Scope of Requirements

Introduction

Earlier this year Arts Council England, in collaboration with UK Theatre and Society of London Theatre (SOLT), commissioned research to explore live to digital work in the theatre sector, and in particular:

- How organisations that produce, present, exhibit and distribute theatre in England are being affected by 'Live-to-Digital'; and
- How and why audiences are engaging with theatre in digital formats.

For additional background information see Appendix 1.

Arts Council England now wish to commission further research to explore the effect of live to digital work on audiences and among arts and cultural organisations for artforms and cultural activity not covered in the theatre study: opera, music, dance, combined arts, visual arts, museums and literature.

Research aims and key lines of enquiry

Arts Council England wish to conduct research that will deliver an improved understanding of the following key areas in relation to Opera, Music, Dance, Museums (Exhibitions), Visual arts, Combined arts and literature.

1) **Digital audiences and demand-side profile**

- **What impact are digital screenings in venues and online having on audiences for live performances/exhibitions?**
- Who is engaging with digital screenings performances and events, where are they and are they more diverse than audiences at live events?
- What are the differences with regard to quality of experience and access between digital or 'live' events?
- What kind of live performance/exhibition is currently being offered digitally that is drawing audiences?
- What motivates audiences to attend live to digital screenings, or to consume live performance digitally (i.e. is it star or brand driven; how important is cost or physical proximity, etc.)
- What is the future propensity for current audiences and potential audiences to attend/consume live arts and culture events digitally in venues or online?

2) **Arts and cultural organisations and supply-side profile**

- What organisations are supplying Live-to-Digital work? What kind of live performance and event content is currently being offered digitally that is drawing audiences?
- Where are organisations across different art-forms showing live to digital content, e.g. some forms are dominant in event cinema, others might be on YouTube, Facebook, or paid-for online services.
- What are the motivations, opportunities and barriers for arts and cultural organisations to engage in live to digital? ?
- Have touring patterns and/or programming decisions been affected by the advent of live-to-digital?
- What are the opportunities and barriers for smaller arts and cultural organisations to create live to digital content, and for arts and cultural organisation in different regions of England?
- What are the opportunities for co-promotion and aggregation – e.g. where cinemas, producers and local venues work together?

Requirements and Proposed methodology

We would like you to propose a research methodology that explores the aims and key lines of enquiry described above. You should take into account the art-form specific opportunities and barriers with regards to live-to-digital. The methodology may involve all or some of the following approaches but you are also welcome to suggest additional or alternative methods you feel would be suitable in meeting the aims and objectives of the project or answering the key research questions:

Audiences:
- **A hosted online survey with existing audiences** – The survey should ideally be piloted, tested and refined prior to full launch. The survey should aim for a large-scale (e.g. at least 500 respondents) sample.

- **An online survey or poll with potential audiences and those that do not currently participate or attend live to digital offers** – The survey should ideally be piloted, tested and refined prior to launch. The survey should aim for a sample that is representative of the English adult population (e.g. aged 16+) and at least 500 respondents

- **Focus groups or interviews with audiences** - These focus groups would collect in-depth attitudinal and perception-based data from audiences. The focus groups would ideally be spread across the country and involve different demographics of audiences and a mixture of already engaged audiences, potential audiences and non-attendees, as well as a cross-section of audiences across the art-forms.

Arts and cultural organisations:
- **A hosted online survey -** The survey should ideally be piloted, tested and refined prior to full launch

- **One-to-one interviews or focus groups** – targeted at artists, producers, distributors and exhibitors and leading figures from the arts and cultural sector and trade bodies, and across all relevant art-forms.

Key background material (not exclusive):

- ''Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution'' – ACE, UK Theatre and SOLT
- "Understanding the impact of event cinema" – ACE/BFI 2015
- "Live to digital arts" – Riverside Studios/Home 2015
- "Digital Culture 2015: How is digital culture changing arts and cultural organisations?" - Digital R&D Funds for the Arts
- "Estimating the Impact of Live Simulcast on Theatre Attendance: An Application to London's National Theatre" – NESTA 2014
- "A smooth sea never made a skilled sailor". DERO project: Research findings and insights final report
- Adventures in live-streaming: learning from Miracle Theatre's first performance – Digital R&D Fund for the Arts 2013
- "Sector split on need for national screening strategy" – Article by Arts Professional published 01-05-2015
- "Is opera in cinemas the perfect introduction to the art-form?" – Joseph Attard, PhD student, Kings College London

> You are asked to note the ideas for a research methodology suggested above and outline how you would implement a research strategy incorporating these ideas and suggestions with associated costs for each strand.
>
> You are invited to suggest fully costed alternative or additional research methods that meet the aims and objectives of the research and come within the budget. You should include in detail the phasing of different research approaches over the course of the contract. You should also provide information on how research participants will be engaged, conduct the research fieldwork and how they would ensure quality of data analysis and reporting outputs.
>
> Your proposal should include information about how you would approach recruitment/sampling, target sample sizes for qualitative and quantitative research, and modes of data collection.

Expected outputs

- A full **research report** or set of reporting outputs which are likely to published, inclusive of details of the methodology and sources of evidence and data.
- An **executive summary report** about the key findings from the project
- A set of **case studies** where live programming and/or audiences, and/or business models have been significantly affected by the availability of live to digital content, and representing a range of different art and cultural forms.

- A full set of **survey data tables** with various cross-tabulation, and a full SPSS file for **each** survey dataset.
- A **one-hour presentation** to Arts Council staff on the key findings from the research and implications.

You are asked to note the proposed research outputs expected, and are invited to suggest additional or alternative outputs you feel could be of value to Arts Council England.

Appendix 1

Supporting Background Information to the Scope of Requirements

The early 21st century has seen unparalleled changes in how audiences engage digitally with live cultural experiences - communally in cinemas (Event Cinema), 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, festivals and the visual arts; and includes major UK arts organisations that have increased their virtual capacity at the cinema.

Live-to-Digital also encompasses online distributors and platforms, commissioners and industry bodies, making the ecology more complex. Over the past five years, with the rise of Event Cinema, a proliferation of new terminology has emerged in marketing literature and industry produced publications. Terms such as 'event cinema', 'live cinema' and 'alternative content' are used to account for a diversity of cinematic distribution and exhibition strategies – covering the livecasting of events (theatre, opera, dance, music) to cinema auditoria, the replay of pre-recorded live events in cinema auditoria and immersive or enhanced screenings.

Earlier this year Arts Council England, in collaboration with UK Theatre and Society of London Theatre (SOLT), commissioned research to explore live to digital work in the theatre sector, and in particular:

- How organisations that produce, present, exhibit and distribute theatre in England are being affected by 'Live-to-Digital'; and
- How and why audiences are engaging with theatre in digital formats.

The report, '*From Live-to-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution'* is the first authoritative piece of primary research into the impacts of live to digital work on Theatre audience and organisations. Key findings from this report (which was published on 11th October) included:

- 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.
- The majority of theatre organisations did not report a decline in touring over the past two years due to the emergence of live to digital.
- Streamers are younger and more diverse than live theatre and 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.

One of the main questions this study set out to explore was whether theatres in England are losing audiences to Live-to-Digital productions. The research explored the demand-side (audiences) and supply-side (organisational) factors of the Live-to-Digital market in the theatre sector in England.

Increasingly arts and cultural organisations, such as the Royal Opera House and the British Museum, are using cinemas to broadcast live events, either as live streaming's or encores. Motivations for such broadcasts include ensuring more people experience and are inspired by the arts, commercial gains and to push new artistic boundaries.

As part of the live to digital research, exhibitors (i.e. venues with screens) were asked what kind of arts and cultural event cinema content was currently being offered. The majority of exhibitors surveyed (92%) reported that they screen Live-to-Digital theatre productions. This was followed by Opera (76%), Ballet (69%) and Museum exhibition tours (53%) – see figure 1 overleaf.
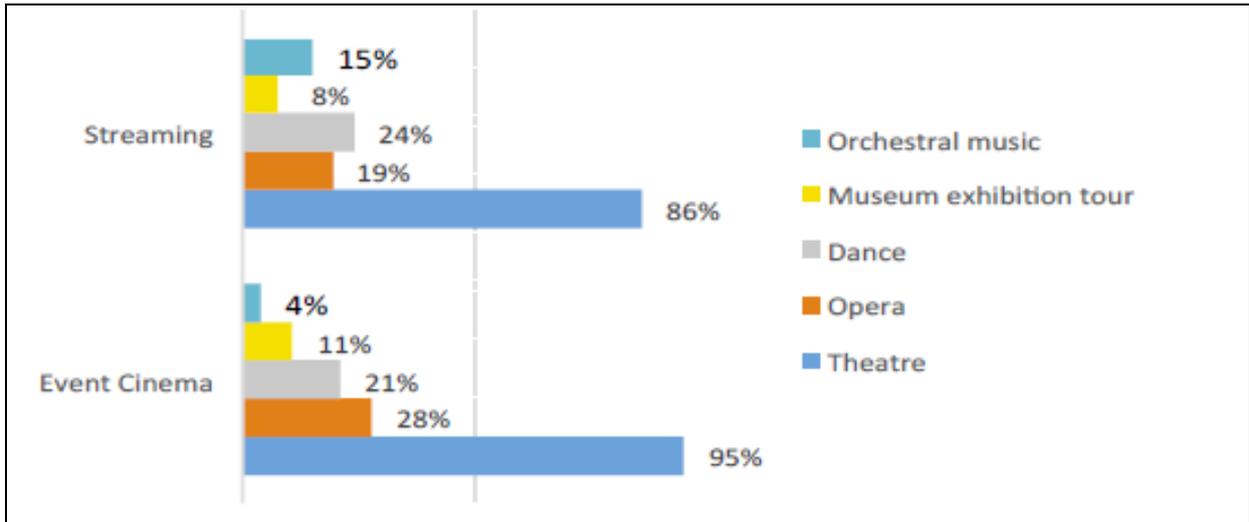
Figure 1 – Live performance content currently being offered digitally
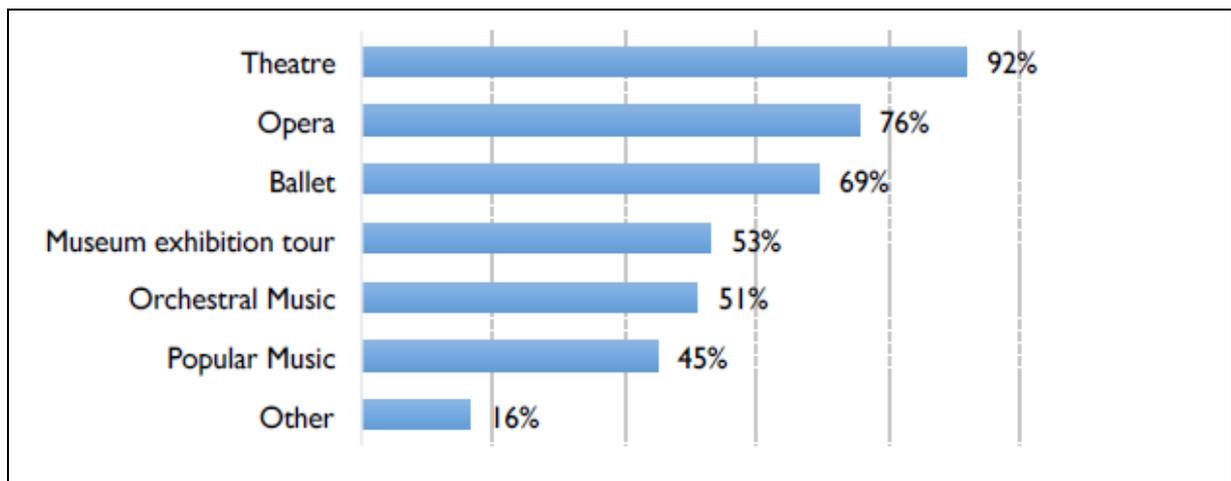
Source: *From Live-to-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution*

The live to digital research, which surveyed only Theatre audiences, asked respondents what kinds of Live to Digital work they had seen (see figure 2 below).

Figure 2 - Live-to-Digital Genres steamed or attended through Event Cinema by theatre audiences

Source: *From Live-to-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and*

Distribution

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