From Live-to-Digital

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

AEA Consulting

Executive Summary Presentation
October 2016

ARTS COUNCIL ENGLAND

UK THEATRE

SOCIETY OF LONDON THEATRE

1.

Study Objectives and background

The commissioning bodies identified three research goals...

1. How are organisations that produce, present, exhibit and distribute theatre in England being affected by 'Live-to-Digital'?
2. How and why are audiences engaging with theatre in digital formats?
3. What can the wider cultural sector learn from the experience of the theatre sector and its audiences?

...and 11 questions related to those goals

Supply and demand profile

1. Who are the audiences for this work?
2. What organisations are supplying this work?
3. What kind of content is being offered?

Audience motivations, barriers and experiences

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

Supplier offer, barriers, experiences and impact on touring

7. What are the motivations, opportunities and barriers for organisations to participate?
8. Have theatre touring patterns been affected?

The future of Live-to-Digital

9. What does the future hold for attendees?
10. What are the future opportunities for content creation?
11. What are the opportunities for co-promotion?

1. Objectives & Methodology

Multi-modal research focused on current theatre audiences and theatre producers, suppliers, and exhibitors

Research Methods

1. Literature review & glossary
2. Stakeholder interviews
3. Supplier focus groups
4. Online audience survey – theatre attendees only, with varying live-to-digital experience
5. Online supplier survey – theatre producers/presenters only, with varying live-to-digital experience
6. Audience interviews
7. Social media analysis
8. In-depth case studies

1. Objectives & Methodology

Online Audience Survey Segmentation & Profile (n = 1,263)

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%

Online Supplier Survey Segmentation & Profile (n= 245)

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%

Segment	# Respondents	% Proportion
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	38%

Case Studies

Belarus Free Theatre

Complicite

The Dukes Theatre

Fiery Angel

HiBrow

Theatre Royal Newcastle

2.

Key Findings

Summary Findings

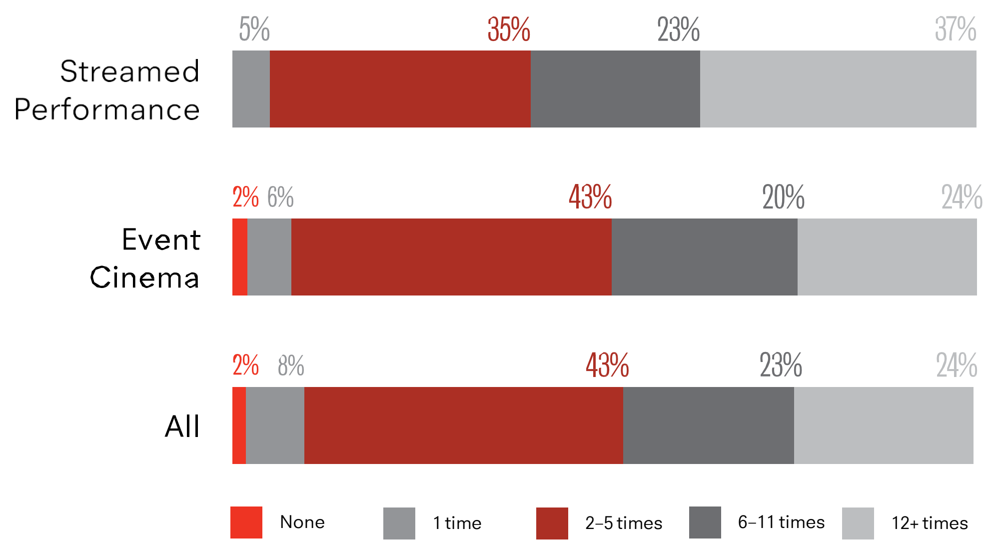
- Minimal impact on live attendance
- Overall stable levels of touring, but some organisations are experiencing challenges
- Streamers are younger/more diverse than live theatre/Event Cinema audiences
- Audiences do not believe Live-to-Digital is a substitute for live theatre; they believe it is a significant and distinct experience
- Consumers are motivated by economics and convenience, but not 'liveness'
- Lack of access and lack of interest inhibit Event Cinema consumption
- Poor technology and low awareness of available content are barriers to streaming
- Economics rarely incentivise but often deter Live-to-Digital production
- Breaking down perceived barriers to entry could promote supplier participation
- Overall, Live-to-Digital perceived to have positive impact

2. Key Findings

Data reveal minimal impact on live attendance

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.

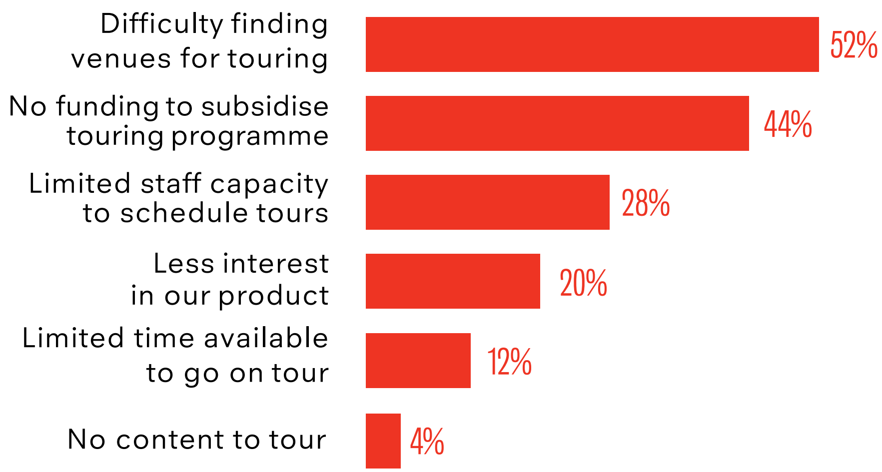
Frequency of live cultural performance attendance in the last 12 months by Live-to-Digital participation segment (n = 1,187)



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

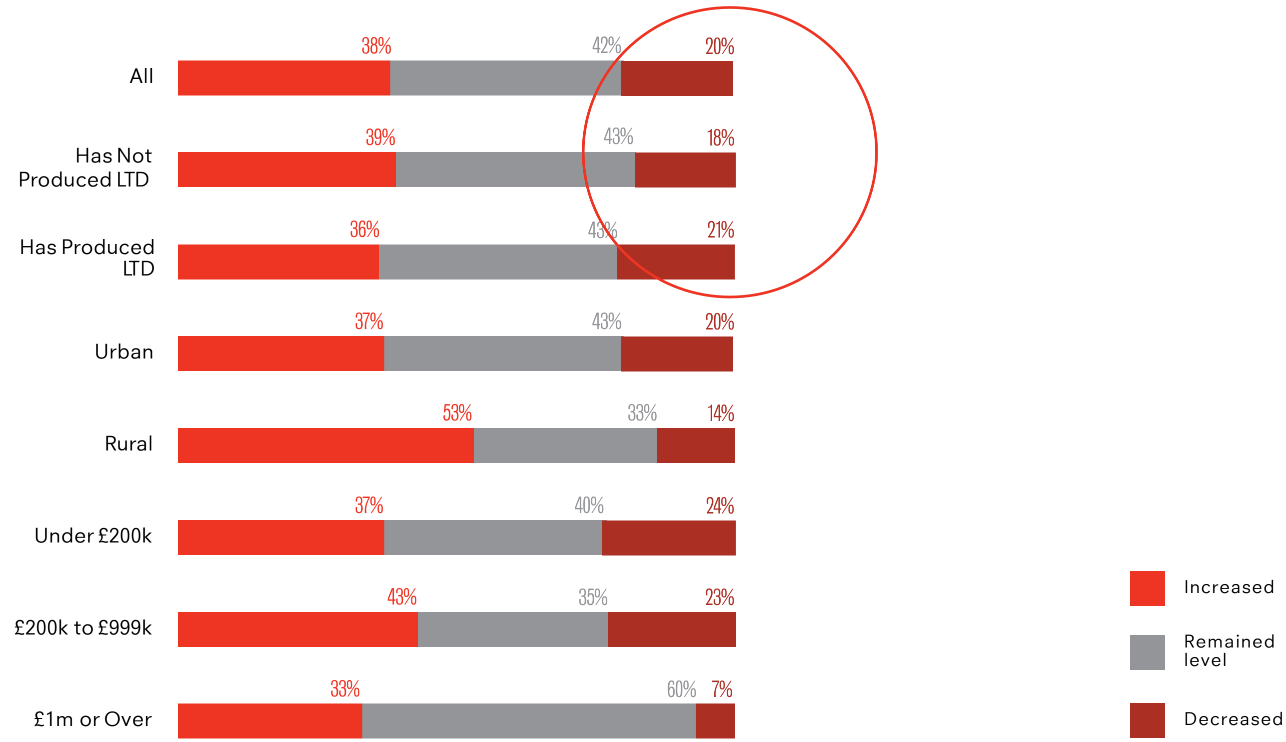
The majority of theatre organisations have not reported a decline in the touring market over the past two years. Direct Live-to-Digital experience does not seem to correlate with any decline in touring.

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



2. Key Findings

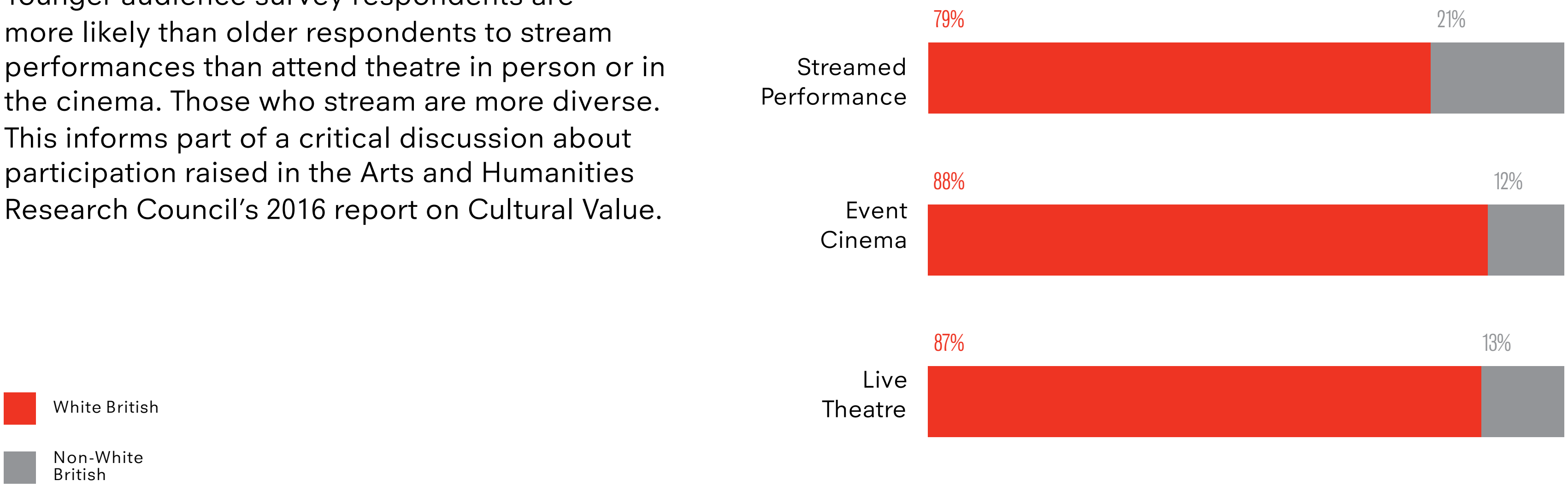
Touring levels in the last two years (n = 129)



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

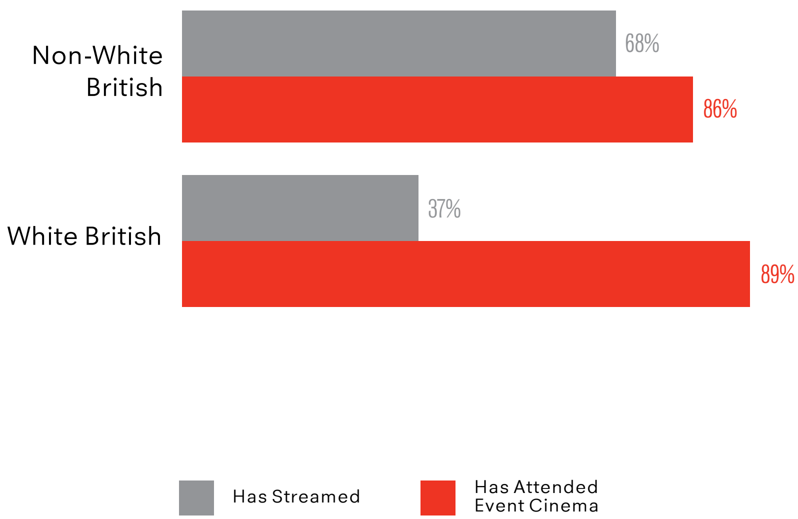
Younger audience survey respondents are more likely than older respondents to stream performances than attend theatre in person or in the cinema. Those who stream are more diverse. This informs part of a critical discussion about participation raised in the Arts and Humanities Research Council's 2016 report on Cultural Value.

Audience survey ethnicity demographics (n = 1,161)

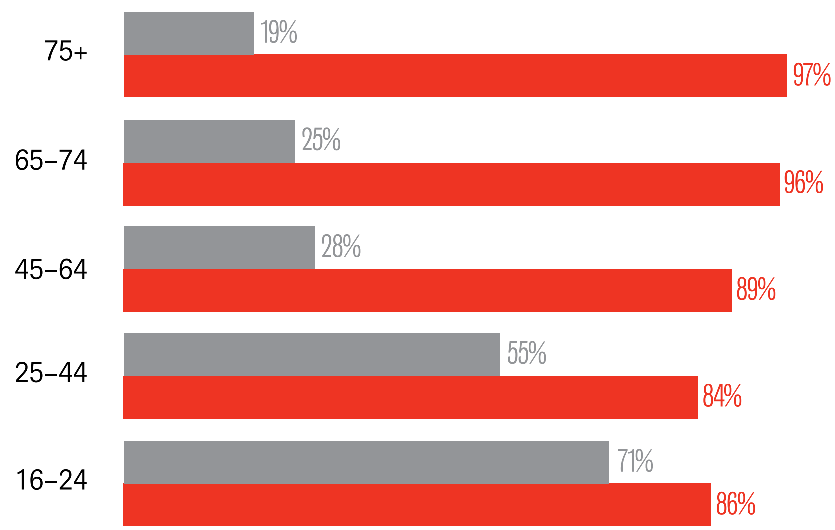


2. Key Findings

Audience survey ethnicity demographics
(n = 1,161)



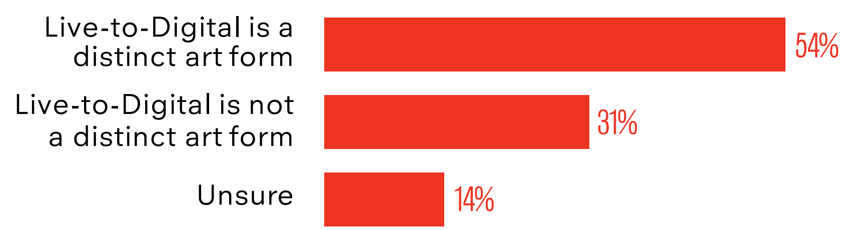
Audience survey participation by age segment
(n = 1,187)



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

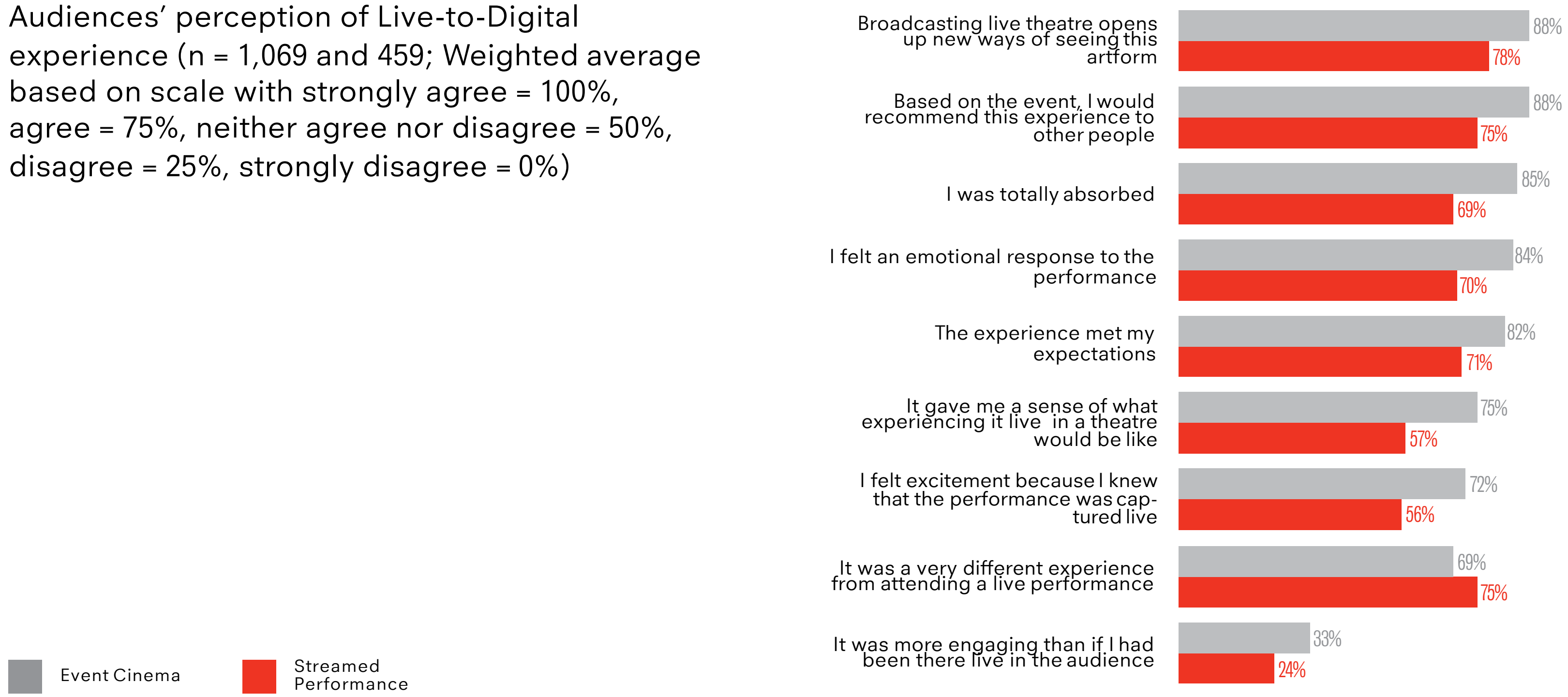
Attendees are highly satisfied with their digital experiences and would recommend the experience to others. But for those audiences – and many creators and suppliers – Live-to-Digital is seen not as a replacement for live, but as a distinct experience that opens up “new ways of seeing theatre”.

Suppliers’ perception of Live-to-Digital as an art-form distinct from live theatre, opera, ballet, film, etc. (n=245)



2. Key Findings

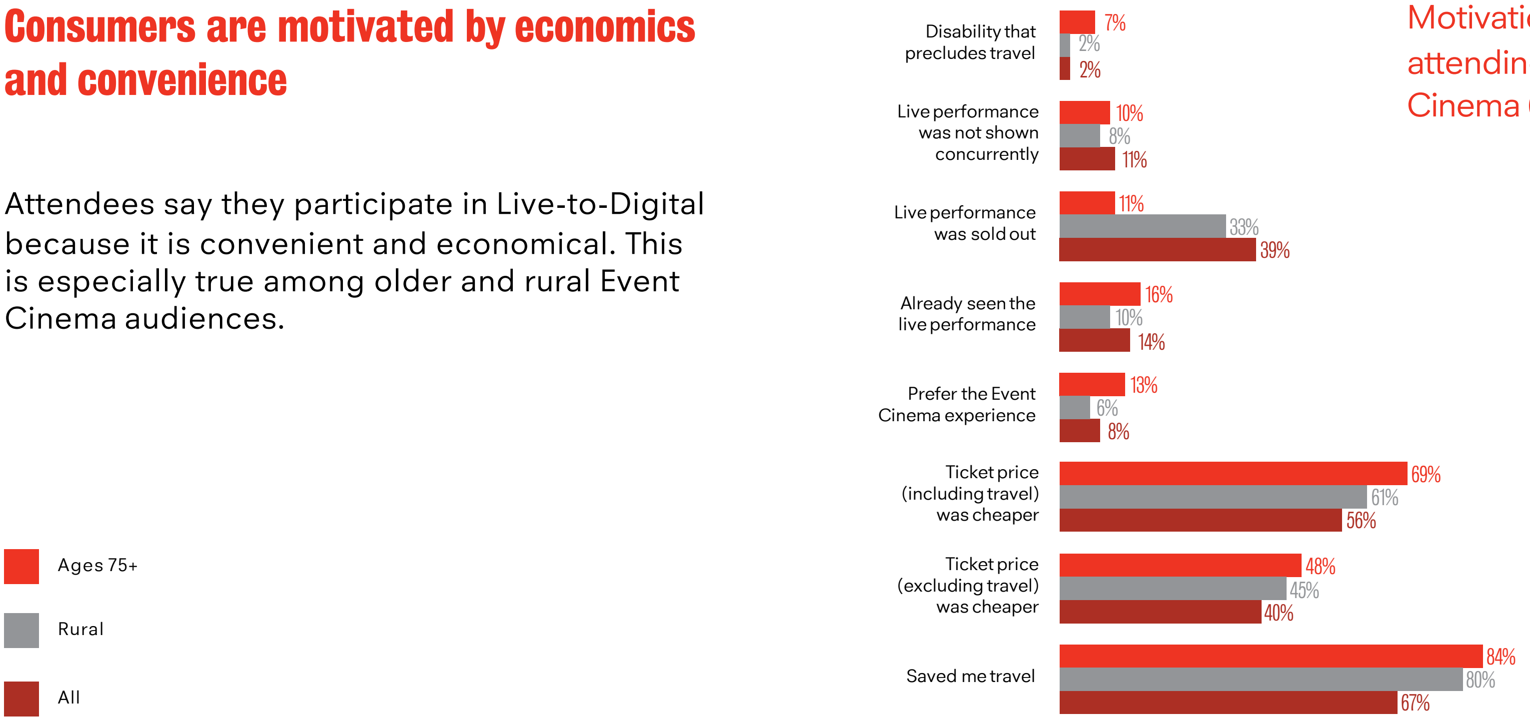
Audiences' perception of Live-to-Digital experience (n = 1,069 and 459; Weighted average based on scale with strongly agree = 100%, agree = 75%, neither agree nor disagree = 50%, disagree = 25%, strongly disagree = 0%)



Consumers are motivated by economics and convenience

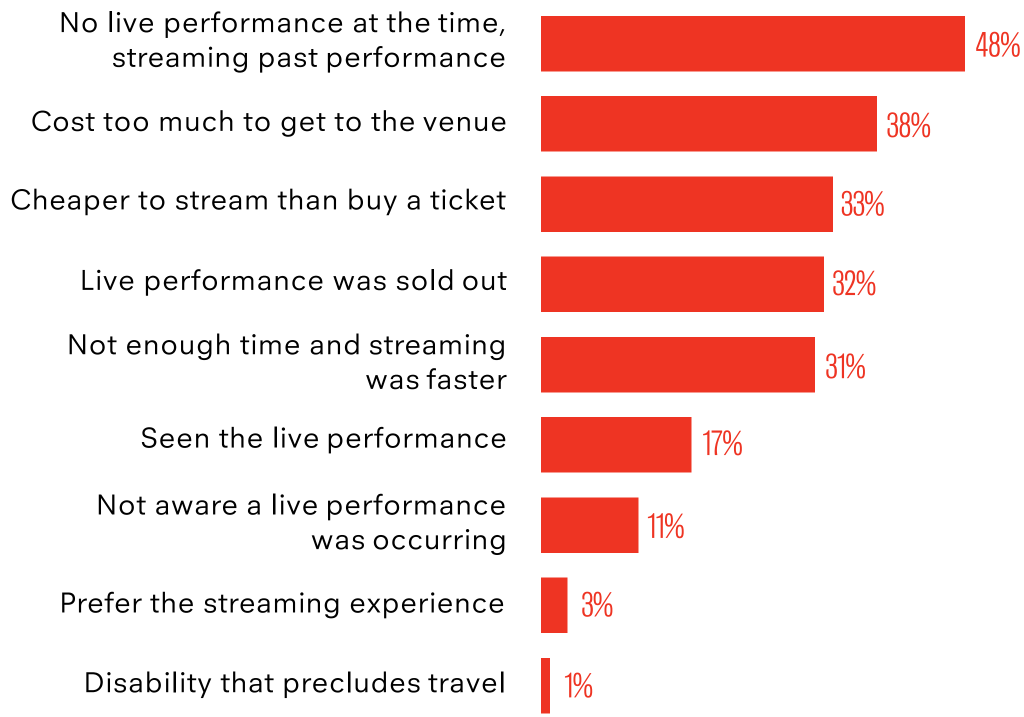
Attendees say they participate in Live-to-Digital because it is convenient and economical. This is especially true among older and rural Event Cinema audiences.

Motivations for attending Event Cinema (n = 1,052)



2. Key Findings

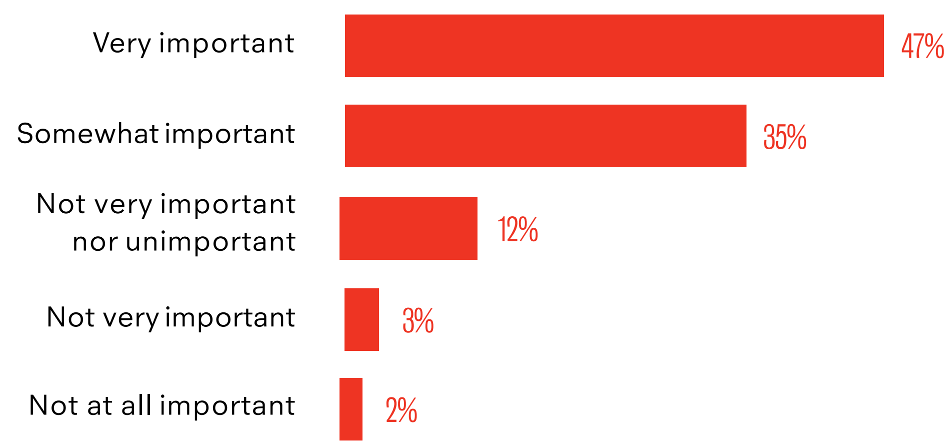
Motivations for streaming online (n = 376)



Consumers are not motivated by ‘liveness’ – but suppliers say it is more important

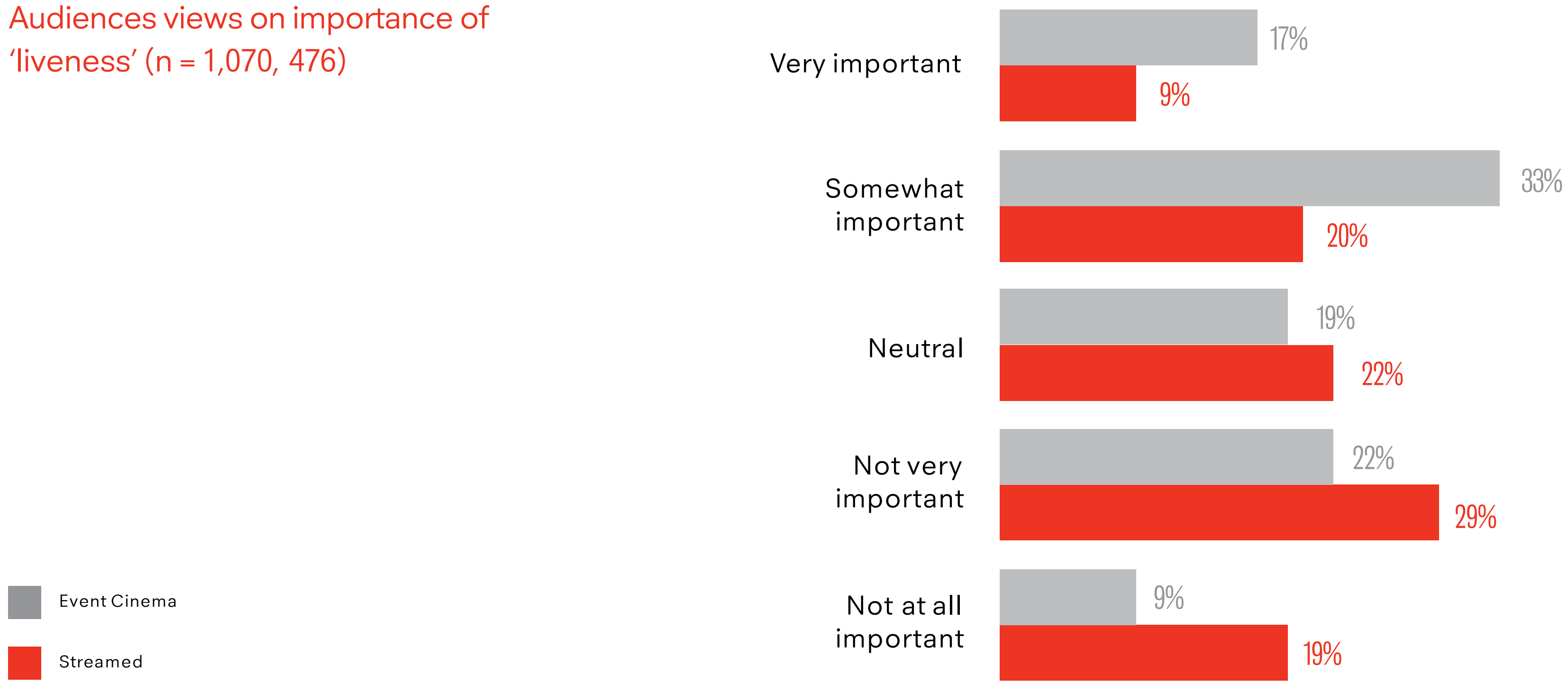
Few audience members say ‘liveness’ is an important part of the Live-to-Digital experience – though suppliers feel the opposite.

Suppliers’ views regarding whether ‘liveness’ (i.e. occurring in real time) is important to their audiences in Live-to-Digital form (n = 147)



2. Key Findings

Audiences views on importance of 'liveness' (n = 1,070, 476)



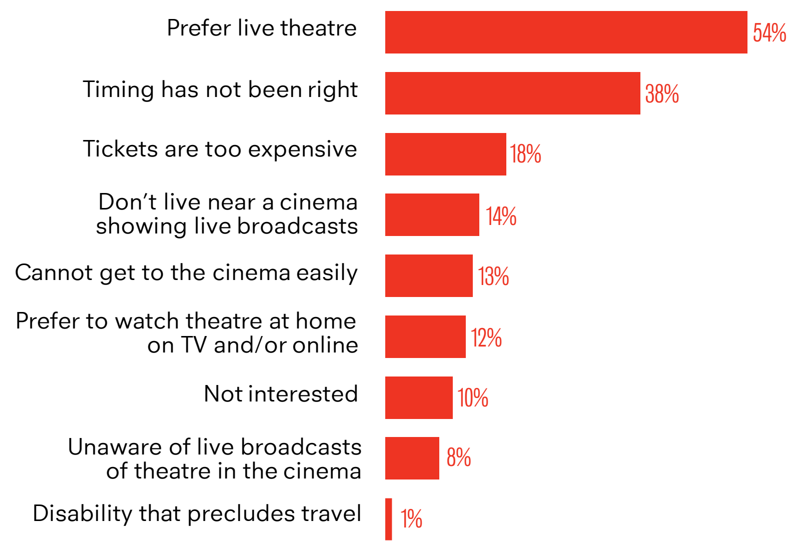
2. Key Findings

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

54% of respondents say a preference for live theatre is a barrier to Event Cinema attendance; 36% say the same for streaming (figure on following slide).

Lack of access and lack of interest inhibit Event Cinema consumption, while poor technology and low awareness of available content are barriers to streaming. Inconvenient timing and a lack of viewing locations are commonly identified barriers to Event Cinema consumption, especially for rural audiences. Meanwhile, a lack of understanding of what content is available and how one can access it has put many off streaming, as has poor Internet connectivity.

Barriers to Event Cinema attendance (n=115)



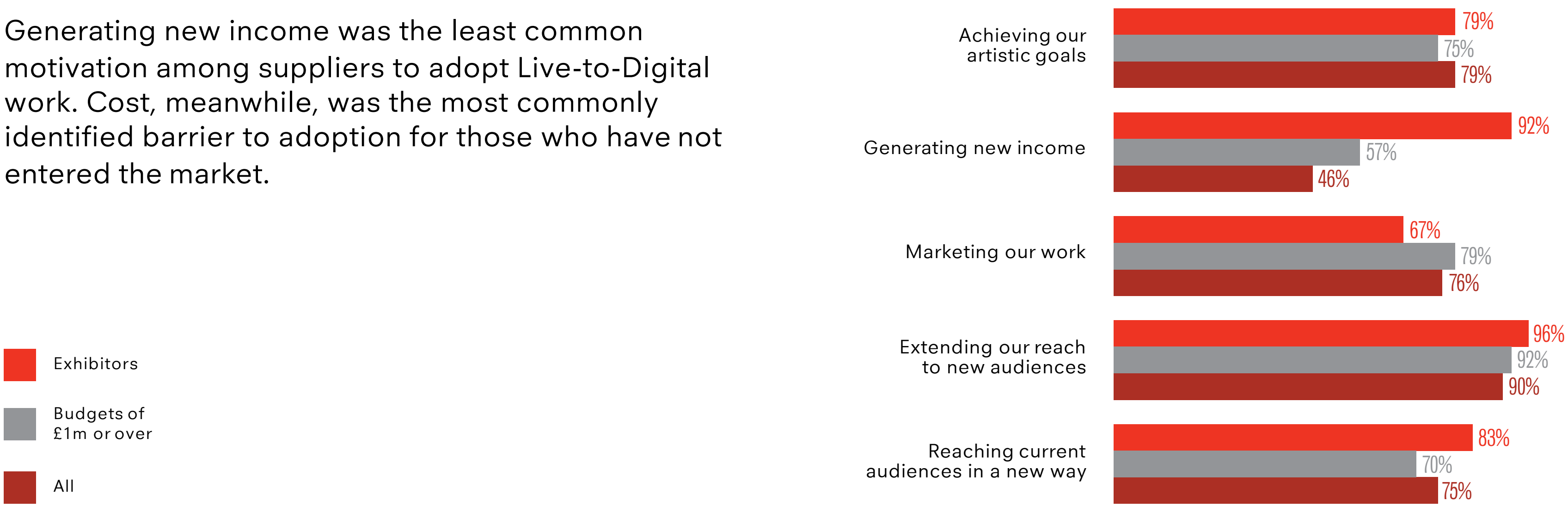
2. Key Findings

Barriers to streaming online (n=115)

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

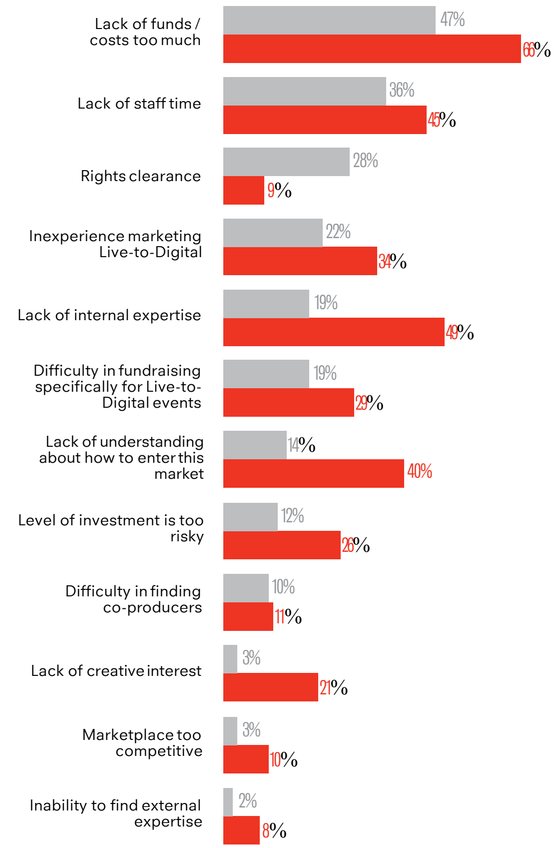
Generating new income was the least common motivation among suppliers to adopt Live-to-Digital work. Cost, meanwhile, was the most commonly identified barrier to adoption for those who have not entered the market.

Suppliers' perception of importance of drivers for Live-to-Digital (n = 63)



2. Key Findings

Perceived challenges in producing Live-to-Digital (n = 245)



Challenges for those that have produced

Barriers to those who have not produced

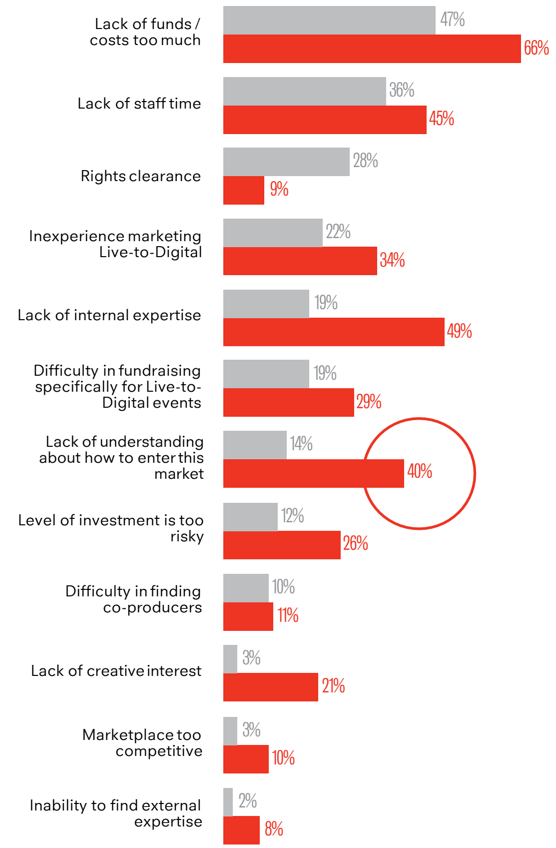
Breaking down perceived barriers to entry could promote wider participation among suppliers

Some suppliers believe that the barriers to entry remain too steep for the majority of theatre organisations. Others, however, contend that there is still room for organisations to present and produce bespoke content for distribution on established online platforms. Many of those who have not yet entered the market cite a "lack of understanding about how to enter the market" as a contributing factor preventing participation.

Challenges for those that have produced

Barriers to those who have not produced

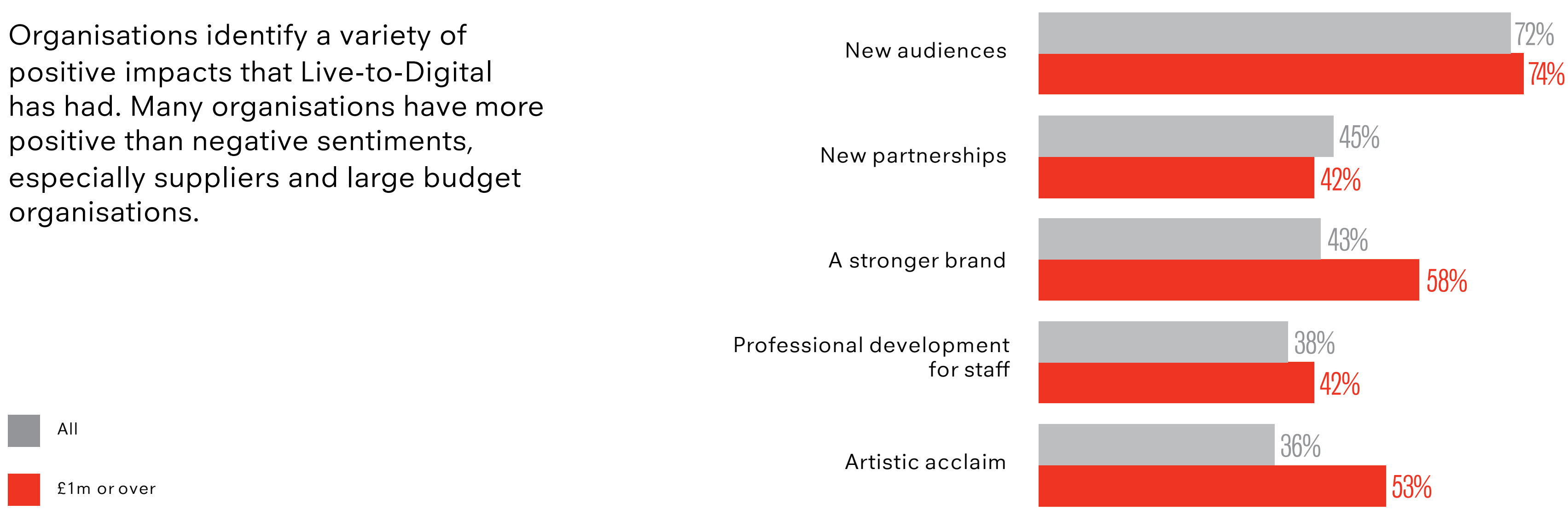
Perceived challenges in producing Live-to-Digital by *organisations* that have and have not previously produced Live-to-Digital (n = 245)



Overall, Live-to-Digital perceived to have positive impact

Organisations identify a variety of positive impacts that Live-to-Digital has had. Many organisations have more positive than negative sentiments, especially suppliers and large budget organisations.

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



2. Key Findings

Opinions about the impact of Live-to-Digital marketplace on respondents' organisations (n = 243)