	42%	-	NA	2%	-1%	-6%	
	More publicity	**48%**	9%	0%	-5%	2%	2%	-7%	-8%	2%	-8%	28%	-	NA	1%	-1%	-6%	
	Improved public transportation to venues screening Event Cinema	**6%**	8%	-3%	1%	NA	NA	NA	-3%	NA	NA	NA	-	NA	-3%	2%	-2%	8%
	Screenings at more times	**50%**	-7%	4%	-3%	0%	0%	4%	-14%	-2%	-20%	26%	-	NA	-14%	10%	2%	-1%
	Nothing will make me more likely to attend	**13%**	1%	-2%	4%	NA	NA	-2%	-0%	1%	19%	NA	-	NA	8%	-6%	1%	-7%

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
	Other	**7%**	NA	-1%	5%	0%	NA	1%	-6%	-0%	NA	NA	-	NA	-3%	2%	2%	-4%
A30	**How much would you be willing to pay for a ticket to an Event Cinema screening?**																	
	Nothing	**1%**	1%	0%	-0%	-1%	NA	1%	0%	NA	NA	NA	-	-1%	0%	-0%	0%	NA
	£1-10	**19%**	18%	7%	-6%	-11%	-13%	15%	-1%	-1%	-2%	-11%	-	-5%	5%	-4%	2%	-7%
	£10-20	**72%**	-16%	-4%	5%	7%	10%	-15%	3%	5%	-4%	5%	-	5%	-5%	3%	-1%	5%
	£20-35	**7%**	-3%	-3%	1%	5%	4%	-1%	-2%	-2%	6%	4%	-	0%	-1%	1%	-1%	3%
	£35-50	**0%**	NA	0%	0%	0%	NA	NA	NA	NA	0%	3%	-	0%	0%	-0%	-0%	NA
	More than £50	**0%**	NA	NA	0%	NA	NA	NA	NA	NA	NA	NA	-	NA	NA	0%	0%	NA
	Streaming																	
A31	**Which types of live or on-demand streaming performances/cultural events have you seen online or on the television? Please tick all that apply.**																	
	Orchestral music	**15%**	-4%	-6%	5%	13%	35%	-1%	-3%	0%	3%	-2%	-	0%	-0%	NA	-2%	
	Opera	**19%**	-3%	-3%	0%	12%	22%	-3%	5%	-5%	-12%	-11%	-	1%	-0%	NA	-3%	2%
	Theatre	**86%**	-2%	2%	-4%	-3%	23%	7%	-1%	-9%	2%	3%	-	2%	-2%	NA	0%	-4%
	Dance	**24%**	7%	-2%	-4%	-1%	9%	5%	2%	-5%	-11%	34%	-	-2%	-1%	NA	-1%	2%
	Museum exhibition tour	**8%**	1%	-3%	-1%	2%	26%	-1%	-0%	-4%	9%	-3%	-	1%	-0%	NA	-1%	9%
	I can't remember	**3%**	-0%	1%	-1%	NA	5%	0%	-1%	-1%	3%	1%	-	-0%	-2%	NA	0%	2%
	Other	**7%**	-1%	-1%	1%	3%	2%	1%	2%	3%	-4%	8%	-	-1%	-0%	NA	-0%	4%
A32	**Which theatre companies' live or on-demand streaming performances have you seen online or on TV?**																	
	Royal Exchange Theatre	**3%**	3%	-0%	-1%	-0%	NA	2%	1%	1%	-2%	NA	-	0%	-	NA	0%	-0%
	Tricycle Theatre	**1%**	2%	-0%	NA	NA	NA	NA	NA	5%	NA	NA	-	0%	-	NA	0%	NA
	The Old Vic	**15%**	2%	3%	-4%	-1%	NA	1%	5%	-6%	-7%	6%	-	0%	-	NA	-3%	-0%
	Chichester Festival Theatre	**4%**	-2%	2%	-1%	1%	NA	-0%	2%	-3%	-0%	NA	-	0%	-	NA	-0%	-3%
	Almeida Theatre	**8%**	-3%	0%	2%	0%	0%	5%	1%	-4%	-3%	-6%	-	1%	-0%	NA	-0%	-2%
	Young Vic	**7%**	-1%	0%	1%	-2%	2%	4%	-1%	2%	-3%	0%	-	0%	-	NA	-2%	6%
	Liverpool Everyman Playhouse	**1%**	1%	-1%	-0%	-0%	NA	4%	NA	-0%	-1%	NA	-	0%	-	NA	-0%	2%
	Royal Shakespeare Company	**52%**	1%	-3%	-4%	11%	31%	-14%	8%	2%	-8%	22%	-	2%	-1%	NA	1%	8%
	English Touring Theatre	**1%**	NA	-0%	1%	1%	NA	NA	-0%	-0%	0%	8%	-	-0%	-	NA	-0%	2%
	Northern Ballet	**8%**	-2%	2%	1%	-4%	NA	-4%	0%	4%	-0%	10%	-	-0%	-	NA	0%	1%
	Frantic Assembly	**5%**	6%	-1%	-2%	NA	NA	1%	-0%	6%	-4%	NA	-	-0%	-	NA	1%	-4%
	Regent's Park Open Air Theatre	**7%**	6%	0%	-4%	-4%	NA	5%	3%	-3%	-6%	NA	-	1%	-	NA	0%	-1%
	Royal Court	**7%**	2%	1%	-1%	-4%	NA	3%	1%	-3%	5%	-2%	-	-0%	-0%	NA	-1%	-1%
	Unicorn Theatre	**0%**	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
	Shakespeare's Globe	**34%**	-14%	8%	-8%	9%	25%	12%	-1%	-8%	-13%	14%	-	2%	-1%	NA	-0%	-1%
	National Theatre On Demand in Schools	**4%**	NA	2%	2%	-3%	NA	NA	1%	6%	-3%	NA	-	0%	-	NA	0%	-0%
	National Jewish Theatre	**1%**	NA	-0%	0%	2%	NA	NA	1%	NA	NA	2%	-	0%	-	NA	-0%	NA
	Theatre Royal Newcastle	**1%**	NA	0%	-0%	NA	8%	NA	NA	NA	NA	13%	-	0%	-	NA	-1%	4%
	Other	**37%**	5%	3%	-2%	-17%	-20%	11%	3%	-7%	-3%	-20%	-	-1%	-1%	NA	3%	
A33	**What types of theatrical performances have you streamed live or on-demand? Please tick all that apply.**																	
	Drama	**82%**	-13%	5%	-2%	5%	18%	2%	0%	-13%	3%	3%	-	3%	-2%	NA	-0%	4%
	Stand-up Comedy	**8%**	3%	2%	-4%	-4%	1%	1%	-1%	0%	-0%	1%	-	-2%	-	NA	-0%	-3%
	Musical	**25%**	6%	4%	-7%	-9%	-8%	4%	3%	-10%	-9%	-5%	-	-1%	-0%	NA	0%	-4%
	Physical theatre and circus	**7%**	5%	-2%	0%	-2%	2%	5%	-2%	4%	-3%	NA	-	-2%	-	NA	0%	-2%
	Family theatre	**3%**	NA	0%	1%	2%	5%	1%	-2%	-1%	0%	10%	-	-1%	-	NA	-1%	5%
	Pantomime	**0%**	NA	NA	1%	NA	NA	NA	NA	NA	NA	NA	-	NA	-	NA	0%	NA
	Other	**11%**	8%	-3%	-2%	1%	NA	1%	-1%	3%	-8%	-2%	-	-0%	-0%	NA	-0%	-2%
A34	**Are any of the following reasons you have streamed a theare performance online or on TV, rather than going in person? Please tick all that apply.**																	
	Not enough time and streaming was faster	**31%**	16%	-3%	-6%	-8%	-6%	16%	-14%	1%	-4%	24%	-	-1%	-0%	NA	-1%	7%
	Cost too much to get to the venue	**38%**	15%	-7%	-3%	-5%	21%	21%	-10%	-8%	-7%	-19%	-	0%	-1%	NA	-5%	
	Cheaper to stream than buy a ticket	**33%**	14%	0%	-9%	-7%	-16%	14%	-8%	6%	-9%	-9%	-	0%	-	NA	1%	-2%
	Prefer the streaming experience	**3%**	-0%	2%	-1%	NA	NA	3%	-1%	-1%	-1%	10%	-	-0%	-	NA	-0%	-2%
	Seen the live performance	**17%**	-0%	2%	1%	-9%	-8%	-2%	1%	-7%	5%	-3%	-	1%	-	NA	1%	-7%
	Live performance was sold out	**32%**	1%	4%	-1%	-9%	-24%	-14%	7%	-2%	-3%	-3%	-	1%	-	NA	3%	-5%
	Not aware a live performance was occurring	**11%**	14%	-6%	-1%	0%	NA	2%	2%	-6%	-3%	-1%	-	1%	-0%	NA	1%	-2%
	No live performances at the time, streaming past performance	**48%**	10%	3%	-9%	-9%	-15%	3%	-2%	-5%	-3%	-2%	-	3%	-	NA	-1%	5%
	Disability that precludes travel	**1%**	NA	1%	NA	0%	NA	1%	-0%	NA	2%	NA	-	-0%	-	NA	-0%	NA
	Other	**9%**	2%	-4%	4%	-1%	-0%	-2%	-0%	9%	3%	NA	-	-1%	-	NA	-1%	-6%

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		Age					Income					Participation				Location	
	All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
A35 How strongly do agree with the following statements about streaming theatre online or on TV, based on the last production you watched? *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																	
I was totally absorbed	**69%**	-0%	-1%	1%	1%	1%	0%	4%	-8%	-7%	4%	-	0%	0%	NA	-1%	-3%
I felt an emotional response to the performance	**69%**	-0%	-1%	1%	1%	1%	0%	4%	-8%	-7%	4%	-	0%	0%	NA	-1%	-3%
Streaming gave me a good sense of what experiencing it live in a theatre would be like	**57%**	-4%	-2%	4%	3%	15%	1%	1%	-5%	-0%	0%	-	0%	0%	NA	-1%	3%
Streaming theatre opens up new ways of seeing this artform	**69%**	-0%	-1%	1%	1%	1%	0%	4%	-8%	-7%	4%	-	0%	0%	NA	-1%	-3%
Streaming was more engaging than attending a live performance	**24%**	-4%	1%	-0%	2%	9%	-4%	2%	-3%	0%	-5%	-	1%	0%	NA	-0%	-1%
Streaming was a very different experience from attending a live performance	**75%**	7%	-1%	-3%	-2%	-9%	5%	-1%	-7%	2%	0%	-	0%	-0%	NA	0%	2%
The experience met my expectations	**71%**	-2%	1%	0%	1%	1%	6%	-0%	-7%	-3%	-3%	-	1%	-0%	NA	-1%	3%
I felt real excitement because I knew that the performance was captured as a live event	**56%**	1%	-3%	1%	7%	7%	-5%	4%	-3%	-2%	-9%	-	0%	0%	NA	-1%	4%
Based on the event, I would recommend this experience to other people	**75%**	-0%	1%	-1%	-1%	0%	4%	2%	-7%	-4%	-9%	-	1%	0%	NA	0%	-1%
A36 How important is it to you that the streamed performance online or on TV is live (i.e. taking place in real time)?																	
	43%	-3%	-2%	4%	3%	5%	-7%	7%	3%	-3%	-17%	-	-1%	0%	NA	1%	-1%
A37 With how many people did you stream the most recent theatre performance online or on television that you viewed?																	
Myself only	**65%**	7%	4%	-5%	-9%	-27%	16%	4%	-4%	-7%	-31%	-	0%	0%	NA	1%	
2 people (1 other)	**27%**	-5%	-3%	5%	13%	11%	-8%	-3%	-7%	8%	16%	-	0%	-0%	NA	-0%	5%
3-4 people	**5%**	-2%	-1%	1%	-3%	18%	NA	-0%	4%	0%	17%	-	-0%	-0%	NA	-1%	
5 or more people	**2%**	1%	0%	-0%	-1%	NA	-2%	-1%	8%	-1%	NA	-	-0%	0%	NA	1%	-1%
A38 On what platforms do you most often stream theatre performances? Please tick all that apply.																	

		All	Age: 16-24	Age: 25-44	Age: 45-64	Age: 65-74	Age: 75+	Income: Less than £20,000	Income: £20,000 – £39,999	Income: £40,000 – £59,000	Income: £60,000 – £99,999	Income: £100,000 and over	Participation: Live Theatre	Participation: Event Cinema	Participation: Streamed Performance	Participation: No Streamed Performance	Location: Urban	Location: Rural
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	Digital Theatre	30%	7%	5%	-7%	-17%	-13%	12%	-2%	-9%	-3%	-18%	-	2%	-0%	NA	0%	
	The Space	4%	2%	0%	-1%	-3%	NA	7%	-2%	1%	-1%	NA	-	-0%	-	NA	-0%	0%
	Sky Arts	21%	7%	0%	-5%	2%	-13%	-2%	-1%	-2%	-8%	11%	-	2%	-0%	NA	3%	0%
	BBC iplayer	60%	-2%	-4%	-4%	17%	48%	-4%	1%	2%	-4%	17%	-	3%	-1%	NA	3%	
	Curzon Home Cinema	2%	NA	-1%	3%	5%	NA	NA	-0%	0%	1%	6%	-	0%	-	NA	-0%	3%
	Periscope	2%	NA	3%	-1%	NA	NA	1%	-1%	1%	NA	7%	-	-0%	-	NA	1%	NA
	YouTube	44%	20%	2%	-14%	-20%	-11%	19%	-0%	-3%	-5%	-4%	-	-2%	-	NA	0%	
	Vimeo	6%	-3%	2%	2%	NA	NA	2%	2%	-3%	-3%	7%	-	-1%	-	NA	-0%	-4%
	Canvas	1%	4%	NA	NA	NA	NA	2%	NA	3%	NA	NA	-	0%	-	NA	0%	NA
	Other	12%	-1%	3%	-2%	-4%	-3%	-0%	1%	1%	-1%	-2%	-	0%	-	NA	2%	-5%
A39	**Where have you watched streamed theatre performances online or on television in the past 12 months? Please tick all that apply.**																	
	At home	89%	0%	0%	-4%	3%	20%	4%	1%	-10%	3%	2%	-	2%	-1%	NA	1%	-1%
	At work	10%	-7%	8%	-3%	-9%	NA	-7%	4%	7%	3%	NA	-	-0%	-	NA	1%	-2%
	At school/university	8%	17%	-4%	-4%	-7%	NA	3%	-5%	3%	1%	NA	-	1%	-	NA	-0%	3%
	At a friend or family member's house	7%	9%	-2%	-2%	-5%	NA	5%	2%	-5%	-6%	-3%	-	0%	-	NA	1%	-2%
	In transit	4%	4%	0%	-2%	-3%	NA	3%	0%	-2%	-2%	NA	-	1%	-	NA	1%	-0%
	At the hospital	0%	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
	Other	12%	-1%	3%	-2%	-4%	-3%	-0%	1%	1%	-1%	-2%	-	0%	-	NA	2%	-5%
A40	**Is your home Internet access fast enough to allow you to watch video without interruptions (the screen freezing, audio and video out of sync, etc.)?**																	
	Never falters	22%	3%	4%	-6%	-6%	-7%	-2%	11%	-12%	-1%	5%	-	-2%	-0%	NA	1%	2%
	Occasional isues	70%	-4%	1%	1%	-2%	7%	-4%	-7%	7%	6%	-6%	-	2%	0%	NA	2%	
	Usually have interruptions	8%	2%	-5%	4%	7%	0%	5%	-4%	6%	-4%	1%	-	-0%	0%	NA	-3%	
	I don't know	0%	NA	NA	0%	1%	NA	1%	0%	NA	NA	NA	-	-0%	0%	NA	NA	NA
A41	**Are any of the following reasons you have not streamed a theatre performance online or on television before? Please tick all that apply.**																	
	Not interested in the performances offered	3%	NA	3%	-1%	-0%	-1%	1%	-0%	0%	-2%	7%	-	-1%	NA	-	-0%	1%
	Prefer live theatre	36%	18%	-1%	-4%	1%	4%	10%	-3%	-5%	-5%	3%	-	-1%	NA	-	1%	-2%
	Don't want to watch without the company of an audience	16%	-3%	-1%	0%	-0%	2%	-1%	4%	-6%	-0%	-1%	-	-0%	NA	-	2%	-4%
	Don't know where to find online	34%	19%	4%	-2%	-9%	2%	3%	2%	-4%	7%	7%	-	0%	NA	-	1%	-2%
	Don't have a computer or mobile device at home	0%	NA	NA	0%	-0%	NA	1%	0%	NA	NA	NA	-	0%	NA	-	-0%	1%

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			Age					Income					Participation				Location	
		All	16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
	Don't have a television at home	3%	4%	-0%	-1%	1%	1%	5%	-1%	-1%	-2%	NA	-	-0%	NA	-	-0%	-1%
	Television does not support on-demand viewing	21%	13%	-5%	-4%	4%	13%	1%	7%	-0%	-7%	-17%	-	-0%	NA	-0%	-3%	6%
	Internet access is too slow / nonexistent	15%	-9%	-6%	3%	3%	3%	4%	-3%	-2%	-1%	-9%	-	1%	NA	-	-5%	
	Unaware content online or on television	43%	-3%	-3%	1%	-3%	7%	-0%	2%	0%	2%	-1%	-	1%	NA	-	0%	-2%
	Don't know how to pay for content I want to view	12%	-6%	-3%	1%	-0%	6%	3%	2%	-2%	-2%	4%	-	-0%	NA	-	-0%	-0%
	Prefer not to pay for content I want to view	24%	10%	-3%	0%	-2%	2%	1%	1%	-3%	-2%	-4%	-	-0%	NA	-	1%	-1%
	Haven't had the chance yet	14%	-7%	9%	-0%	-7%	-4%	-0%	-4%	2%	8%	9%	-	0%	NA	-	1%	-4%
	Other	8%	19%	10%	-4%	-6%	-6%	3%	0%	1%	-1%	-4%	-	0%	NA	NA	2%	-5%
A42	**How much would you be willing to pay to view a streaming theatre performance online or on television?**																	
	Nothing	34%	5%	-4%	-2%	6%	7%	5%	-1%	3%	-4%	-17%	-	-2%	-5%	3%	-0%	3%
	£1-5	36%	15%	-0%	-0%	-5%	-16%	-0%	3%	-1%	-1%	4%	-	1%	4%	-3%	3%	-5%
	£5-10	22%	-17%	2%	3%	-1%	6%	-2%	-2%	-1%	4%	0%	-	1%	3%	-2%	-1%	0%
	£10-20	6%	-2%	1%	-1%	-0%	2%	-1%	1%	-0%	-0%	8%	-	0%	-2%	1%	-1%	0%
	£20-35	1%	NA	-0%	0%	0%	1%	NA	-0%	NA	2%	1%	-	-0%	0%	-0%	-0%	0%
	£35-50	0%	NA	0%	-0%	0%	NA	NA	-0%	NA	NA	3%	-	0%	NA	-0%	-0%	1%
	More than £50	0%	NA	NA	0%	NA	NA	NA	NA	NA	NA	NA	-	0%	0%	NA	NA	NA
A43	**How much would you be willing to pay for subscription to enable you to stream theatre and other arts performances online or on television for a monthly fee with unlimited access?**																	
	Not interested	46%	-29%	-8%	6%	16%	24%	-1%	-2%	-1%	1%	-5%	-	-1%	-12%	9%	-1%	6%
	£1-5 per month	33%	24%	5%	-6%	-8%	-18%	-3%	-2%	2%	3%	10%	-	0%	8%	-6%	0%	1%
	£5-10 per month	18%	8%	2%	-1%	-7%	-6%	4%	3%	-1%	-4%	-4%	-	0%	4%	-3%	1%	-6%
	£10-20 per month	3%	NA	1%	1%	-1%	0%	-1%	1%	-1%	-1%	-1%	-	0%	1%	-1%	-1%	-1%
	£20+ per month	0%	NA	0%	NA	NA	NA	NA	NA	NA	1%	NA	-	0%	NA	0%	0%	NA
A44	**Would you say that streaming theatre online or on television and/or Event Cinema has made you more likely to visit the theatre in person?**																	
	No impact	71%	-4%	-2%	1%	1%	9%	4%	-1%	0%	1%	-0%	-	-2%	1%	-1%	-1%	5%
	I see more of live theatre because of it	17%	7%	2%	-0%	-5%	-10%	-4%	-1%	5%	-1%	-1%	-	2%	3%	-2%	0%	-3%
	I see less of live theatre because of it	2%	NA	-1%	-0%	3%	3%	-0%	0%	-1%	-0%	4%	-	0%	-1%	1%	0%	-0%
	I'm not sure	10%	-1%	1%	-0%	1%	-2%	1%	1%	-4%	0%	-3%	-	-0%	-3%	2%	0%	-2%

		All	Age					Income					Participation				Location	
			16-24	25-44	45-64	65-74	75+	Less than £20,000	£20,000 – £39,999	£40,000 – £59,000	£60,000 – £99,999	£100,000 and over	Live Theatre	Event Cinema	Streamed Performance	No Streamed Performance	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.															
	Disability & Accessibility																	
A45	**Are you disabled or do you attend performances with someone who is a disabled person?**																	
	Yes	**12%**	2%	-1%	-1%	-1%	9%	4%	1%	-5%	-2%	-9%	-	-0%	-2%	2%	1%	-3%
	No	**88%**	-2%	1%	1%	1%	-9%	-4%	-1%	5%	2%	9%	-	0%	2%	-2%	-1%	3%
A46	**Which of the following services are currently made available in Live-to-Digital arts content that you view in the cinema or stream online or on television?**																	
	Audio description	**20%**	8%	2%	-4%	2%	-5%	2%	-2%	-14%	1%	NA	-	-5%	11%	-5%	2%	-8%
	Stage-text performances	**13%**	16%	0%	-8%	-2%	2%	4%	4%	NA	0%	NA	-	0%	12%	-6%	1%	-2%
	Signed performances	**5%**	9%	-0%	-1%	-2%	NA	NA	6%	NA	5%	NA	-	1%	7%	-3%	1%	NA
	Relaxed performances	**9%**	5%	4%	-0%	-4%	NA	-7%	6%	NA	22%	NA	-	1%	8%	-4%	1%	-1%
	Visual story	**6%**	9%	3%	-4%	-0%	NA	4%	-5%	NA	21%	NA	-	1%	8%	-4%	2%	NA
	I don't know	**57%**	-15%	-5%	7%	16%	-4%	-5%	-1%	31%	-2%	43%	-	6%	-13%	6%	-4%	
	Other	**9%**	NA	8%	-6%	-7%	14%	4%	1%	NA	NA	NA	-	-2%	-6%	3%	1%	0%

TABLE 4

Supplier Survey: Responses / Proportionate Responses

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Supplier Activities																
	Theatre Producer	**175**			84	54	36	153	17	**78%**			82%	81%	72%	83%	53%
	Exhibitor	**49**			18	13	14	32	15	**22%**			18%	19%	28%	17%	47%
	Budget																
	Under £200k	**114**	84	18				94	17	**48%**	48%	40%	NA	NA	NA	47%	59%
	£200k to £999k	**77**	54	13				66	10	**32%**	31%	29%	NA	NA	NA	33%	34%
	£1m or Over	**46**	36	14				42	2	**19%**	21%	31%	NA	NA	NA	21%	7%
	Location	**237**	170	47	111	76	44										
	Urban	**207**	153	32	94	66	42			**87%**	90%	68%	85%	87%	95%	NA	NA
	Rural	**30**	17	15	17	10	2			**13%**	10%	32%	15%	13%	5%	NA	NA
S1	**Produces live theatre**																
	Yes	**175**	175	16	84	54	36	153	17	**71%**	100%	33%	74%	70%	78%	74%	57%
	No	**70**	0	33	30	23	10	54	13	**29%**	-	67%	26%	30%	22%	26%	43%
S2	**Primary Discipline**																
	Theatre	**124**	122	4	65	37	22	106	15	**70%**	70%	24%	76%	67%	59%	68%	83%
	Combined Arts	**35**	34	11	14	10	10	32	2	**20%**	19%	65%	16%	18%	27%	21%	11%
	Other	**19**	19	2	6	8	5	17	1	**11%**	11%	12%	7%	15%	14%	11%	6%
S3	**Permanent Home/Venue**																
	Yes	**74**	73	16	20	23	31	67	6	**42%**	42%	94%	24%	43%	84%	44%	33%
	No	**103**	101	1	65	31	6	87	12	**58%**	58%	6%	76%	57%	16%	56%	67%
S4	**NPO**																
	Yes	**72**	69	9	9	33	30	66	3	**41%**	40%	53%	11%	61%	81%	43%	17%
	No	**106**	106	8	76	22	7	89	15	**60%**	61%	47%	89%	41%	19%	58%	83%
	Live-to-Digital Production Experience																
S5	**Has your organisation ever acted as producer, or are you in the process of producing, Live-to-Digital theatre programming? Remember to include live and encore broadcasts to cinema, TV, and online platforms.**																
	Yes	**58**	58	6	14	24	19	53	2	**33%**	33%	35%	16%	44%	51%	34%	11%
	No	**111**	108	11	66	27	18	93	16	**62%**	62%	65%	78%	49%	49%	60%	89%
	I'm not sure	**9**	9	0	5	4	0	9	0	**5%**	5%	NA	6%	7%	NA	6%	NA
S6	**What factors have prevented you from producing LTD, to-date?**																
	Lack of staff time	**50**	48	6	28	12	10	40	8	**45%**	44%	55%	42%	44%	56%	43%	50%
	Lack of creative interest	**23**	23	2	14	7	2	18	4	**21%**	21%	18%	21%	26%	11%	19%	25%
	Lack of internal expertise	**54**	52	5	31	12	11	42	10	**49%**	48%	45%	47%	44%	61%	45%	63%
	Inability to find external expertise	**9**	9	0	6	1	2	9	0	**8%**	8%	NA	9%	4%	11%	10%	NA
	Lack of funds / costs too much	**73**	71	8	44	17	12	61	10	**66%**	66%	73%	67%	63%	67%	66%	63%
	Lack of support from senior leadership	**3**	3	2	2	0	1	1	2	**3%**	3%	18%	3%	NA	6%	1%	13%
	Does not fulfill our mission	**42**	40	5	28	9	5	33	8	**38%**	37%	45%	42%	33%	28%	35%	50%
	Difficulty in finding co-producers	**12**	12	2	6	2	4	9	2	**11%**	11%	18%	9%	7%	22%	10%	13%

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Difficulty in fundraising specifically for live-to-digital projects	**32**	32	2	21	6	5	28	3	**29%**	30%	18%	32%	22%	28%	30%	19%
	Marketplace too competitive	**11**	11	2	9	0	2	9	2	**10%**	10%	18%	14%	NA	11%	10%	13%
	Inexperience marketing for live-to-digital	**38**	38	2	24	9	5	32	4	**34%**	35%	18%	36%	33%	28%	34%	25%
	Lacking in the brand power to make live-to-digital financially viable	**48**	48	6	32	8	8	41	6	**43%**	44%	55%	48%	30%	44%	44%	38%
	Rights clearance	**10**	10	0	6	1	3	9	1	**9%**	9%	NA	9%	4%	17%	10%	6%
	Level of investment is too risky	**29**	29	5	17	6	6	22	5	**26%**	27%	45%	26%	22%	33%	24%	31%
	Lack of understanding about how to enter this market	**44**	44	4	24	11	9	35	7	**40%**	41%	36%	36%	41%	50%	38%	44%
	None of the above	**3**	3	0	3	0	0	3	0	**3%**	3%	NA	5%	NA	NA	3%	NA
S7	**How strongly do the following drivers motivate your live-to-digital production?** *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*																
	Reaching current audiences in a new way	**58**	58	6	14	24	19	53	2	**75%**	75%	83%	75%	79%	70%	78%	25%
	Extending our reach to new audiences	**58**	58	6	14	24	19	53	2	**90%**	90%	96%	80%	94%	92%	92%	75%
	Marketing our work	**58**	58	6	14	24	19	53	2	**76%**	76%	67%	71%	76%	79%	78%	50%
	Generating new income	**55**	55	6	14	22	19	51	2	**46%**	46%	92%	46%	36%	57%	48%	38%
	Achieving our artistic goals	**57**	57	6	14	24	19	53	2	**79%**	79%	79%	80%	81%	75%	82%	38%
S8	**Do you see live-to-digital production as critical to your overall mission?**																
	Yes, absolutely	**19**	19	3	2	8	8	18	0	**33%**	33%	50%	14%	33%	42%	34%	NA
	Yes, somewhat	**25**	25	2	9	10	6	23	1	**43%**	43%	33%	64%	42%	32%	43%	50%
	No, not at all	**10**	10	1	3	4	3	8	1	**17%**	17%	17%	21%	17%	16%	15%	50%
	We are not sure at this time	**4**	4	0	0	2	2	4	0	**7%**	7%	NA	NA	8%	11%	8%	NA
S9	**What aspect of your mission and strategic priorities does live-to-digital programming attempt to fulfil?**																
	Providing access to those who otherwise may not be able to attend (because of cost, distance, etc.)	**40**	40	4	9	17	13	37	1	**69%**	69%	67%	64%	71%	68%	70%	50%
	Reaching new audiences / expanding our reach	**43**	43	5	10	18	14	40	1	**74%**	74%	83%	71%	75%	74%	75%	50%
	Providing new experiences for audiences	**36**	36	5	9	13	13	34	0	**62%**	62%	83%	64%	54%	68%	64%	NA
	Serving the educational sector	**21**	21	2	5	9	7	19	1	**36%**	36%	33%	36%	38%	37%	36%	50%

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Pushing artistic boundaries	**29**	29	3	8	11	10	27	1	**50%**	50%	50%	57%	46%	53%	51%	50%
	Engaging with technology	**33**	33	3	9	14	10	31	1	**57%**	57%	50%	64%	58%	53%	58%	50%
	Supporting environmental sustainability (e.g. lower emissions from transportation than live touring)	**12**	12	2	0	7	5	12	0	**21%**	21%	33%	NA	29%	26%	23%	NA
	Contributing to financial sustainability	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Other	**7**	7	0	4	3	0	7	0	**12%**	12%	NA	29%	13%	NA	13%	NA
S10	**Which of the following types of new audiences do you aim to serve via live-to-digital?**																
	Any audience that has not yet seen our work	**39**	39	4	9	16	13	36	1	**91%**	91%	80%	90%	89%	93%	90%	100%
	National audiences who are further from our primary venue	**25**	25	2	4	10	10	22	1	**58%**	58%	40%	40%	56%	71%	55%	100%
	Rural audiences	**28**	28	4	4	13	10	26	1	**65%**	65%	80%	40%	72%	71%	65%	100%
	International audiences	**31**	31	1	6	13	11	29	0	**72%**	72%	20%	60%	72%	79%	73%	NA
	Disabled audiences	**24**	24	2	4	10	9	22	1	**56%**	56%	40%	40%	56%	64%	55%	100%
	Older audiences	**19**	19	3	4	6	9	18	0	**44%**	44%	60%	40%	33%	64%	45%	NA
	Younger audiences	**29**	29	2	5	13	11	28	1	**67%**	67%	40%	50%	72%	79%	70%	100%
	Students in formal education – primary/secondary	**22**	22	1	3	10	9	22	0	**51%**	51%	20%	30%	56%	64%	55%	NA
	Students in formal education – college/university	**27**	27	2	5	14	8	26	1	**63%**	63%	40%	50%	78%	57%	65%	100%
	Audiences for whom our live theatre ticket prices are too high	**17**	17	1	3	4	10	17	0	**40%**	40%	20%	30%	22%	71%	43%	NA
	Other	**3**	3	0	1	0	1	2	0	**7%**	7%	NA	10%	NA	7%	5%	NA
S11	**How satisfied has your organisation been with your live-to-digital productions to-date, in terms of fulfilling your organisation's mission?** *Weighted average: very satisfied = 100%, somewhat satisfied = 75%, neutral = 50%, somewhat unsatisfied = 25%, and very unsatisfied = 0%*																
	Providing access to those who otherwise may not be able to attend (because of cost, distance, etc.)	**33**	33	3	8	12	13	31	1	**80%**	80%	92%	66%	83%	85%	79%	100%
	Reaching new audiences / expanding our reach	**35**	32	2	8	13	14	33	1	**78%**	78%	100%	66%	81%	82%	78%	75%
	Providing new experiences for audiences	**30**	30	4	7	10	13	29	0	**81%**	81%	100%	68%	85%	85%	81%	NA
	Serving the educational sector	**18**	17	2	2	9	7	17	1	**76%**	76%	75%	63%	72%	86%	79%	25%

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Pushing artistic boundaries	**27**	25	2	7	10	10	25	1	**78%**	78%	88%	68%	85%	78%	77%	75%
	Engaging with technology	**29**	26	2	8	11	10	27	1	**83%**	84%	100%	81%	86%	80%	82%	75%
	Supporting environmental sustainability (e.g. lower emissions from transportation than live touring)	**12**	12	1	0	7	5	12	0	**67%**	67%	50%	NA	61%	75%	67%	NA
	Contributing to financial sustainability	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Other	**5**	3	0	3	2	0	5	0	**90%**	100%	NA	92%	88%	NA	90%	NA
S12	**Do you feel that live-to-digital production currently is or will in the future contribute to your organisation's financial sustainability?**																
	Yes	**21**	21	5	5	8	8	21	0	**36%**	36%	83%	36%	33%	42%	40%	NA
	No	**20**	20	1	6	10	4	17	2	**34%**	34%	17%	43%	42%	21%	32%	100%
	I don't know	**17**	17	0	3	6	7	15	0	**29%**	29%	NA	21%	25%	37%	28%	NA
S13	**Which of the following drivers of financial sustainability do you aim to leverage via live-to-digital?**																
	Additional stream of earned income	**18**	18	5	4	7	7	18	0	**86%**	86%	100%	80%	88%	88%	86%	NA
	Replacement for traditional touring income	**2**	2	1	0	1	1	2	0	**10%**	10%	20%	NA	13%	13%	10%	NA
	Additional contributed income through programming that appeals to new funders	**10**	10	2	4	3	3	10	0	**48%**	48%	40%	80%	38%	38%	48%	NA
	Other	**3**	3	0	1	1	1	3	0	**14%**	14%	NA	20%	13%	13%	14%	NA
S14	**How comfortable is your senior leadership team with taking financial risks on live-to-digital productions?**																
	Very comfortable	**9**	9	1	1	5	3	9	0	**16%**	17%	17%	7%	21%	16%	17%	NA
	Pretty comfortable	**14**	8	2	2	4	8	13	0	**24%**	15%	33%	14%	17%	42%	25%	NA
	Somewhat comfortable	**16**	16	1	6	7	3	15	1	**28%**	31%	17%	43%	29%	16%	28%	50%
	Not at all comfortable	**14**	14	1	4	5	4	11	1	**24%**	27%	17%	29%	21%	21%	21%	50%
	I don't know	**5**	5	1	1	3	1	5	0	**9%**	10%	17%	7%	13%	5%	9%	NA
S15	**How comfortable is your senior leadership team with taking creative risks on live-to-digital productions?**																
	Very comfortable	**28**	28	2	8	15	5	26	1	**48%**	48%	33%	57%	63%	26%	49%	50%
	Pretty comfortable	**20**	20	3	3	7	9	18	1	**34%**	34%	50%	21%	29%	47%	34%	50%
	Somewhat comfortable	**8**	8	0	2	2	4	8	0	**14%**	14%	NA	14%	8%	21%	15%	NA
	Not at all comfortable	**1**	1	0	1	0	0	0	0	**2%**	2%	NA	7%	NA	NA	NA	NA
	I don't know	**1**	1	1	0	0	1	1	0	**2%**	2%	17%	NA	NA	5%	2%	NA
S16	**How comfortable is your board with taking risks on live-to-digital productions?**																
	Very comfortable	**10**	10	0	2	5	3	10	0	**18%**	19%	NA	14%	23%	16%	20%	NA
	Pretty comfortable	**18**	14	3	5	5	7	16	0	**32%**	27%	50%	36%	23%	37%	31%	NA
	Somewhat comfortable	**14**	14	1	3	7	4	13	1	**25%**	27%	17%	21%	32%	21%	25%	50%
	Not at all comfortable	**4**	4	1	1	1	2	3	1	**7%**	8%	17%	7%	5%	11%	6%	50%
	I don't know	**10**	10	1	3	4	3	9	0	**18%**	19%	17%	21%	18%	16%	18%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S17	**Which risks are your board most concerned with?**																
	Financial	**41**	41	5	8	18	14	39	1	**71%**	71%	83%	57%	75%	74%	74%	50%
	Artistic	**13**	13	1	2	3	8	12	1	**22%**	22%	17%	14%	13%	42%	23%	50%
	Legal	**13**	13	0	3	6	4	12	1	**22%**	22%	NA	21%	25%	21%	23%	50%
	Reputational	**13**	13	3	2	7	4	12	1	**22%**	22%	50%	14%	29%	21%	23%	50%
	Technical	**9**	9	1	3	4	2	7	1	**16%**	16%	17%	21%	17%	11%	13%	50%
	Audience alienation	**8**	8	1	1	3	4	7	1	**14%**	14%	17%	7%	13%	21%	13%	50%
	I don't know	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Other	**4**	4	0	2	1	1	3	0	**7%**	7%	NA	14%	4%	5%	6%	NA
S18	**Have you produced any completed live-to-digital productions in the past?**																
	Yes	**46**	46	4	8	21	16	41	2	**79%**	79%	67%	57%	88%	84%	77%	100%
	No	**9**	9	2	4	3	2	9	0	**16%**	16%	33%	29%	13%	11%	17%	NA
	I'm not sure	**3**	3	0	2	0	1	3	0	**5%**	5%	NA	14%	NA	5%	6%	NA
S19	**Are you currently working on any live-to-digital productions?**																
	Yes	**32**	32	2	6	15	10	29	2	**55%**	55%	33%	43%	63%	53%	55%	100%
	No	**25**	25	4	8	9	8	23	0	**43%**	43%	67%	57%	38%	42%	43%	NA
	I'm not sure	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	5%	2%	NA
S20	**How many live-to-digital productions have you produced? (Include productions that are in development and ongoing)**																
	n	**50**	49	3	11	22	16	46	2								
	Average	**6.5**	5.2	9.3	4.2	5.9	8.9	6.7	3.5								
	Average, excluding outliers (# LTD productions > 20)	**3.7**	3.7	2.0	2.2	3.4	4.9	3.6	3.5								
	Median	**3**	3	3	2	3	5	3	4								
S21	**Within which theatre genres would you classify these productions?**																
	Drama	**26**	26	3	6	10	10	24	2	**45%**	45%	50%	43%	42%	53%	45%	100%
	Stand-up Comedy	**1**	1	1	0	1	0	1	0	**2%**	2%	17%	NA	4%	NA	2%	NA
	Musical	**10**	10	1	3	7	0	9	0	**17%**	17%	17%	21%	29%	NA	17%	NA
	Physical theatre and circus	**6**	6	1	3	2	1	6	0	**10%**	10%	17%	21%	8%	5%	11%	NA
	Family theatre	**11**	11	2	4	5	2	10	0	**19%**	19%	33%	29%	21%	11%	19%	NA
	Pantomime	**1**	1	0	0	1	0	1	0	**2%**	2%	NA	NA	4%	NA	2%	NA
	Improvisational theatre	**1**	1	0	1	0	0	1	0	**2%**	2%	NA	7%	NA	NA	2%	NA
	Experimental theatre	**13**	13	0	4	8	1	12	0	**22%**	22%	NA	29%	33%	5%	23%	NA
	Cabaret	**3**	3	0	3	0	0	3	0	**5%**	5%	NA	21%	NA	NA	6%	NA
	Other	**20**	20	1	5	6	8	18	0	**34%**	34%	17%	36%	25%	42%	34%	NA
S22	**For which of the following types of venues/screening platforms have you provided live-to-digital productions?**																
	Cinemas	**9**	9	1	0	2	7	9	0	**16%**	16%	17%	NA	8%	37%	17%	NA
	Free view	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Pay to view	**9**	9	1	0	2	7	9	0	**16%**	16%	17%	NA	8%	37%	17%	NA
	Theatres/art centres	**14**	14	3	3	4	6	12	0	**24%**	24%	50%	21%	17%	32%	23%	NA
	Free view	**7**	7	1	1	3	2	5	0	**12%**	12%	17%	7%	13%	11%	9%	NA
	Pay to view	**8**	8	2	2	2	4	8	0	**14%**	14%	33%	14%	8%	21%	15%	NA

		Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
	n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
Non-traditional venues (libraries, pubs, etc.)	**9**	9	1	3	3	3	8	0	**16%**	16%	17%	21%	13%	16%	15%	NA
Free view	**4**	4	0	2	2	0	3	0	**7%**	7%	NA	14%	8%	NA	6%	NA
Pay to view	**5**	5	1	1	1	3	5	0	**9%**	9%	17%	7%	4%	16%	9%	NA
Schools	**9**	9	0	1	2	6	9	0	**16%**	16%	NA	7%	8%	32%	17%	NA
Free view	**8**	8	0	1	2	5	8	0	**14%**	14%	NA	7%	8%	26%	15%	NA
Pay to view	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	5%	2%	NA
Broadcast television	**10**	10	1	0	4	6	10	0	**17%**	17%	17%	NA	17%	32%	19%	NA
Free view	**10**	10	1	0	4	6	10	0	**17%**	17%	17%	NA	17%	32%	19%	NA
Pay to view	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	5%	2%	NA
On-demand television	**3**	3	0	0	2	1	3	0	**5%**	5%	NA	NA	8%	5%	6%	NA
Free view	**2**	2	0	0	2	0	2	0	**3%**	3%	NA	NA	8%	NA	4%	NA
Pay to view	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	5%	2%	NA
Our own website or app	**32**	32	2	10	16	5	28	2	**55%**	55%	33%	71%	67%	26%	53%	100%
Free view	**31**	31	1	9	16	5	27	2	**53%**	53%	17%	64%	67%	26%	51%	100%
Pay to view	**2**	2	1	2	0	0	2	0	**3%**	3%	17%	14%	NA	NA	4%	NA
Third party website or app (YouTube, Vimeo, Periscope, etc.)	**40**	40	2	10	20	9	35	2	**69%**	69%	33%	71%	83%	47%	66%	100%
Free view	**38**	38	2	10	19	8	33	2	**66%**	66%	33%	71%	79%	42%	62%	100%
Pay to view	**3**	3	1	0	1	2	3	0	**5%**	5%	17%	NA	4%	11%	6%	NA
The Space	**8**	8	1	0	4	4	8	0	**14%**	14%	17%	NA	17%	21%	15%	NA
Free view	**8**	8	1	0	4	4	8	0	**14%**	14%	17%	NA	17%	21%	15%	NA
Pay to view	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
Digital Theatre	**6**	6	0	0	2	4	6	0	**10%**	10%	NA	NA	8%	21%	11%	NA
Free view	**1**	1	0	0	1	0	1	0	**2%**	2%	NA	NA	4%	NA	2%	NA
Pay to view	**5**	5	0	0	1	4	5	0	**9%**	9%	NA	NA	4%	21%	9%	NA
Other	**9**	9	0	1	5	2	7	0	**16%**	16%	NA	7%	21%	11%	13%	NA
Any pay to view experience?	**17**	17	3	3	4	10	17	0	**29%**	29%	50%	21%	17%	53%	32%	NA
Any free view experience?	**46**	46	2	12	21	12	41	2	**79%**	79%	33%	86%	88%	63%	77%	100%
S23 Have you worked with a distributor for your live-to-digital production(s)?																
Yes	**17**	17	2	2	4	11	17	0	**30%**	30%	40%	14%	17%	61%	33%	NA
No	**37**	37	2	11	20	5	32	2	**65%**	65%	40%	79%	83%	28%	62%	100%
I don't know	**3**	3	1	1	0	2	3	0	**5%**	5%	20%	7%	NA	11%	6%	NA
S24 What funding models have you used for live-to-digital productions?																
Co-production	**6**	6	0	2	3	1	6	0	**10%**	10%	NA	14%	13%	5%	11%	NA
Commercial investment	**2**	2	0	0	0	2	2	0	**3%**	3%	NA	NA	NA	11%	4%	NA
Specific fundraising	**12**	12	0	0	7	5	12	0	**21%**	21%	NA	NA	29%	26%	23%	NA
Crowd funding	**1**	1	0	1	0	0	1	0	**2%**	2%	NA	7%	NA	NA	2%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Funding comes from same budget as live productions	**29**	29	3	9	14	6	26	2	**50%**	50%	50%	64%	58%	32%	49%	100%
	Other	**13**	13	1	2	3	7	11	0	**22%**	22%	17%	14%	13%	37%	21%	NA
S25	**How have you found the process of funding live-to-digital productions, in comparison for funding traditional live productions?**																
	Funding live-to-digital productions is more difficult than funding traditional live productions	**15**	15	0	3	8	4	15	0	**26%**	26%	NA	21%	33%	21%	28%	NA
	Funding live-to-digital productions is easier than funding traditional live productions	**2**	2	1	1	1	0	2	0	**3%**	3%	17%	7%	4%	NA	4%	NA
	Funding live-to-digital is about the same level of difficulty as funding traditional live productions	**15**	15	2	5	7	3	13	1	**26%**	26%	33%	36%	29%	16%	25%	50%
	I don't know	**15**	15	2	5	7	3	13	1	**26%**	26%	33%	36%	29%	16%	25%	50%
S26	**With whom have you co-produced a live-to-digital production?**																
	Digital Theatre	**4**	4	0	0	1	3	4	0	**7%**	7%	NA	NA	4%	16%	8%	NA
	National Theatre / NT Live	**3**	3	0	0	0	3	3	0	**5%**	5%	NA	NA	NA	16%	6%	NA
	Other	**15**	15	1	4	6	5	15	0	**26%**	26%	17%	29%	25%	26%	28%	NA
S27	**What was the approximate budget for your most expensive live-to-digital production to-date?**																
	Less than £10,000	**26**	26	3	10	11	4	22	2	**46%**	46%	75%	71%	48%	22%	43%	100%
	£10,001 - £50,000	**11**	11	0	1	7	3	11	0	**20%**	20%	NA	7%	30%	17%	22%	NA
	£50,001 - £100,000	**4**	4	0	0	2	2	4	0	**7%**	7%	NA	NA	9%	11%	8%	NA
	£100,001 - £200,000	**2**	2	0	0	1	1	2	0	**4%**	4%	NA	NA	4%	6%	4%	NA
	£200,001 - £300,000	**2**	2	0	0	0	2	2	0	**4%**	4%	NA	NA	NA	11%	4%	NA
	More than £300,000	**2**	2	0	0	0	2	2	0	**4%**	4%	NA	NA	NA	11%	4%	NA
	I don't know	**9**	9	1	3	2	4	8	0	**16%**	16%	25%	21%	9%	22%	16%	NA
S28	**What is the approximate average budget for your live-to-digital productions?**																
	Less than £10,000	**31**	31	3	11	14	5	27	2	**56%**	53%	50%	79%	58%	26%	51%	100%
	£10,001 - £50,000	**6**	6	0	1	4	1	6	0	**10%**	10%	NA	7%	17%	5%	11%	NA
	£50,001 - £100,000	**3**	3	0	0	2	1	3	0	**5%**	5%	NA	NA	8%	5%	6%	NA
	£100,001 - £200,000	**2**	2	0	0	0	2	2	0	**3%**	3%	NA	NA	NA	11%	4%	NA
	More than £200,000	**3**	3	0	0	0	3	3	0	**5%**	5%	NA	NA	NA	16%	6%	NA
	I don't know	**10**	10	1	2	2	6	9	0	**17%**	17%	17%	14%	8%	32%	17%	NA
S29	**What is the most you have netted (profit) for one of your live-to-digital productions?**																
	Less than £10,000	**36**	36	3	10	17	9	33	2	**68%**	68%	75%	71%	81%	53%	69%	100%
	£10,001 - £50,000	**2**	2	0	0	1	1	2	0	**4%**	4%	NA	NA	5%	6%	4%	NA
	£50,001 - £100,000	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	£100,001 - £200,000	**2**	2	0	0	0	2	2	0	**4%**	4%	NA	NA	NA	12%	4%	NA
	More than £200,000	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	6%	2%	NA
	I don't know	**12**	12	1	4	3	4	10	0	**23%**	23%	25%	29%	14%	24%	21%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S30	**What is the most you have lost on one of your live-to-digital productions?**																
	Less than £10,000	**27**	27	2	9	9	9	25	1	**53%**	53%	67%	64%	50%	50%	53%	100%
	£10,001 - £50,000	**5**	5	0	0	4	1	5	0	**10%**	10%	NA	NA	22%	6%	11%	NA
	£50,001 - £100,000	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	£100,001 - £200,000	**3**	3	0	0	0	3	3	0	**6%**	6%	NA	NA	NA	17%	6%	NA
	More than £200,000	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**16**	16	1	5	5	5	14	0	**31%**	31%	33%	36%	28%	28%	30%	NA
S31	**Does your marketing strategy for live-to-digital productions differ from your marketing strategy for live theatre?**																
	Yes	**28**	28	3	6	14	8	26	1	**50%**	50%	60%	43%	61%	44%	51%	50%
	No	**16**	16	2	4	6	6	15	1	**29%**	29%	40%	29%	26%	33%	29%	50%
	I don't know	**12**	12	0	4	3	4	10	0	**21%**	21%	NA	29%	13%	22%	20%	NA
S32	**Do you have access to audience data from your live-to-digital productions?**																
	Yes	**25**	25	3	5	11	8	21	2	**44%**	44%	60%	36%	48%	42%	40%	100%
	No	**25**	25	1	7	9	9	24	0	**44%**	44%	20%	50%	39%	47%	46%	NA
	I don't know	**7**	7	1	2	3	2	7	0	**12%**	12%	20%	14%	13%	11%	13%	NA
S33	**How important would it be for you to have direct access to this data?**																
	Not at all important	**1**	1	0	1	0	0	0	0	**5%**	5%	NA	25%	NA	NA	NA	NA
	Not very important	**1**	1	0	0	0	1	1	0	**5%**	5%	NA	NA	NA	13%	5%	NA
	Not very important nor unimportant	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Somewhat important	**5**	5	0	3	0	2	5	0	**25%**	25%	NA	75%	NA	25%	26%	NA
	Very important	**13**	13	0	0	8	5	13	0	**65%**	65%	NA	NA	100%	63%	68%	NA
S34	**What factors have been significant assets for your organisation in producing live-to-digital productions?**																
	Allocation of sufficient staff time	**23**	23	1	3	12	8	22	1	**40%**	40%	17%	21%	50%	42%	42%	50%
	Internal expertise	**25**	25	4	7	10	8	23	1	**43%**	43%	67%	50%	42%	42%	43%	50%
	Creative interest	**33**	33	4	8	15	10	30	2	**57%**	57%	67%	57%	63%	53%	57%	100%
	External expertise	**22**	22	1	2	13	7	22	0	**38%**	38%	17%	14%	54%	37%	42%	NA
	Sufficient funding dedicated to the project	**25**	25	1	6	10	9	25	0	**43%**	43%	17%	43%	42%	47%	47%	NA
	Support from senior leadership	**21**	21	2	3	8	10	21	0	**36%**	36%	33%	21%	33%	53%	40%	NA
	Ability to find co-producers	**13**	13	2	4	4	5	13	0	**22%**	22%	33%	29%	17%	26%	25%	NA
	Ability to fundraise specifically for live-to-digital projects	**13**	13	1	2	8	3	13	0	**22%**	22%	17%	14%	33%	16%	25%	NA
	Marketplace not too competitive	**8**	8	2	3	3	2	7	1	**14%**	14%	33%	21%	13%	11%	13%	50%
	Level of investment is not too risky	**17**	17	0	5	7	5	15	1	**29%**	29%	NA	36%	29%	26%	28%	50%
	Prior experience marketing for live-to-digital	**4**	4	0	0	2	2	4	0	**7%**	7%	NA	NA	8%	11%	8%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Pro-ducer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Pro-ducer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Knowledge of rights clearance process and issues	**20**	20	2	4	8	8	20	0	**34%**	34%	33%	29%	33%	42%	38%	NA
	Cost of live-to-digital productions	**16**	16	1	4	9	3	16	0	**28%**	28%	17%	29%	38%	16%	30%	NA
	Understanding about how to enter this market	**15**	15	1	4	6	5	15	0	**26%**	26%	17%	29%	25%	26%	28%	NA
	None of the above	**3**	3	0	1	0	2	2	0	**5%**	5%	NA	7%	NA	11%	4%	NA
	Other	**3**	3	0	0	2	1	3	0	**5%**	5%	NA	NA	8%	5%	6%	NA
S35	**What benefits have live-to-digital productions brought to your organisation?**																
	New audiences	**42**	42	3	8	19	14	38	2	**72%**	72%	50%	57%	79%	74%	72%	100%
	Increased revenue (earned income)	**7**	7	2	2	0	5	7	0	**12%**	12%	33%	14%	NA	26%	13%	NA
	Increased interest from funders (contrib-uted income)	**15**	15	1	1	5	9	15	0	**26%**	26%	17%	7%	21%	47%	28%	NA
	Artistic acclaim	**21**	21	1	4	7	10	21	0	**36%**	36%	17%	29%	29%	53%	40%	NA
	Aesthetic innovation	**16**	16	0	3	9	4	15	0	**28%**	28%	NA	21%	38%	21%	28%	NA
	A stronger brand	**25**	25	1	4	9	11	23	1	**43%**	43%	17%	29%	38%	58%	43%	50%
	Professional develop-ment for staff	**22**	22	1	2	11	8	19	2	**38%**	38%	17%	14%	46%	42%	36%	100%
	Attracted new Board members	**5**	5	1	0	3	2	5	0	**9%**	9%	17%	NA	13%	11%	9%	NA
	New partnerships	**26**	26	3	5	13	8	24	2	**45%**	45%	50%	36%	54%	42%	45%	100%
	None of the above	**6**	6	0	2	2	2	5	0	**10%**	10%	NA	14%	8%	11%	9%	NA
	Other	**4**	4	0	0	4	0	4	0	**7%**	7%	NA	NA	17%	NA	8%	NA
S36	**What factors have been significant challenges for your organisation in producing live-to-digital productions?**																
	Lack of staff time	**21**	21	1	5	10	6	20	1	**36%**	36%	17%	36%	42%	32%	38%	50%
	Lack of internal expertise	**11**	11	1	2	6	3	9	2	**19%**	19%	17%	14%	25%	16%	17%	100%
	Lack of creative interest	**2**	2	0	1	0	1	1	0	**3%**	3%	NA	7%	NA	5%	2%	NA
	Inability to find exter-nal expertise	**1**	1	1	0	1	0	0	1	**2%**	2%	17%	NA	4%	NA	NA	50%
	Lack of funds / costs too much	**27**	27	0	8	12	7	26	0	**47%**	47%	NA	57%	50%	37%	49%	NA
	Lack of support from senior leadership	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Difficulty in finding co-producers	**6**	6	0	1	3	2	6	0	**10%**	10%	NA	7%	13%	11%	11%	NA
	Difficulty in fundrais-ing specifically for live-to-digital projects	**11**	11	0	5	5	1	11	0	**19%**	19%	NA	36%	21%	5%	21%	NA
	Marketplace too competitive	**2**	2	1	1	0	1	2	0	**3%**	3%	17%	7%	NA	5%	4%	NA
	Level of investment is too risky	**7**	7	0	1	2	4	7	0	**12%**	12%	NA	7%	8%	21%	13%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Inexperience marketing for live-to-digital	**13**	13	1	3	6	4	12	1	**22%**	22%	17%	21%	25%	21%	23%	50%
	Rights clearance	**16**	16	0	0	7	9	15	1	**28%**	28%	NA	NA	29%	47%	28%	50%
	Cost of live-to-digital productions	**22**	22	0	3	10	9	21	0	**38%**	38%	NA	21%	42%	47%	40%	NA
	Lack of understanding about how to enter this market	**8**	8	0	1	4	3	8	0	**14%**	14%	NA	7%	17%	16%	15%	NA
	None of the above	**4**	4	0	0	2	2	4	0	**7%**	7%	NA	NA	8%	11%	8%	NA
	Other	**6**	6	1	2	3	1	6	0	**10%**	10%	17%	14%	13%	5%	11%	NA
S37	**What costs, if any, have your own live-to-digital productions brought to your organisation?**																
	Undesirable aesthetic consequences for a production	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Net loss in income	**4**	4	0	0	2	2	4	0	**7%**	7%	NA	NA	8%	11%	8%	NA
	Inability to schedule tours in venues	**5**	5	1	2	2	1	4	1	**9%**	9%	17%	14%	8%	5%	8%	50%
	Distraction from our core work	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Increased stress upon staff	**17**	17	0	3	9	5	16	1	**29%**	29%	NA	21%	38%	26%	30%	50%
	Dissatisfied audiences	**1**	1	0	0	1	0	1	0	**2%**	2%	NA	NA	4%	NA	2%	NA
	None of the above	**26**	26	2	7	9	10	23	1	**45%**	45%	33%	50%	38%	53%	43%	50%
	Other	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Impacts on Touring																
S38	**Do you tour your theatre productions?**																
	Yes	**131**	131	6	63	40	28	113	15	**74%**	75%	38%	75%	73%	76%	73%	88%
	No	**46**	44	10	21	15	9	42	2	**26%**	25%	63%	25%	27%	24%	27%	12%
S39	**Have you changed the types of venues for your touring in the last two years?**																
	Yes	**40**	40	1	28	10	2	34	6	**33%**	33%	20%	46%	28%	8%	33%	43%
	No	**81**	81	4	33	26	22	69	8	**67%**	67%	80%	54%	72%	92%	67%	57%
S40	**Has your touring increased or decreased in the last two years?**																
	Increased	**49**	49	1	23	17	9	41	8	**38%**	38%	20%	37%	43%	33%	37%	53%
	Decreased	**25**	25	1	14	9	2	22	2	**19%**	19%	20%	23%	23%	7%	20%	13%
	Remained level	**55**	55	3	25	14	16	48	5	**43%**	43%	60%	40%	35%	59%	43%	33%
S41	**You indicated that your organisation has increased touring in the last two years. What has led to that increase?**																
	New content to tour	**31**	31	0	15	11	5	25	6	**63%**	63%	NA	65%	65%	56%	61%	75%
	More demand for our content	**23**	23	1	9	12	2	20	3	**47%**	47%	100%	39%	71%	22%	49%	38%
	More staff capacity to schedule tours	**8**	8	0	2	5	1	7	1	**16%**	16%	NA	9%	29%	11%	17%	13%
	Secured new relationships with venues	**38**	38	0	19	12	7	34	4	**78%**	78%	NA	83%	71%	78%	83%	50%
	Received funding for touring	**20**	20	0	10	7	3	15	5	**41%**	41%	NA	43%	41%	33%	37%	63%
	Other	**4**	4	0	2	0	2	4	0	**8%**	8%	NA	9%	NA	22%	10%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S42	**You indicated that your organisation has decreased touring in the last two years. What has led to that decrease?**																
	No content to tour	**1**	1	0	1	0	0	1	0	**4%**	4%	NA	7%	NA	NA	5%	NA
	Limited staff capacity to schedule tours	**7**	7	1	3	3	1	5	1	**28%**	28%	100%	21%	33%	50%	23%	50%
	Limited time available to go on tour	**3**	3	1	1	2	0	2	1	**12%**	12%	100%	7%	22%	NA	9%	50%
	Less interest in our product	**5**	5	0	3	2	0	5	0	**20%**	20%	NA	21%	22%	NA	23%	NA
	No funding to subsidise touring programme	**11**	11	1	5	4	2	8	2	**44%**	44%	100%	36%	44%	100%	36%	100%
	Difficulty finding venues for touring	**13**	13	0	7	5	1	11	1	**52%**	52%	NA	50%	56%	50%	50%	50%
	Other	**8**	8	0	5	2	1	8	0	**32%**	32%	NA	36%	22%	50%	36%	NA
S43	**You indicated that your organisation has had difficulty finding venues for touring. What were the reasons?**																
	Venues not interested in our product	**4**	4	0	2	1	1	3	0	**31%**	31%	NA	29%	20%	100%	27%	NA
	Venues explicitly stated they were programming more live-to-digital content	**6**	6	0	4	2	0	5	1	**46%**	46%	NA	57%	40%	NA	45%	100%
	No staff capacity to fully research touring market	**6**	6	0	3	2	1	5	0	**46%**	46%	NA	43%	40%	100%	45%	NA
	Other	**3**	3	0	1	2	0	3	0	**23%**	23%	NA	14%	40%	NA	27%	NA
S44	**You indicated that venues stated to you that they were producing more live-to-digital content. What reasons did venues state to you for this change?**																
	Audiences requested it	**3**	3	0	2	1	0	2	1	**50%**	50%	NA	50%	50%	NA	40%	100%
	Less expensive than staging live productions	**6**	6	0	4	2	0	5	1	**100%**	100%	NA	100%	100%	NA	100%	100%
	Interested in trying new content	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Other	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Future Live-to-Digital Work																
S45	**Do you plan to produce any live-to-digital productions in the future?**																
	Yes	**57**	57	3	19	22	15	55	1	**33%**	33%	19%	23%	41%	41%	36%	6%
	No	**46**	46	6	29	12	5	39	5	**26%**	27%	38%	35%	22%	14%	25%	31%
	I don't know	**72**	70	7	35	20	17	60	10	**41%**	40%	44%	42%	37%	46%	39%	63%
S46	**Will any of the factors below influence whether your organisation produces live-to-digital productions in the future?**																
	Interest in disseminating our work in new ways	**93**	92	8	38	30	25	81	9	**53%**	53%	50%	45%	56%	69%	53%	53%

		Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
	n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
Desire or need to find new ways of engaging with our audiences	**96**	96	9	39	30	26	85	7	**55%**	55%	56%	46%	56%	72%	56%	41%
Demand from audiences for more digital access to our work	**86**	86	7	35	27	24	76	8	**49%**	49%	44%	42%	50%	67%	50%	47%
Development of better technology for producing and distributing live-to-digital productions	**59**	58	4	25	18	16	54	3	**34%**	33%	25%	30%	33%	44%	35%	18%
Development of less expensive technology for producing and distributing live-to-digital productions	**87**	87	9	31	31	25	76	8	**50%**	50%	56%	37%	57%	69%	50%	47%
Bringing on staff / hiring external advisers with expertise	**61**	61	5	27	19	15	51	8	**35%**	35%	31%	32%	35%	42%	33%	47%
Artistic staff becoming interested in live-to-digital for its creative potential	**66**	66	7	32	19	15	58	6	**38%**	38%	44%	38%	35%	42%	38%	35%
Obtaining funding / philanthropic support to pursue	**102**	101	6	44	35	23	91	10	**58%**	58%	38%	52%	65%	64%	59%	59%
Finding a co-producer	**56**	55	4	24	16	16	52	3	**32%**	31%	25%	29%	30%	44%	34%	18%
Getting support of senior leadership	**10**	10	3	2	2	6	9	1	**6%**	6%	19%	2%	4%	17%	6%	6%
Improved processes for clearing rights	**30**	30	1	4	12	14	27	2	**17%**	17%	6%	5%	22%	39%	18%	12%
Improved ability to clear 'down-stream' rights (beyond the live/encore broadcast)	**32**	32	2	7	10	15	31	1	**18%**	18%	13%	8%	19%	42%	20%	6%
None of the above	**14**	14	2	9	4	1	10	3	**8%**	8%	13%	11%	7%	3%	7%	18%
Other	**16**	16	1	12	3	1	13	2	**9%**	9%	6%	14%	6%	3%	8%	12%
S47 Which of the following venues/screening platforms are you likely to use for future live-to-digital productions?																
Cinemas	**21**	21	0	2	6	13	21	0	**37%**	37%	NA	11%	27%	87%	38%	NA
Theatres/arts centres	**29**	29	1	9	10	9	28	0	**51%**	51%	33%	47%	45%	60%	51%	NA
Non-traditional venues (libraries, pubs, etc.)	**23**	23	0	10	7	5	22	0	**40%**	40%	NA	53%	32%	33%	40%	NA
Schools	**23**	23	0	8	7	8	23	0	**40%**	40%	NA	42%	32%	53%	42%	NA
Television	**17**	17	0	3	4	10	17	0	**30%**	30%	NA	16%	18%	67%	31%	NA
Our own website	**47**	47	2	17	20	9	44	2	**82%**	82%	67%	89%	91%	60%	80%	200%
Third party website or app (YouTube, Vimeo, Periscope, etc.)	**47**	47	2	16	21	9	44	2	**82%**	82%	67%	84%	95%	60%	80%	200%

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	I don't know	**1**	1	0	0	1	0	1	0	**2%**	2%	NA	NA	5%	NA	2%	NA
	Other	**5**	5	0	0	4	1	5	0	**9%**	9%	NA	NA	18%	7%	9%	NA
S48	**Which of the following distributors/platforms are you likely to use for future live-to-digital productions?**																
	Arts Alliance Media	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Altive Media	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	By Experience	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	7%	2%	NA
	Digital Theatre	**4**	4	0	0	1	3	4	0	**7%**	7%	NA	NA	5%	20%	7%	NA
	Fathom Events	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	7%	2%	NA
	Cinegi	**4**	4	1	2	1	1	4	0	**7%**	7%	33%	11%	5%	7%	7%	NA
	More2Screen	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Rightster	**3**	3	0	1	1	1	3	0	**5%**	5%	NA	5%	5%	7%	5%	NA
	Curzon Home Cinema	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Picturehouse Entertainment	**7**	7	0	1	2	4	7	0	**12%**	12%	NA	5%	9%	27%	13%	NA
	BFI Player	**1**	1	0	0	0	1	1	0	**2%**	2%	NA	NA	NA	7%	2%	NA
	Canvas	**4**	4	0	0	4	0	4	0	**7%**	7%	NA	NA	18%	NA	7%	NA
	HiBrow	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	The Space	**15**	15	0	2	8	5	15	0	**26%**	26%	NA	11%	36%	33%	27%	NA
	BBC	**11**	11	0	1	3	7	11	0	**19%**	19%	NA	5%	14%	47%	20%	NA
	National Theatre	**9**	9	0	1	3	5	9	0	**16%**	16%	NA	5%	14%	33%	16%	NA
	Live from Television Centre	**2**	2	0	2	0	0	2	0	**4%**	4%	NA	11%	NA	NA	4%	NA
	Pilot / Theatre-Livestream.tv	**3**	3	0	2	1	0	3	0	**5%**	5%	NA	11%	5%	NA	5%	NA
	We will handle distribution internally	**13**	13	1	3	8	2	11	2	**23%**	23%	33%	16%	36%	13%	20%	200%
	I don't know	**30**	30	1	14	11	4	29	0	**53%**	53%	33%	74%	50%	27%	53%	NA
	Other	**7**	7	0	0	4	3	7	0	**12%**	12%	NA	NA	18%	20%	13%	NA
	Exhibitors																
S53	**Does your organisation operate a venue where live-to-digital arts programming is screened, such as live or encore theatre or opera, or another art form? Include screenings that you exhibit directly, as well as screenings in your space by third parties.**																
	Yes	**49**	16	49	18	13	14	32	15	**20%**	9%	100%	16%	17%	30%	15%	50%
	No	**192**	155	0	94	62	32	171	15	**78%**	89%	NA	82%	81%	70%	83%	50%
	I'm not sure	**4**	4	0	2	2	0	4	0	**2%**	2%	NA	2%	3%	NA	2%	NA
S54	**What types of live-to-digital productions, including encores, have been screened in your venue(s)?**																
	Theatre	**45**	14	45	17	12	12	28	15	**92%**	88%	92%	94%	92%	86%	88%	100%
	Opera	**37**	12	37	11	11	11	23	12	**76%**	75%	76%	61%	85%	79%	72%	80%
	Ballet	**34**	10	34	10	10	10	22	10	**69%**	63%	69%	56%	77%	71%	69%	67%
	Orchestral Music	**25**	7	25	8	6	7	17	7	**51%**	44%	51%	44%	46%	50%	53%	47%
	Popular Music	**22**	5	22	6	7	6	17	4	**45%**	31%	45%	33%	54%	43%	53%	27%
	Museum exhibition tour	**26**	7	26	6	9	8	19	5	**53%**	44%	53%	33%	69%	57%	59%	33%
	Other	**8**	2	8	3	3	2	6	2	**16%**	13%	16%	17%	23%	14%	19%	13%
S55	**How many live-to-digital theatre productions were screened in your venue(s) in the past 12 months?**																
	n	**47**	15	47	17	13	13	30	15								

		n	Supplier Activity		Budget Size			Location		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural		Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Average	**31.2**	27.5	31.2	22.5	32.0	36.8	32.4	27.5								
	Total	**1468**	413	1468	383	416	479	971	413								
S56	**Approximately what percentage of your gross box office sales were live-to-digital tickets (including encores)?**																
	less than 5%	**14**	5	14	5	3	5	11	2	**30%**	33%	30%	29%	23%	38%	35%	14%
	6-10%	**6**	2	6	2	0	3	5	1	**13%**	13%	13%	12%	NA	23%	16%	7%
	11-15%	**6**	2	6	2	2	2	3	2	**13%**	13%	13%	12%	15%	15%	10%	14%
	16-20%	**7**	4	7	1	4	1	6	1	**15%**	27%	15%	6%	31%	8%	19%	7%
	21-25%	**2**	1	2	0	1	1	2	0	**4%**	7%	4%	NA	8%	8%	6%	NA
	26-30%	**3**	1	3	2	1	0	1	2	**6%**	7%	6%	12%	8%	NA	3%	14%
	31-45%	**5**	0	5	2	2	0	2	3	**11%**	NA	11%	12%	15%	NA	6%	21%
	46-60%	**4**	0	4	3	0	1	1	3	**9%**	NA	9%	18%	NA	8%	3%	21%
	more than 60%	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
S57	**How does this percentage of your gross box office sales from live-to-digital tickets compare with three years ago?**																
	Roughly the same	**3**	1	3	2	0	1	3	0	**7%**	7%	7%	14%	NA	8%	11%	NA
	Small increase in live-to-digital sales	**7**	4	7	2	2	2	3	2	**17%**	27%	17%	14%	17%	17%	11%	17%
	Significant increase in live-to-digital sales	**30**	9	30	9	9	9	21	9	**71%**	60%	71%	64%	75%	75%	75%	75%
	Small decrease in live-to-digital sales	**1**	0	1	0	1	0	1	0	**2%**	NA	2%	NA	8%	NA	4%	NA
	Significant decrease in live-to-digital sales	**1**	1	1	1	0	0	0	1	**2%**	7%	2%	7%	NA	NA	NA	8%
S58	**What type of venue(s) does your organisation operate?**																
	Theatre	**15**	9	15	6	5	4	10	5	**31%**	56%	31%	33%	38%	29%	31%	33%
	Traditional cinema	**18**	4	18	6	6	4	12	5	**37%**	25%	37%	33%	46%	29%	38%	33%
	Art-house cinema	**10**	3	10	2	3	3	7	2	**20%**	19%	20%	11%	23%	21%	22%	13%
	Arts centre	**21**	9	21	4	7	9	15	6	**43%**	56%	43%	22%	54%	64%	47%	40%
	School	**1**	0	1	1	0	0	0	1	**2%**	NA	2%	6%	NA	NA	NA	7%
	Pub/Café/Restaurant/Hotel	**4**	1	4	0	3	1	3	1	**8%**	6%	8%	NA	23%	7%	9%	7%
	Church hall	**2**	0	2	2	0	0	0	2	**4%**	NA	4%	11%	NA	NA	NA	13%
	Community centre	**4**	0	4	3	1	0	0	4	**8%**	NA	8%	17%	8%	NA	NA	27%
	Gallery	**4**	2	4	1	2	1	2	2	**8%**	13%	8%	6%	15%	7%	6%	13%
	Outdoor public space	**3**	1	3	1	1	1	2	1	**6%**	6%	6%	6%	8%	7%	6%	7%
	Other	**7**	1	7	3	4	0	4	3	**14%**	6%	14%	17%	31%	NA	13%	20%
S59	**Does your organisation host live performances in its venue(s)? Include hires by third-parties.**																
	Yes	**38**	15	38	14	12	10	25	13	**78%**	94%	78%	78%	92%	71%	78%	87%
	No	**11**	1	11	4	1	4	7	2	**22%**	6%	22%	22%	8%	29%	22%	13%
S60	**Does your organisation act as avenue for live theatre, including hires by third parties?**																
	Yes	**33**	16	33	11	12	9	20	13	**67%**	100%	67%	61%	92%	64%	63%	87%
	No	**16**	0	16	7	1	5	12	2	**33%**	NA	33%	39%	8%	36%	38%	13%
S61	**How many live theatre productions appeared in your venue(s) in the past 12 months?**																
	n	**33**	16	33	11	12	9	20	13								
	Average	**76.8**	128.6	76.8	20.2	38.1	205.1	111.2	23.9								

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Median	**22**	40.5	22	8	12.5	200	38.5	5								
	Total	**2,535**	2,057	2,535	222	457	1,846	2,224	311								
S62	**Do live theatre productions and live-to-digital productions compete for space/time in your venue(s)?**																
	Yes	**17**	10	17	7	5	4	11	6	**52%**	63%	52%	64%	42%	44%	55%	46%
	No	**16**	6	16	4	7	5	9	7	**48%**	38%	48%	36%	58%	56%	45%	54%
S63	**What factors prevent theatre productions and screenings from competing for space in your venue(s)?**																
	We have dedicated spaces for theatre and cinema screenings	**5**	3	5	0	2	3	4	1	**31%**	50%	31%	NA	29%	60%	44%	14%
	We have enough spaces for all the productions	**4**	2	4	1	2	1	1	3	**25%**	33%	25%	25%	29%	20%	11%	43%
	We have a policy guiding how many live and live-to-digital events appear in our venue(s)	**1**	0	1	0	1	0	0	1	**6%**	NA	6%	NA	14%	NA	NA	14%
	Our programming schedule is not crowded enough to result in competition for space	**7**	2	7	3	2	2	3	4	**44%**	33%	44%	75%	29%	40%	33%	57%
	Other	**4**	2	4	0	2	2	4	0	**25%**	33%	25%	NA	29%	40%	44%	NA
S64	**What factors cause theatre productions and screenings to compete for space in your venue(s)?**																
	Theatre and cinema screenings must occur in the same spaces within our venue(s)	**17**	10	17	7	5	4	11	6	**100%**	100%	100%	100%	100%	100%	100%	100%
	We have many of our own live and live-to-digital productions to fit into the schedule	**3**	1	3	1	1	0	1	2	**18%**	10%	18%	14%	20%	NA	9%	33%
	Hires by exhibitors of live-to-digital increase demand for our venue(s)	**2**	1	2	0	1	1	2	0	**12%**	10%	12%	NA	20%	25%	18%	NA
	We have no policy guiding how many live and live-to-digital events appear in our venues(s)	**7**	2	7	4	2	0	2	5	**41%**	20%	41%	57%	40%	NA	18%	83%
	Other	**1**	0	1	17	0	0	0	1	**6%**	NA	6%	243%	NA	NA	NA	17%
S65	**How has the number of live theatre productions in your venue(s) increased or decreased in the last 2- 3 years?**																
	Decreased by 75-100%	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Decreased by 50-74%	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Decreased by 25-49%	**2**	1	2	0	2	0	1	1	**6%**	6%	6%	NA	17%	NA	5%	8%
	Decreased by 1-24%	**7**	4	7	3	0	4	4	3	**21%**	25%	21%	27%	NA	44%	20%	23%
	No change	**14**	7	14	5	5	3	10	4	**42%**	44%	42%	45%	42%	33%	50%	31%

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Increased by 1-24%	**7**	3	7	1	4	2	4	3	**21%**	19%	21%	9%	33%	22%	20%	23%
	Increased by 25-49%	**1**	0	1	1	0	0	1	0	**3%**	NA	3%	9%	NA	NA	5%	NA
	Increased by 50-74%	**2**	1	2	1	1	0	0	2	**6%**	6%	6%	9%	8%	NA	NA	15%
	Increased by 75-100%	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
S66	**Are you trying to increase or decrease the number of live performances (including theatre and other types of performances) in your venue?**																
	Increase	**13**	5	13	4	7	2	7	6	**39%**	31%	39%	36%	58%	22%	35%	46%
	Decrease	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	No change	**15**	7	15	6	4	5	9	6	**45%**	44%	45%	55%	33%	56%	45%	46%
	I don't know	**1**	1	1	0	0	1	1	0	**3%**	6%	3%	NA	NA	11%	5%	NA
	Undecided	**4**	3	4	1	1	1	3	1	**12%**	19%	12%	9%	8%	11%	15%	8%
S67	**Are you trying to increase or decrease the number of live-to-digital screenings in your venue?**																
	Increase	**19**	8	19	6	9	4	13	6	**58%**	50%	58%	55%	75%	44%	65%	46%
	Decrease	**1**	1	1	1	0	0	0	1	**3%**	6%	3%	9%	NA	NA	NA	8%
	No change	**9**	4	9	2	3	3	4	5	**27%**	25%	27%	18%	25%	33%	20%	38%
	I don't know	**1**	1	1	0	0	1	1	0	**3%**	6%	3%	NA	NA	11%	5%	NA
	Undecided	**3**	2	3	2	0	1	2	1	**9%**	13%	9%	18%	NA	11%	10%	8%
	Feelings about the Marketplace																
S68	**Do you feel that the live-to-digital market has had a positive or negative impact upon your organisation?**																
	Positive	**93**	52	45	34	29	23	76	15	**38%**	30%	92%	30%	38%	50%	37%	50%
	Neutral	**88**	66	1	42	29	17	77	7	**36%**	38%	2%	37%	38%	37%	37%	23%
	Negative	**31**	30	2	20	6	5	26	5	**13%**	17%	4%	18%	8%	11%	13%	17%
	No opinion	**31**	25	1	18	12	1	27	3	**13%**	14%	2%	16%	16%	2%	13%	10%
S69	**Has your organisation's programming changed due to the effects of the live-to-digital market?**																
	Yes	**56**	31	33	27	15	11	40	15	**23%**	18%	67%	24%	20%	24%	19%	50%
	No	**171**	133	15	77	57	34	152	14	**70%**	76%	31%	68%	75%	74%	74%	47%
	I don't know	**16**	10	1	10	4	1	14	1	**7%**	6%	2%	9%	5%	2%	7%	3%
S70	**Which of the following in your organisation has been impacted by the live-to-digital market?**																
	Repertoire	**17**	8	10	8	5	4	13	4	**30%**	26%	30%	30%	33%	36%	33%	27%
	Casting	**2**	1	1	1	1	0	1	1	**4%**	3%	3%	4%	7%	NA	3%	7%
	Performance locations	**15**	12	4	9	5	1	11	4	**27%**	39%	12%	33%	33%	9%	28%	27%
	Performance venues	**14**	14	1	10	4	0	11	3	**25%**	45%	3%	37%	27%	NA	28%	20%
	Number of performances	**30**	15	18	15	10	3	22	8	**54%**	48%	55%	56%	67%	27%	55%	53%
	Number of tickets sold	**37**	17	28	17	10	8	25	12	**66%**	55%	85%	63%	67%	73%	63%	80%
	Type of audience attending	**25**	9	21	11	8	3	16	8	**45%**	29%	64%	41%	53%	27%	40%	53%
	Staffing	**12**	6	8	4	6	2	9	3	**21%**	19%	24%	15%	40%	18%	23%	20%
	Fundraising income (directly increased)	**10**	5	7	4	3	2	5	5	**18%**	16%	21%	15%	20%	18%	13%	33%
	Fundraising income (directly decreased)	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	None of the above	**5**	3	2	2	1	2	5	0	**9%**	10%	6%	7%	7%	18%	13%	NA
	For those that report positive impacts in first marketplace question																

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Repertoire	**10**	2	9	5	3	2	6	4	**26%**	13%	29%	29%	27%	25%	23%	33%
	Casting	**2**	1	1	1	1	0	1	1	**5%**	6%	3%	6%	9%	NA	4%	8%
	Performance locations	**6**	3	4	2	3	1	5	1	**15%**	19%	13%	12%	27%	13%	19%	8%
	Performance venues	**2**	2	1	1	1	0	2	0	**5%**	13%	3%	6%	9%	NA	8%	NA
	Number of performances	**18**	3	17	8	7	1	11	7	**46%**	19%	55%	47%	64%	13%	42%	58%
	Number of tickets sold	**27**	7	26	12	8	5	15	12	**69%**	44%	84%	71%	73%	63%	58%	100%
	Type of audience attending	**22**	6	20	10	7	2	14	7	**56%**	38%	65%	59%	64%	25%	54%	58%
	Staffing	**10**	4	8	2	6	2	7	3	**26%**	25%	26%	12%	55%	25%	27%	25%
	Fundraising income (directly increased)	**9**	4	7	3	3	2	4	5	**23%**	25%	23%	18%	27%	25%	15%	42%
	Fundraising income (directly decreased)	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	For those that report negative impacts in first marketplace question																
	Repertoire	**6**	6	1	3	1	2	6	0	**46%**	46%	100%	33%	50%	100%	60%	NA
	Casting	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Performance locations	**8**	8	0	7	1	0	5	3	**62%**	62%	NA	78%	50%	NA	50%	100%
	Performance venues	**11**	11	0	9	2	0	8	3	**85%**	85%	NA	100%	100%	NA	80%	100%
	Number of performances	**11**	11	1	7	2	2	10	1	**85%**	85%	100%	78%	100%	100%	100%	33%
	Number of tickets sold	**8**	8	1	5	1	2	8	0	**62%**	62%	100%	56%	50%	100%	80%	NA
	Type of audience attending	**1**	1	0	1	0	0	0	1	**8%**	8%	NA	11%	NA	NA	NA	33%
	Staffing	**2**	2	0	2	0	0	2	0	**15%**	15%	NA	22%	NA	NA	20%	NA
	Fundraising income (directly increased)	**1**	1	0	1	0	0	1	0	**8%**	8%	NA	11%	NA	NA	10%	NA
	Fundraising income (directly decreased)	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	The importance of 'Liveness'																
S71	**How important do you think liveness (ie. knowing that a performance is happening in real time) is to your audiences?**																
	Weighted average: very important = 100%, somewhat important = 75%, neither important nor unimportant = 50%, not very important = 25%, and not at all important = 0%																
	Not at all important	**5**	5	1	2	2	1	4	1	**2%**	3%	2%	2%	3%	2%	2%	3%
	Not very important	**8**	6	1	4	4	0	7	1	**3%**	4%	2%	4%	5%	NA	3%	3%
	Neither important nor unimportant	**29**	19	4	15	10	3	27	1	**12%**	11%	8%	14%	13%	7%	13%	3%
	Somewhat important	**85**	52	33	27	26	26	70	12	**35%**	30%	67%	25%	34%	57%	35%	40%
	Very important	**113**	89	10	62	34	16	94	15	**47%**	52%	20%	56%	45%	35%	47%	50%
S72	**Is offering content on a time-limited basis important to your organisation?**																
	Yes	**56**	35	18	15	20	16	48	6	**24%**	21%	37%	14%	27%	35%	24%	22%
	No	**84**	60	15	47	28	8	74	8	**36%**	36%	31%	44%	38%	17%	37%	30%
	I'm not sure	**94**	70	16	45	25	22	77	13	**40%**	42%	33%	42%	34%	48%	39%	48%

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Distributors																
S73	**Does your organisation act as a distributor for live-to-digital productions?**																
	Yes	**12**	6	3	2	4	5	11	1	**5%**	3%	6%	2%	5%	11%	5%	3%
	No	**233**	169	46	112	73	41	196	29	**95%**	97%	94%	98%	95%	89%	95%	97%
S74	**What types of live-to-digital productions has your organisation distributed?**																
	Theatre	**10**	6	2	2	3	4	9	1	**83%**	100%	67%	100%	75%	80%	82%	100%
	Opera	**3**	0	2	1	1	0	2	1	**25%**	NA	67%	50%	25%	NA	18%	100%
	Ballet	**2**	0	2	1	0	0	1	1	**17%**	NA	67%	50%	NA	NA	9%	100%
	Orchestral Music	**1**	0	1	0	0	0	1	0	**8%**	NA	33%	NA	NA	NA	9%	NA
	Museum exhibition tour	**1**	0	1	0	0	0	1	0	**8%**	NA	33%	NA	NA	NA	9%	NA
	Other	**2**	0	1	1	0	1	2	0	**17%**	NA	33%	50%	NA	20%	18%	NA
S75	**Through what venues/screening platforms does your organisation distribute live-to-digital content?**																
	Cinemas	**6**	3	2	0	2	3	6	0	**50%**	50%	67%	NA	50%	60%	55%	NA
	Theatres/arts centres	**8**	4	2	2	3	2	7	1	**67%**	67%	67%	100%	75%	40%	64%	100%
	Non-traditional venues (libraries, pubs, etc.)	**6**	2	1	2	3	1	5	1	**50%**	33%	33%	100%	75%	20%	45%	100%
	Schools	**2**	2	0	0	0	2	2	0	**17%**	33%	NA	NA	NA	40%	18%	NA
	Broadcast television	**1**	1	0	0	0	1	1	0	**8%**	17%	NA	NA	NA	20%	9%	NA
	On-demand television	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Our own website or app	**3**	3	0	0	1	2	3	0	**25%**	50%	NA	NA	25%	40%	27%	NA
	Third party website or app (YouTube, Vimeo, Periscope, etc.)	**4**	3	0	1	1	2	4	0	**33%**	50%	NA	50%	25%	40%	36%	NA
	Other	**1**	1	0	0	0	1	1	0	**8%**	17%	NA	NA	NA	20%	9%	NA
S76	**What venues/screening platform(s) do you see becoming more important to live-to-digital distribution in the future?**																
	Cinemas	**7**	4	2	0	2	4	7	0	**58%**	67%	67%	NA	50%	80%	64%	NA
	Theatres/arts centres	**8**	5	2	1	3	3	7	1	**67%**	83%	67%	50%	75%	60%	64%	100%
	Non-traditional venues (libraries, pubs, etc.)	**8**	4	1	1	4	2	8	0	**67%**	67%	33%	50%	100%	40%	73%	NA
	Schools	**8**	5	2	0	3	4	8	0	**67%**	83%	67%	NA	75%	80%	73%	NA
	Broadcast television	**3**	3	0	0	0	3	3	0	**25%**	50%	NA	NA	NA	60%	27%	NA
	On-demand television	**7**	4	1	1	2	3	7	0	**58%**	67%	33%	50%	50%	60%	64%	NA
	Our own website or app	**5**	4	0	0	3	2	5	0	**42%**	67%	NA	NA	75%	40%	45%	NA
	Third party website or app (YouTube, Vimeo, Periscope, etc.)	**9**	5	1	1	4	4	9	0	**75%**	83%	33%	50%	100%	80%	82%	NA
	Other	**1**	1	0	0	0	1	1	0	**8%**	17%	NA	NA	NA	20%	9%	NA
S77	**Does your organisation also distribute traditional cinema content? (e.g., ‘regular films’, not live-to-digital productions)?**																
	Yes	**5**	0	3	1	2	1	4	1	**42%**	NA	100%	50%	50%	20%	36%	100%
	No	**7**	6	0	1	2	4	7	0	**58%**	100%	NA	50%	50%	80%	64%	NA
S78	**For how long has your organisation been distributing live-to-digital content?**																

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	<1 year	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	1-2 years	**4**	3	0	0	2	2	4	0	**33%**	50%	NA	NA	50%	40%	36%	NA
	3-4 years	**2**	1	1	1	0	1	1	1	**17%**	17%	33%	50%	NA	20%	9%	100%
	5-6 years	**2**	0	0	1	1	0	2	0	**17%**	NA	NA	50%	25%	NA	18%	NA
	7+ years	**4**	2	2	0	1	2	4	0	**33%**	33%	67%	NA	25%	40%	36%	NA
S79	**As a distributor, what types of financial agreements do you have with live-to-digital content producers?**																
	Leasing/fixed-fee	**4**	0	1	1	2	0	4	0	**33%**	NA	33%	50%	50%	NA	36%	NA
	Profit-sharing (net)	**5**	1	3	1	1	2	4	1	**42%**	17%	100%	50%	25%	40%	36%	100%
	Rental or purchase revenue split	**2**	0	1	0	1	0	2	0	**17%**	NA	33%	NA	25%	NA	18%	NA
	Subscription revenue split	**1**	0	0	0	1	0	1	0	**8%**	NA	NA	NA	25%	NA	9%	NA
	Ad-share	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	Affiliate hosting	**1**	0	1	0	0	1	1	0	**8%**	NA	33%	NA	NA	20%	9%	NA
	Other	**2**	1	1	1	1	0	1	1	**17%**	17%	33%	50%	25%	NA	9%	100%
S80	**On average, how have your profits on live-to-digital content compared to those for traditional cinema content?**																
	Equally profitable	**1**	1	0	0	1	0	1	0	**8%**	17%	NA	NA	25%	NA	9%	NA
	More profitable	**3**	1	2	1	0	1	2	1	**25%**	17%	67%	50%	NA	20%	18%	100%
	Less profitable	**4**	1	1	0	2	2	4	0	**33%**	17%	33%	NA	50%	40%	36%	NA
	I prefer not to say	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**1**	1	0	0	0	1	1	0	**8%**	17%	NA	NA	NA	20%	9%	NA
S81	**What is the current approximate ratio of traditional cinema content to live-to-digital content that you are distributing?**																
	Roughly equal	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	0-10% Traditional / 90-100% Live-to-digital	**4**	2	1	0	1	2	4	0	**44%**	50%	33%	NA	33%	50%	50%	NA
	11-20% Traditional / 80-89% Live-to-digital	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	21-50% Traditional / 50-79% Live-to-digital	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	51-60% Traditional / 40-49% Live-to-digital	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	61%-80% Traditional / 20-39% Live-to-digital	**1**	1	0	0	1	0	1	0	**11%**	25%	NA	NA	33%	NA	13%	NA
	81-100% Traditional / 0-19% Live-to-digital	**4**	1	2	1	1	2	3	1	**44%**	25%	67%	100%	33%	50%	38%	100%
S82	**How has the ratio of traditional cinema content you are distributing to live-to-digital content changed over the last three years?**																
	Major increase in live-to-digital content	**1**	0	1	0	0	0	1	0	**13%**	NA	33%	NA	NA	NA	14%	NA
	Minor increase in live-to-digital content	**1**	0	1	0	0	1	1	0	**13%**	NA	33%	NA	NA	25%	14%	NA
	About the same	**5**	3	1	1	1	3	4	1	**63%**	100%	33%	100%	50%	75%	57%	100%
	Minor decrease in live-to-digital content	**1**	0	0	0	1	0	1	0	**13%**	NA	NA	NA	50%	NA	14%	NA
	Major decrease in live-to-digital content	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
S83	**How does your organisation view the financial risks involved in creating live-to-digital content, in comparison to traditional cinema content?**																

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Equally risky	**1**	1	0	0	0	1	1	0	**14%**	50%	NA	NA	NA	33%	17%	NA
	More risky	**3**	0	1	0	2	1	3	0	**43%**	NA	33%	NA	100%	33%	50%	NA
	Less risky	**2**	0	2	1	0	0	1	1	**29%**	NA	67%	100%	NA	NA	17%	100%
	No opinion	**1**	1	0	0	0	1	1	0	**14%**	50%	NA	NA	NA	33%	17%	NA
	I don't know	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
S84	**What factors are to your company's greatest advantage in distributing live-to-digital content?** *Weighted average: major advantage = 100%, Somewhat significant advantage = 66%, minor advantage = 33%, not at all an advantage = 0%*																
	Space within the marketplace	**8**	4	2	0	3	4	8	0	**53%**	50%	50%	NA	50%	63%	53%	NA
	Ability to secure downstream rights (i.e. beyond the live or encore performance)	**8**	4	2	0	2	5	8	0	**47%**	50%	13%	NA	75%	45%	47%	NA
	Quality of our content in comparison to other companies	**8**	4	3	1	1	5	7	1	**63%**	63%	67%	75%	50%	60%	61%	75%
	Our ability to find exhibitors for our work	**8**	3	3	1	2	4	7	1	**69%**	58%	75%	75%	75%	63%	68%	75%
	Our ability to obtain good time-slots for programming	**7**	3	2	0	2	4	7	0	**54%**	42%	75%	NA	50%	50%	54%	NA
	Experience in navigating UK marketplace	**7**	4	2	0	1	5	7	0	**64%**	63%	75%	NA	50%	65%	64%	NA
	Experience in navigating the international marketplace (from UK)	**6**	3	2	0	1	4	6	0	**50%**	50%	63%	NA	25%	50%	50%	NA
	Ability to secure partnerships with commercial producers	**8**	3	3	1	3	3	7	1	**44%**	42%	67%	75%	25%	42%	39%	75%
S85	**What factors are to your company's greatest disadvantage in distributing live-to-digital content?** *Weighted average: major problem = 100%, Somewhat significant problem = 66%, minor problem = 33%, not at all a problem = 0%*																
	Crowded marketplace	**7**	3	2	0	2	4	7	0	**36%**	33%	38%	NA	38%	31%	36%	NA
	Inability to secure downstream rights (i.e. beyond the live or encore performance)	**6**	3	2	0	1	4	6	0	**25%**	17%	38%	NA	25%	19%	25%	NA
	Lack of quality content available	**7**	3	2	0	2	4	7	0	**14%**	25%	13%	NA	0%	25%	14%	NA
	Lack of exhibitors available	**6**	2	2	0	2	3	6	0	**13%**	25%	13%	NA	0%	25%	13%	NA
	Competition for identifying time-slots for programming	**6**	2	2	0	2	3	6	0	**42%**	38%	25%	NA	63%	25%	42%	NA
	Inexperience in navigating UK marketplace	**6**	2	2	0	2	3	6	0	**21%**	25%	0%	NA	38%	17%	21%	NA
	Inexperience navigating international marketplace (from UK)	**6**	2	2	0	2	3	6	0	**21%**	25%	0%	NA	38%	17%	21%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Inability to secure partnerships with commercial producers	**5**	2	2	0	1	3	5	0	**25%**	38%	13%	NA	25%	33%	25%	NA
S86	**What, if anything, is preventing you from securing downstream rights?**																
	Talent not interested in making content available beyond the live/encore performance	**4**	3	1	0	1	2	4	0	**33%**	50%	33%	NA	25%	40%	36%	NA
	Producer not interested in making content available beyond the live/encore performance	**3**	1	1	1	0	1	3	0	**25%**	17%	33%	50%	NA	20%	27%	NA
	No clear precedent for digital rights	**4**	3	1	0	0	3	4	0	**33%**	50%	33%	NA	NA	60%	36%	NA
	Unable to reach agreement with content owners	**1**	0	1	0	0	0	1	0	**8%**	NA	33%	NA	NA	NA	9%	NA
	Nothing in particular	**3**	0	1	1	2	0	2	1	**25%**	NA	33%	50%	50%	NA	18%	100%
	Other	**2**	1	1	0	0	2	2	0	**17%**	17%	33%	NA	NA	40%	18%	NA
S87	**Does your organisation have a social media strategy specifically for live-to-digital productions?**																
	Yes	**9**	5	2	1	2	5	9	0	**82%**	100%	67%	50%	67%	100%	90%	NA
	No	**2**	0	1	1	1	0	1	1	**18%**	NA	33%	50%	33%	NA	10%	100%
	I don't know	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
S88	**How do you think your organisation's investment in live-to-digital productions will change in the next few years?**																
	Increase	**8**	5	2	1	1	5	8	0	**73%**	100%	67%	50%	33%	100%	80%	NA
	Decrease	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	No change	**2**	0	1	1	1	0	1	1	**18%**	NA	33%	50%	33%	NA	10%	100%
	I prefer not to say	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**1**	0	0	0	1	0	1	0	**9%**	NA	NA	NA	33%	NA	10%	NA
S89	**Do you see potential for distributing more 'niche' content in the future (i.e. a longer tail)?**																
	Yes	**7**	3	2	1	2	3	7	0	**64%**	60%	67%	50%	67%	60%	70%	NA
	No	**2**	1	0	0	1	1	2	0	**18%**	20%	NA	NA	33%	20%	20%	NA
	I don't know	**2**	1	1	1	0	1	1	1	**18%**	20%	33%	50%	NA	20%	10%	100%
S90	**Which of the following developments has the potential to increase the amount of 'niche' content you distribute in the future?**																
	Downstream rights become easier to secure	**5**	2	1	1	2	1	5	0	**71%**	67%	50%	100%	100%	33%	71%	NA
	The market for niche work improves	**5**	3	1	0	2	2	5	0	**71%**	100%	50%	NA	100%	67%	71%	NA
	The right platform becomes available for distributing niche content	**4**	2	0	1	2	1	4	0	**57%**	67%	NA	100%	100%	33%	57%	NA

			Supplier Activity		Budget Size			Location			Supplier Activity		Budget Size			Location	
		n	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural	**All**	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	More niche content productions become available	**6**	3	1	1	2	2	6	0	**86%**	100%	50%	100%	100%	67%	86%	NA
	The cost of niche productions goes down	**5**	2	2	0	2	2	5	0	**71%**	67%	100%	NA	100%	67%	71%	NA
	Niche productions of a higher level of artistic quality become available	**5**	2	1	1	2	1	5	0	**71%**	67%	50%	100%	100%	33%	71%	NA
	Niche productions of a higher technical level become available	**5**	2	2	0	2	2	5	0	**71%**	67%	100%	NA	100%	67%	71%	NA
	Another development	**0**	0	0	0	0	0	0	0	**NA**	NA	NA	NA	NA	NA	NA	NA
	About your organisation																
S91	**Do you see live-to-digital content as an art form distinct from live theatre, opera, ballet, film etc.?**																
	Yes	**132**	96	26	61	41	27	111	18	**54%**	55%	53%	54%	53%	59%	54%	60%
	No	**77**	54	19	31	27	16	66	8	**32%**	31%	39%	27%	35%	35%	32%	27%
	I don't know	**35**	24	4	21	9	3	29	4	**14%**	14%	8%	19%	12%	7%	14%	13%
S92	**What best classifies your organisation?**																
	Commercial	**24**	11	9	13	4	3	19	4	**10%**	6%	18%	11%	5%	7%	9%	13%
	Social enterprise	**13**	8	3	8	5	0	12	1	**5%**	5%	6%	7%	6%	NA	6%	3%
	Not-for-profit / charity	**195**	150	31	89	65	38	165	24	**80%**	86%	63%	78%	84%	83%	80%	80%
	Local authority owned and operated	**8**	2	5	2	2	4	7	1	**3%**	1%	10%	2%	3%	9%	3%	3%
	Former local-authority owned, now an independent Trust	**2**	1	1	1	0	1	2	0	**1%**	1%	2%	1%	NA	2%	1%	NA
S93	**Your organisation's total expenditure in your most recently completed financial year**																
	Less than £20,000	**33**	26	2	33	0	0	31	2	**14%**	15%	4%	29%	NA	NA	15%	7%
	£20,001 to £49,999	**25**	20	4	25	0	0	20	4	**10%**	11%	8%	22%	NA	NA	10%	13%
	£50,000 to £99,999	**27**	25	2	27	0	0	21	5	**11%**	14%	4%	24%	NA	NA	10%	17%
	£100,000 to £199,999	**29**	13	10	29	0	0	22	6	**12%**	7%	20%	25%	NA	NA	11%	20%
	£200,000 to £499,999	**48**	32	8	0	48	0	38	10	**20%**	18%	16%	NA	62%	NA	18%	33%
	£500,000 to £999,999	**29**	22	5	0	29	0	28	0	**12%**	13%	10%	NA	38%	NA	14%	NA
	£1m to under £2.5m	**18**	12	6	0	0	18	16	1	**7%**	7%	12%	NA	NA	39%	8%	3%
	£2.5m to under £5m	**16**	13	6	0	0	16	14	1	**7%**	7%	12%	NA	NA	35%	7%	3%
	£5m to under £10m	**4**	4	0	0	0	4	4	0	**2%**	2%	NA	NA	NA	9%	2%	NA
	£10m or more	**8**	7	2	0	0	8	8	0	**3%**	4%	4%	NA	NA	17%	4%	NA
	I don't know	**7**	0	4	0	0	0	5	1	**3%**	NA	8%	NA	NA	NA	2%	3%

TABLE 5

Supplier Survey: Differential Proportions

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.						
	Supplier Activities								
	Theatre Producer	**78%**			4%	2%	-6%	5%	-25%
	Exhibitor	**22%**			-4%	-2%	6%	-5%	25%
	Budget								
	Under £200k	**48%**	0%	-8%				-2%	11%
	£200k to £999k	**32%**	-1%	-4%				0%	2%
	£1m or Over	**19%**	1%	12%				1%	-13%
	Location								
	Urban	**87%**	3%	-19%	-3%	-0%	8%		
	Rural	**13%**	-3%	19%	3%	0%	-8%		
S1	**Produces live theatre**								
	Yes	**71%**	29%	-39%	2%	-1%	7%	2%	-15%
	No	**29%**		39%	-2%	1%	-7%	-2%	15%
S2	**Primary Discipline**								
	Theatre	**70%**	0%	-46%	7%	-2%	-10%	-1%	14%
	Combined Arts	**20%**	-0%	45%	-3%	-1%	7%	1%	-9%
	Other	**11%**	0%	1%	-4%	4%	3%	0%	-5%
S3	**Permanent Home/ Venue**								
	Yes	**42%**	0%	52%	-18%	1%	42%	2%	-8%
	No	**58%**	-0%	-52%	18%	-1%	-42%	-2%	8%
S4	**NPO**								
	Yes	**41%**	-1%	12%	-30%	20%	40%	2%	-24%
	No	**60%**	1%	-13%	30%	-19%	-41%	-2%	23%
	Live-to-Digital Production Experience								
S5	**Has your organisation ever acted as producer, or are you in the process of producing, Live-to-Digital theatre programming? Remember to include live and encore broadcasts to cinema, TV, and online platforms.**								
	Yes	**33%**	1%	3%	-16%	11%	19%	2%	-21%
	No	**62%**	-1%	2%	15%	-13%	-14%	-2%	27%
	I'm not sure	**5%**	0%	NA	1%	2%	NA	1%	NA
S6	**What factors have prevented you from producing LTD, to-date?**								
	Lack of staff time	**45%**	-1%	10%	-3%	-1%	11%	-2%	5%
	Lack of creative interest	**21%**	1%	-3%	0%	5%	-10%	-1%	4%
	Lack of internal expertise	**49%**	-1%	-3%	-2%	-4%	12%	-3%	14%
	Inability to find external expertise	**8%**	0%	NA	1%	-4%	3%	2%	NA
	Lack of funds / costs too much	**66%**	-0%	7%	1%	-3%	1%	-0%	-3%
	Lack of support from senior leadership	**3%**	0%	15%	0%	NA	3%	-2%	10%

			Supplier Activity		Budget Size			Location	
		All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
			Please note: Percentage values in the columns below show % difference from the full sample. Differences between +/- 5-10% are coloured pale pink and light grey, respectively; differences greater than +/- 10% are red and dark grey, respectively. Displayed values are rounded; only those values actually above threshold values are coloured.						
	Supplier Activities								
	Theatre Producer	**78%**			4%	2%	-6%	5%	-25%
	Exhibitor	**22%**			-4%	-2%	6%	-5%	25%
	Budget								
	Under £200k	**48%**	0%	-8%				-2%	11%
	£200k to £999k	**32%**	-1%	-4%				0%	2%
	£1m or Over	**19%**	1%	12%				1%	-13%
	Location								
	Urban	**87%**	3%	-19%	-3%	-0%	8%		
	Rural	**13%**	-3%	19%	3%	0%	-8%		
S1	**Produces live theatre**								
	Yes	**71%**	29%	-39%	2%	-1%	7%	2%	-15%
	No	**29%**		39%	-2%	1%	-7%	-2%	15%
S2	**Primary Discipline**								
	Theatre	**70%**	0%	-46%	7%	-2%	-10%	-1%	14%
	Combined Arts	**20%**	-0%	45%	-3%	-1%	7%	1%	-9%
	Other	**11%**	0%	1%	-4%	4%	3%	0%	-5%
S3	**Permanent Home/ Venue**								
	Yes	**42%**	0%	52%	-18%	1%	42%	2%	-8%
	No	**58%**	-0%	-52%	18%	-1%	-42%	-2%	8%
S4	**NPO**								
	Yes	**41%**	-1%	12%	-30%	20%	40%	2%	-24%
	No	**60%**	1%	-13%	30%	-19%	-41%	-2%	23%
	Live-to-Digital Production Experience								
S5	**Has your organisation ever acted as producer, or are you in the process of producing, Live-to-Digital theatre programming? Remember to include live and encore broadcasts to cinema, TV, and online platforms.**								
	Yes	**33%**	1%	3%	-16%	11%	19%	2%	-21%
	No	**62%**	-1%	2%	15%	-13%	-14%	-2%	27%
	I'm not sure	**5%**	0%	NA	1%	2%	NA	1%	NA
S6	**What factors have prevented you from producing LTD, to-date?**								
	Lack of staff time	**45%**	-1%	10%	-3%	-1%	11%	-2%	5%
	Lack of creative interest	**21%**	1%	-3%	0%	5%	-10%	-1%	4%
	Lack of internal expertise	**49%**	-1%	-3%	-2%	-4%	12%	-3%	14%
	Inability to find external expertise	**8%**	0%	NA	1%	-4%	3%	2%	NA
	Lack of funds / costs too much	**66%**	-0%	7%	1%	-3%	1%	-0%	-3%
	Lack of support from senior leadership	**3%**	0%	15%	0%	NA	3%	-2%	10%

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Does not fulfill our mission	38%	-1%	8%	5%	-5%	-10%	-2%	12%
	Difficulty in finding co-producers	11%	0%	7%	-2%	-3%	11%	-1%	2%
	Difficulty in fundraising specifically for live-to-digital projects	29%	1%	-11%	3%	-7%	-1%	1%	-10%
	Marketplace too competitive	10%	0%	8%	4%	NA	1%	-0%	3%
	Inexperience marketing for live-to-digital	34%	1%	-16%	2%	-1%	-6%	0%	-9%
	Lacking in the brand power to make live-to-digital financially viable	43%	1%	11%	5%	-14%	1%	1%	-6%
	Rights clearance	9%	0%	NA	0%	-5%	8%	1%	-3%
	Level of investment is too risky	26%	1%	19%	-0%	-4%	7%	-2%	5%
	Lack of understanding about how to enter this market	40%	1%	-3%	-3%	1%	10%	-2%	4%
	None of the above	3%	0%	NA	2%	NA	NA	1%	NA
S7	**How strongly do the following drivers motivate your live-to-digital production?** *Weighted average: very strongly = 100%, fairly strongly = 75%, somewhat = 50%, not very much = 25%, and not at all = 0%*								
	Reaching current audiences in a new way	75%	-	8%	-0%	4%	-6%	2%	-50%
	Extending our reach to new audiences	90%	-	6%	-10%	4%	2%	2%	-15%
	Marketing our work	76%	-	-10%	-5%	-0%	3%	2%	-26%
	Generating new income	46%	-	46%	1%	-10%	11%	2%	-8%
	Achieving our artistic goals	79%	-	0%	1%	2%	-4%	3%	-41%
S8	**Do you see live-to-digital production as critical to your overall mission?**								
	Yes, absolutely	33%	-	17%	-18%	1%	9%	1%	NA
	Yes, somewhat	43%	-	-10%	21%	-1%	-12%	0%	7%
	No, not at all	17%	-	-1%	4%	-1%	-1%	-2%	33%
	We are not sure at this time	7%	-	NA	NA	1%	4%	1%	NA
S9	**What aspect of your mission and strategic priorities does live-to-digital programming attempt to fulfil?**								
	Providing access to those who otherwise may not be able to attend (because of cost, distance, etc.)	69%	-	-2%	-5%	2%	-1%	1%	-19%
	Reaching new audiences / expanding our reach	74%	-	9%	-3%	1%	-0%	1%	-24%

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Providing new experiences for audiences	62%	-	21%	2%	-8%	6%	2%	NA
	Serving the educational sector	36%	-	-3%	-0%	1%	1%	-0%	14%
	Pushing artistic boundaries	50%	-	-	7%	-4%	3%	1%	-
	Engaging with technology	57%	-	-7%	7%	1%	-4%	2%	-7%
	Supporting environmental sustainability (e.g. lower emissions from transportation than live touring)	21%	-	13%	NA	8%	6%	2%	NA
	Contributing to financial sustainability	NA	NA	NA	NA	NA	NA	NA	NA
	Other	12%	-	NA	17%	0%	NA	1%	NA
S10	**Which of the following types of new audiences do you aim to serve via live-to-digital?**								
	Any audience that has not yet seen our work	91%	-	-11%	-1%	-2%	2%	-1%	9%
	National audiences who are further from our primary venue	58%	-	-18%	-18%	-3%	13%	-3%	42%
	Rural audiences	65%	-	15%	-25%	7%	6%	-0%	35%
	International audiences	72%	-	-52%	-12%	0%	6%	0%	NA
	Disabled audiences	56%	-	-16%	-16%	-0%	8%	-1%	44%
	Older audiences	44%	-	16%	-4%	-11%	20%	1%	NA
	Younger audiences	67%	-	-27%	-17%	5%	11%	3%	33%
	Students in formal education – primary/secondary	51%	-	-31%	-21%	4%	13%	4%	NA
	Students in formal education – college/university	63%	-	-23%	-13%	15%	-6%	2%	37%
	Audiences for whom our live theatre ticket prices are too high	40%	-	-20%	-10%	-17%	32%	3%	NA
	Other	7%	-	NA	3%	NA	0%	-2%	NA
S11	**How satisfied has your organisation been with your live-to-digital productions to-date, in terms of fulfilling your organisation's mission?** *Weighted average: very satisfied = 100%, somewhat satisfied = 75%, neutral = 50%, somewhat unsatisfied = 25%, and very unsatisfied = 0%*								
	Providing access to those who otherwise may not be able to attend (because of cost, distance, etc.)	80%	-	12%	-14%	4%	5%	-1%	20%
	Reaching new audiences / expanding our reach	78%	0%	22%	-12%	3%	4%	0%	-3%
	Providing new experiences for audiences	81%	-	19%	-13%	4%	4%	0%	NA

	All	Supplier Activity		Budget Size			Location	
		Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
Serving the educational sector	**76%**	0%	-1%	-14%	-4%	9%	3%	-51%
Pushing artistic boundaries	**78%**	0%	10%	-10%	7%	-0%	-1%	-3%
Engaging with technology	**83%**	1%	17%	-2%	4%	-3%	-0%	-8%
Supporting environmental sustainability (e.g. lower emissions from transportation than live touring)	**67%**	-	-17%	NA	-6%	8%	-	NA
Contributing to financial sustainability	**NA**	NA	NA	NA	NA	NA	NA	NA
Other	**90%**	10%	NA	2%	-3%	NA	-	NA
S12 Do you feel that live-to-digital production currently is or will in the future contribute to your organisation's financial sustainability?								
Yes	**36%**	-	47%	-0%	-3%	6%	3%	NA
No	**34%**	-	-18%	8%	7%	-13%	-2%	66%
I don't know	**29%**	-	NA	-8%	-4%	8%	-1%	NA
S13 Which of the following drivers of financial sustainability do you aim to leverage via live-to-digital?								
Additional stream of earned income	**86%**	-	14%	-6%	2%	2%	-	NA
Replacement for traditional touring income	**10%**	-	10%	NA	3%	3%	-	NA
Additional contributed income through programming that appeals to new funders	**48%**	-	-8%	32%	-10%	-10%	-	NA
Other	**14%**	-	NA	6%	-2%	-2%	-	NA
S14 How comfortable is your senior leadership team with taking financial risks on live-to-digital productions?								
Very comfortable	**16%**	2%	1%	-8%	5%	0%	1%	NA
Pretty comfortable	**24%**	-9%	9%	-10%	-7%	18%	0%	NA
Somewhat comfortable	**28%**	3%	-11%	15%	2%	-12%	1%	22%
Not at all comfortable	**24%**	3%	-7%	4%	-3%	-3%	-3%	26%
I don't know	**9%**	1%	8%	-1%	4%	-3%	1%	NA
S15 How comfortable is your senior leadership team with taking creative risks on live-to-digital productions?								
Very comfortable	**48%**	-	-15%	9%	14%	-22%	1%	2%
Pretty comfortable	**34%**	-	16%	-13%	-5%	13%	-1%	16%
Somewhat comfortable	**14%**	-	NA	0%	-5%	7%	1%	NA
Not at all comfortable	**2%**	-	NA	5%	NA	NA	NA	NA
I don't know	**2%**	-	15%	NA	NA	4%	0%	NA
S16 How comfortable is your board with taking risks on live-to-digital productions?								
Very comfortable	**18%**	1%	NA	-4%	5%	-2%	2%	NA
Pretty comfortable	**32%**	-5%	18%	4%	-9%	5%	-1%	NA
Somewhat comfortable	**25%**	2%	-8%	-4%	7%	-4%	0%	25%
Not at all comfortable	**7%**	1%	10%	-	-3%	3%	-1%	43%

			Supplier Activity		Budget Size			Location	
		All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	I don't know	**18%**	1%	-1%	4%	0%	-2%	-0%	NA
S17	**Which risks are your board most concerned with?**								
	Financial	**71%**	-	13%	-14%	4%	3%	3%	-21%
	Artistic	**22%**	-	-6%	-8%	-10%	20%	0%	28%
	Legal	**22%**	-	NA	-1%	3%	-1%	0%	28%
	Reputational	**22%**	-	28%	-8%	7%	-1%	0%	28%
	Technical	**16%**	-	1%	6%	1%	-5%	-2%	34%
	Audience alienation	**14%**	-	3%	-7%	-1%	7%	-1%	36%
	I don't know	**NA**	NA	NA	NA	NA	NA	NA	NA
	Other	**7%**	-	NA	7%	-3%	-2%	-1%	NA
S18	**Have you produced any completed live-to-digital productions in the past?**								
	Yes	**79%**	-	-13%	-22%	8%	5%	-2%	21%
	No	**16%**	-	18%	13%	-3%	-5%	1%	NA
	I'm not sure	**5%**	-	NA	9%	NA	0%	0%	NA
S19	**Are you currently working on any live-to-digital productions?**								
	Yes	**55%**	-	-22%	-12%	7%	-3%	-0%	45%
	No	**43%**	-	24%	14%	-6%	-1%	0%	NA
	I'm not sure	**2%**	-	NA	NA	NA	4%	0%	NA
S20	**How many live-to-digital productions have you produced? (Include productions that are in development and ongoing)**								
	n								
	Average								
	Average, excluding outliers (# LTD productions > 20)								
	Median								
S21	**Within which theatre genres would you classify these productions?**								
	Drama	**45%**	-	5%	-2%	-3%	8%	0%	55%
	Stand-up Comedy	**2%**	-	15%	NA	2%	NA	0%	NA
	Musical	**17%**	-	-1%	4%	12%	NA	-0%	NA
	Physical theatre and circus	**10%**	-	6%	11%	-2%	-5%	1%	NA
	Family theatre	**19%**	-	14%	10%	2%	-8%	-0%	NA
	Pantomime	**2%**	-	NA	NA	2%	NA	0%	NA
	Improvisational theatre	**2%**	-	NA	5%	NA	NA	0%	NA
	Experimental theatre	**22%**	-	NA	6%	11%	-17%	0%	NA
	Cabaret	**5%**	-	NA	16%	NA	NA	0%	NA
	Other	**34%**	-	-18%	1%	-9%	8%	-1%	NA
S22	**For which of the following types of venues/screening platforms have you provided live-to-digital productions?**								
	Cinemas	**16%**	-	1%	NA	-7%	21%	1%	NA
	Free view	**NA**	NA	NA	NA	NA	NA	NA	NA
	Pay to view	**16%**	-	1%	NA	-7%	21%	1%	NA
	Theatres/art centres	**24%**	-	26%	-3%	-7%	7%	-1%	NA
	Free view	**12%**	-	5%	-5%	0%	-2%	-3%	NA
	Pay to view	**14%**	-	20%	0%	-5%	7%	1%	NA

	All	Supplier Activity		Budget Size			Location	
		Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
Non-traditional venues (libraries, pubs, etc.)	**16%**	-	1%	6%	-3%	0%	-0%	NA
Free view	**7%**	-	NA	7%	1%	NA	-1%	NA
Pay to view	**9%**	-	8%	-1%	-4%	7%	1%	NA
Schools	**16%**	-	NA	-8%	-7%	16%	1%	NA
Free view	**14%**	-	NA	-7%	-5%	13%	1%	NA
Pay to view	**2%**	-	NA	NA	NA	4%	0%	NA
Broadcast television	**17%**	-	-1%	NA	-1%	14%	2%	NA
Free view	**17%**	-	-1%	NA	-1%	14%	2%	NA
Pay to view	**2%**	-	NA	NA	NA	4%	0%	NA
On-demand television	**5%**	-	NA	NA	3%	0%	0%	NA
Free view	**3%**	-	NA	NA	5%	NA	0%	NA
Pay to view	**2%**	-	NA	NA	NA	4%	0%	NA
Our own website or app	**55%**	-	-22%	16%	11%	-29%	-2%	45%
Free view	**53%**	-	-37%	11%	13%	-27%	-3%	47%
Pay to view	**3%**	-	13%	11%	NA	NA	0%	NA
Third party website or app (YouTube, Vimeo, Periscope, etc.)	**69%**	-	-36%	2%	14%	-22%	-3%	31%
Free view	**66%**	-	-32%	6%	14%	-23%	-3%	34%
Pay to view	**5%**	-	11%	NA	-1%	5%	0%	NA
The Space	**14%**	-	3%	NA	3%	7%	1%	NA
Free view	**14%**	-	3%	NA	3%	7%	1%	NA
Pay to view	**NA**	NA	NA	NA	NA	NA	NA	NA
Digital Theatre	**10%**	-	NA	NA	-2%	11%	1%	NA
Free view	**2%**	-	NA	NA	2%	NA	0%	NA
Pay to view	**9%**	-	NA	NA	-4%	12%	1%	NA
Other	**16%**	-	NA	-8%	5%	-5%	-2%	NA
Any pay to view experience?	**29%**	-	21%	-8%	-13%	23%	3%	NA
Any free view experience?	**79%**	-	-46%	6%	8%	-16%	-2%	21%
S23 **Have you worked with a distributor for your live-to-digital production(s)?**								
Yes	**30%**	-	10%	-16%	-13%	31%	3%	NA
No	**65%**	-	-25%	14%	18%	-37%	-3%	35%
I don't know	**5%**	-	15%	2%	NA	6%	1%	NA
S24 **What funding models have you used for live-to-digital productions?**								
Co-production	**10%**	-	NA	4%	2%	-5%	1%	NA
Commercial investment	**3%**	-	NA	NA	NA	7%	0%	NA
Specific fundraising	**21%**	-	NA	NA	8%	6%	2%	NA
Crowd funding	**2%**	-	NA	5%	NA	NA	0%	NA

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Funding comes from same budget as live productions	**50%**	-	-	14%	8%	-18%	-1%	50%
	Other	**22%**	-	-6%	-8%	-10%	14%	-2%	NA
S25	**How have you found the process of funding live-to-digital productions, in comparison for funding traditional live productions?**								
	Funding live-to-digital productions is more difficult than funding traditional live productions	**26%**	-	NA	-4%	7%	-5%	2%	NA
	Funding live-to-digital productions is easier than funding traditional live productions	**3%**	-	13%	4%	1%	NA	0%	NA
	Funding live-to-digital is about the same level of difficulty as funding traditional live productions	**26%**	-	7%	10%	3%	-10%	-1%	24%
	I don't know	**26%**	-	7%	10%	3%	-10%	-1%	24%
S26	**With whom have you co-produced a live-to-digital production?**								
	Digital Theatre	**7%**	-	NA	NA	-3%	9%	1%	NA
	National Theatre / NT Live	**5%**	-	NA	NA	NA	11%	0%	NA
	Other	**26%**	-	-9%	3%	-1%	0%	2%	NA
S27	**What was the approximate budget for your most expensive live-to-digital production to-date?**								
	Less than £10,000	**46%**	-	29%	25%	1%	-24%	-3%	54%
	£10,001 - £50,000	**20%**	-	NA	-13%	11%	-3%	2%	NA
	£50,001 - £100,000	**7%**	-	NA	NA	2%	4%	1%	NA
	£100,001 - £200,000	**4%**	-	NA	NA	1%	2%	0%	NA
	£200,001 - £300,000	**4%**	-	NA	NA	NA	8%	0%	NA
	More than £300,000	**4%**	-	NA	NA	NA	8%	0%	NA
	I don't know	**16%**	-	9%	5%	-7%	6%	-0%	NA
S28	**What is the approximate average budget for your live-to-digital productions?**								
	Less than £10,000	**56%**	-3%	-6%	22%	2%	-30%	-5%	44%
	£10,001 - £50,000	**10%**	-	NA	-3%	6%	-5%	1%	NA
	£50,001 - £100,000	**5%**	-	NA	NA	3%	0%	0%	NA
	£100,001 - £200,000	**3%**	-	NA	NA	NA	7%	0%	NA
	More than £200,000	**5%**	-	NA	NA	NA	11%	0%	NA
	I don't know	**17%**	-	-1%	-3%	-9%	14%	-0%	NA
S29	**What is the most you have netted (profit) for one of your live-to-digital productions?**								
	Less than £10,000	**68%**	-	7%	4%	13%	-15%	1%	32%
	£10,001 - £50,000	**4%**	-	NA	NA	1%	2%	0%	NA
	£50,001 - £100,000	**NA**	NA	NA	NA	NA	NA	NA	NA
	£100,001 - £200,000	**4%**	-	NA	NA	NA	8%	0%	NA
	More than £200,000	**2%**	-	NA	NA	NA	4%	0%	NA
	I don't know	**23%**	-	2%	6%	-8%	1%	-2%	NA

			Supplier Activity		Budget Size			Location	
		All	Theatre Pro-ducer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S30	**What is the most you have lost on one of your live-to-digital productions?**								
	Less than £10,000	**53%**	-	14%	11%	-3%	-3%	0%	47%
	£10,001 - £50,000	**10%**	-	NA	NA	12%	-4%	1%	NA
	£50,001 - £100,000	**NA**	NA	NA	NA	NA	NA	NA	NA
	£100,001 - £200,000	**6%**	-	NA	NA	NA	11%	1%	NA
	More than £200,000	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**31%**	-	2%	4%	-4%	-4%	-2%	NA
S31	**Does your marketing strategy for live-to-digital productions differ from your marketing strategy for live theatre?**								
	Yes	**50%**	-	10%	-7%	11%	-6%	1%	-
	No	**29%**	-	11%	-	-2%	5%	1%	21%
	I don't know	**21%**	-	NA	7%	-8%	1%	-2%	NA
S32	**Do you have access to audience data from your live-to-digital productions?**								
	Yes	**44%**	-	16%	-8%	4%	-2%	-3%	56%
	No	**44%**	-	-24%	6%	-5%	4%	2%	NA
	I don't know	**12%**	-	8%	2%	1%	-2%	1%	NA
S33	**How important would it be for you to have direct access to this data?**								
	Not at all important	**5%**	-	NA	20%	NA	NA	NA	NA
	Not very important	**5%**	-	NA	NA	NA	8%	0%	NA
	Not very important nor unimportant	**NA**	NA	NA	NA	NA	NA	NA	NA
	Somewhat important	**25%**	-	NA	50%	NA	-	1%	NA
	Very important	**65%**	-	NA	NA	35%	-3%	3%	NA
S34	**What factors have been significant assets for your organisation in producing live-to-digital productions?**								
	Allocation of sufficient staff time	**40%**	-	-23%	-18%	10%	2%	2%	10%
	Internal expertise	**43%**	-	24%	7%	-1%	-1%	0%	7%
	Creative interest	**57%**	-	10%	0%	6%	-4%	-0%	43%
	External expertise	**38%**	-	-21%	-24%	16%	-1%	4%	NA
	Sufficient funding dedicated to the project	**43%**	-	-26%	-0%	-1%	4%	4%	NA
	Support from senior leadership	**36%**	-	-3%	-15%	-3%	16%	3%	NA
	Ability to find co-producers	**22%**	-	11%	6%	-6%	4%	2%	NA
	Ability to fundraise specifically for live-to-digital projects	**22%**	-	-6%	-8%	11%	-7%	2%	NA
	Marketplace not too competitive	**14%**	-	20%	8%	-1%	-3%	-1%	36%
	Level of investment is not too risky	**29%**	-	NA	6%	-0%	-3%	-1%	21%
	Prior experience marketing for live-to-digital	**7%**	-	NA	NA	1%	4%	1%	NA

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Knowledge of rights clearance process and issues	34%	-	-1%	-6%	-1%	8%	3%	NA
	Cost of live-to-digital productions	28%	-	-11%	1%	10%	-12%	3%	NA
	Understanding about how to enter this market	26%	-	-9%	3%	-1%	0%	2%	NA
	None of the above	5%	-	NA	2%	NA	5%	-1%	NA
	Other	5%	-	NA	NA	3%	0%	0%	NA
S35	**What benefits have live-to-digital productions brought to your organisation?**								
	New audiences	72%	-	-22%	-15%	7%	1%	-1%	28%
	Increased revenue (earned income)	12%	-	21%	2%	NA	14%	1%	NA
	Increased interest from funders (contributed income)	26%	-	-9%	-19%	-5%	22%	2%	NA
	Artistic acclaim	36%	-	-20%	-8%	-7%	16%	3%	NA
	Aesthetic innovation	28%	-	NA	-6%	10%	-7%	1%	NA
	A stronger brand	43%	-	-26%	-15%	-6%	15%	0%	7%
	Professional development for staff	38%	-	-21%	-24%	8%	4%	-2%	62%
	Attracted new Board members	9%	-	8%	NA	4%	2%	1%	NA
	New partnerships	45%	-	5%	-9%	9%	-3%	0%	55%
	None of the above	10%	-	NA	4%	-2%	0%	-1%	NA
	Other	7%	-	NA	NA	10%	NA	1%	NA
S36	**What factors have been significant challenges for your organisation in producing live-to-digital productions?**								
	Lack of staff time	36%	-	-20%	-0%	5%	-5%	2%	14%
	Lack of internal expertise	19%	-	-2%	-5%	6%	-3%	-2%	81%
	Lack of creative interest	3%	-	NA	4%	NA	2%	-2%	NA
	Inability to find external expertise	2%	-	15%	NA	2%	NA	NA	48%
	Lack of funds / costs too much	47%	-	NA	11%	3%	-10%	3%	NA
	Lack of support from senior leadership	NA	NA	NA	NA	NA	NA	NA	NA
	Difficulty in finding co-producers	10%	-	NA	-3%	2%	0%	1%	NA
	Difficulty in fundraising specifically for live-to-digital projects	19%	-	NA	17%	2%	-14%	2%	NA
	Marketplace too competitive	3%	-	13%	4%	NA	2%	0%	NA
	Level of investment is too risky	12%	-	NA	-5%	-4%	9%	1%	NA

			Supplier Activity		Budget Size			Location	
		All	Theatre Pro-ducer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Inexperience marketing for live-to-digital	22%	-	-6%	-1%	3%	-1%	0%	28%
	Rights clearance	28%	-	NA	NA	2%	20%	1%	22%
	Cost of live-to-digital productions	38%	-	NA	-17%	4%	9%	2%	NA
	Lack of understanding about how to enter this market	14%	-	NA	-7%	3%	2%	1%	NA
	None of the above	7%	-	NA	NA	1%	4%	1%	NA
	Other	10%	-	6%	4%	2%	-5%	1%	NA
S37	**What costs, if any, have your own live-to-digital productions brought to your organisation?**								
	Undesirable aesthetic consequences for a production	NA	NA	NA	NA	NA	NA	NA	NA
	Net loss in income	7%	-	NA	NA	1%	4%	1%	NA
	Inability to schedule tours in venues	9%	-	8%	6%	-0%	-3%	-1%	41%
	Distraction from our core work	NA	NA	NA	NA	NA	NA	NA	NA
	Increased stress upon staff	29%	-	NA	-8%	8%	-3%	1%	21%
	Dissatisfied audiences	2%	-	NA	NA	2%	NA	0%	NA
	None of the above	45%	-	-11%	5%	-7%	8%	-1%	5%
	Other	NA	NA	NA	NA	NA	NA	NA	NA
	Impacts on Touring								
S38	**Do you tour your theatre productions?**								
	Yes	74%	1%	-37%	1%	-1%	2%	-1%	14%
	No	26%	-1%	37%	-1%	1%	-2%	1%	-14%
S39	**Have you changed the types of venues for your touring in the last two years?**								
	Yes	33%	-	-13%	13%	-5%	-25%	-0%	10%
	No	67%	-	13%	-13%	5%	25%	0%	-10%
S40	**Has your touring increased or decreased in the last two years?**								
	Increased	38%	-	-18%	-1%	5%	-5%	-1%	15%
	Decreased	19%	-	1%	3%	3%	-12%	0%	-6%
0.816	Remained level	43%	-	17%	-2%	-8%	17%	1%	-9%
S41	**You indicated that your organisation has increased touring in the last two years. What has led to that increase?**								
	New content to tour	63%	-	NA	2%	1%	-8%	-2%	12%
	More demand for our content	47%	-	53%	-8%	24%	-25%	2%	-9%
	More staff capacity to schedule tours	16%	-	NA	-8%	13%	-5%	1%	-4%
	Secured new relationships with venues	78%	-	NA	5%	-7%	0%	5%	-28%
	Received funding for touring	41%	-	NA	3%	0%	-7%	-4%	22%
	Other	8%	-	NA	1%	NA	14%	2%	NA

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S42	**You indicated that your organisation has decreased touring in the last two years. What has led to that decrease?**								
	No content to tour	**4%**	-	NA	3%	NA	NA	1%	NA
	Limited staff capacity to schedule tours	**28%**	-	72%	-7%	5%	22%	-5%	22%
	Limited time available to go on tour	**12%**	-	88%	-5%	10%	NA	-3%	38%
	Less interest in our product	**20%**	-	NA	1%	2%	NA	3%	NA
	No funding to subsidise touring programme	**44%**	-	56%	-8%	0%	56%	-8%	56%
	Difficulty finding venues for touring	**52%**	-	NA	-2%	4%	-2%	-2%	-2%
	Other	**32%**	-	NA	4%	-10%	18%	4%	NA
S43	**You indicated that your organisation has had difficulty finding venues for touring. What were the reasons?**								
	Venues not interested in our product	**31%**	-	NA	-2%	-11%	69%	-3%	NA
	Venues explicitly stated they were programming more live-to-digital content	**46%**	-	NA	11%	-6%	NA	-1%	54%
	No staff capacity to fully research touring market	**46%**	-	NA	-3%	-6%	54%	-1%	NA
	Other	**23%**	-	NA	-9%	17%	NA	4%	NA
S44	**You indicated that venues stated to you that they were producing more live-to-digital content. What reasons did venues state to you for this change?**								
	Audiences requested it	**50%**	-	NA	-	-	NA	-10%	50%
	Less expensive than staging live productions	**100%**	-	NA	-	-	NA	-	-
	Interested in trying new content	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**NA**	NA	NA	NA	NA	NA	NA	NA
	Other	**NA**	NA	NA	NA	NA	NA	NA	NA
	Future Live-to-Digital Work								
S45	**Do you plan to produce any live-to-digital productions in the future?**								
	Yes	**33%**	0%	-14%	-10%	8%	8%	3%	-26%
	No	**26%**	0%	11%	9%	-4%	-13%	-1%	5%
	I don't know	**41%**	-1%	3%	1%	-4%	5%	-2%	21%
S46	**Will any of the factors below influence whether your organisation produces live-to-digital productions in the future?**								
	Interest in disseminating our work in new ways	**53%**	-1%	-3%	-8%	2%	16%	-0%	-0%

	All	Supplier Activity		Budget Size			Location	
		Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
Desire or need to find new ways of engaging with our audiences	**55%**	-	1%	-8%	1%	17%	1%	-14%
Demand from audiences for more digital access to our work	**49%**	-	-5%	-7%	1%	18%	1%	-2%
Development of better technology for producing and distributing live-to-digital productions	**34%**	-1%	-9%	-4%	-0%	11%	2%	-16%
Development of less expensive technology for producing and distributing live-to-digital productions	**50%**	-	7%	-13%	8%	20%	-0%	-3%
Bringing on staff / hiring external advisers with expertise	**35%**	-	-4%	-3%	0%	7%	-2%	12%
Artistic staff becoming interested in live-to-digital for its creative potential	**38%**	-	6%	0%	-3%	4%	0%	-2%
Obtaining funding / philanthropic support to pursue	**58%**	-1%	-21%	-6%	7%	6%	1%	1%
Finding a co-producer	**32%**	-1%	-7%	-3%	-2%	12%	2%	-14%
Getting support of senior leadership	**6%**	-	13%	-3%	-2%	11%	0%	0%
Improved processes for clearing rights	**17%**	-	-11%	-12%	5%	22%	1%	-5%
Improved ability to clear 'down-stream' rights (beyond the live/encore broadcast)	**18%**	-	-6%	-10%	0%	23%	2%	-12%
None of the above	**8%**	-	5%	3%	-1%	-5%	-1%	10%
Other	**9%**	-	-3%	5%	-4%	-6%	-1%	3%
S47 Which of the following venues/screening platforms are you likely to use for future live-to-digital productions?								
Cinemas	**37%**	-	NA	-26%	-10%	50%	1%	NA
Theatres/arts centres	**51%**	-	-18%	-4%	-5%	9%	0%	NA
Non-traditional venues (libraries, pubs, etc.)	**40%**	-	NA	12%	-9%	-7%	-0%	NA
Schools	**40%**	-	NA	2%	-9%	13%	1%	NA
Television	**30%**	-	NA	-14%	-12%	37%	1%	NA
Our own website	**82%**	-	-16%	7%	8%	-22%	-2%	118%
Third party website or app (YouTube, Vimeo, Periscope, etc.)	**82%**	-	-16%	2%	13%	-22%	-2%	118%
I don't know	**2%**	-	NA	NA	3%	NA	0%	NA

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Other	9%	-	NA	NA	9%	-2%	0%	NA
S48	Which of the following distributors/platforms are you likely to use for future live-to-digital productions?								
	Arts Alliance Media	NA	NA	NA	NA	NA	NA	NA	NA
	Altive Media	NA	NA	NA	NA	NA	NA	NA	NA
	By Experience	2%	-	NA	NA	NA	5%	0%	NA
	Digital Theatre	7%	-	NA	NA	-2%	13%	0%	NA
	Fathom Events	2%	-	NA	NA	NA	5%	0%	NA
	Cinegi	7%	-	26%	4%	-2%	-0%	0%	NA
	More2Screen	NA	NA	NA	NA	NA	NA	NA	NA
	Rightster	5%	-	NA	-	-1%	1%	0%	NA
	Curzon Home Cinema	NA	NA	NA	NA	NA	NA	NA	NA
	Picturehouse Entertainment	12%	-	NA	-7%	-3%	14%	0%	NA
	BFI Player	2%	-	NA	NA	NA	5%	0%	NA
	Canvas	7%	-	NA	NA	11%	NA	0%	NA
	HiBrow	NA	NA	NA	NA	NA	NA	NA	NA
	The Space	26%	-	NA	-16%	10%	7%	1%	NA
	BBC	19%	-	NA	-14%	-6%	27%	1%	NA
	National Theatre	16%	-	NA	-11%	-2%	18%	1%	NA
	Live from Television Centre	4%	-	NA	7%	NA	NA	0%	NA
	Pilot / Theatre-Livestream.tv	5%	-	NA	5%	-1%	NA	0%	NA
	We will handle distribution internally	23%	-	11%	-7%	14%	-9%	-3%	177%
	I don't know	53%	-	-19%	21%	-3%	-26%	0%	NA
	Other	12%	-	NA	NA	6%	8%	0%	NA
	Exhibitors								
S53	Does your organisation operate a venue where live-to-digital arts programming is screened, such as live or encore theatre or opera, or another art form? Include screenings that you exhibit directly, as well as screenings in your space by third parties.								
	Yes	20%	-11%	80%	-4%	-3%	10%	-5%	30%
	No	78%	10%	NA	4%	2%	-9%	4%	-28%
	I'm not sure	2%	1%	NA	0%	1%	NA	0%	NA
S54	What types of live-to-digital productions, including encores, have been screened in your venue(s)?								
	Theatre	92%	-4%	-	3%	0%	-6%	-4%	8%
	Opera	76%	-1%	-	-14%	9%	3%	-4%	4%
	Ballet	69%	-7%	-	-14%	8%	2%	-1%	-3%
	Orchestral Music	51%	-7%	-	-7%	-5%	-1%	2%	-4%
	Popular Music	45%	-14%	-	-12%	9%	-2%	8%	-18%
	Museum exhibition tour	53%	-9%	-	-20%	16%	4%	6%	-20%
	Other	16%	-4%	-	0%	7%	-2%	2%	-3%
S55	How many live-to-digital theatre productions were screened in your venue(s) in the past 12 months?								
	n								
	Average								

			Supplier Activity		Budget Size			Location	
		All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Total								
S56	**Approximately what percentage of your gross box office sales were live-to-digital tickets (including encores)?**								
	less than 5%	**30%**	4%	-	-0%	-7%	9%	6%	-16%
	6-10%	**13%**	1%	-	-1%	NA	10%	3%	-6%
	11-15%	**13%**	1%	-	-1%	3%	3%	-3%	2%
	16-20%	**15%**	12%	-	-9%	16%	-7%	4%	-8%
	21-25%	**4%**	2%	-	NA	3%	3%	2%	NA
	26-30%	**6%**	0%	-	5%	1%	NA	-3%	8%
	31-45%	**11%**	NA	-	1%	5%	NA	-4%	11%
	46-60%	**9%**	NA	-	9%	NA	-1%	-5%	13%
	more than 60%	**NA**	NA	NA	NA	NA	NA	NA	NA
S57	**How does this percentage of your gross box office sales from live-to-digital tickets compare with three years ago?**								
	Roughly the same	**7%**	-0%	-	7%	NA	1%	4%	NA
	Small increase in live-to-digital sales	**17%**	10%	-	-2%	-	-	-6%	-
	Significant increase in live-to-digital sales	**71%**	-11%	-	-7%	4%	4%	4%	4%
	Small decrease in live-to-digital sales	**2%**	NA	-	NA	6%	NA	1%	NA
	Significant decrease in live-to-digital sales	**2%**	4%	-	5%	NA	NA	NA	6%
S58	**What type of venue(s) does your organisation operate?**								
	Theatre	**31%**	26%	-	3%	8%	-2%	1%	3%
	Traditional cinema	**37%**	-12%	-	-3%	9%	-8%	1%	-3%
	Art-house cinema	**20%**	-2%	-	-9%	3%	1%	1%	-7%
	Arts centre	**43%**	13%	-	-21%	11%	21%	4%	-3%
	School	**2%**	NA	-	4%	NA	NA	NA	5%
	Pub/Café/Restaurant/Hotel	**8%**	-2%	-	NA	15%	-1%	1%	-1%
	Church hall	**4%**	NA	-	7%	NA	NA	NA	9%
	Community centre	**8%**	NA	-	9%	-0%	NA	NA	19%
	Gallery	**8%**	4%	-	-3%	7%	-1%	-2%	5%
	Outdoor public space	**6%**	0%	-	-1%	2%	1%	0%	1%
	Other	**14%**	-8%	-	2%	16%	NA	-2%	6%
S59	**Does your organisation host live performances in its venue(s)? Include hires by third-parties.**								
	Yes	**78%**	16%	-	0%	15%	-6%	1%	9%
	No	**22%**	-16%	-	-0%	-15%	6%	-1%	-9%
S60	**Does your organisation act as avenue for live theatre, including hires by third parties?**								
	Yes	**67%**	33%	-	-6%	25%	-3%	-5%	19%
	No	**33%**	NA	-	6%	-25%	3%	5%	-19%
S61	**How many live theatre productions appeared in your venue(s) in the past 12 months?**								
	n								
	Average								
	Median								
	Total								

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S62	**Do live theatre productions and live-to-digital productions compete for space/time in your venue(s)?**								
	Yes	**52%**	11%	-	12%	-10%	-7%	3%	-5%
	No	**48%**	-11%	-	-12%	10%	7%	-3%	5%
S63	**What factors prevent theatre productions and screenings from competing for space in your venue(s)?**								
	We have dedicated spaces for theatre and cinema screenings	**31%**	19%	-	NA	-3%	29%	13%	-17%
	We have enough spaces for all the productions	**25%**	8%	-	-	4%	-5%	-14%	18%
	We have a policy guiding how many live and live-to-digital events appear in our venue(s)	**6%**	NA	-	NA	8%	NA	NA	8%
	Our programming schedule is not crowded enough to result in competition for space	**44%**	-10%	-	31%	-15%	-4%	-10%	13%
	Other	**25%**	8%	-	NA	4%	15%	19%	NA
S64	**What factors cause theatre productions and screenings to compete for space in your venue(s)?**								
	Theatre and cinema screenings must occur in the same spaces within our venue(s)	**100%**	-	-	-	-	-	-	-
	We have many of our own live and live-to-digital productions to fit into the schedule	**18%**	-8%	-	-3%	2%	NA	-9%	16%
	Hires by exhibitors of live-to-digital increase demand for our venue(s)	**12%**	-2%	-	NA	8%	13%	6%	NA
	We have no policy guiding how many live and live-to-digital events appear in our venues(s)	**41%**	-21%	-	16%	-1%	NA	-23%	42%
	Other	**6%**	NA	-	237%	NA	NA	NA	11%
S65	**How has the number of live theatre productions in your venue(s) increased or decreased in the last 2- 3 years?**								
	Decreased by 75-100%	**NA**	NA	NA	NA	NA	NA	NA	NA
	Decreased by 50-74%	**NA**	NA	NA	NA	NA	NA	NA	NA
	Decreased by 25-49%	**6%**	0%	-	NA	11%	NA	-1%	2%
	Decreased by 1-24%	**21%**	4%	-	6%	NA	23%	-1%	2%
	No change	**42%**	1%	-	3%	-1%	-9%	8%	-12%
	Increased by 1-24%	**21%**	-2%	-	-12%	12%	1%	-1%	2%

			Supplier Activity		Budget Size			Location	
		All	Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Increased by 25-49%	**3%**	NA	-	6%	NA	NA	2%	NA
	Increased by 50-74%	**6%**	0%	-	3%	2%	NA	NA	9%
	Increased by 75-100%	**NA**	NA	NA	NA	NA	NA	NA	NA
S66	**Are you trying to increase or decrease the number of live performances (including theatre and other types of performances) in your venue?**								
	Increase	**39%**	-8%	-	-3%	19%	-17%	-4%	7%
	Decrease	**NA**	NA	NA	NA	NA	NA	NA	NA
	No change	**45%**	-2%	-	9%	-12%	10%	-0%	1%
	I don't know	**3%**	3%	-	NA	NA	8%	2%	NA
	Undecided	**12%**	7%	-	-3%	-4%	-1%	3%	-4%
S67	**Are you trying to increase or decrease the number of live-to-digital screenings in your venue?**								
	Increase	**58%**	-8%	-	-3%	17%	-13%	7%	-11%
	Decrease	**3%**	3%	-	6%	NA	NA	NA	5%
	No change	**27%**	-2%	-	-9%	-2%	6%	-7%	11%
	I don't know	**3%**	3%	-	NA	NA	8%	2%	NA
	Undecided	**9%**	3%	-	9%	NA	2%	1%	-1%
	Feelings about the Marketplace								
S68	**Do you feel that the live-to-digital market has had a positive or negative impact upon your organisation?**								
	Positive	**38%**	-8%	54%	-8%	-0%	12%	-1%	12%
	Neutral	**36%**	2%	-34%	1%	2%	1%	1%	-13%
	Negative	**13%**	5%	-9%	5%	-5%	-2%	-0%	4%
	No opinion	**13%**	2%	-11%	3%	3%	-11%	0%	-3%
S69	**Has your organisation's programming changed due to the effects of the live-to-digital market?**								
	Yes	**23%**	-5%	44%	1%	-3%	1%	-4%	27%
	No	**70%**	6%	-40%	-3%	5%	4%	3%	-24%
	I don't know	**7%**	-1%	-5%	2%	-1%	-4%	0%	-3%
S70	**Which of the following in your organisation has been impacted by the live-to-digital market?**								
	Repertoire	**30%**	-5%	-0%	-1%	3%	6%	2%	-4%
	Casting	**4%**	-0%	-1%	0%	3%	NA	-1%	3%
	Performance locations	**27%**	12%	-15%	7%	7%	-18%	1%	-0%
	Performance venues	**25%**	20%	-22%	12%	2%	NA	3%	-5%
	Number of performances	**54%**	-5%	1%	2%	13%	-26%	1%	-0%
	Number of tickets sold	**66%**	-11%	19%	-3%	1%	7%	-4%	14%
	Type of audience attending	**45%**	-16%	19%	-4%	9%	-17%	-5%	9%
	Staffing	**21%**	-2%	3%	-7%	19%	-3%	1%	-1%
	Fundraising income (directly increased)	**18%**	-2%	3%	-3%	2%	0%	-5%	15%
	Fundraising income (directly decreased)	**NA**	NA	NA	NA	NA	NA	NA	NA
	None of the above	**9%**	1%	-3%	-2%	-2%	9%	4%	NA
	For those that report positive impacts in first marketplace question								
	Repertoire	**26%**	-13%	3%	4%	2%	-1%	-3%	8%

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	Casting	5%	1%	-2%	1%	4%	NA	-1%	3%
	Performance locations	15%	3%	-2%	-4%	12%	-3%	4%	-7%
	Performance venues	5%	7%	-2%	1%	4%	NA	3%	NA
	Number of performances	46%	-27%	9%	1%	17%	-34%	-4%	12%
	Number of tickets sold	69%	-25%	15%	1%	3%	-7%	-12%	31%
	Type of audience attending	56%	-19%	8%	2%	7%	-31%	-3%	2%
	Staffing	26%	-1%	0%	-14%	29%	-1%	1%	-1%
	Fundraising income (directly increased)	23%	2%	-0%	-5%	4%	2%	-8%	19%
	Fundraising income (directly decreased)	NA	NA	NA	NA	NA	NA	NA	NA
	For those that report negative impacts in first marketplace question								
	Repertoire	46%	-	54%	-13%	4%	54%	14%	NA
	Casting	NA	NA	NA	NA	NA	NA	NA	NA
	Performance locations	62%	-	NA	16%	-12%	NA	-12%	38%
	Performance venues	85%	-	NA	15%	15%	NA	-5%	15%
	Number of performances	85%	-	15%	-7%	15%	15%	15%	-51%
	Number of tickets sold	62%	-	38%	-6%	-12%	38%	18%	NA
	Type of audience attending	8%	-	NA	3%	NA	NA	NA	26%
	Staffing	15%	-	NA	7%	NA	NA	5%	NA
	Fundraising income (directly increased)	8%	-	NA	3%	NA	NA	2%	NA
	Fundraising income (directly decreased)	NA	NA	NA	NA	NA	NA	NA	NA
	The importance of 'Liveness'								
S71	**How important do you think liveness (ie. knowing that a performance is happening in real time) is to your audiences?** *Weighted average: very important = 100%, somewhat important = 75%, neither important nor unimportant = 50%, not very important = 25%, and not at all important = 0%*								
	Not at all important	2%	1%	-0%	-0%	1%	0%	-0%	1%
	Not very important	3%	0%	-1%	0%	2%	NA	0%	-
	Neither important nor unimportant	12%	-1%	-4%	2%	1%	-6%	1%	-9%
	Somewhat important	35%	-5%	32%	-11%	-1%	21%	-1%	5%
	Very important	47%	5%	-27%	9%	-2%	-12%	-1%	3%
S72	**Is offering content on a time-limited basis important to your organisation?**								
	Yes	24%	-3%	13%	-10%	3%	11%	0%	-2%
	No	36%	0%	-5%	8%	2%	-19%	1%	-6%
	I'm not sure	40%	2%	-8%	2%	-6%	8%	-1%	8%
	Distributors								

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
S73	**Does your organisation act as a distributor for live-to-digital productions?**								
	Yes	**5%**	-1%	1%	-3%	0%	6%	0%	-2%
	No	**95%**	1%	-1%	3%	-0%	-6%	-0%	2%
S74	**What types of live-to-digital productions has your organisation distributed?**								
	Theatre	**83%**	17%	-17%	17%	-8%	-3%	-2%	17%
	Opera	**25%**	NA	42%	25%	-	NA	-7%	75%
	Ballet	**17%**	NA	50%	33%	NA	NA	-8%	83%
	Orchestral Music	**8%**	NA	25%	NA	NA	NA	1%	NA
	Museum exhibition tour	**8%**	NA	25%	NA	NA	NA	1%	NA
	Other	**17%**	NA	17%	33%	NA	3%	2%	NA
S75	**Through what venues/screening platforms does your organisation distribute live-to-digital content?**								
	Cinemas	**50%**	-	17%	NA	-	10%	5%	NA
	Theatres/arts centres	**67%**	-	-	33%	8%	-27%	-3%	33%
	Non-traditional venues (libraries, pubs, etc.)	**50%**	-17%	-17%	50%	25%	-30%	-5%	50%
	Schools	**17%**	17%	NA	NA	NA	23%	2%	NA
	Broadcast television	**8%**	8%	NA	NA	NA	12%	1%	NA
	On-demand television	**NA**	NA	NA	NA	NA	NA	NA	NA
	Our own website or app	**25%**	25%	NA	NA	-	15%	2%	NA
	Third party website or app (YouTube, Vimeo, Periscope, etc.)	**33%**	17%	NA	17%	-8%	7%	3%	NA
	Other	**8%**	8%	NA	NA	NA	12%	1%	NA
S76	**What venues/screening platform(s) do you see becoming more important to live-to-digital distribution in the future?**								
	Cinemas	**58%**	8%	8%	NA	-8%	22%	5%	NA
	Theatres/arts centres	**67%**	17%	-	-17%	8%	-7%	-3%	33%
	Non-traditional venues (libraries, pubs, etc.)	**67%**	-	-33%	-17%	33%	-27%	6%	NA
	Schools	**67%**	17%	-	NA	8%	13%	6%	NA
	Broadcast television	**25%**	25%	NA	NA	NA	35%	2%	NA
	On-demand television	**58%**	8%	-25%	-8%	-8%	2%	5%	NA
	Our own website or app	**42%**	25%	NA	NA	33%	-2%	4%	NA
	Third party website or app (YouTube, Vimeo, Periscope, etc.)	**75%**	8%	-42%	-25%	25%	5%	7%	NA
	Other	**8%**	8%	NA	NA	NA	12%	1%	NA
S77	**Does your organisation also distribute traditional cinema content? (e.g., 'regular films', not live-to-digital productions)?**								
	Yes	**42%**	NA	58%	8%	8%	-22%	-5%	58%
	No	**58%**	42%	NA	-8%	-8%	22%	5%	NA
S78	**For how long has your organisation been distributing live-to-digital content?**								
	<1 year	**NA**	NA	NA	NA	NA	NA	NA	NA

		All	Supplier Activity: Theatre Pro-ducer	Supplier Activity: Exhibitor	Budget Size: Under £200k	Budget Size: £200k to £999k	Budget Size: £1m or Over	Location: Urban	Location: Rural
	1-2 years	**33%**	17%	NA	NA	17%	7%	3%	NA
	3-4 years	**17%**	-	17%	33%	NA	3%	-8%	83%
	5-6 years	**17%**	NA	NA	33%	8%	NA	2%	NA
	7+ years	**33%**	-	33%	NA	-8%	7%	3%	NA
S79	**As a distributor, what types of financial agreements do you have with live-to-digital content producers?**								
	Leasing/fixed-fee	**33%**	NA	-	17%	17%	NA	3%	NA
	Profit-sharing (net)	**42%**	-25%	58%	8%	-17%	-2%	-5%	58%
	Rental or purchase revenue split	**17%**	NA	17%	NA	8%	NA	2%	NA
	Subscription revenue split	**8%**	NA	NA	NA	17%	NA	1%	NA
	Ad-share	**NA**	NA	NA	NA	NA	NA	NA	NA
	Affiliate hosting	**8%**	NA	25%	NA	NA	12%	1%	NA
	Other	**17%**	-	17%	33%	8%	NA	-8%	83%
S80	**On average, how have your profits on live-to-digital content compared to those for traditional cinema content?**								
	Equally profitable	**8%**	8%	NA	NA	17%	NA	1%	NA
	More profitable	**25%**	-8%	42%	25%	NA	-5%	-7%	75%
	Less profitable	**33%**	-17%	-	NA	17%	7%	3%	NA
	I prefer not to say	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**8%**	8%	NA	NA	NA	12%	1%	NA
S81	**What is the current approximate ratio of traditional cinema content to live-to-digital content that you are distributing?**								
	Roughly equal	**NA**	NA	NA	NA	NA	NA	NA	NA
	0-10% Traditional / 90-100% Live-to-digital	**44%**	6%	-11%	NA	-11%	6%	6%	NA
	11-20% Traditional / 80-89% Live-to-digital	**NA**	NA	NA	NA	NA	NA	NA	NA
	21-50% Traditional / 50-79% Live-to-digital	**NA**	NA	NA	NA	NA	NA	NA	NA
	51-60% Traditional / 40-49% Live-to-digital	**NA**	NA	NA	NA	NA	NA	NA	NA
	61%-80% Traditional / 20-39% Live-to-digital	**11%**	14%	NA	NA	22%	NA	1%	NA
	81-100% Traditional / 0-19% Live-to-digital	**44%**	-19%	22%	56%	-11%	6%	-7%	56%
S82	**How has the ratio of traditional cinema content you are distributing to live-to-digital content changed over the last three years?**								
	Major increase in live-to-digital content	**13%**	NA	21%	NA	NA	NA	2%	NA
	Minor increase in live-to-digital content	**13%**	NA	21%	NA	NA	13%	2%	NA
	About the same	**63%**	38%	-29%	38%	-13%	13%	-5%	38%
	Minor decrease in live-to-digital content	**13%**	NA	NA	NA	38%	NA	2%	NA
	Major decrease in live-to-digital content	**NA**	NA	NA	NA	NA	NA	NA	NA
S83	**How does your organisation view the financial risks involved in creating live-to-digital content, in comparison to traditional cinema content?**								
	Equally risky	**14%**	36%	NA	NA	NA	19%	2%	NA

	All	Supplier Activity		Budget Size			Location	
		Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
More risky	**43%**	NA	-10%	NA	57%	-10%	7%	NA
Less risky	**29%**	NA	38%	71%	NA	NA	-12%	71%
No opinion	**14%**	36%	NA	NA	NA	19%	2%	NA
I don't know	**NA**	NA	NA	NA	NA	NA	NA	NA
S84 **What factors are to your company's greatest advantage in distributing live-to-digital content?** *Weighted average: major advantage = 100%, Somewhat significant advantage = 66%, minor advantage = 33%, not at all an advantage = 0%*								
Space within the marketplace	**53%**	-3%	-3%	NA	-3%	9%	-	NA
Ability to secure downstream rights (i.e. beyond the live or encore performance)	**47%**	3%	-34%	NA	28%	-2%	-	NA
Quality of our content in comparison to other companies	**63%**	-	4%	13%	-13%	-3%	-2%	13%
Our ability to find exhibitors for our work	**69%**	6%	-10%	6%	6%	6%	-6%	-1%
Our ability to obtain good time-slots for programming	**54%**	-12%	21%	NA	-4%	-4%	-	NA
Experience in navigating UK marketplace	**64%**	-2%	11%	NA	-14%	1%	-	NA
Experience in navigating the international marketplace (from UK)	**50%**	-	13%	NA	-25%	-	-	NA
Ability to secure partnerships with commercial producers	**44%**	-2%	23%	31%	-19%	-2%	-4%	31%
S85 **What factors are to your company's greatest disadvantage in distributing live-to-digital content?** **Weighted average: major problem = 100%, Somewhat significant problem = 66%, minor problem = 33%, not at all a problem = 0%**								
Crowded marketplace	**36%**	-2%	2%	NA	2%	-4%	-	NA
Inability to secure downstream rights (i.e. beyond the live or encore performance)	**25%**	-8%	13%	NA	-	-6%	-	NA
Lack of quality content available	**14%**	11%	-2%	NA	NA	11%	-	NA
Lack of exhibitors available	**13%**	13%	-	NA	NA	13%	-	NA
Competition for identifying time-slots for programming	**42%**	-4%	-17%	NA	21%	-17%	-	NA
Inexperience in navigating UK marketplace	**21%**	4%	NA	NA	17%	-4%	-	NA
Inexperience navigating international marketplace (from UK)	**21%**	4%	NA	NA	17%	-4%	-	NA

		All	Supplier Activity: Theatre Producer	Supplier Activity: Exhibitor	Budget Size: Under £200k	Budget Size: £200k to £999k	Budget Size: £1m or Over	Location: Urban	Location: Rural
	Inability to secure partnerships with commercial producers	**25%**	4%	NA	NA	17%	-4%	-	NA
S86	**What, if anything, is preventing you from securing downstream rights?**								
	Talent not interested in making content available beyond the live/encore performance	**33%**	17%	-	NA	-8%	7%	3%	NA
	Producer not interested in making content available beyond the live/encore performance	**25%**	-8%	8%	25%	NA	-5%	2%	NA
	No clear precedent for digital rights	**33%**	17%	-	NA	NA	27%	3%	NA
	Unable to reach agreement with content owners	**8%**	NA	25%	NA	NA	NA	1%	NA
	Nothing in particular	**25%**	NA	8%	25%	25%	NA	-7%	75%
	Other	**17%**	-	17%	NA	NA	23%	2%	NA
S87	**Does your organisation have a social media strategy specifically for live-to-digital productions?**								
	Yes	**82%**	18%	-15%	-32%	-15%	18%	8%	NA
	No	**18%**	NA	15%	32%	15%	NA	-8%	82%
	I don't know	**NA**	NA	NA	NA	NA	NA	NA	NA
S88	**How do you think your organisation's investment in live-to-digital productions will change in the next few years?**								
	Increase	**73%**	27%	-6%	-23%	-39%	27%	7%	NA
	Decrease	**NA**	NA	NA	NA	NA	NA	NA	NA
	No change	**18%**	NA	15%	32%	15%	NA	-8%	82%
	I prefer not to say	**NA**	NA	NA	NA	NA	NA	NA	NA
	I don't know	**9%**	NA	NA	NA	24%	NA	1%	NA
S89	**Do you see potential for distributing more 'niche' content in the future (i.e. a longer tail)?**								
	Yes	**64%**	-4%	3%	-14%	3%	-4%	6%	NA
	No	**18%**	2%	NA	NA	15%	2%	2%	NA
	I don't know	**18%**	2%	15%	32%	NA	2%	-8%	82%
S90	**Which of the following developments has the potential to increase the amount of 'niche' content you distribute in the future?**								
	Downstream rights become easier to secure	**71%**	-5%	-21%	29%	29%	-38%	-	NA
	The market for niche work improves	**71%**	29%	-21%	NA	29%	-5%	-	NA
	The right platform becomes available for distributing niche content	**57%**	10%	NA	43%	43%	-24%	-	NA
	More niche content productions become available	**86%**	14%	-36%	14%	14%	-19%	-	NA

		All	Supplier Activity		Budget Size			Location	
			Theatre Producer	Exhibitor	Under £200k	£200k to £999k	£1m or Over	Urban	Rural
	The cost of niche productions goes down	**71%**	-5%	29%	NA	29%	-5%	-	NA
	Niche productions of a higher level of artistic quality become available	**71%**	-5%	-21%	29%	29%	-38%	-	NA
	Niche productions of a higher technical level become available	**71%**	-5%	29%	NA	29%	-5%	-	NA
	Another development	**NA**	NA	NA	NA	NA	NA	NA	NA
	About your organisation								
S91	**Do you see live-to-digital content as an art form distinct from live theatre, opera, ballet, film etc.?**								
	Yes	**54%**	1%	-1%	-0%	-1%	5%	-0%	6%
	No	**32%**	-1%	7%	-4%	4%	3%	0%	-5%
	I don't know	**14%**	-1%	-6%	4%	-3%	-8%	-0%	-1%
S92	**What best classifies your organisation?**								
	Commercial	**10%**	-4%	8%	1%	-5%	-3%	-1%	3%
	Social enterprise	**5%**	-1%	1%	2%	1%	NA	0%	-2%
	Not-for-profit / charity	**80%**	6%	-16%	-2%	5%	3%	0%	0%
	Local authority owned and operated	**3%**	-2%	7%	-2%	-1%	5%	0%	0%
	Former local-authority owned, now an independent Trust	**1%**	-0%	1%	0%	NA	1%	0%	NA
S93	**Your organisation's total expenditure in your most recently completed financial year**								
	Less than £20,000	**14%**	1%	-9%	15%	NA	NA	1%	-7%
	£20,001 to £49,999	**10%**	1%	-2%	12%	NA	NA	-1%	3%
	£50,000 to £99,999	**11%**	3%	-7%	13%	NA	NA	-1%	6%
	£100,000 to £199,999	**12%**	-4%	9%	14%	NA	NA	-1%	8%
	£200,000 to £499,999	**20%**	-1%	-3%	NA	43%	NA	-1%	14%
	£500,000 to £999,999	**12%**	1%	-2%	NA	26%	NA	2%	NA
	£1m to under £2.5m	**7%**	-0%	5%	NA	NA	32%	0%	-4%
	£2.5m to under £5m	**7%**	1%	6%	NA	NA	28%	0%	-3%
	£5m to under £10m	**2%**	1%	NA	NA	NA	7%	0%	NA
	£10m or more	**3%**	1%	1%	NA	NA	14%	1%	NA
	I don't know	**3%**	NA	5%	NA	NA	NA	-0%	0%