OPPDRAGSGIVER: TICKETCO / FIB

DIGITAL FESTIVAL

MARKET REASEARCH ON DIGITAL ART- & CULTURE EXPERIENCES

UTFØRT AV:

npu Norsk Publikumsutvikling Audiences Norway

Rasmussen Nordic

Photo: Bent René Synnevåg/Festspillene i Bergen

The report contains 3 parts:

Part one: Findings fra C-19 monitor

Part two: Finding from case interviews and market research

Part three: Recommendations

Report from the Covid-19 Monitor Dashboard

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DIGITAL PROGRAMS

Interest, willingness to pay and customer journey among frequent attenders of Norwegian theatres, orchestras and museums i 2020

COVID 19 Audience Outlook Monitor

COVID-19 Monitor is the Norwegian branch of AUDIENCE OUTLOOK MONITOR initiated by **WOLFBROWN** (US)

21 institutions (Dance, Opera, Orchestra, Museum Theatre)

Survey link sendt by email to customers active since january 2018

Wawes of data collection : May/September/November

12399 answers (5054/3889/3376)

Age profile: 55+ (biggest cohort 65-74)

Gender: 7 out of 10 woman

Frequency: 2 to 5 visits per year

50% live together with people who are vulnerable to Covid-19

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Arktisk Filharmoni
Bergen Filharmoniske Orkester
Bergen Nasjonale Opera
BIT Teatergarasjen
Bærum Kulturhus
Dansens Hus
Den Nationale Scene
Den Norske Opera & Ballett
Det Norske Teatret
Henie Onstad Kunstsenter
Hålogaland Teater
Kilden Teater og Konserthus
Munchmuseet
Nationaltheatret
Nordland Teater
Opera Østfold
Oslo Nye Teater
Rogaland Teater
Stavanger Symfoniorkester
Teatret Vårt
Trøndelag Teater

Key findings

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Online participation and attitudes towards paid content

- Older an more frequent «in person» attenders are more actively engaged in online programs in 2020 – but most of them have not been paying for their online cultural experiences.
- There is a shift in attitude among «in person» attenders towards payment for online content. We see a steady growth of users agreeing that online content should be paid for – biggest shift in attitude among older segments.
- Younger and more low frequent attenders are more willing to pay for online programs in general – but not necessarily from theese institutions.
- Willingness to pay is connected both to taste preference (different types of theatre and concerts) and formats (live or pre-recorded)
- Younger and more willing to pay segments are more interested in live stream then prerecorded content
- Those who prefer live stream explain their preference by the artistic quality of here and now and the social added value of togetherness.

Willingness to pay for livestreamed events vrs recorded

- There is an average willingness to pay 200 nok for a single live cultural experience
- There is higher willingness to pay for livestreamed events (>200) then prerecorded events (<200)
- There is a decrease in numbers who paid for digital content in total from May to November, but an increase in payment for ticketed events from september to november. This reflects whats on offer.
- There is an increased demand and willingness to pay for prerecorded events as opposed to livestreamed events when communicated as something you can «see whenever it suits you».
- Age cohort 35 to 54 are willing to pay more than other age groups (three waves)

Findings: Online customer journey – motivations and barriers

- Biggest motivation (73%) in May was cut off /lockdown. (We didnt survey motivation in sept/nov)
- Younger segments are more motivated by **supporting artists** and **sharing experiences with others** then older segments
- Younger segments experience more barriers than older ones – most important barrier for younger segments is **to much screen time already** and **lack of interest in digital art programs**
- Younger segments are more likely to have discovered new artists and artworks online
- Middle aged and younger segments are more likely to have watched online content together with multiple others

Findings: Programs, formats, social and intellectual add-ons

- Respondents across age prefers the concert - live or prerecorded – over programs that goes in depth and behind the scenes
- Younger segments are much more likely to see the difference between live and prerecorded, and to value the social aspect of live over the «whenever it suits you» –offer.
- Over 54% prefers a **live streamed concert as it is performed** (not live on tape) over an edited 90 minutes recording available on demand (27%) and a shorter version with musician insights (19%). «**Available on demand» has most supporters in the age cohort between 55 and 75**.
- Printed programs and interviews with musicians and composers in the intermssion can enhance the experience a little on average between the age groups. **Chat-options with musicians and social interaction between audiences is considered to detract from the experience by most** – and across age groups.
- **Only 2 out of 10 prefer to watch digital concerts from their local music organisation**. Near 8 out of 10 have no preference – meaning they are up for grabs by other producing organizations online.

#1 Who are the respondents?

Finding #1: Respondents are high frequent «in person» users of physical events. They represent the institutions most loyal customers. They are not necessarily representative for audiences in the market for digital art and culture in general.

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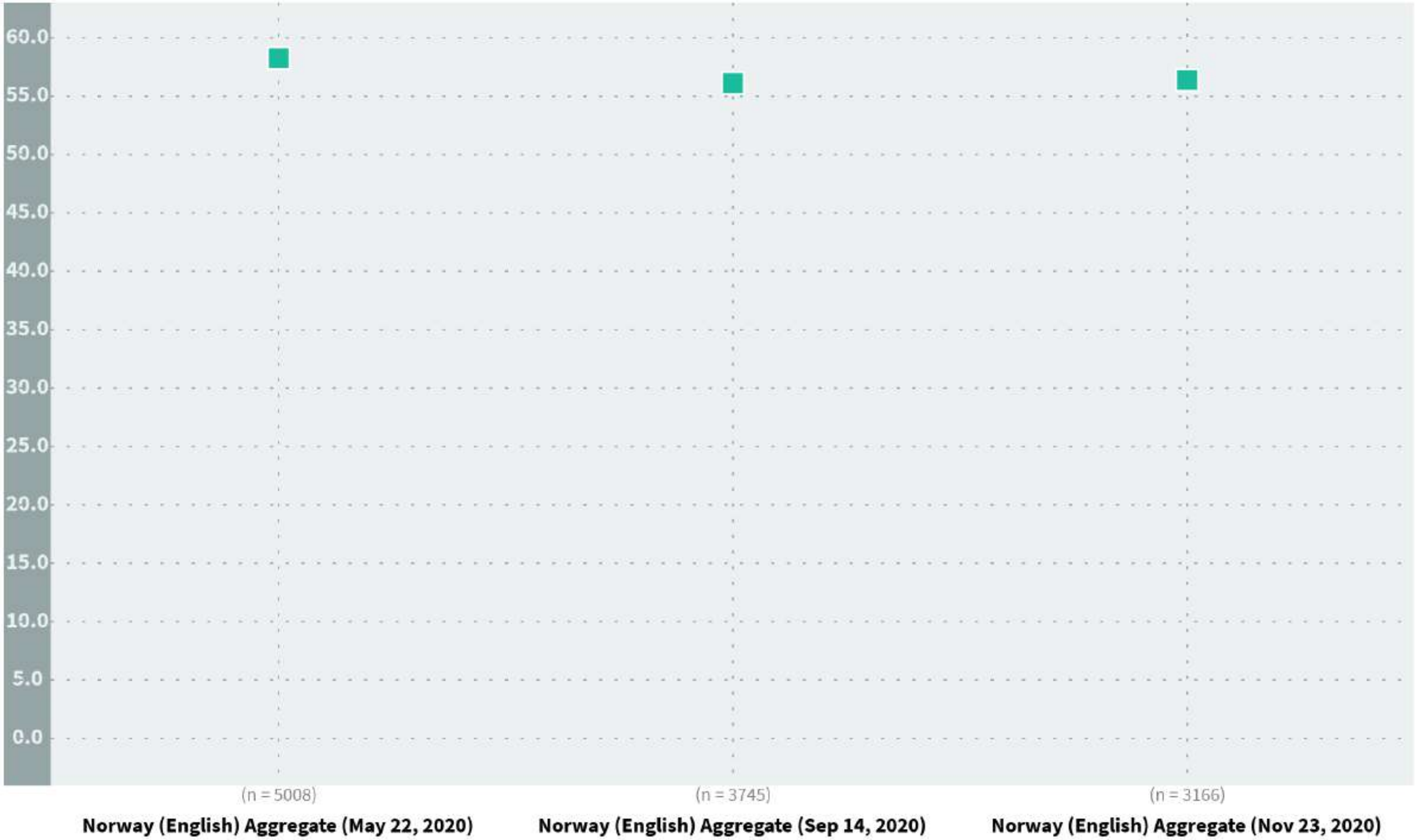
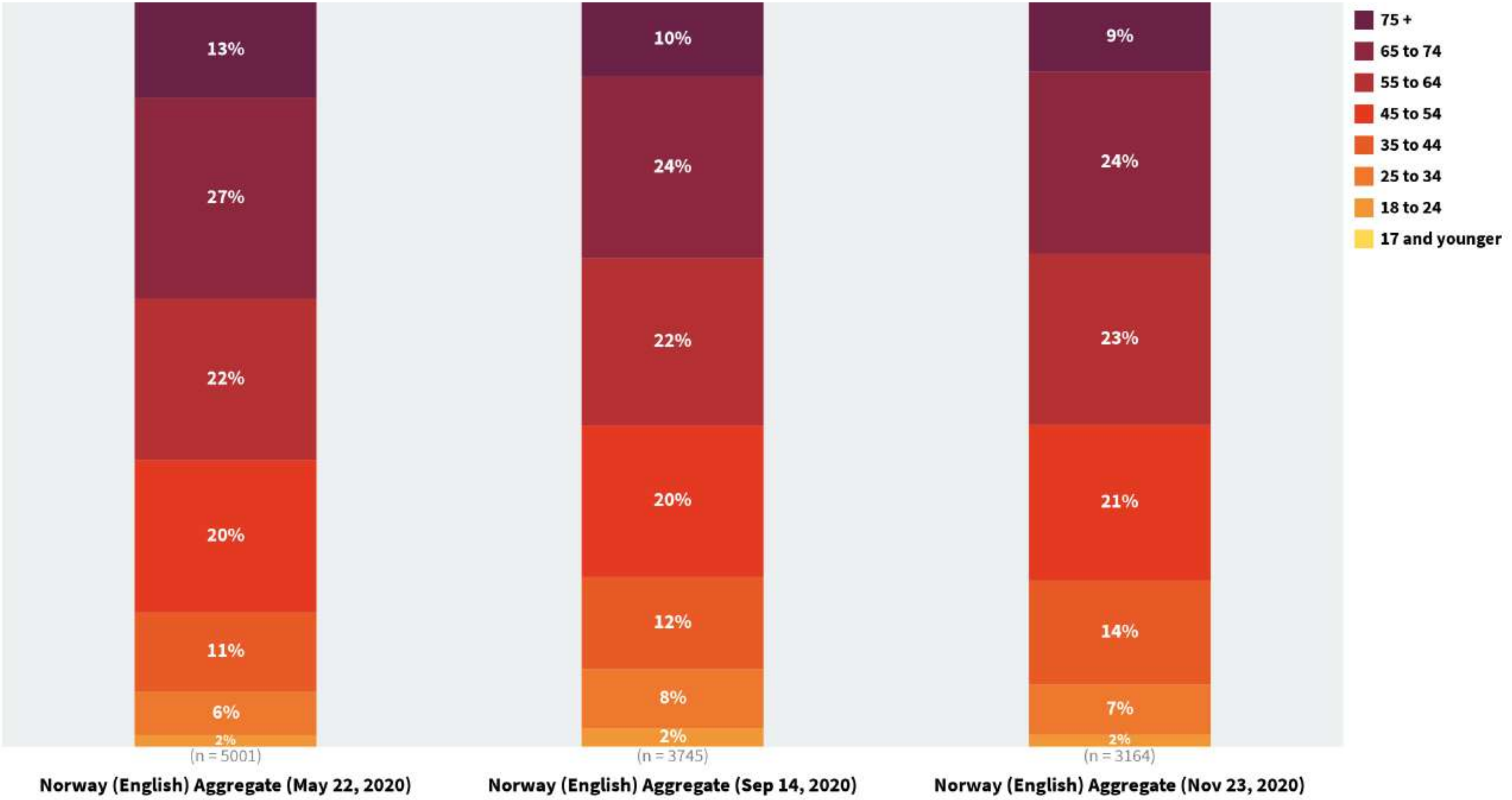
Average Age



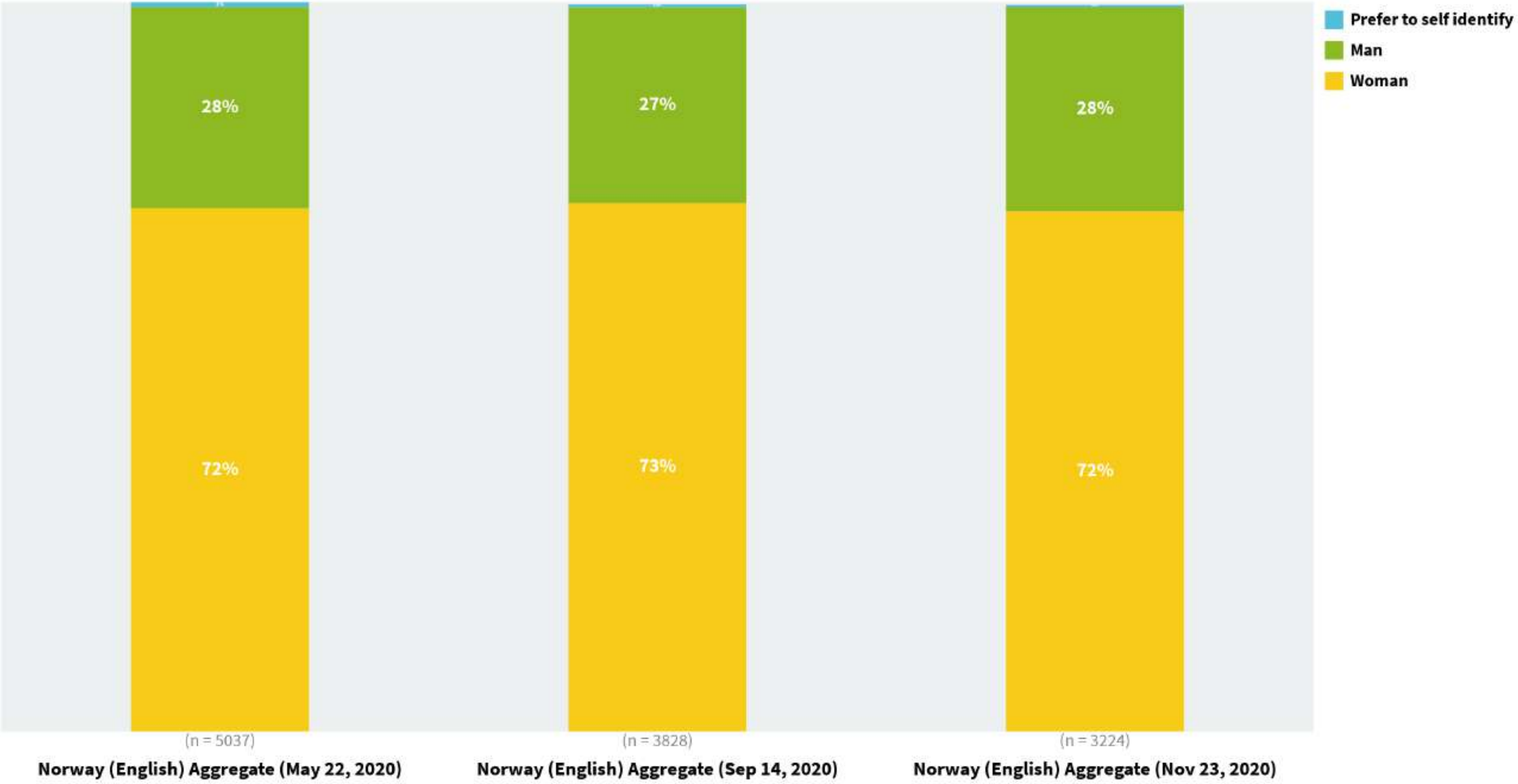
60.0
55.0
50.0
45.0
40.0
35.0
30.0
25.0
20.0
15.0
10.0
5.0
0.0
(n = 5008)
Norway (English) Aggregate (May 22, 2020)
(n = 3745)
Norway (English) Aggregate (Sep 14, 2020)
(n = 3166)
Norway (English) Aggregate (Nov 23, 2020)

Age - Eight Cohorts

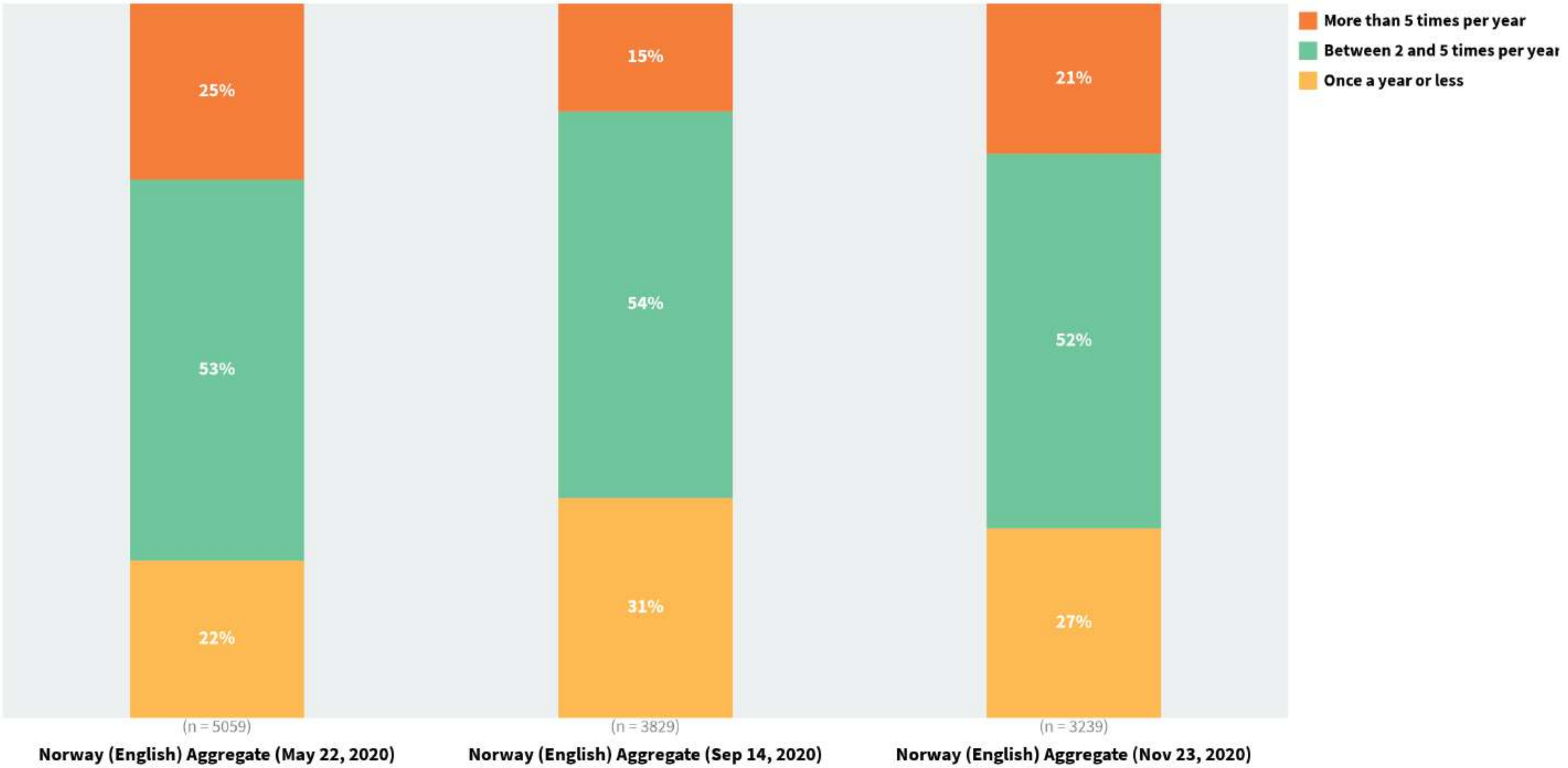


What is your gender? (select multiple)

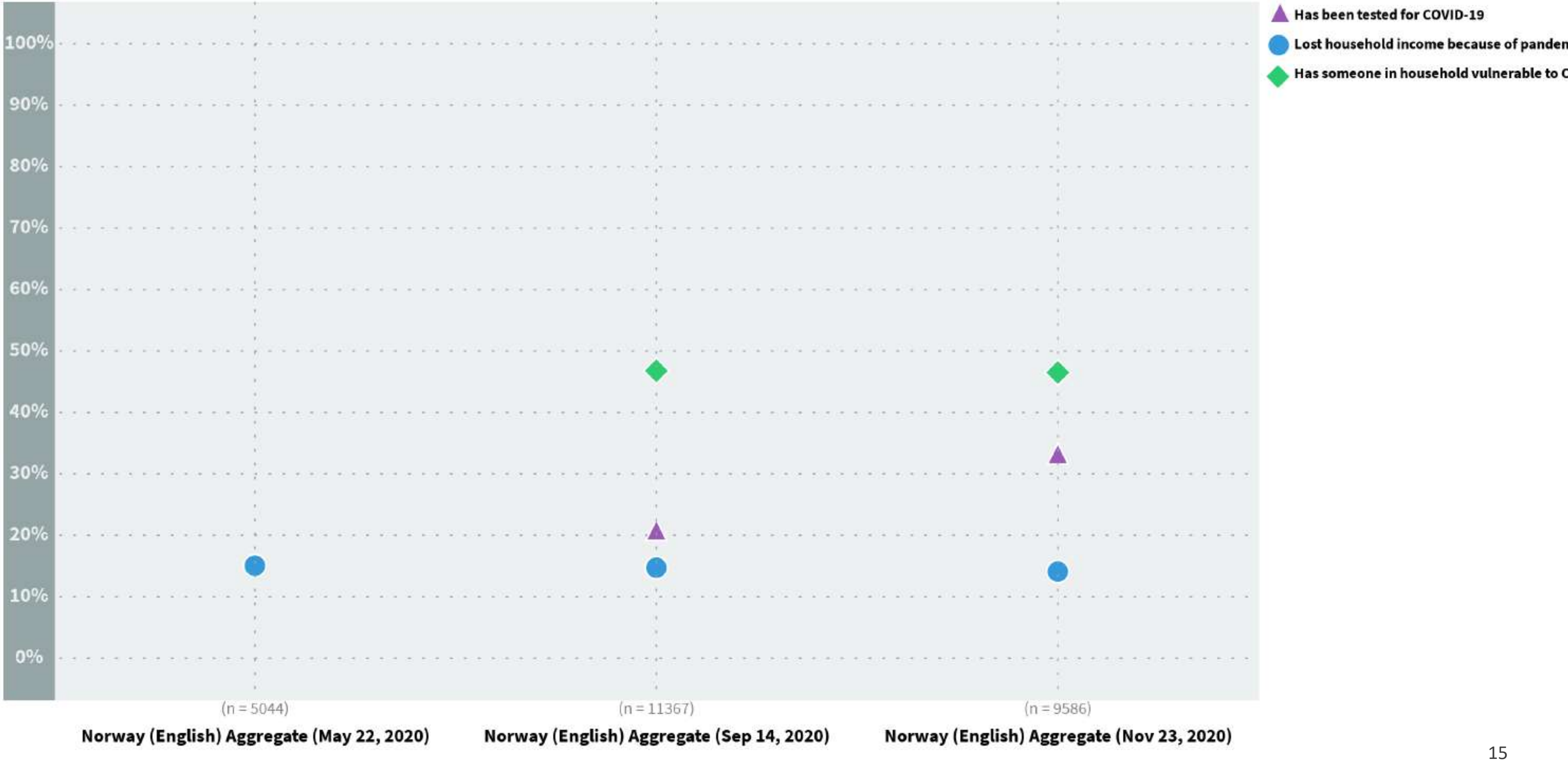
Note: columns on 'select multiple' questions will not total 100%.



How often do you visit us in a normal year?

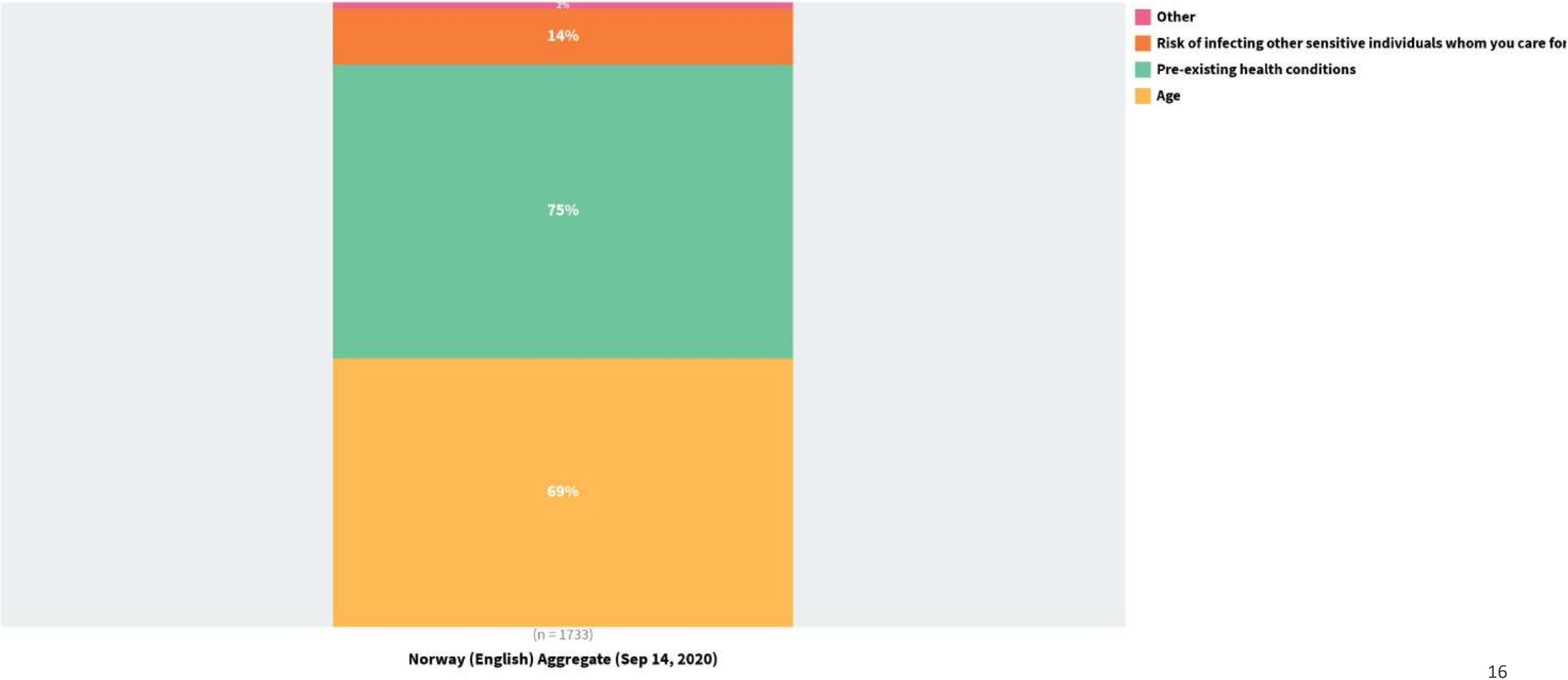


Personal Impact of COVID-19



What makes someone in your immediate family/household vulnerable to a serious health outcome from contracting COVID-19? (select multiple)

Note: columns on 'select multiple' questions will not total 100%.



2. Readiness to return «in person»

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Finding #2: There is a decline in readiness to return «in person» at physical events – especially in older age groups.

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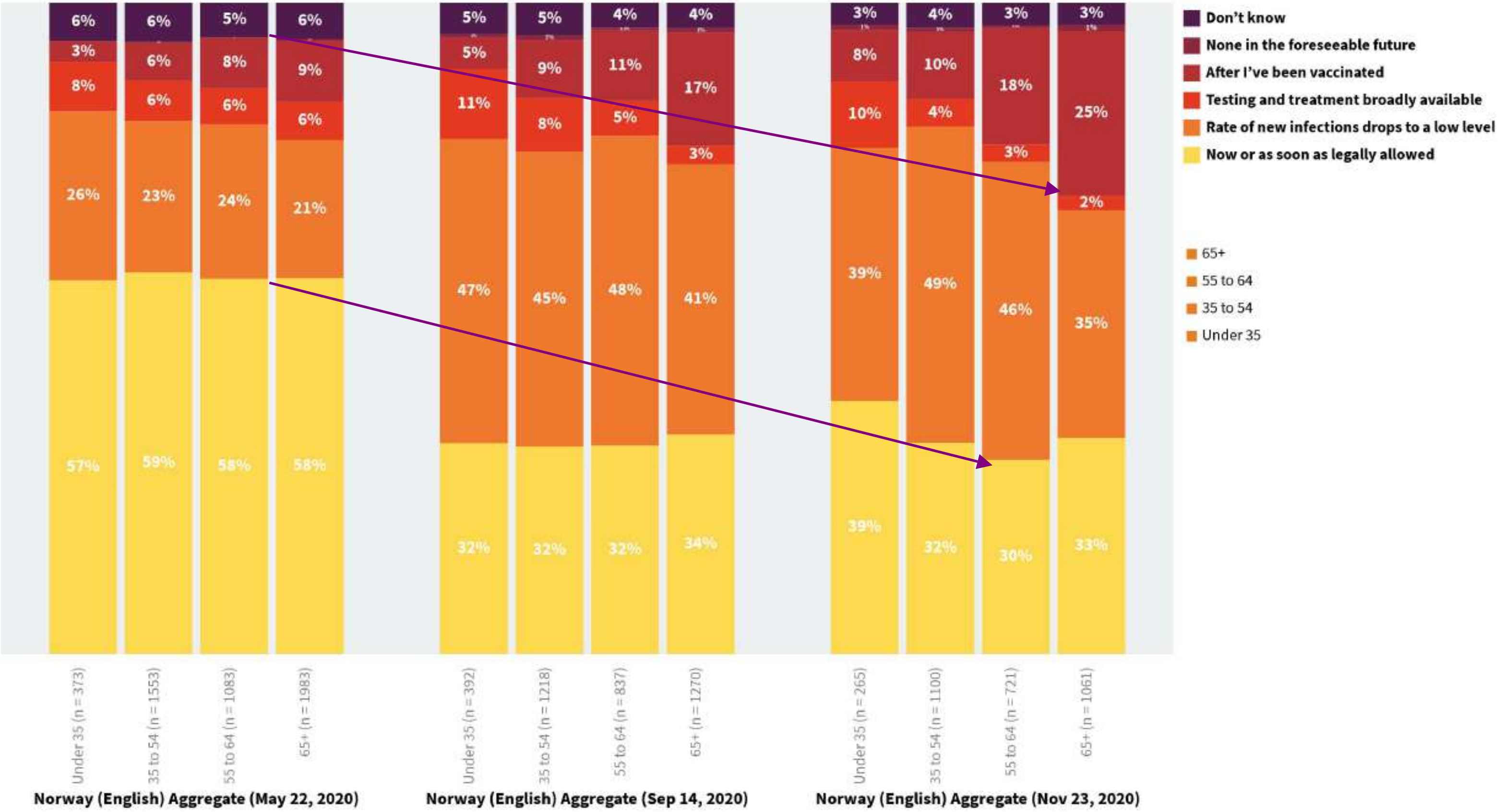
A significant drop in readiness to return «in person»

- 6 out of 10 was ready to return in person as soon as it was legally allowed in May. In November 6/7 out of 10 wil NOT return as soon as it is legally allowed.
- In May and September there is no significant differences between age groups
- In november there is a significant difference between younger and older segments
- Younger segments are now more ready to return that older, and even more ready to return compared to themselves in september.
- Younger segments will probably return to the physical programs before the older.

Under what conditions will you resume attending arts and cultural events?

This question also appears on Demand for Live Programming: Conditions for Return

Filter: Age (4 cohorts)



3. Is there an increase in attendancy at at digital programs from May to November?

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Finding #3: Attendancy rates are going down but that reflects whats on offer.

High frequency is more relevant than age. People who are used to go to the theatre and concert hall in person are more likely to watch programs online.

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Note on supply and demand for digital across the waves.

Changing habits of participation reflects what was on offer

In May the there was an outburst of digital content from the supply side never seen before due to the lockdown.

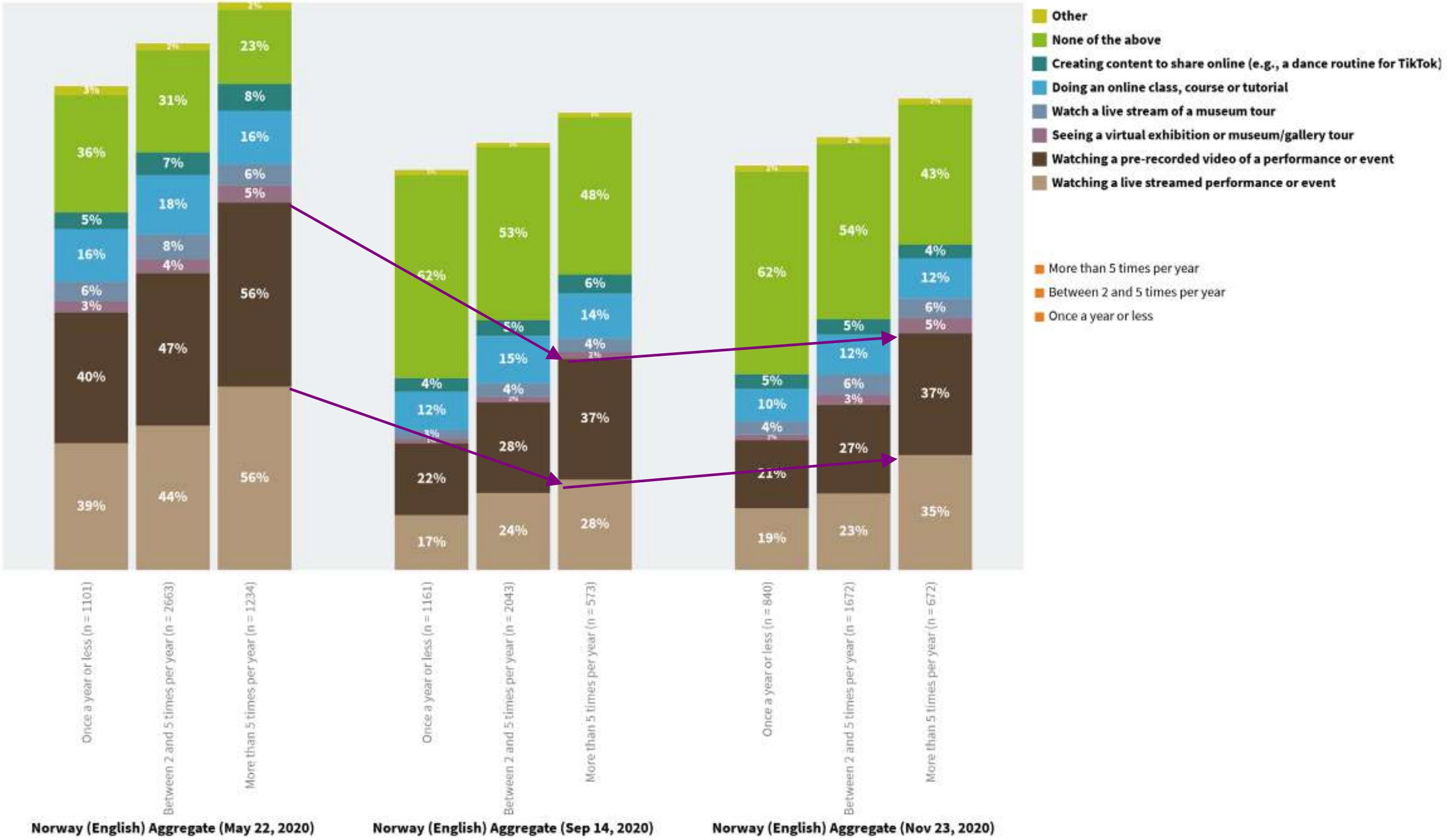
In September the supply side was not very digitally active – focussing on getting “back to normal” – securing audiences that it is safe to return to their physical venues.

In November there was a new lock-down situation in many areas. The supply side was a bit more digitally active (like The Norwegian Theatre offering direct stream of performances), but the supply side was not near as active as in April and May.

During the past two weeks, have you participated in any of the following online or digital arts & culture experiences? (select multiple)

Filter: Attendance Frequency

Note: columns on 'select multiple' questions will not total 100%.

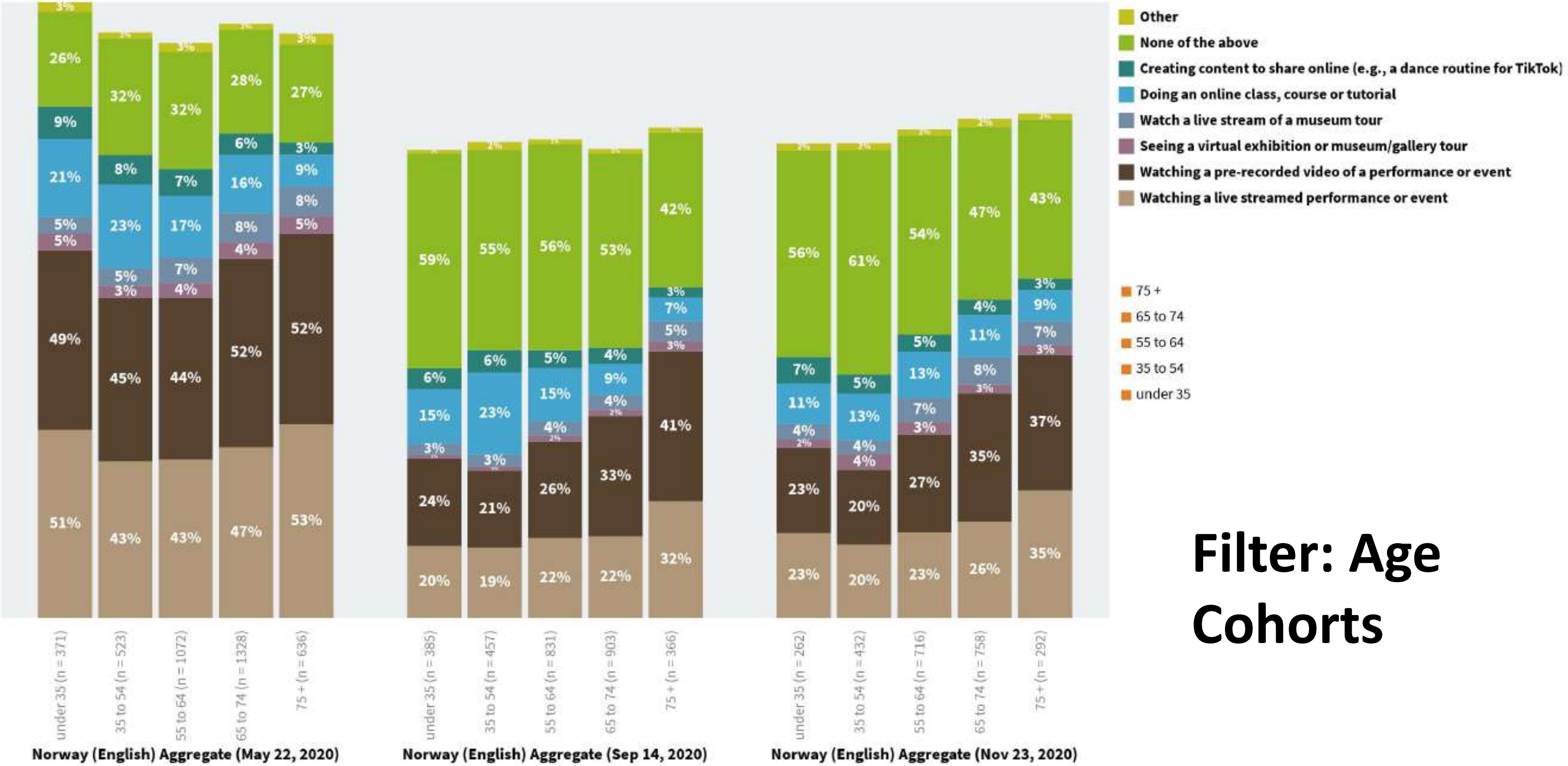


Filter: Attendance Frequency

During the past two weeks, have you participated in any of the following online or digital arts & culture experiences? (select multiple)

Filter: Age Cohort

Note: columns on 'select multiple' questions will not total 100%.



Filter: Age Cohorts

4. Digital content as stopgap solution or a permanent option?

Finding #4: There is a growing expectation for digital content to become a permanent solution after the pandemic is over. (Lower frequency segments are more likely to expect digital to be a permanent solution).

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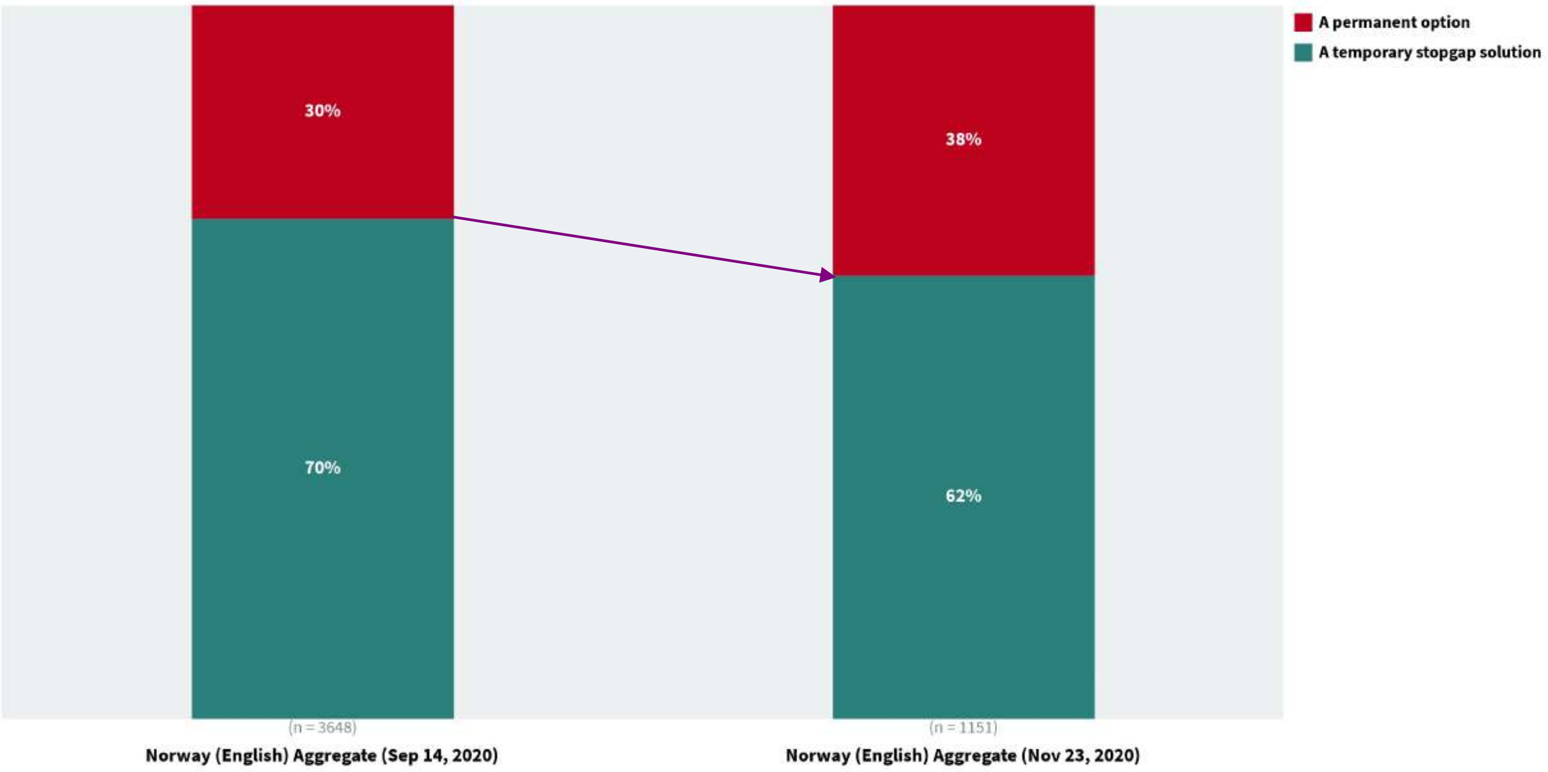
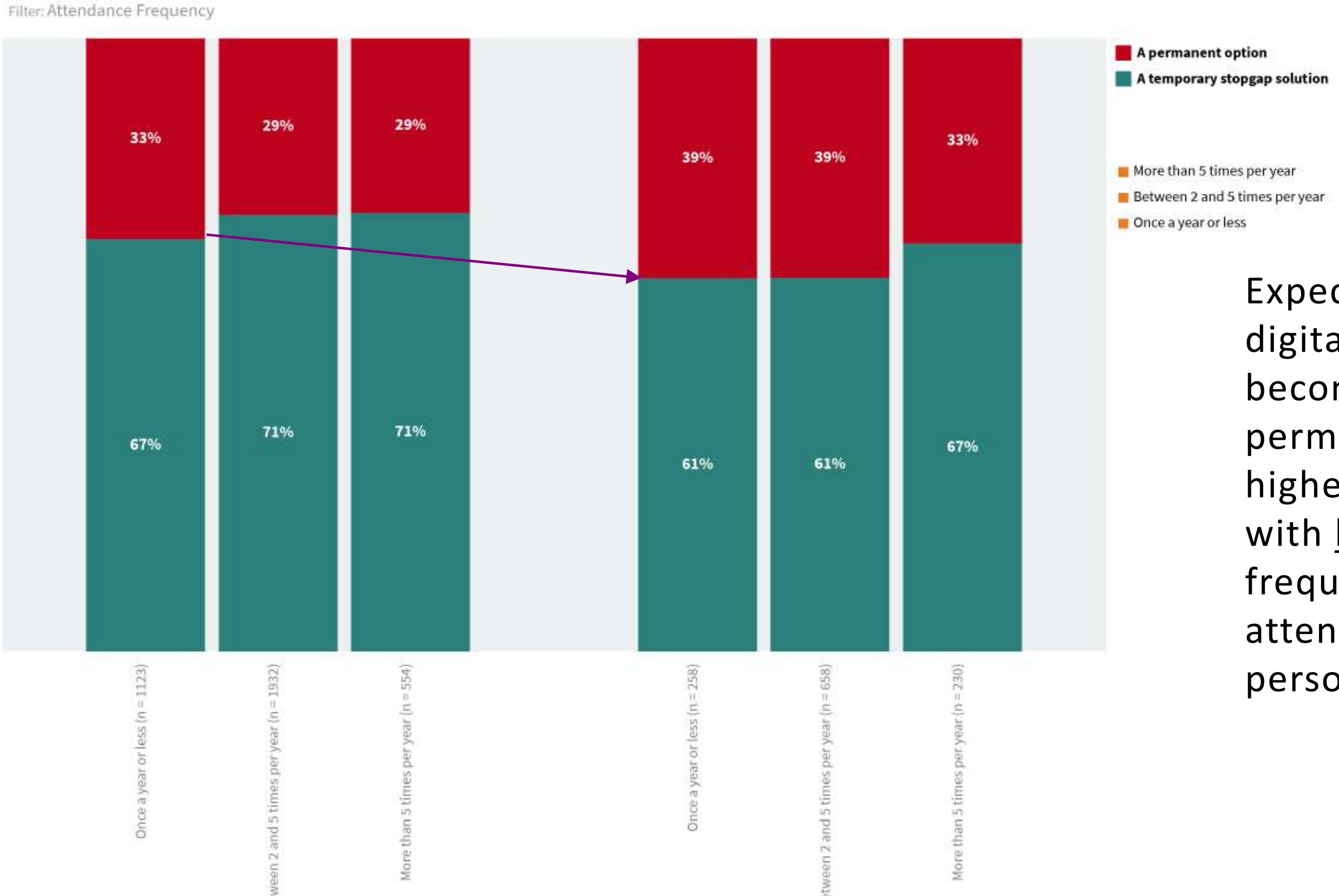
Question: Do you consider digital performances and concerts as temporary stopgap solutions, or is it something you want to enjoy continuously even after the pandemic is over and the institutions can reopen fully? (Choose one)

Likely" to purchase tickets knowing they would watch some or all of the performances at home via live stream.



Likely" to purchase tickets knowing they would watch some or all of the performances at home via live stream.



Expectations for digital content to become a permanent option is higher in segments with lower frequency of attendance in person

5. Preference for participation online «from home» as opposed to different types of indoor venues and outdoor.

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Finding #5: There is a growing preference for attending online from home in all age groups – older segments are likely to report even higher interest than younger

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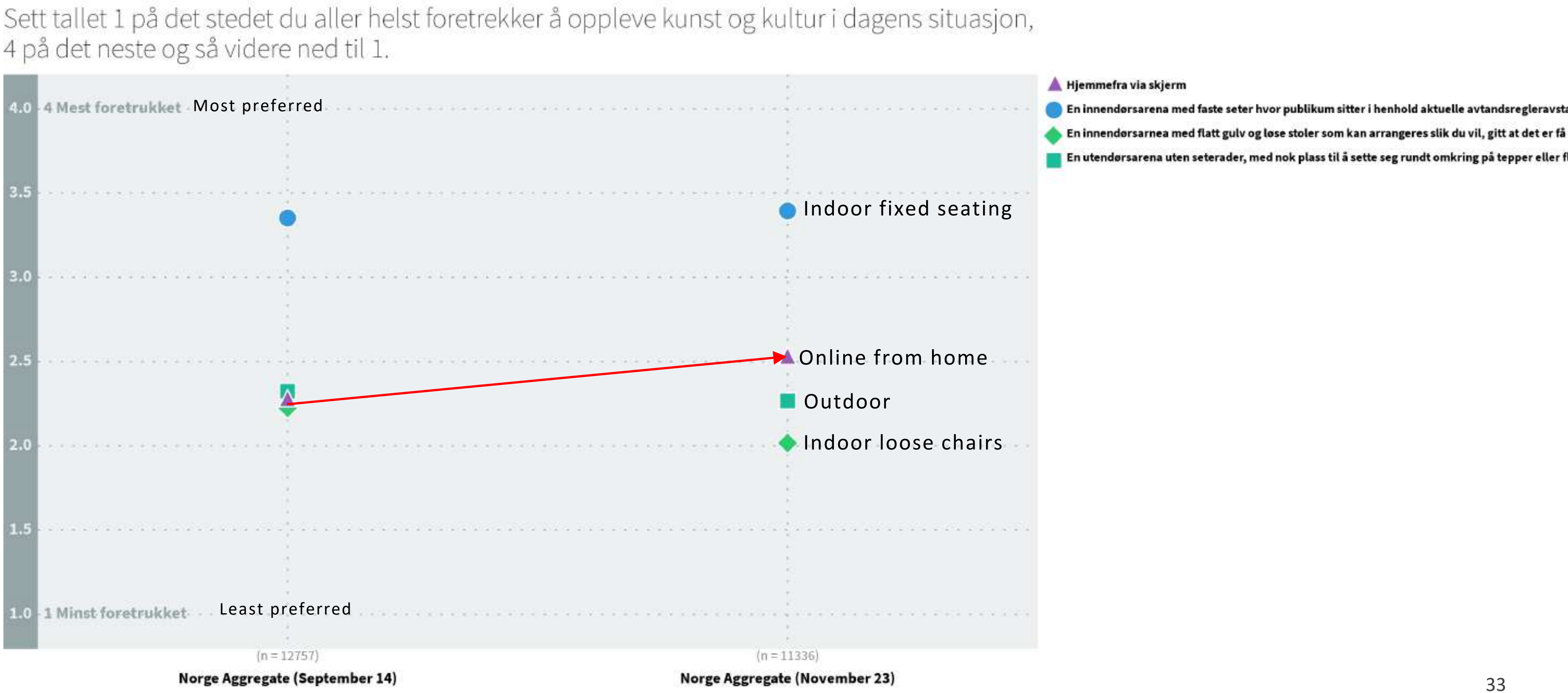
We asked respondents to rank the following ways to watch a live event in the order they´d prefer today

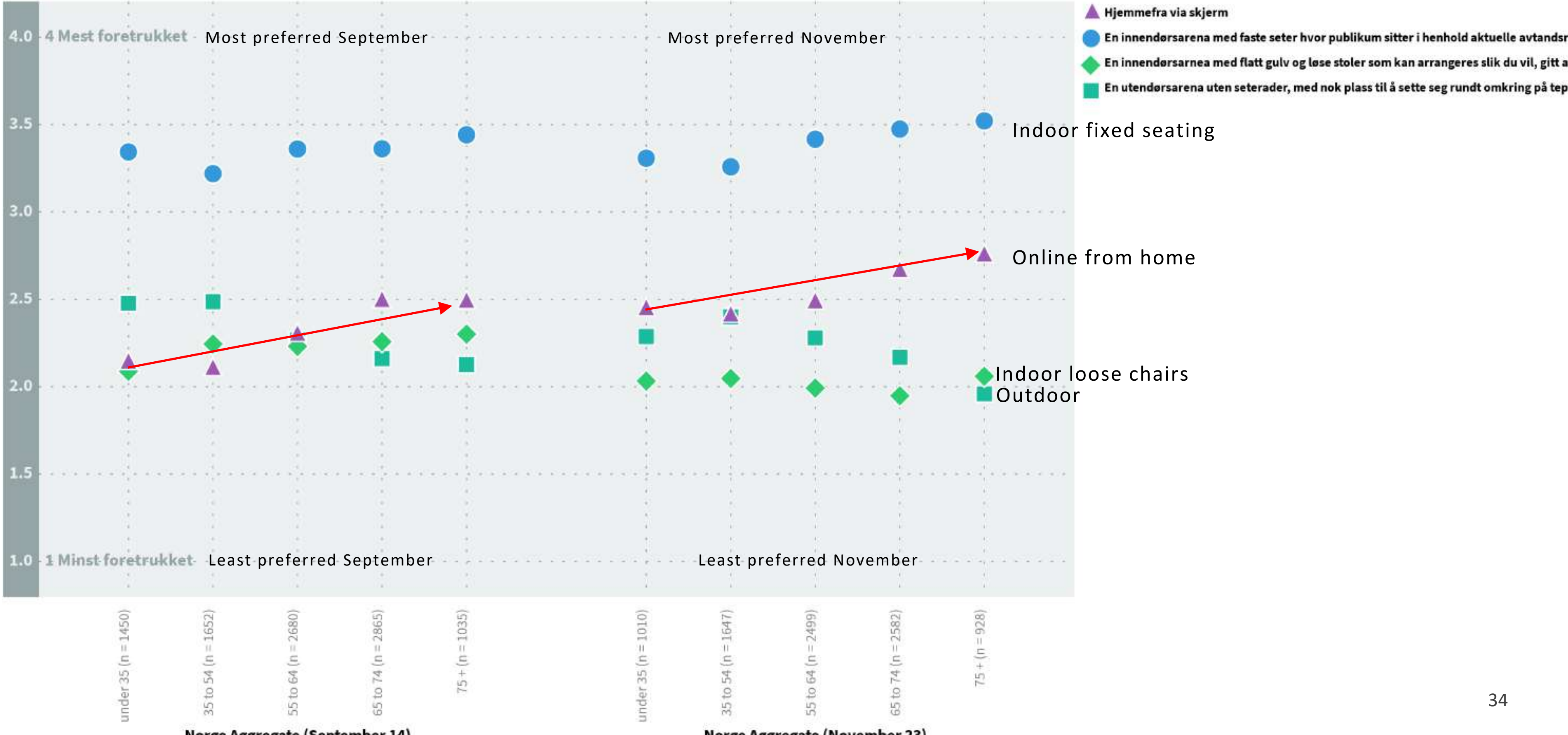
- An **outdoor** venue with lawn space only, assuming there is adequate space for people to spread out on blankets or lawn chairs
- An **indoor, flat-floor space with loose chairs** that you can arrange however you like, assuming there is adequate space for people to spread out
- An **indoor venue with fixed seating**, with audience members seated according to current social distancing guidelines
- A live streamed digital program that you can **watch from home**

Rank the following ways to watch a live event in the order you'd prefer today



Rank the following ways to watch a live event in the order you'd prefer today

Filter : Age from under 35 to 75+



6. Willingness to pay <u>on average for live and recorded</u>- over time – by frequency – and by age

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Finding #6: Older people report paying less for digital content then younger segments. All segments report <u>higher willingness to pay for live</u> performances then prerecorded.

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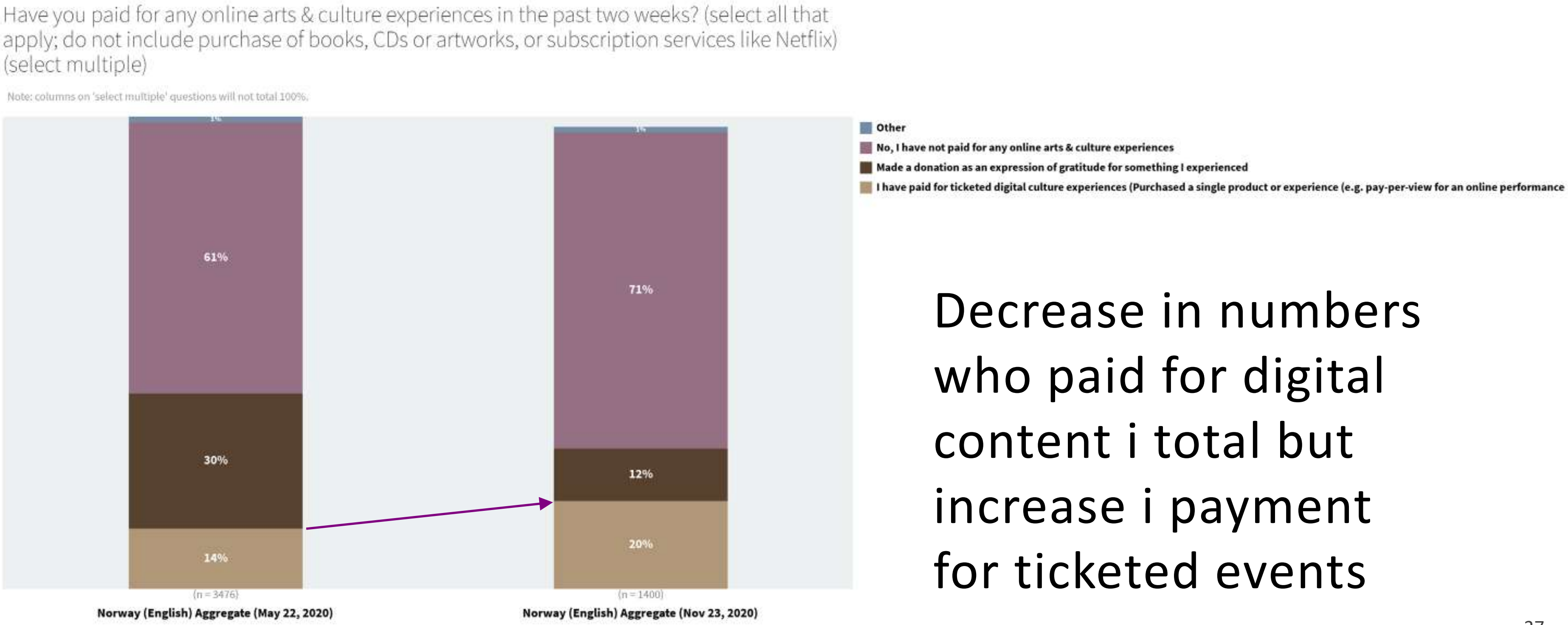
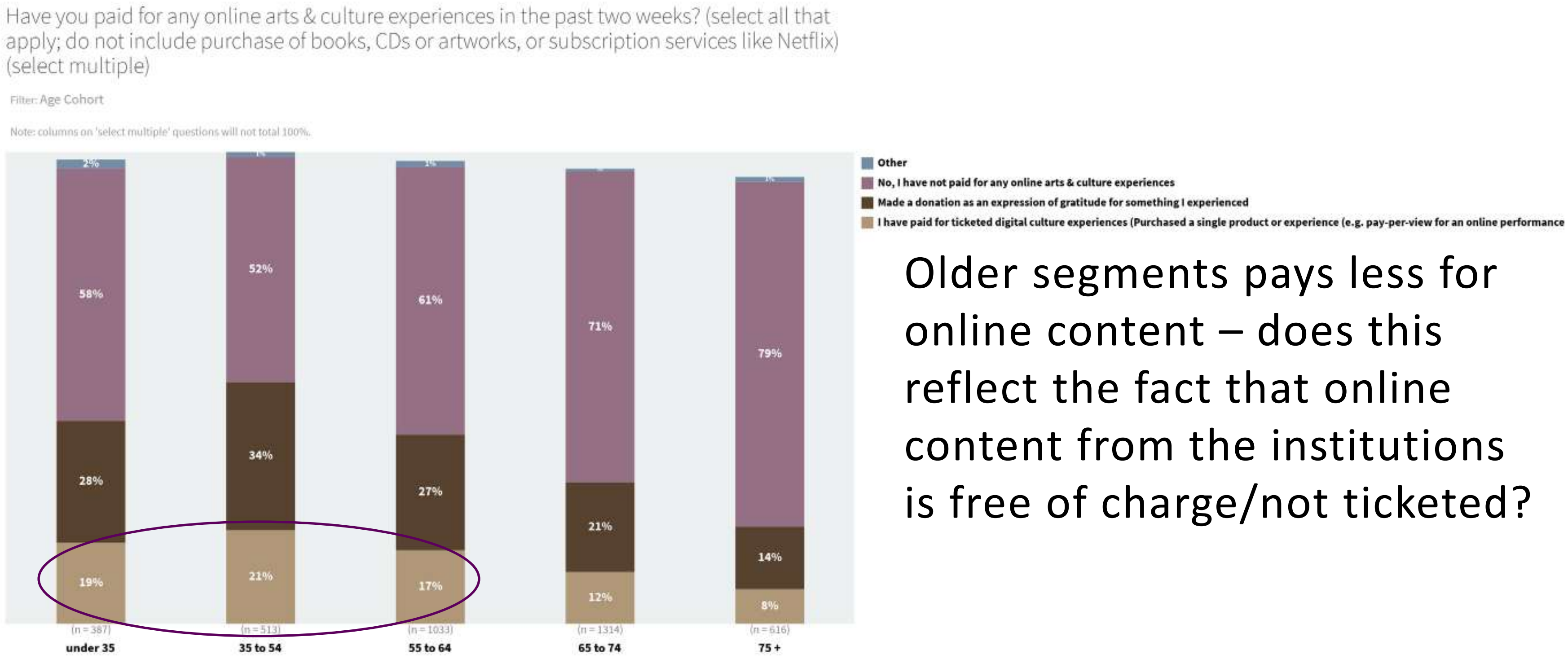
Paid for online content last two weeks



Decrease in numbers who paid for digital content i total but increase i payment for ticketed events

Paid for online content last two weeks – by age

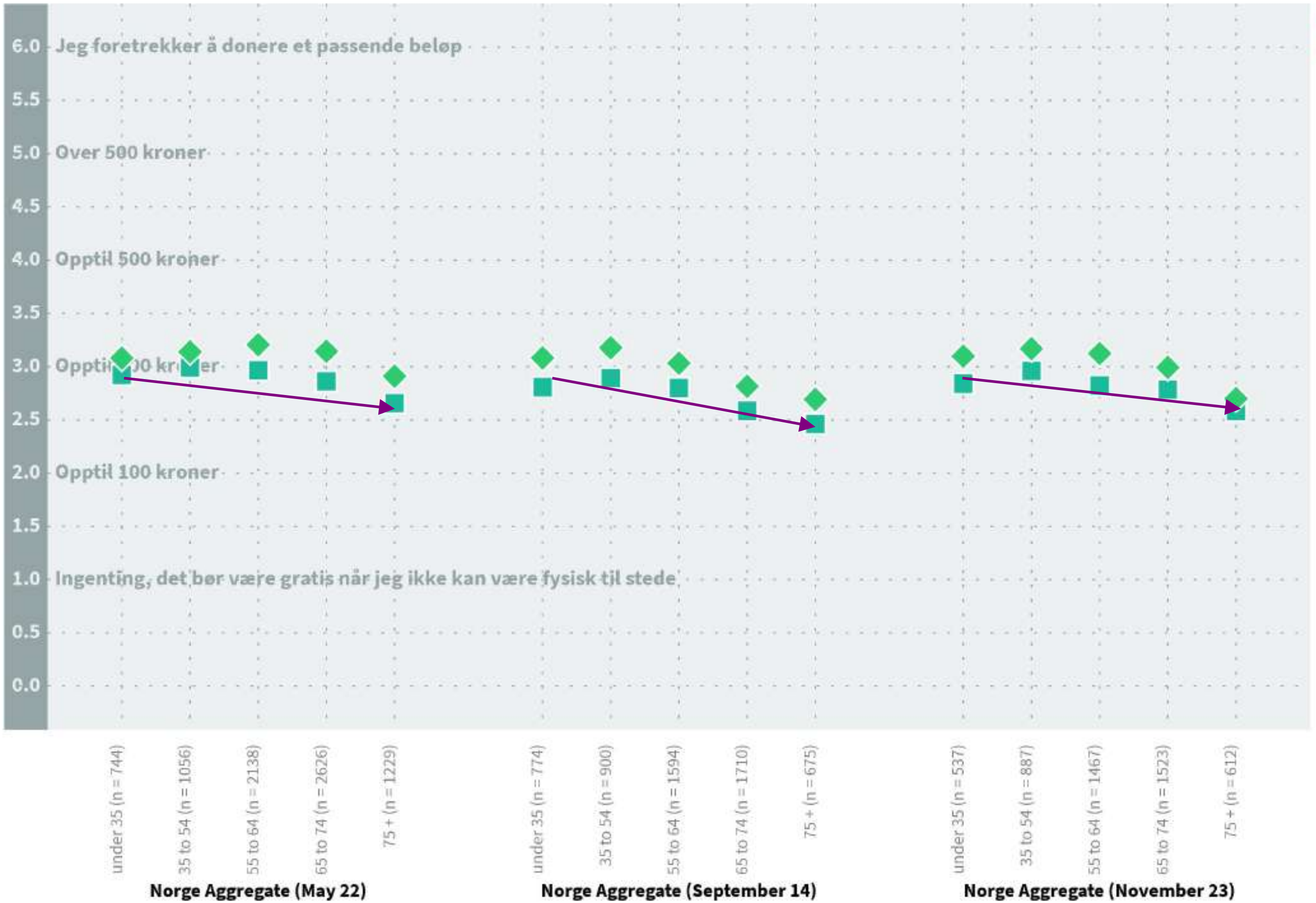


Older segments pays less for online content – does this reflect the fact that online content from the institutions is free of charge/not ticketed?

Willingness to pay for digital cultural events - live versus prerecorded

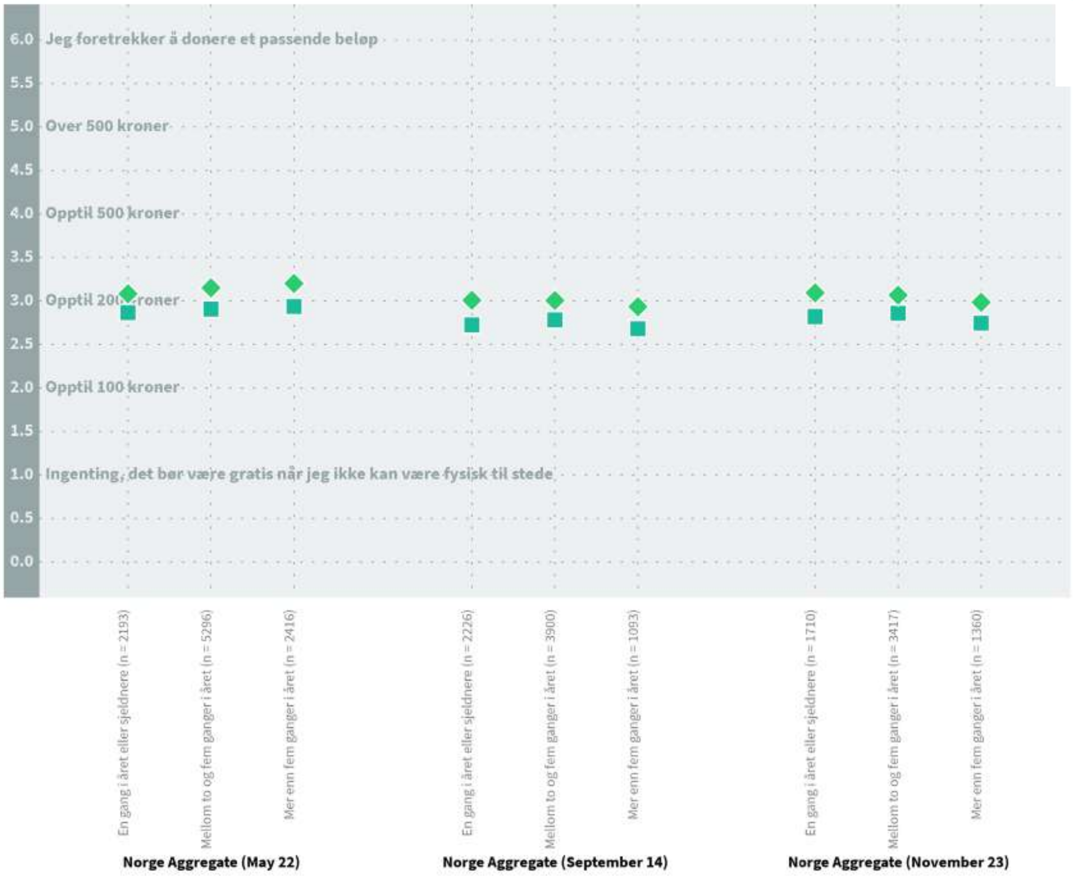
There is an average willingness to pay nok 200,- for a digital cultural event, 200+ for live performance

Willingness to pay for digital cultural events - live versus prerecorded



Older segments are less willing to pay every wave – age cohort 35 to 54 are most willing

Willingness to pay for digital cultural events - live versus prerecorded



No big differences in willingness to pay filtered by frequency

7. Is preference for live over pre-recorded based on age or frequency?

Finding #7 Low frequent and younger segments are more likely to see a big difference between live and recorded. The younger the more likely to prefer live.

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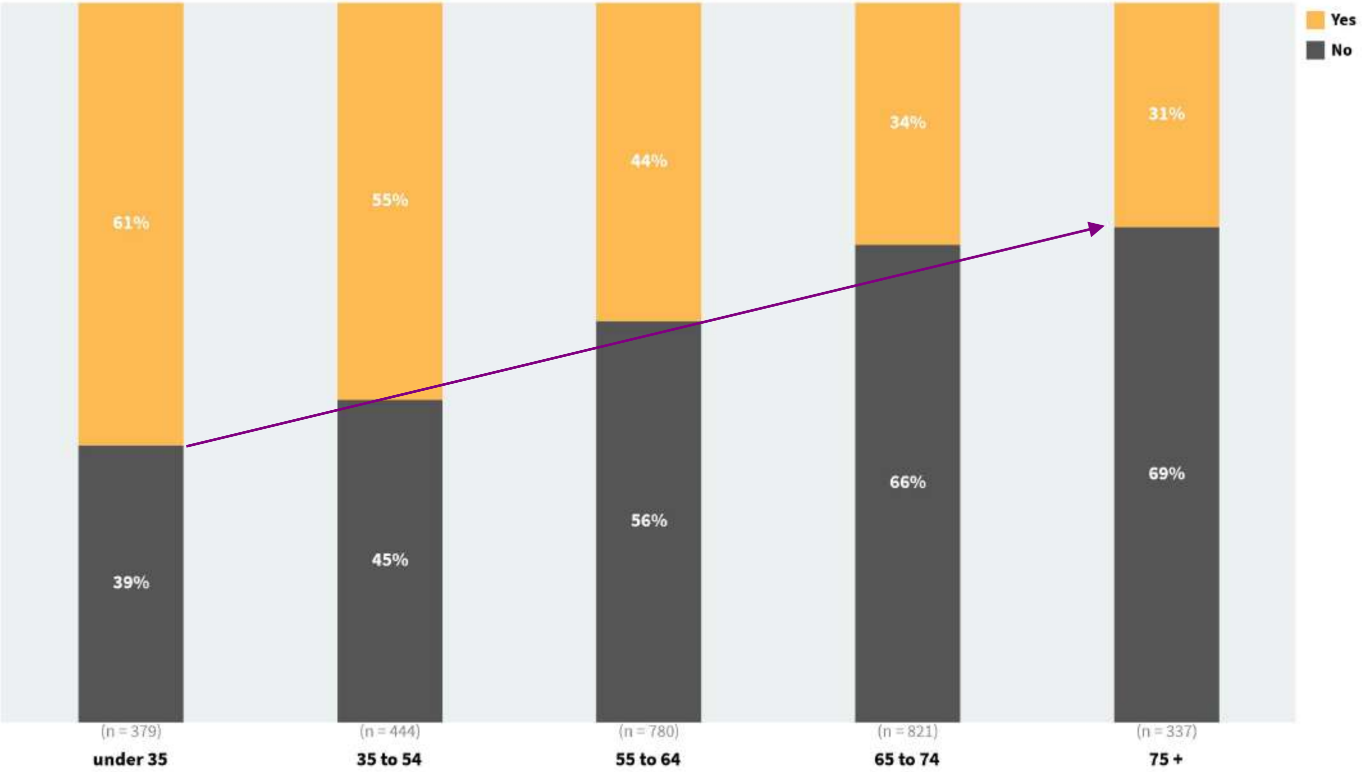
Do you see any value in watching a "live streamed" performance that you cannot get from watching a recording of the same performance at a later date?

This question was only asked of people who received the survey from a performing arts organization.

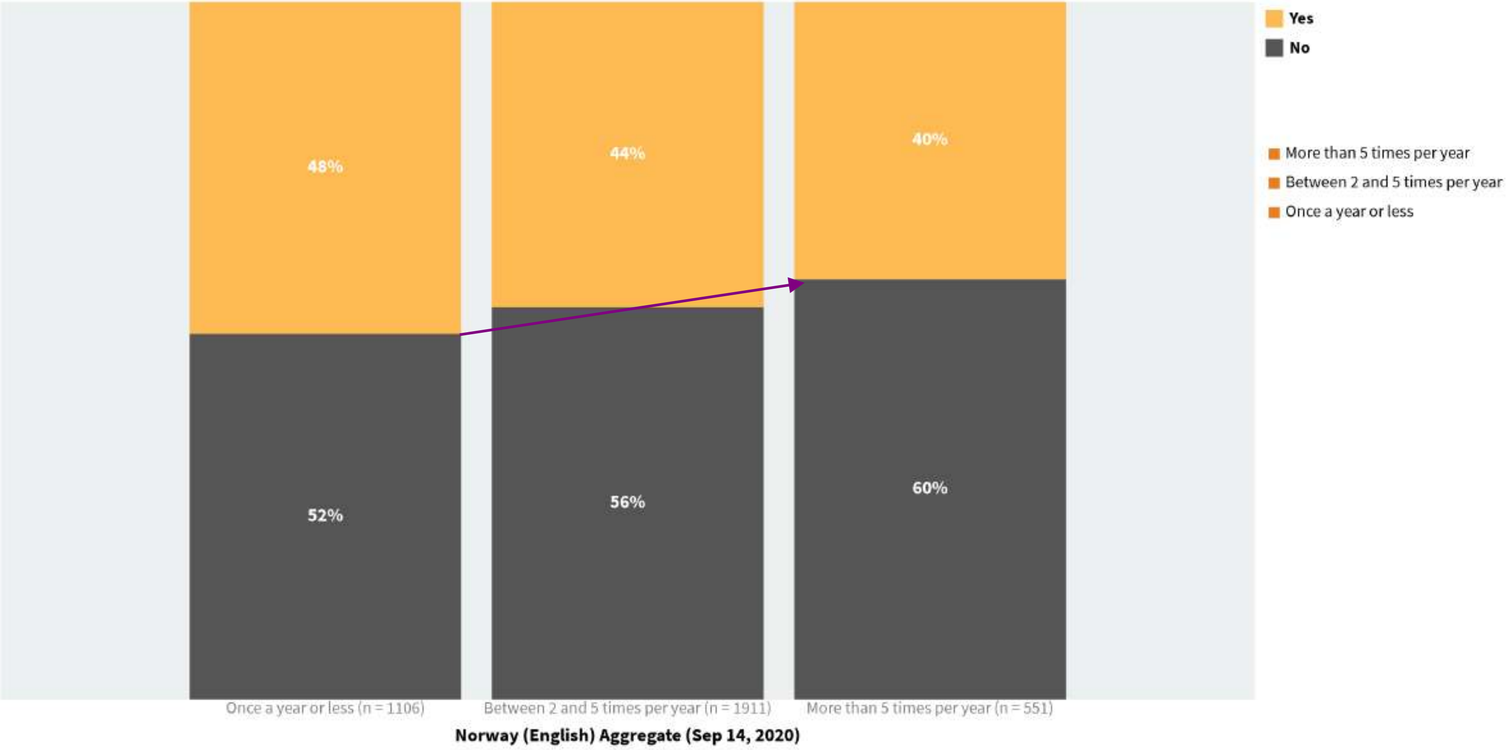
Filter: Age Cohort



Do you see any value in watching a "live streamed" performance that you cannot get from watching a recording of the same performance at a later date?

This question was only asked of people who received the survey from a performing arts organization.

Filter: Attendance Frequency



8. How has the marked for paid digital events developed over time?

Finding #8: The is an increased marked for paid digital events: more respondents are willing to pay in November compared to May, both for live and prerecorded content.

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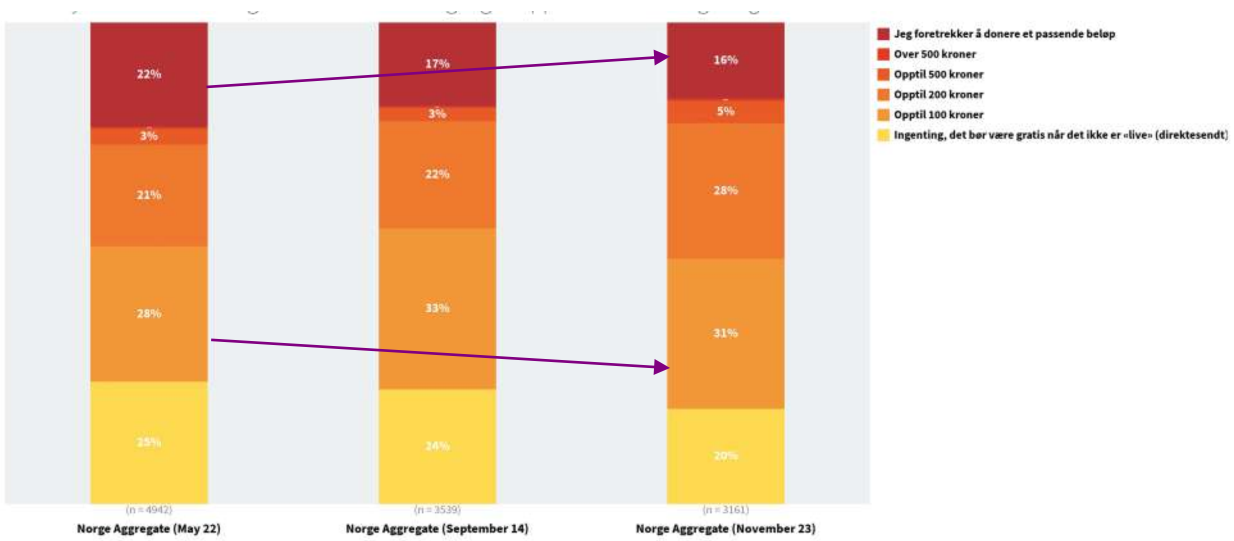
Prerecorded

What would you be willing to pay for a prerecorded digital cultural event?



I prefer to donate whatever I find appopriate
Over 500 kroner
Up to 500 kroner
Up to 200 kroner
Up to 100 kroner
Nothing, it should be free when its not live

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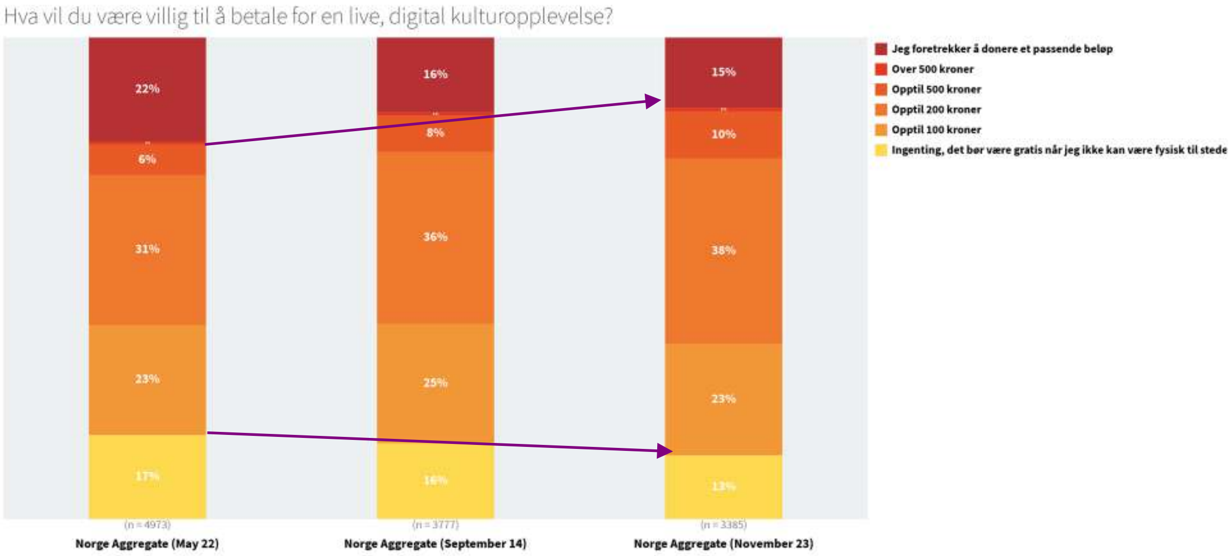
Live performance

What would you be willing to pay for a live streamed cultural event?



I prefer to donate whatever I find appopriate
Over 500 kroner
Up to 500 kroner
Up to 200 kroner
Up to 100 kroner
Nothing, it should be free when its not live

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9. Who is more willing to pay for digital evnts by November?

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Finding #9: Younger segments are more willing to pay then older, even if they visit digital events less frequently. There seems to be a generation gap when it comes to attitudes towards payment for digital content.

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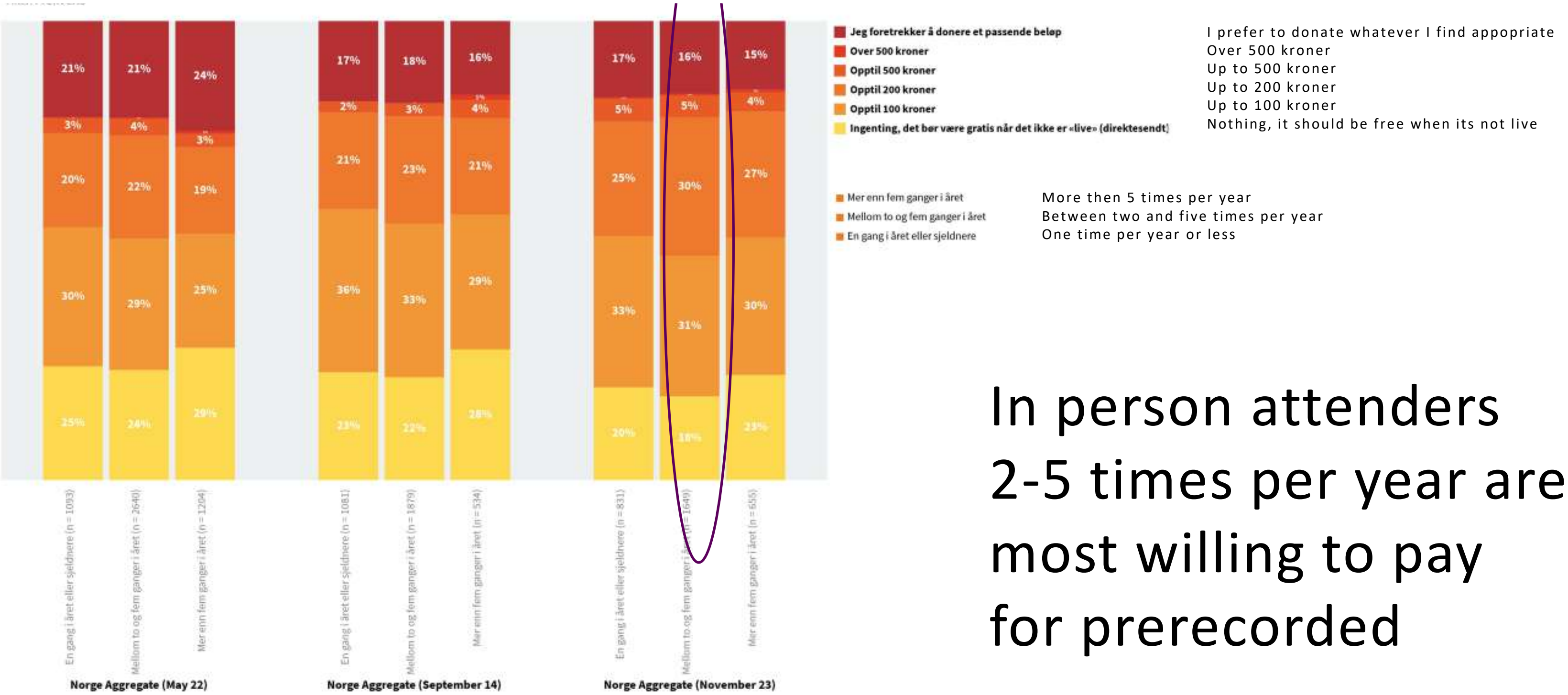
Prerecorded by frequency

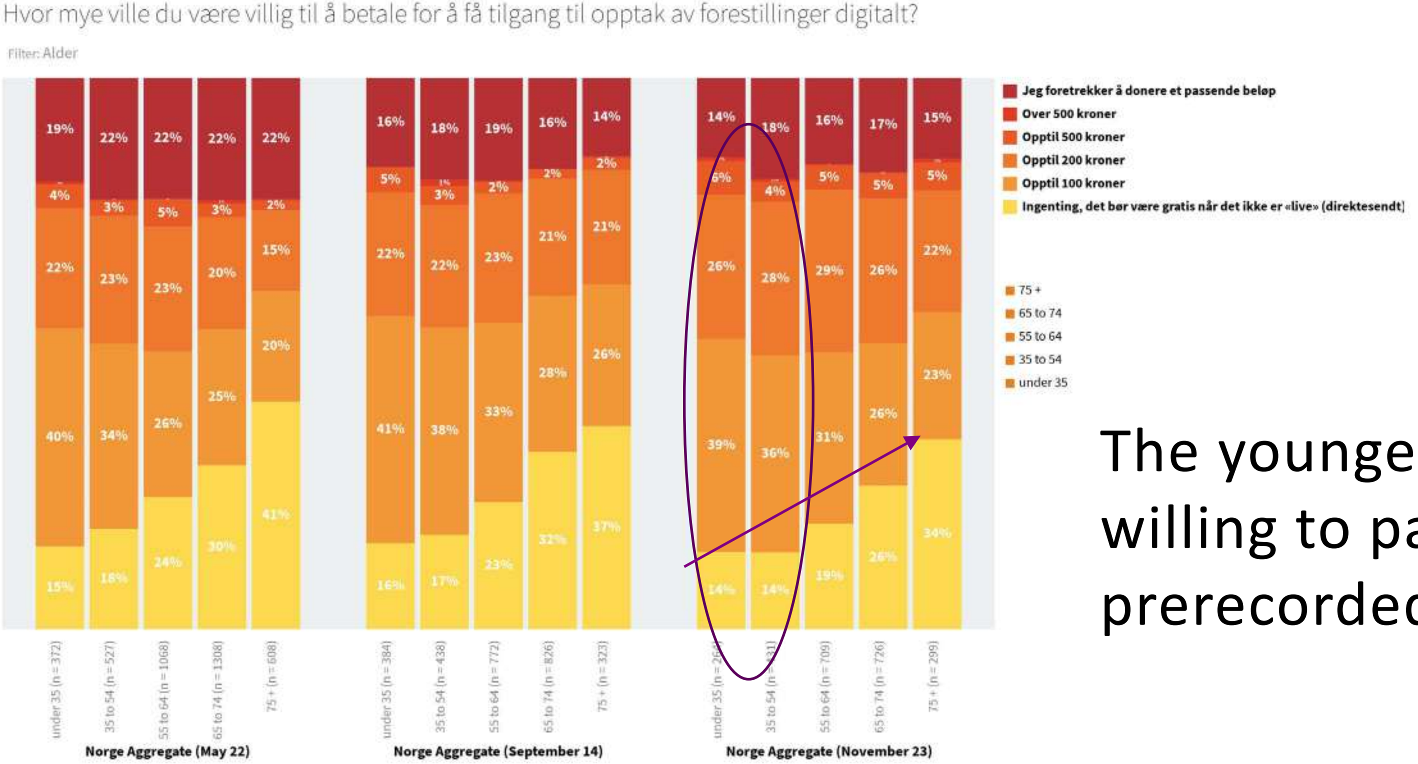
What would you be willing to pay for a prerecorded digital event?



In person attenders 2-5 times per year are most willing to pay for prerecorded

Prerecorded by age

What would you be willing to pay for a prerecorded digital event?

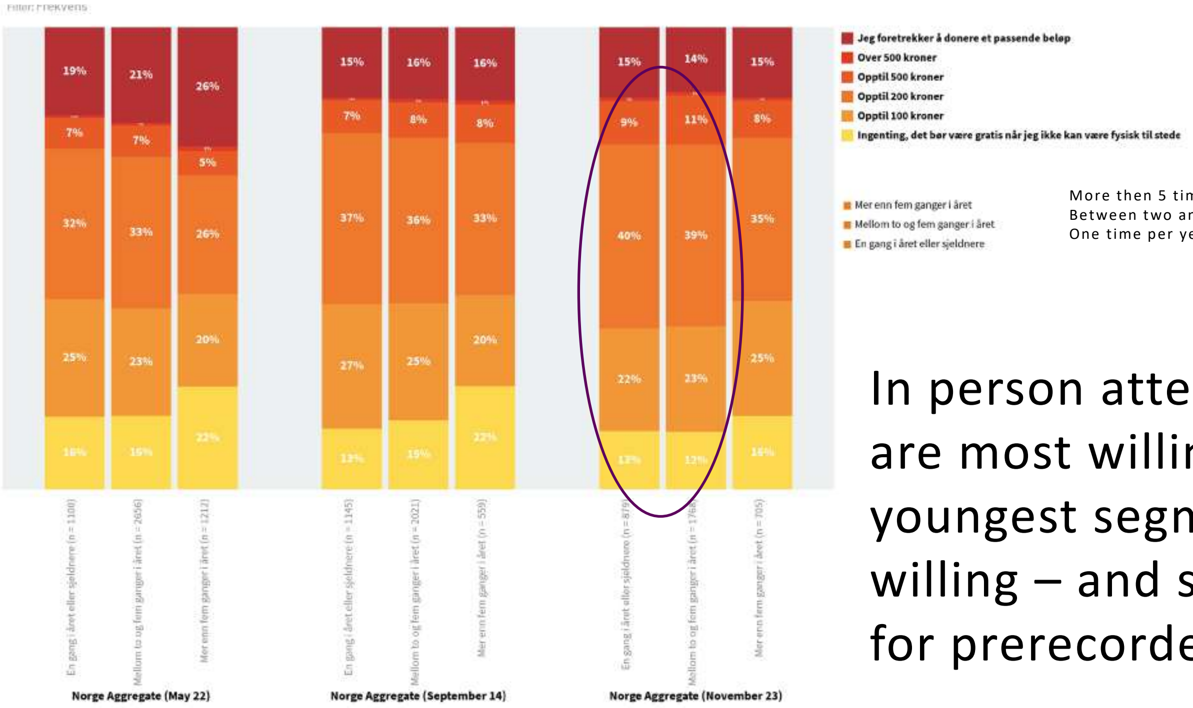


I prefer to donate whatever I find appopriate
Over 500 kroner
Up to 500 kroner
Up to 200 kroner
Up to 100 kroner
Nothing, it should be free when its not live

The younger the more willing to pay for prerecorded

Live performance by frequency

What would you be willing to pay for a live streamed digital event?



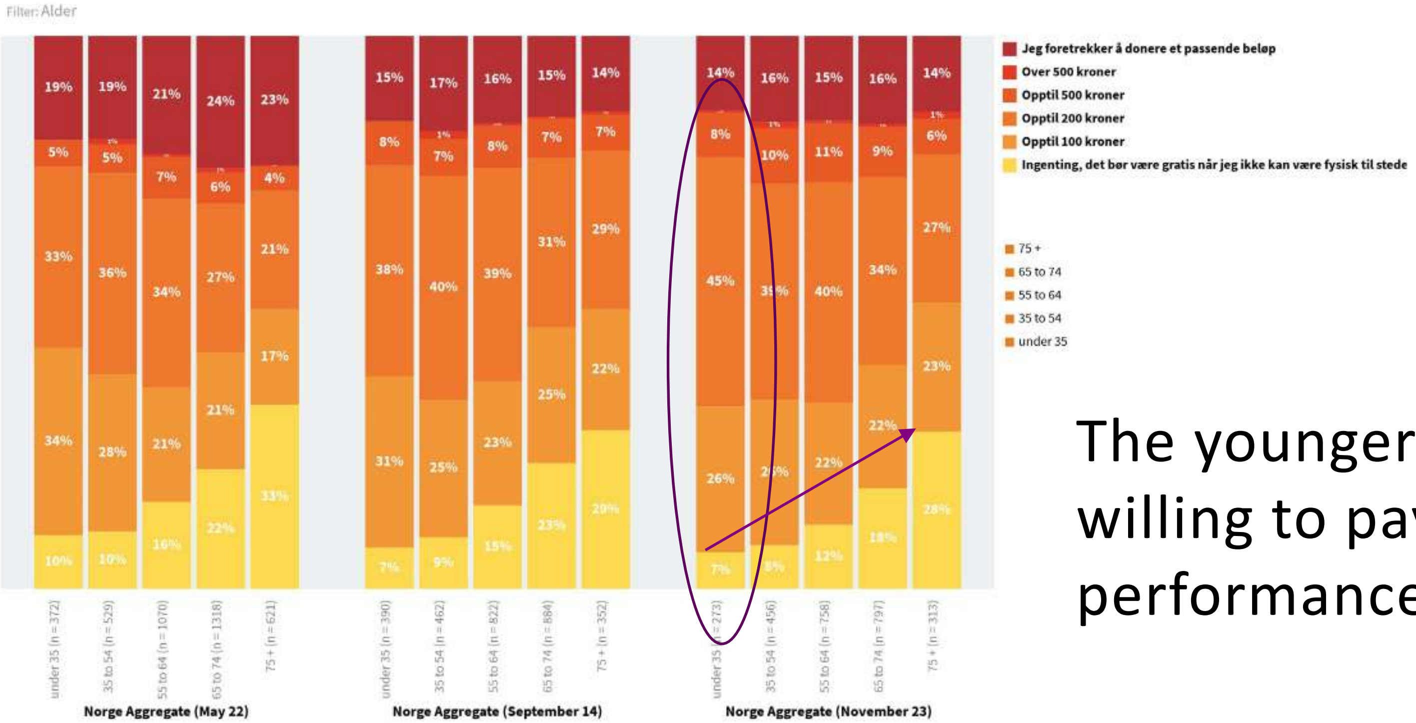
I prefer to donate whatever I find appopriate
Over 500 kroner
Up to 500 kroner
Up to 200 kroner
Up to 100 kroner
Nothing, it should be free when its not live

More then 5 times per year
Between two and five times per year
One time per year or less

In person attenders 2-5 times per year are most willing to pay for live but the youngest segment are just about as willing – and significantly more then for prerecorded

Live performance by age

What would you be willing to pay for a live streamed digital event?



I prefer to donate whatever I find appopriate
Over 500 kroner
Up to 500 kroner
Up to 200 kroner
Up to 100 kroner
Nothing, it should be free when its not live

The younger the more willing to pay for live performances.

10. The value of live stream for those who prefer it – in their own words. (open ended questions)

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Here and now – it can go wrong

- It happens there and then, as art and culture should.
- It provides a more authentic experience. You must be there when it happens
- There is a big difference between watching something performed live (where unforeseen things can happen) and a recording (where you do not know if unforeseen things have been removed). Small "mistakes" or omissions will make the experience more real - it retains one of the charms of theater. Real time gives more "excitement", it is not known in advance how the actors will "succeed" this time with the performance. It is precisely the nerve of the live performance that makes it so exciting. A recording will look more like a film, which is also perfectly fine of course, but live gives a completely different value.

Community and togetherness

- It felt so close and inclusive even though everyone was sitting in their own living room
- The feeling of community I think is stronger during direct stream
- The feeling of participating in a community. Experience "fresh" art.
- It creates a certain sense of community, you can also watch livestream from home with friends so that it still becomes social.
- There is, of course, something illusory about it, but you feel united when you take part in something that happens at the same time, and when you know that the performers are acting at the same time.
- The good feeling of community by watching a concert with 20+ of my friends over video chat at the same time!

Conclusion finding #1-#10

- Older an more frequent «in person» attenders are more actively engaged in online programs in 2020 – but most of them have not been paying for their online cultural experiences
- There is a shift in attitude among «in person» attenders towards payment for online content, bigger shift between older and more frequent users then younger and more low frequent users.
- Younger and more low frequent attenders are more willing to pay for online programs in general – but not necessarily from theese institutions
- Willingness to pay is connected both to taste preference (different types of theatre and concerts) and formats (live or prerecorded)
- Younger and more willing to pay segments are more interested i live stream then in prerecorded content
- Those who prefer live explain their preference by the artistic quality of here and now and the social added value of togetherness.

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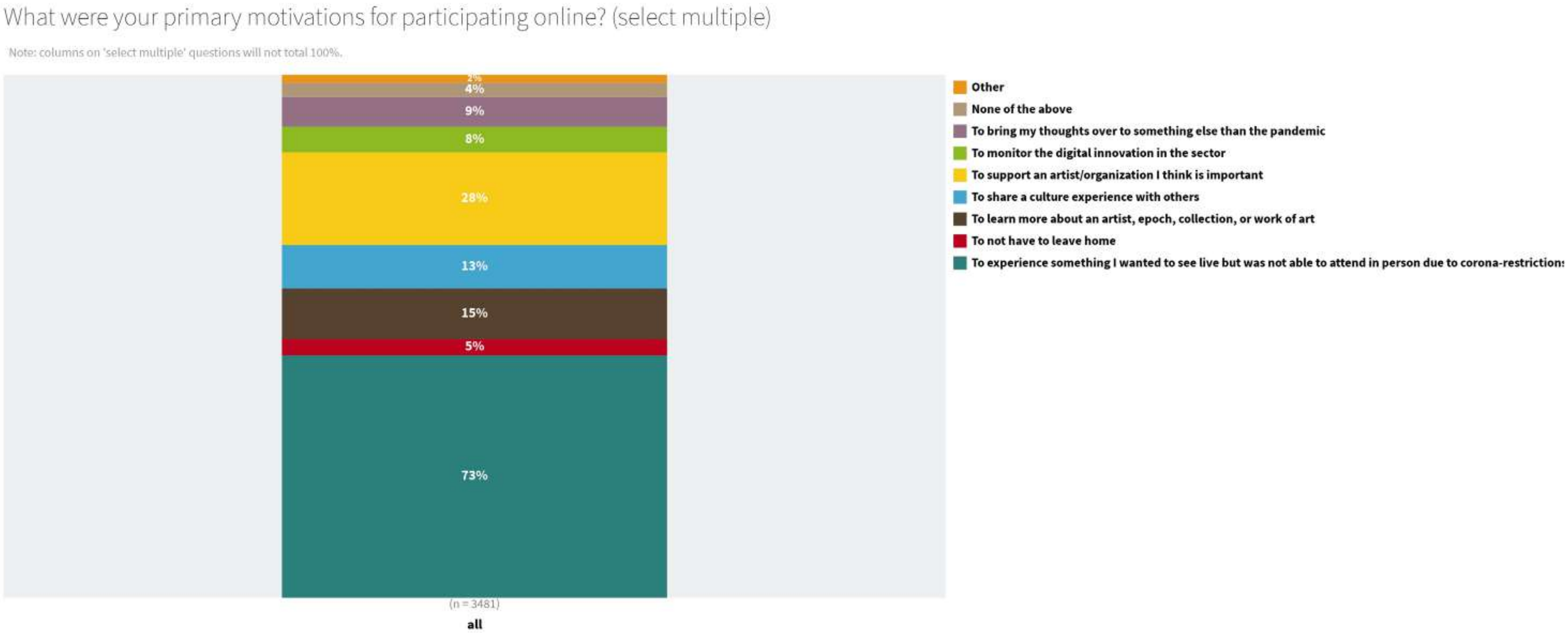
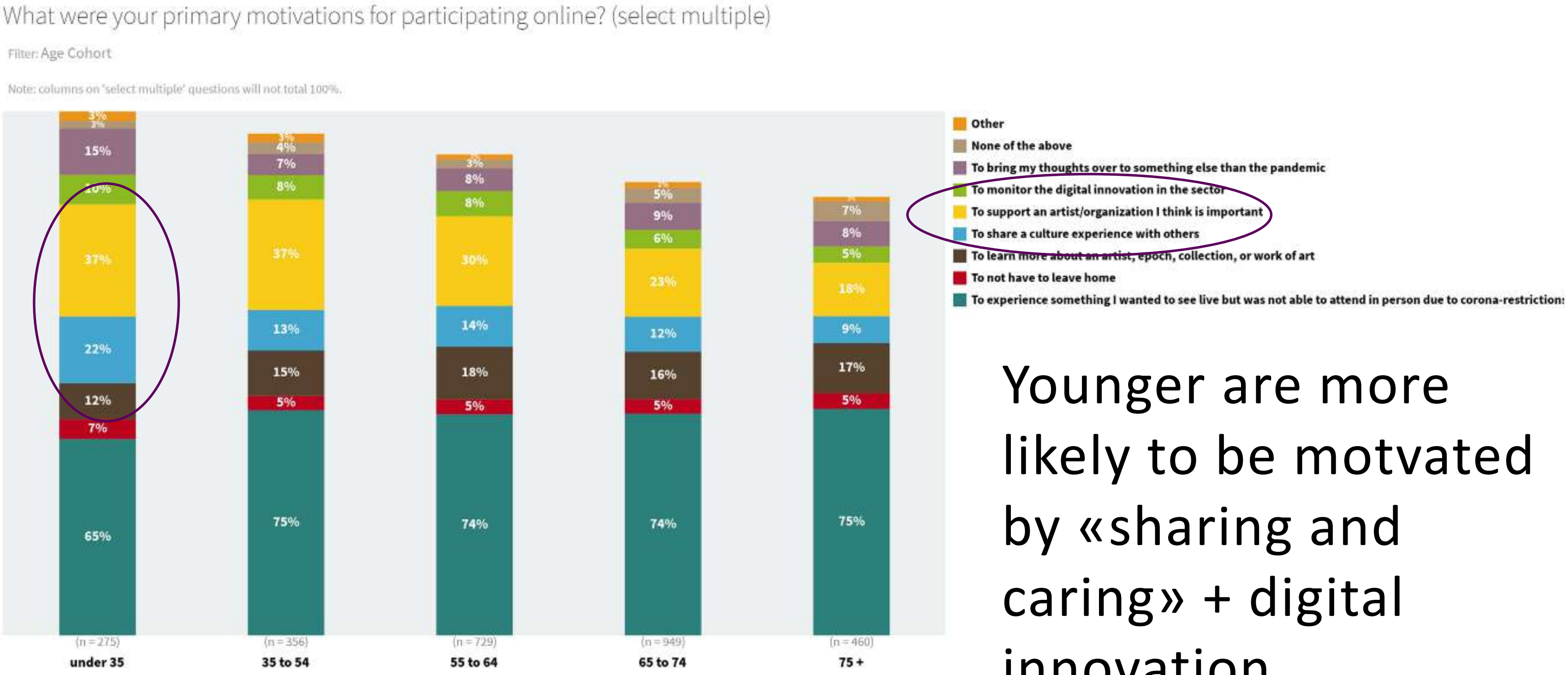
11. Online customer journey

Motivations for participation (May)

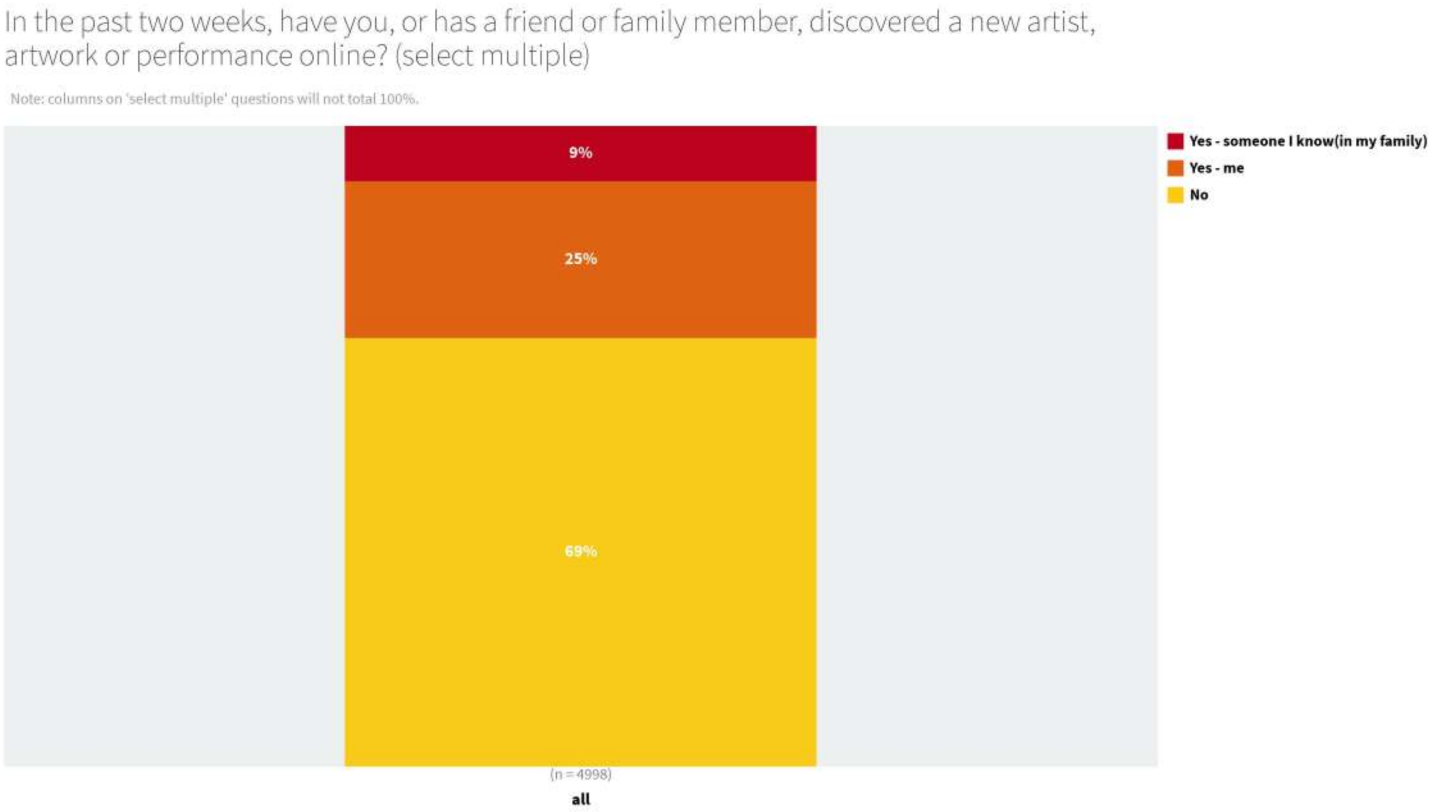


Motivations by age

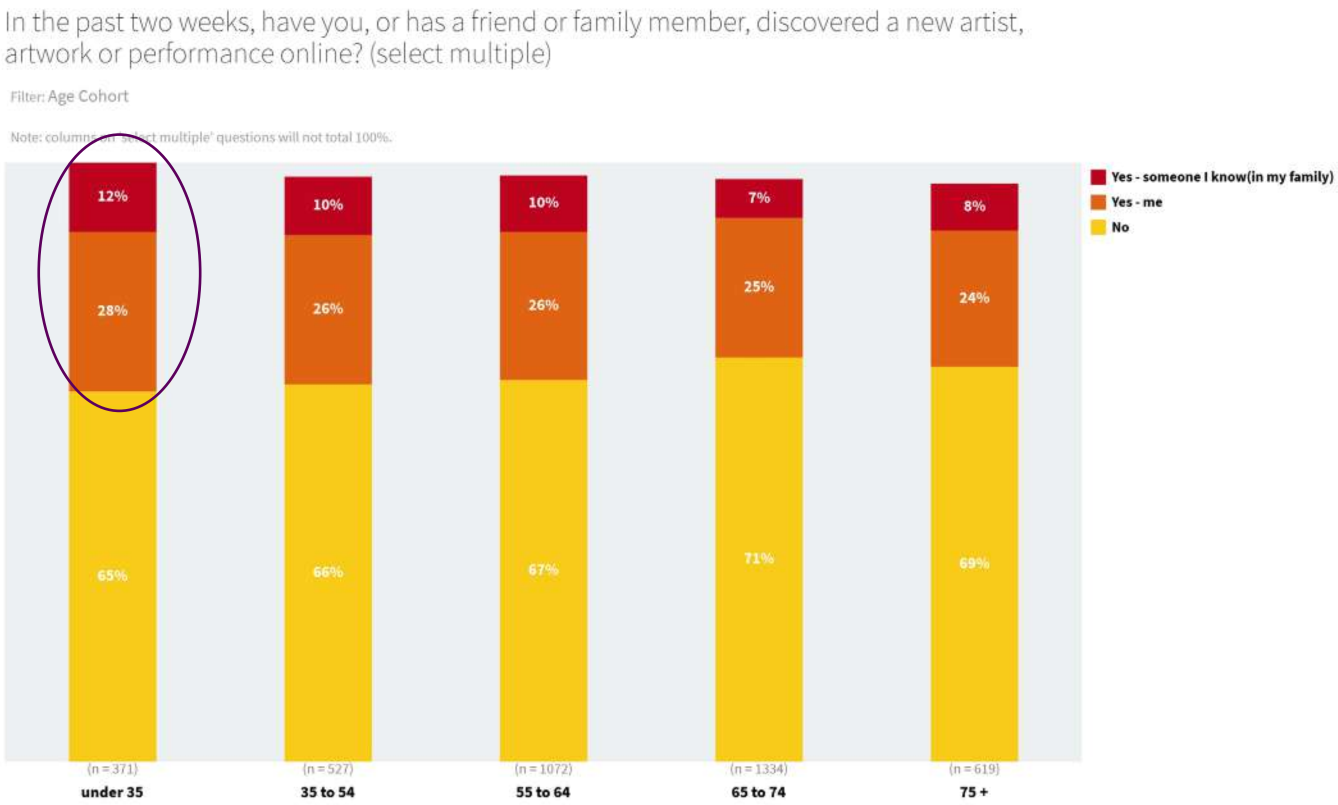


Younger are more likely to be motvated by «sharing and caring» + digital innovation

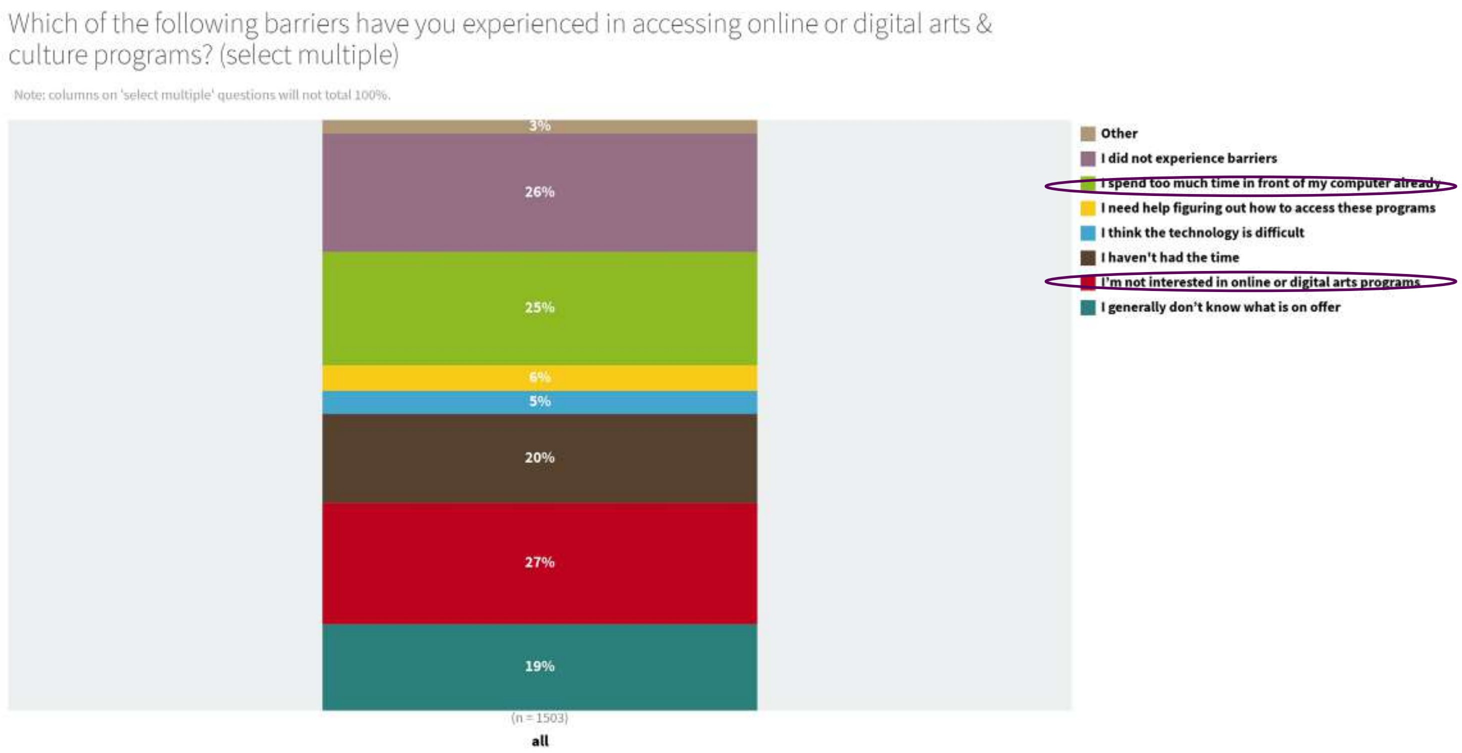
Online discovery



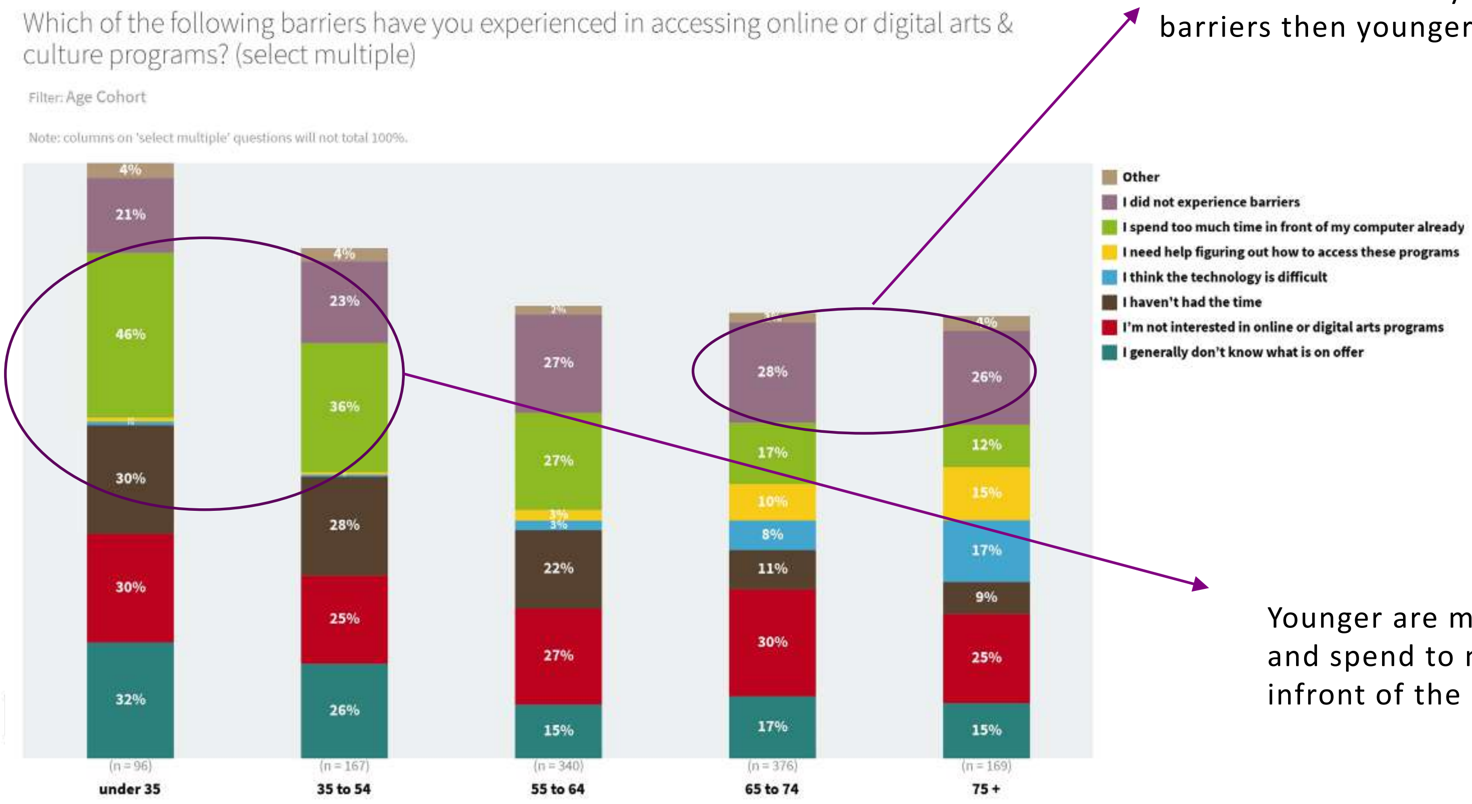
Discovery by age



Barrieres for participation (May)



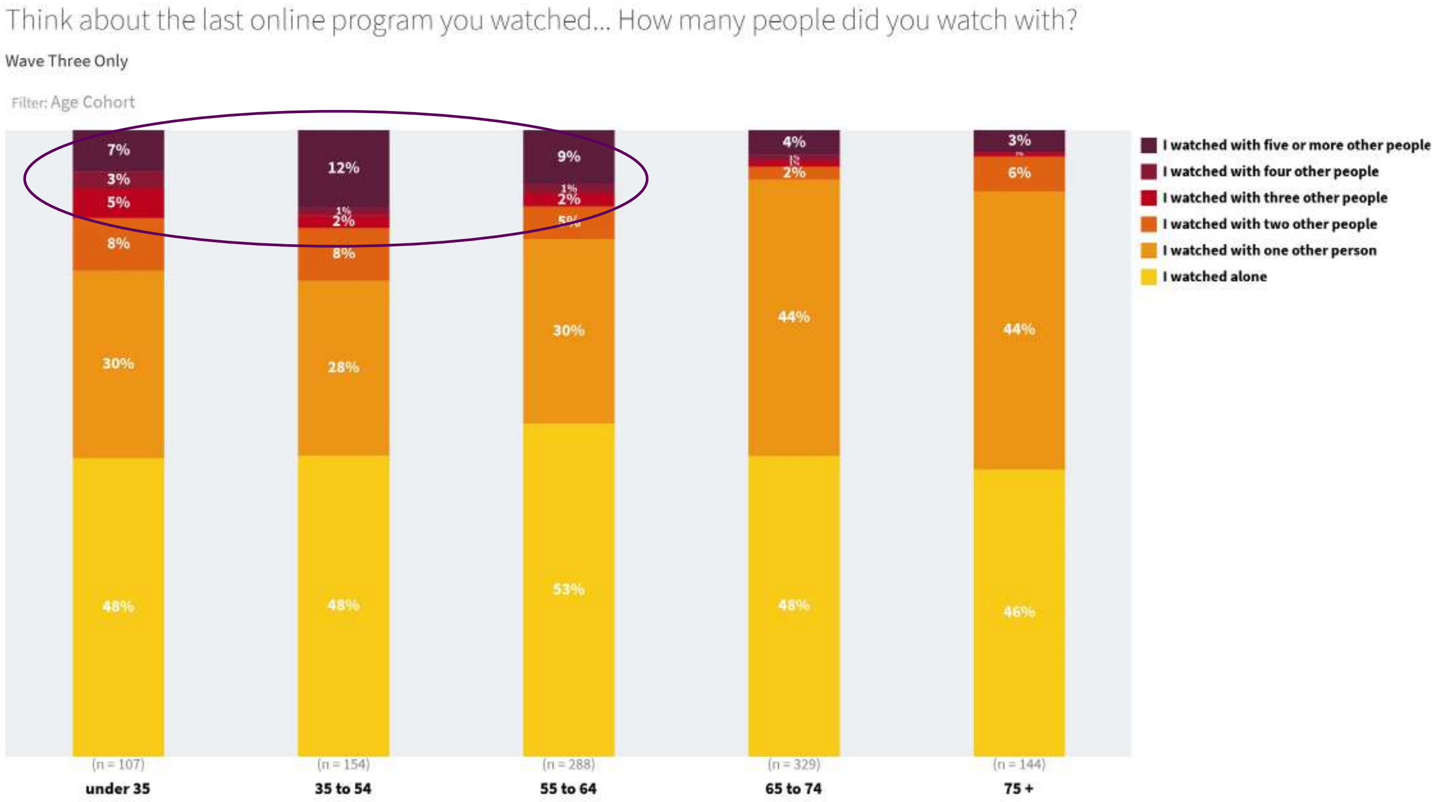
Barriers by age



Older are more likely to not experience barriers then younger

Younger are more time poor and spend to much time infront of the screen already

Number of people watching together (november)



Findings online customer journey

- Biggest motivation (73%) in May was cut off /lockdown. (We didnt survey motivation in sept/nov)
- Younger segments are more motivated by **supporting artists** and **sharing experiences with others** then older segments
- Younger segments experience more barriers than older ones – most important barrier for younger segments is **to much screen time already** and **lack of interest in digital art programs**
- Younger segments are more likely to have discovered new artists and artworks online
- Middle aged and younger segments are more likely to have watched online content together with multiple others

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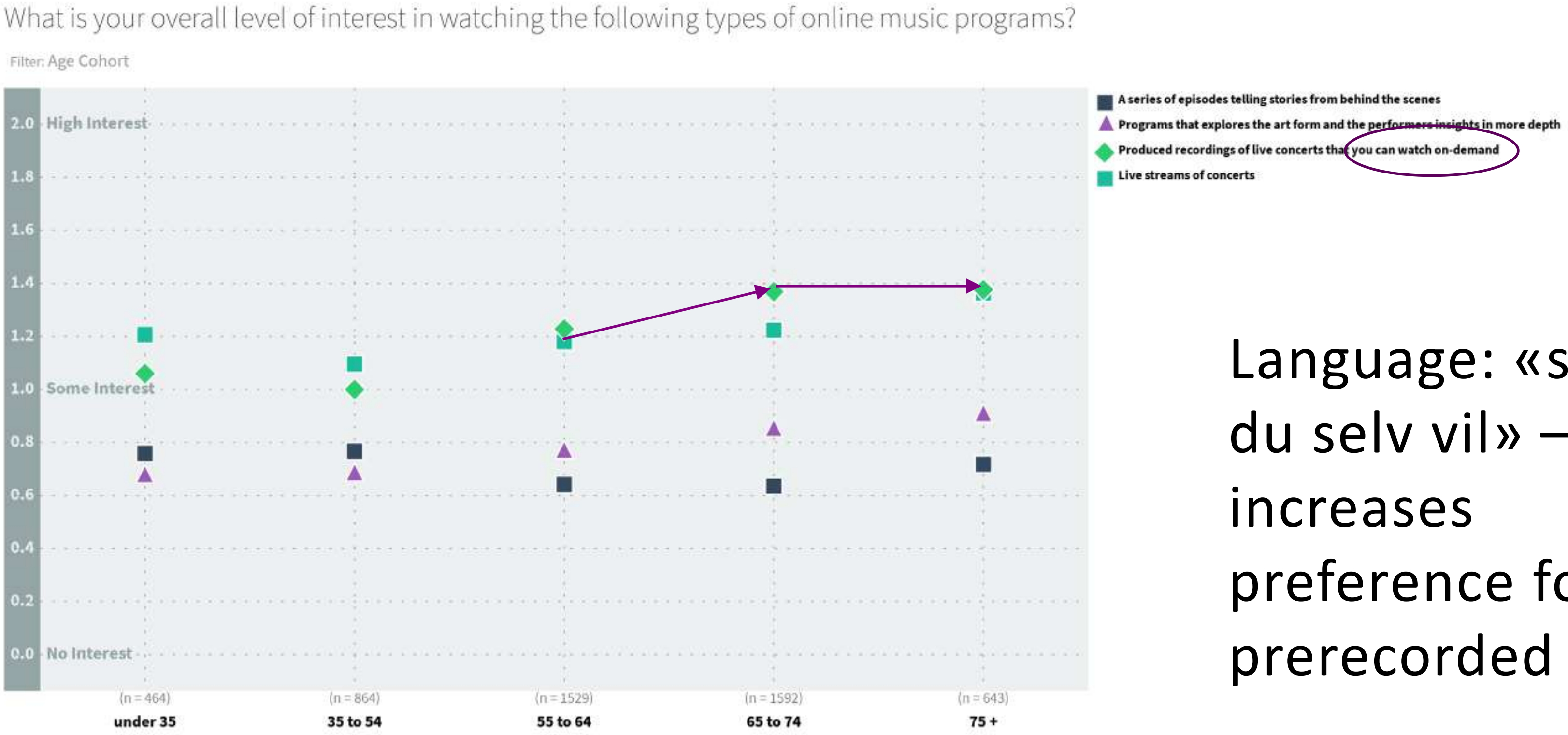
12. Deeper dive into digital content preferences music (november)

npu Norsk Publikumsutvikling Audiences Norway

Programs by age (prerecorded or live)

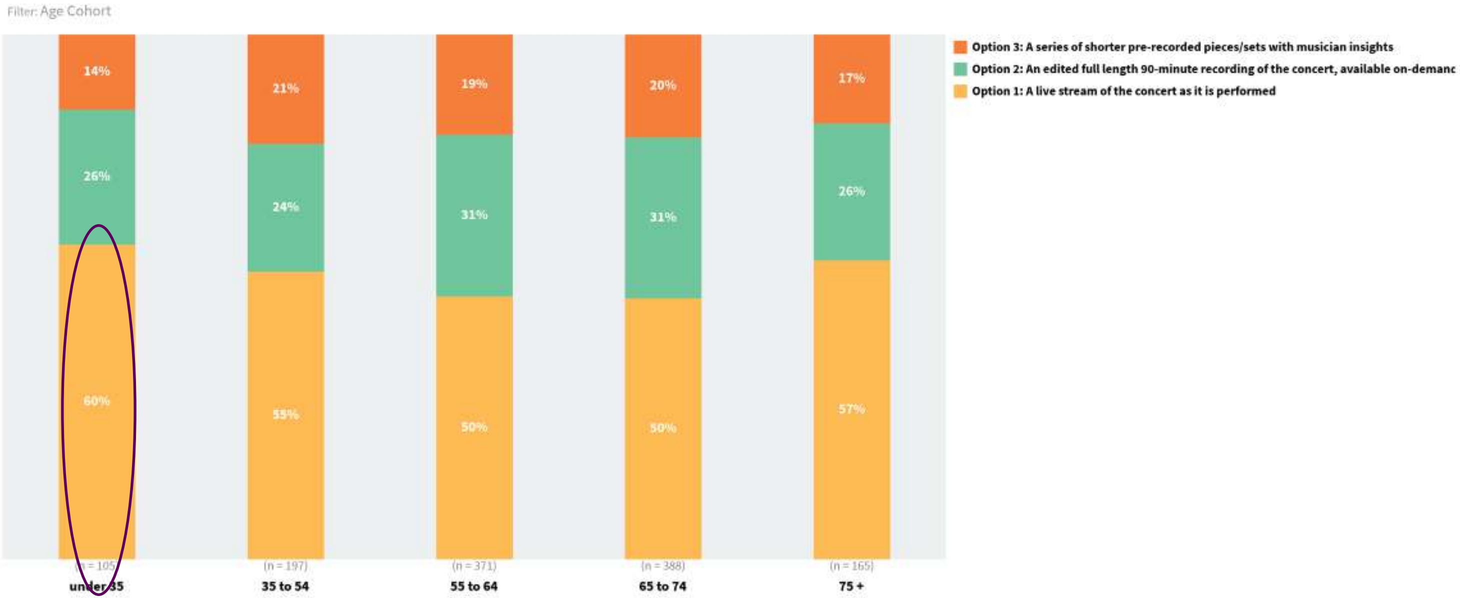


Language: «se når du selv vil» – increases preference for prerecorded

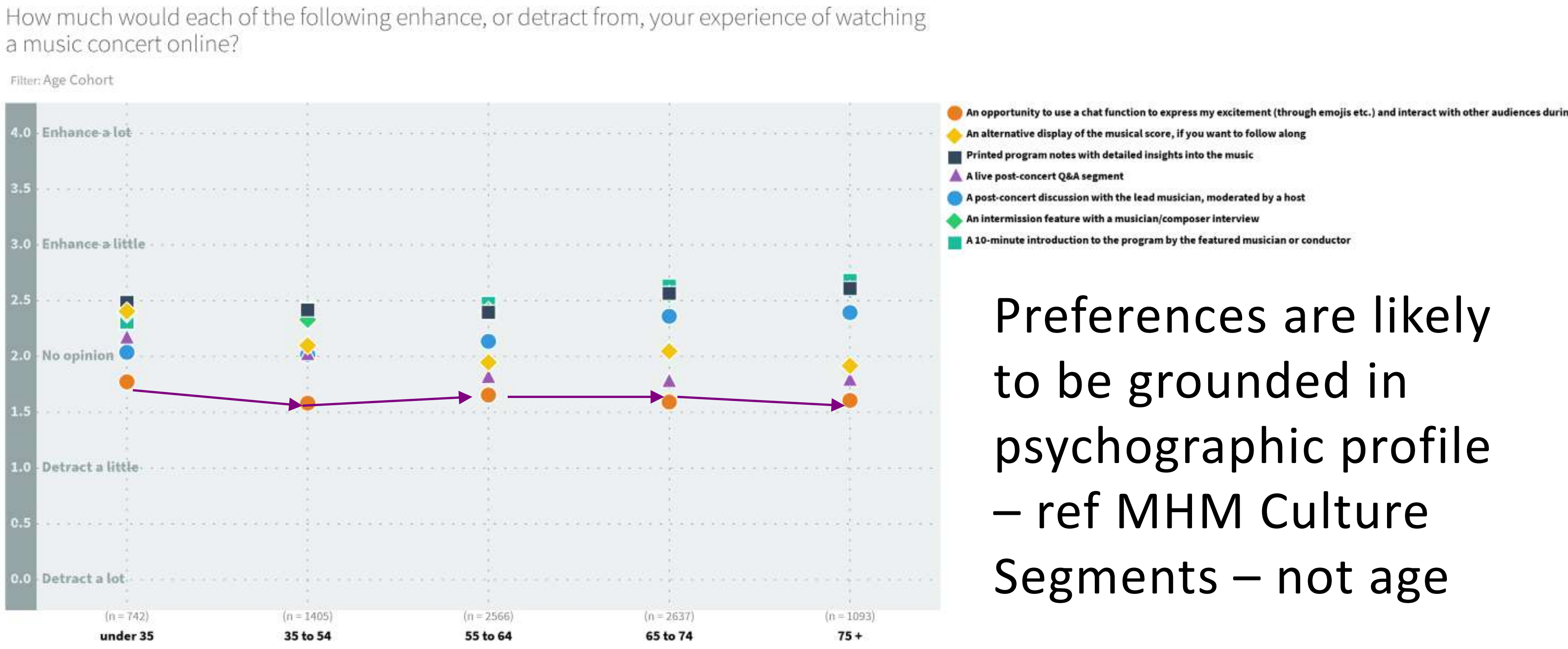
Formats by age

Suppose you were offered three options for watching a digital stream of a concert, performed by professional musicians. The concert consists of three sets of music, and lasts for about 90 minutes, with intermission. All else being equal, which option would you choose?

This question was only asked of respondents who expressed "high interest" or "some interest" in live streamed or on demand programming in response to the question "What is your overall level of interest in watching the following types of online music programs?"



Extra options to enhance the experience



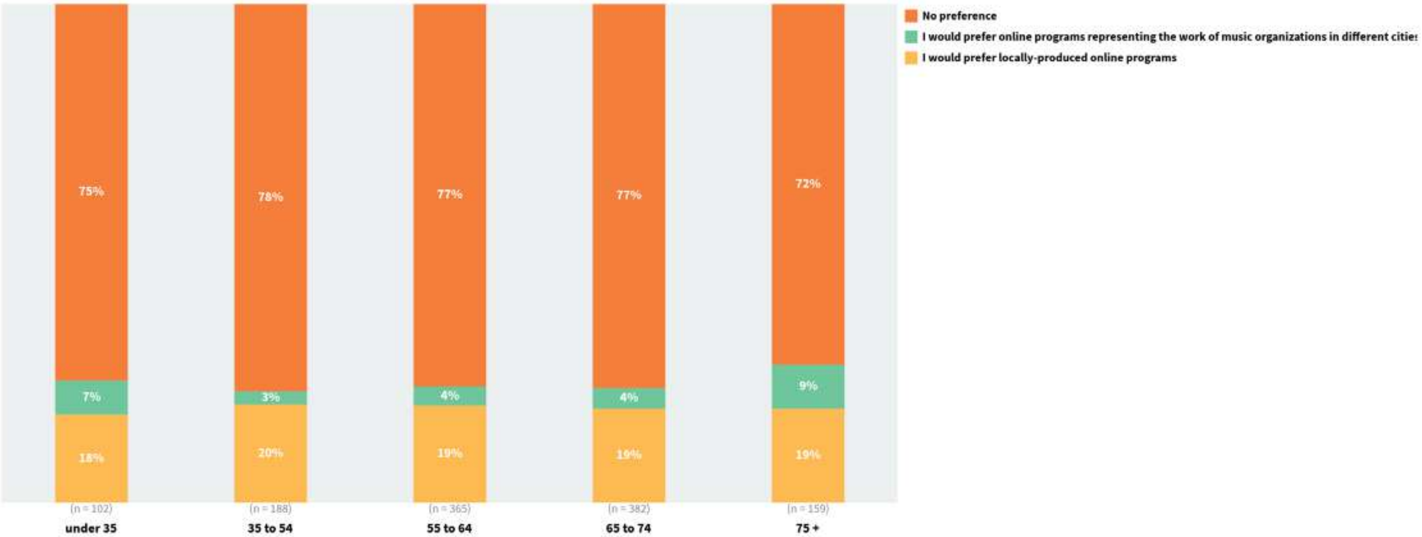
Preferences are likely to be grounded in psychographic profile – ref MHM Culture Segments – not age

Digital loyalty to local music organization – by age

Digital streams of music concerts might be produced by a music organization in your area, or they might be produced by different organizations around the country or overseas. Do you have a preference?

This question was only asked of respondents who expressed "high interest" or "some interest" in live streamed or on demand programming in response to the question "What is your overall level of interest in watching the following types of online music programs?"

Filter: Age Cohort



Findings deeper dive into digital content preferences music

- Respondents across age prefers the concert - live or prerecorded – over programs that goes in depth and behind the scenes
- Over 54% prefers a **live streamed concert as it is performed** (not live on tape) over an edited 90 minutes recording available on demand (27%) and a shorter version with musician insights (19%). «**Available on demand» has most supporters in the age cohort between 55 and 75**.
- Printed programs and interviews with musicians and composers in the intermssion can enhance the experience a little on average between the age groups. **Chat-options with musicians and social interaction between audiences is considered to detract from the experience by most** – and across age groups.
- **Only 2 out of 10 prefer to watch digital concerts from their local music organisation**. Near 8 out of 10 have no preference – meaning they are up for grabs by other producing organizations online.

FINDINGS

THE MARKET RESEARCH

Rasmussen Nordic

THE DATA

AND WHAT IT COULDN’T TELL US

The research data

- A general look at the market of classical music festivals (58 festivals from America, UK, France & Germany)
- A general look at the orchestras from the same countries as above.

Case interviews:

- Pasadena Playhouse
- Göteborg Symfoniker (GSO)
- English Symphony Orchestra (ESO)
- Cleveland Orchestra
- Wimbledon International Festival
- Oxford Lieder Festival
- Det Norske Teater

The research data

- General lack of digital business strategies. Barely any of the case studies had a set plan with goals and a strategy to reach those goals.
- Lack of audience data mapping / targeting / knowledge of what audiences like. They might gather some data – most do not – but they don’t really use it.

THE MARKET

AND COMPETITION

Finding 1 : Only few classical music festivals offer paid digital concerts

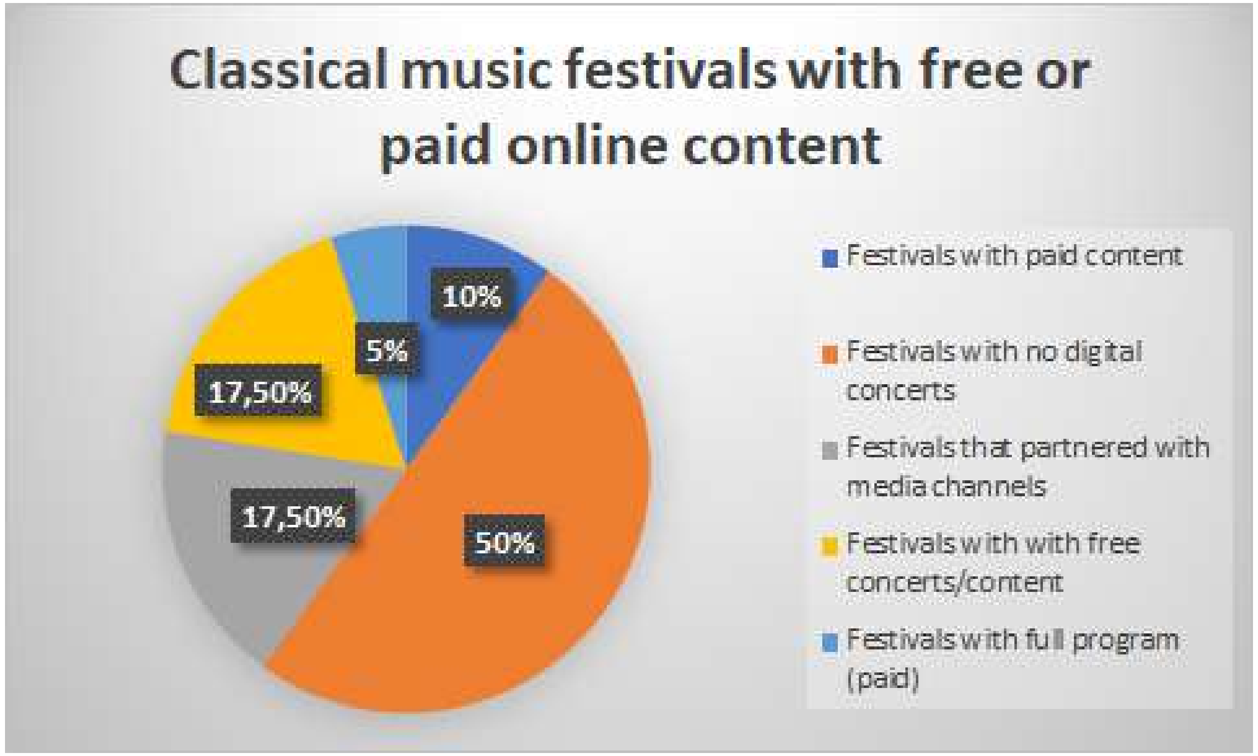
Overview of 58 festivals in the initial research:

Of the German festivals 1 offered 2 paid concerts and not a full program.

Of the English festivals 4 offered paid content and some a full festival program.

Of the American festivals 4 offered paid content.

Of the French festivals 0 offered paid content. Most of them partnered with streaming platforms instead.



Finding 1 : Only few classical music festivals offer paid digital concerts

- Although this is not a complete list of festivals in the respective countries, this accurately represents the overall pattern of the current market. Almost all of the festivals had only become digital because of COVID-19, not by a strategic choice.

- A very **similar pattern repeats itself with the orchestras,** except that during 2020 a lot of the orchestras have reacted to COVID-19 by putting out digital content. While many of them does so without any long-term digital strategy, it is difficult to predict what this will lead to once COVID-19 stops influencing the market. There is a growing interest in becoming more digital.

Other providers of classical music online

There are some competion to be mindful of, but like with the festivals, there is a tendency to not be strategic about digital content and brand.

- Classical music streaming platforms
- Youtube
- Itunes / Spotify

Finding 1 : Only few classical music festivals offer paid digital concerts

Conclusion:

The current market is very *immature* and while there is competition, mostly from the amount of free content, there is a significant lack of strategic competetors on the market with strong audience targeting.

There is a good oppotunity to be front runners on the market and therefore establishing yourself in top-of-mind with the audiences as a digital paid festival.

You should be most mindful of the orhestras with subscribtion platforms as players on the market. This is because they provide all-year-round content and tie people to them with a fixed amount a month that will make it harder to convert these audiences to online festival goers.

PRICING

& PACKAGING

Findings 2: Prices and packages

Looking closer at the case study interviews and the festivals in general and how they priced and packaged their content, there are generally four ways they handled it.

Subscriptions	Pay per concert	Tiered passes / packages	Free

Findings 2: Prices and packages

Free content

The most common solution amongst the organizations not chosen for the case study is to put all content up for free or not put up at all, often on YouTube or Facebook. The donate-what-you-want, or don't donate at all organizations also fall under this category, as there is no demand for payment. Many of these encourage donations. If you look at the festivals it was approximately **84 % who chose this model**. We see a similar pattern when we look at the orchestras who offer digital content, but there are more orchestras than festivals that charge for their performances. The amount of free content is something to be aware of.

The free content can be of great quality but is often lost and gets few viewers.

Findings 2: Prices and packages

Subscription

- Subscription based solution is more **often seen with the orchestras than the festivals**. Chamber Music Northwest from the USA is the exception, but they are a fusion of a chamber ensemble and a music festival, so this is probably part of the reason.

- Among the organization with subscription-based pay walls were Göteborg Symfoniker, Cleveland Orchestra, English symphony orchestra, Pasadena, Chamber Music North.

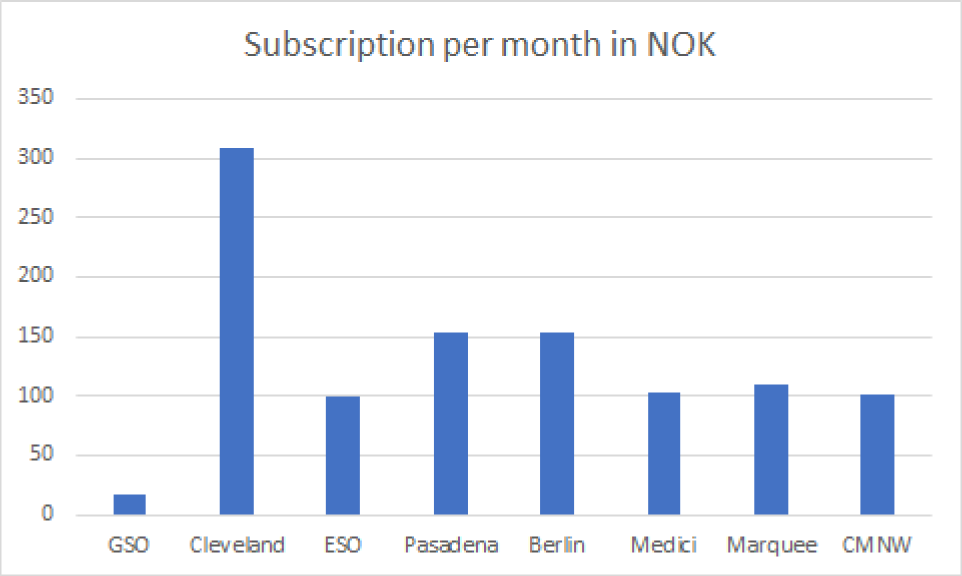
- The subscription-based solution is **often seen in streaming services** such as medici.tv & Marquee.tv, but also with the larger orchestras who are aiming to strategically use the digital content to reach a larger and more international audience like the Berliner Philharmonics.

Findings 2: Prices and packages

Subscriptions

Taking the average of monthly subscription fees in the example list below we are looking at a current market value of:

131 NOK For a monthly subscription



Findings 2: Prices and packages

Subscriptions from cases

Organization	Price per month/year	Price in Nowegian Kroner
Göteborg Symfoniker:	99 SEK (6 months) → 16,5 per month:	16,8 NOK per month
Cleveland Orchestra:	35,99 $ per month 430 $ a year	309,42 NOK per month 3706,59 NOK a year
English Symphony Orchestra:	8,5 £ average a month	99,78 NOK a month

Findings 2: Prices and packages

Subscriptions from other examples

Organization	Price per month/year	Price in Nowegian Krone
Berliner Philharmoniker	14,90 Euro per month 149 Euro a year	154,34 NOK per month 1543,37 NOK a year
Medici.tv	9,9 Euro pr. Month 99 Euro a year	102,5 NOK month 1025,5 NOK a year
Marquee.tv	12,79 dollar per month 127,89 dollar a year	109,97 NOK per month 1099,60 NOK a year
Chamber music Northwest	16,5 dollar pr month (99 $ pr 6 month)	101,91 NOK pr month
Pasadena Symphony & Pops:	25 $ a month (Minimum of 100 $ for 4 months)	154,33 NOK a month

Findings 2: Prices and packages

Differences and similarities in subscriptions

- All the subscriptions listed above include access archived concerts and new livestreams, even though there can be a bit of a difference in the kind of formats each organization offers.
- While some run with yearly subscriptions Pasadena and Chamber Music Northwest refer to their subscriptions as season passes, giving access for example to ‘the spring concerts’.
- It’s also worth noting that English Symphony Orchestra has a donation subscription system where people choose what they want to pay per month with 5 £ as a minimum.
- Some offer both a subscription and paying for single concerts like Chamber Music Northwest.

Findings 2: Prices and packages

Pay per concert

Some orchestras or concert halls choose to only charge per concert like the Royal Opera House and Det Norske Teater. Often, but not always, the organizations that pick this system are new at offering paid digital content. They want to charge for their content but haven't got a massive archive and a platform that supports a larger streaming service yet. As you will see, this way of paying for one concert also features in the 'tiered passes' payment solution, but this will be dealt with under that solution separately.

The price tag on single concerts ranges from around 30 to 450 NOK with the average of the examples listed on the next slide being:

175 NOK for a single digital concert

Findings 2: Prices and packages

Single concert price from cases

Organisation	Price per concert	Price in Norwegian kroner
Det Norske teater	450 NOK (Household ticket, bigger performances) 250 NOK (Single person ticket bigger performances) 175 NOK (small stage performances)	450 NOK 250 NOK 175 NOK
Royal Opera House	3 £ per concert	35,31 NOK
Pasadena Playhouse	24,99 $ per show (only rent for 48 hours)	213,50 NOK

Findings 2: Prices and packages

Single concert price from other examples

Organisation	Price	Price in Norwegian kroner
English music Festival	12£ per concert 20£ for two concerts	141 NOK per concert 235 NOK for 2 concerts
Detroit DSOplay	12 $ per concert	103,48 NOK per concert
Chamber Music Northwest	20 $ per single concert	172,47 NOK per concert
Met Opera	4$ On demand performance	34,49 NOK per concert

What is a concert worth online? Is it really 'only' worth a ⅕ of the concert hall experience?

Findings 2: Prices and packages

Tiered payment / multiple package options

The last solution is primarily used by the festivals, giving the audience the option to chose what sort of package suits them best. Some of the orchestras use multi options as well. Some have a subscription AND the option to pay per concert at the same time, as well as the option to buy 3 concerts in a bundle deal.

In the case material this model applied to Oxford Lieder festival and Wimbledon International festival.

Findings 2: Prices and packages

Tiered payment / multiple package options: **Wimbledon**

Package content	Package price	Price in NOK
Individual performances → 1 concert of the buyer's choice	10 £	118 NOK
Festival pass → access to all concerts From Saturday the 14th November And For 2 weeks after the festival	80 £	944 NOK
Director's pass → access to all events including an EXCLUSIVE performance and for four weeks after the end of the Festival.	160£	1882,74 NOK

Findings 2: Prices and packages

Tiered payment / multiple package options: **Oxford**

Package content	Package price	Price in NOK
Individual performances → 1 concert of the buyer's choice	3-13 £	35 - 152 NOK
Bulk discount for buying more than 1 performance	?	
Pass to all concerts on a specific day	?	
Festival pass → All performances access and able to watch those recordings up to two weeks after the festival ended.	90£	1053 NOK
Pioneer pass → same as the festival pass but with one more week of on demand acces.	110£	1287 NOK

WILLINGNESS

TO PAY

Findings 3: Willingness to pay

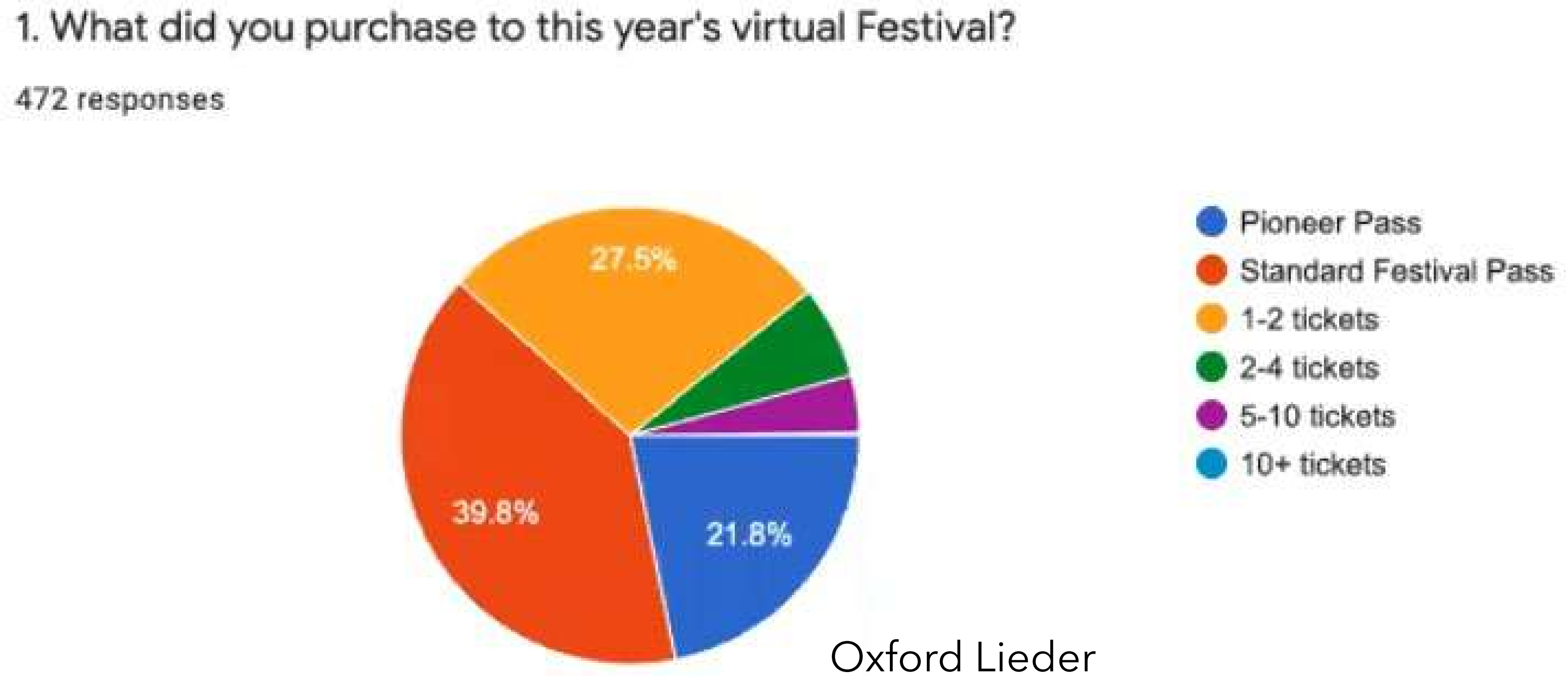
Finding: There is a willingness to pay for digital content as people are purchasing virtual concerts in spite of the fact, that there is much free content out there, even on platforms with both paid and free content. The degree of this is harder to pin down. There were 2 strategies among the cases: All content was behind paywall (except 1–4-minute trailers) or some content free, some paid. First, we'll look at the pay- only solutions.

Let's look at Oxford Festival who was positively surprised by the numbers. *Oxford Lieder case : Sold more with an all-virtual festival than in a normal year.* Oxford held an all-virtual festival in October 2020 as a response to COVID-19. Their numbers are very interesting in a festival perspective, as they sold more than they would in an average year:

Findings 3: Willingness to pay

- "The far majority of our sales were passes. We normally sell 13.000 tickets, but of that we sell about 70 passes, because they are expensive 700 - 800 pounds. An all-access pass was 90 £ for the week and we sold 460 of them. Huge change in pattern. We sold more tickets for this virtual festival than we usually do, before we went digital. Usually people buy two tickets, that would cost 80 £ in total and with the digital they will only have to get one per household to 13 £ for a concert, but this year we sold so many per day, we took more on the box office this year than a normal year. **We beat our box office target by 20 - something percent**. Some of that was because of more international reach." Oxford
- "Because people usually come to a couple of concerts and they pay 50 £ and maybe come to a lunch time for 17 £, so they will spend 70 £, so this year they though well 90 £ are quite reasonable for a pass. These numbers might change when covid ends and it's possible to go back to the venues, but **people are asking for a blended option of live and digital**." Oxford

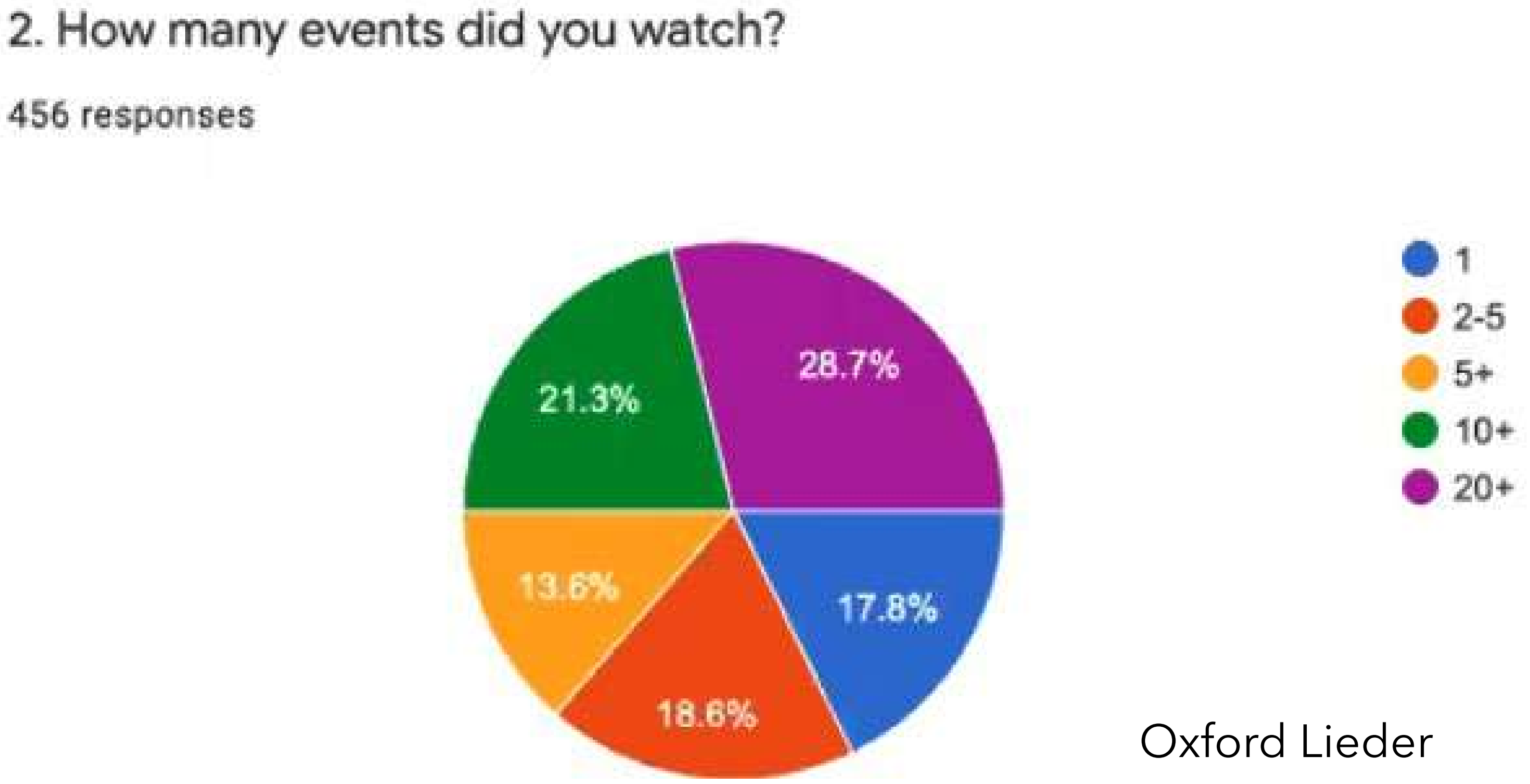
Findings 3: Willingness to pay



Oxford Lieder

It should be taken into consideration with these numbers that the festival only was virtual, and that it could look very different if the audience isn't '*forced*' to watch online.

Findings 3: Willingness to pay



The number of events that people watched also speaks to the interest in the paid concerts. Notice that only 17,8 % merely watched one concert.

Oxford Lieder

Findings 3: Willingness to pay

Wimbledon festival struggled more with their sales. They held a 10-event festival in November, primarily chamber music.

"We sold about 20-30 individual tickets pr. Concerts. 140 tickets sold at top price and maybe 50 tickets sold of the 80 £ tier. We were able to bring the show in at the normal price, but it included the 2000 additional cost. **But we made only ⅕ of our normal ticket sales."** Wimbledon

The difference in the success of the two festivals can perhaps in part be explained with the mindset of their respective Directors. Oxford was much more strategic, and prepped their audience with test events, had a larger program and more focus on their branding, international marketing and what made them unique. Also, they **had a few little online events before the actual festiva**l. The prices were similar except that the passes got you access to more in Oxford.

Findings 3: Willingness to pay

Det Norske Teater

"During the autumn we had **7 performances and about 10.000 tickets sold in total.** The first weekend of the show was like 2000 watching. When you think about limitations in the audience, we were allowed to have 200 for each show in the venue. So, we have to compare it with people watching online - and since it was 2000 it was ten times more as it was possible." Det Norske Teater

"The audience found the prices as right, and the covid-19 survey said that **250 kroner are okay for live-stream content**. However, when it is content already made people won't pay as much when it is not live-streamed - and I think the limit there is about 100 kroners." Det Norske Teater
About 1/3 of the purchases were on the higher household ticket (450 NOK) which was optional and the rest of the tickets were group or single person tickets (250 NOK)

Findings 3: Willingness to pay

When you have both free and paid content

Something that speaks to the willingness to pay is also the platforms that offer both paid and free content. There is a difference in how much each of the case organizations give away for free and how this affects their sales numbers.

Cleveland and Göteborg (at least before COVID-19) are examples of platforms that has some free and some paid content. Cleveland stated that some or their most popular content was the free concerts, like their Christmas concert that was the third most viewed, but this model still manages to attract some paying subscribers:

Findings 3: Willingness to pay

Organization	Premium users	Fremium users
English Symphony Orchestra	35 paying sponsors.	Platform: 320 active user "Our YouTube views average about 8000 views in the four-day period they are up."
Cleveland	We have about 3.000 paid subscribers right now.	We had about 120.000 people visiting the site and actually playing content on the site free or paid
Göteborg	12.000 premium users before COVID-19	april - august: 535.000 visitied GSOPlay - 2020 - in the same period: 1.500.000 visitors
Pasadena	3.000 house holds	6.000 in total users now on the site.

Findings 3: Willingness to pay

English Symphony Orchestra is obligated to make their content free for 4 days before putting it behind a paywall which greatly impacts their ability to make their paid subscription attractive.

"Because we are funded by the arts council, we have to release all of our content for free for 4 days, so that anyone in the public domain can see them in that time, and then afterwards it goes behind our pay wall.[...] Our YouTube views average about 8000 views in the four-day period they are up, but we struggle with converting them over to our own platform. [...]It's a slow building income stream. It's not going to clear debts" ESO

Findings 3: Willingness to pay

It can affect the willingness in a very negative way too, preventing you from getting paying users like in Cleveland. Looking at Cleveland only 2,5 % viewers chooses to pay when there are free concerts available,

" We have about **3.000 paid subscribers right now. We had about 120.000 people visiting the site and actually playing content** on the site free or paid. Well, the most popular stuff is the stuff that's free. And people, you know, I think we had 28.000 people watch it. " Cleveland

The GSO talks about how their model meant that it took a long time to reach their subscriber numbers:

"It took quite a number of years to reach 12.000 of premium subscribers, and now I think we are down to zero again." (After opening up and making it free.) GSO

Findings 3: Willingness to pay

In conclusion one should consider the amount of free content you offer your audiences as a means to affecting the willingness to pay. It may work as a tool to get the ones that are willing to pay, as a marketing device:

> "Every day we would upload clips from our concerts, as a marketing technique and that was very useful." Oxford

Large streaming organizations like Berlin Philharmoniker or Medici.tv do offer 1 or 2 free concerts and most subscription-based providers have a 7- day free trial to give people a taste of what their money might buy.

Findings 3: Willingness to pay

Finding: If you give something for free, make sure you get something else out of it:

"We did start out with not requiring people to sign in to see the free content and of course the viewers were higher. **But then I started realizing that I don't care, because if people are viewing things for free and we are not getting their email address it doesn't matter to me.** It does no good for me whatsoever. Even if the viewership goes down I want people to write an email address, so we set that up and we still have seen a lot of growth. It has still doubled. " Pasadena

LIVE OR ON DEMAND

WHAT DO PEOPLE CHOSE?

Finding 4: Live or recording - what does the audience prefer?

Finding: Many organizations doesn't actually Live Stream, but record it, so they have a better chance to edit it. They still realease it to people as a 'live stream'. Oxford offered a combination of live streams and these 'recorded live streams'.

"A live event is difficult to set up in a museum or a library and it was less expensive recording it first and editing it together." Oxford

GSO noted that some of their most popular content was the more curated shows, that wasn't 'just' a live recording (like their 'National Dag Concert' with a record 700.000 views). That kind of content was expensive and difficult to produce live.

Finding 4: Live or recording - what does the audience prefer?

GSO, Det Norske Teater & OXFORD streamed live. Keep in mind that GSO has been free during covid and it is uncertain if these numbers represent people who would pay for live streams.

Göteborg Symfoniker

2000 - 5000 viewers per live stream

On demand is generally from **10.000** views to around **300.000** views. The one with the most tracktion with **708.000** viewers

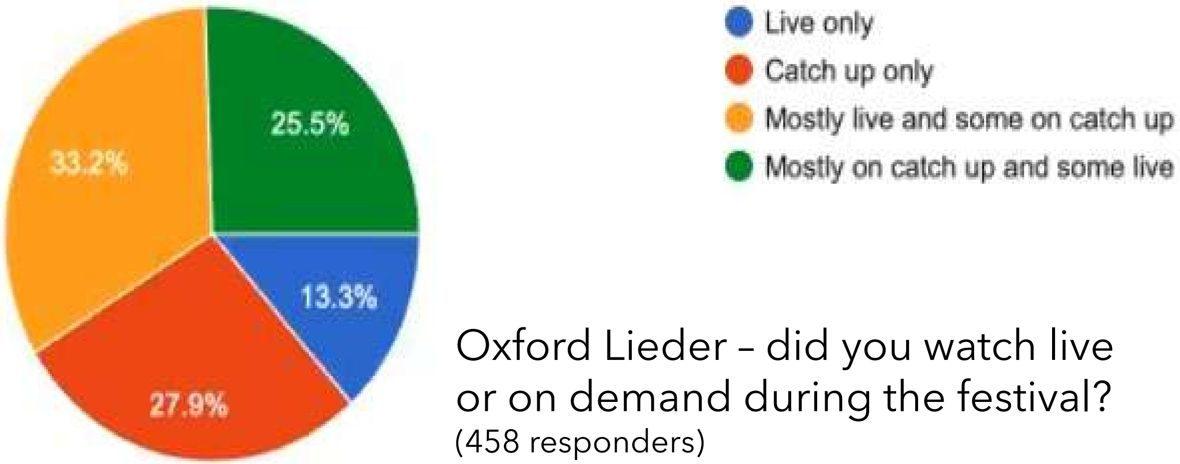
Det Norske Teater

Op mod 2000 viewers per performance
7 performances and about 10.000 watching in total.

Finding 4: Live or recording - what does the audience prefer?

Of the case studies, many chose not to send live, but to record and then stream the recording as a live concert, because it was easier and cheaper for them and offered more opotunity for editing.

GSO & OXFORD streamed live. Keep in mind that GSO has been free during COVID-19 and it is uncertain if these numbers represent people who would pay for live streams.



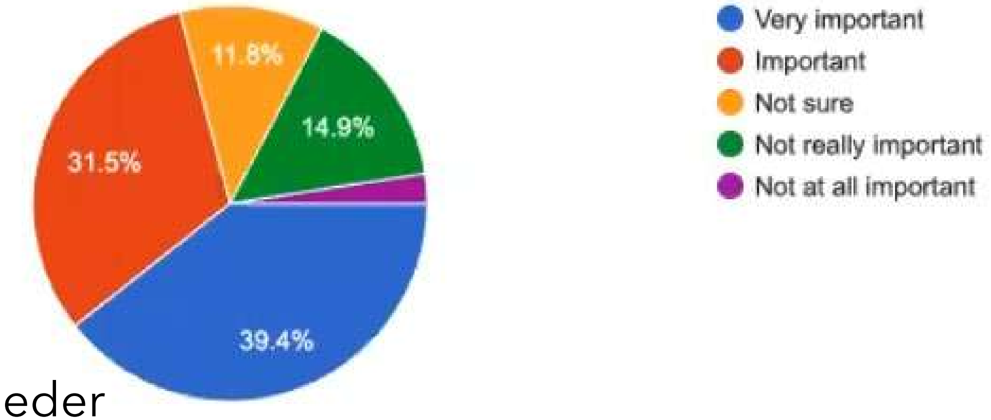
Oxford Lieder – did you watch live or on demand during the festival?
(458 responders)

Finding 4: Live or recording - what does the audience prefer?

“Even though people didn’t necessarily watch it live, they think it is important that it is a live event, and the idea that they could get it live. It is a special quality that it is live.”
Oxford

10. Regardless of whether you watched recitals live or on catch up, how important was it for you that they were broadcast live?

457 responses



Oxford Lieder

The feeling of ‘Event’ as *something limited* is important.

Finding 5: Limited time on demand is an incentive – but not too limited

While being ‘an event’ is clearly important’, at both festivals people were **willing to buy packages that were more expensive to get more on demand time** for a limited event.

“One of the feedbacks that we got was that people wanted more time to watch the festival on demand the following weeks.” Oxford (More than 3 weeks)

“By advice from Wigmore hall, he said if you leave it up for too long then people don’t feel like they need to see it. One of the major agents said. ‘Give people a 5-day window and then they will think they need to see it’.” Wimbledon

Finding 6: There is demand for digital/live hybrid solution

Many of the audiences expressed a positive attitude towards a hybrid solution where you can both visit the concert hall and get access to a digital version. Some of the case organizations plan on making hybrid memberships, where you purchase tickets to live venue events and then also get a digital package included int that:

"We had a lot of really positive reactions from our subscribers. They were really thrilled to learn that they could watch all the concerts in the season even the ones they didn't have ticket to if they went online and then be in-person for the ones that they obviously had bought tickets to. That seemed to be a real plus." Cleveland

Finding 6: There is demand for digital/live hybrid solution

Oxford festival was a good example of the positive reactions to the digital solution and the audiences enjoyed the convenience of it, requesting a hybrid solution next year:

Core audience feedback:

"The ones that usually buy an all-events pass, they actually come to everything. They also saw every concert online in this virtual version, but they **enjoyed the convenience of it**. Being able to take somethings live and somethings on demand, not having to race between venues as they usually do in the festival." Oxford

Finding 6: There is demand for digital/live hybrid solution

Core audience feedback:

"We had a lot of people saying, I usually come to 3, 4, 5 events at the festival but I work. I can't come to more than that or I can't afford it, **or I live too far away to go to every event** all 16 days. Those people said they loved it and especially the on demand after the festival. They were having dinner watching a new concert each night."

"The overwhelming response from the audience was: In the future, **please have both so we can maybe go to the venue to watch the event and if we really like it, we can go home and buy the digital version** and watch it again. And the things we can't go to in person, we can attend virtually." Oxford

Finding 6: There is demand for digital/live hybrid solution

Pasadena on the other hand offered their online subscription to their usual members during COVID-19, but:

> “One thing we found that were really interesting to us is a lot of people did subscribe. A lot of people said yes, but they are not viewing. They are like: "We want to support you, because we want to see you on the other side - but we are not interested in the digital program". That was a big surprise to us. We thought more people would be viewing stuff online, because we know that even if they are older, they are still using Netflix or something like that.” Pasadena

Pasadena is a theatre and is still very new at offering content, which means they don’t have a lot to chose from. They don’t offer events / live streams which can perhaps account for some of the reaction from their audiences.

Finding 6: When offering a hybrid of digital and live – create exclusive content

Even though Oxford Lieder was all virtual in 2020, they are planning to do both digital and concert hall events next year. In contemplating how they would approach the balance of the digital and concert hall they aired the idea of an exclusive content strategy:

> "We might do a blend next year where some concerts are exclusively online, and some are only live and some are both."

This strategy would work as a way of nudging users to use both online and in-person offers.

TARGET GROUPS

WHO WATCHES?

Finding 7: A general lack of target audience strategies / data

The music organizations generally don't define their target audiences in great detail or data track their demographics. While some have a clear idea of who is buying and watching, many do not. For most of them, the digital is just about appeasing their established core audience.

As you will see in the list of mentioned target groups, the orchestras primarily defined them by age or their already established passion for classical music and stage art. This also means that they don't work much with looking at data and seeing if the digital content can attract a different kind of audience or a younger audience. They primarily target their established core audience, not new ones.

Finding 8: Core audiences going digital

Core audience: By far the most common answer, when asked how they approach targeting audiences, is that they set out to make something for the audiences who couldn't attend the physical concerts because of COVID-19. Coming at the **digital as a COVID-19 response strategy,** meant that the digital serves as a substitute for the core audience, rather than a strategic targeting of new groups.

"Eso Digital was a response to covid back in july 2020. To give a platform to release music." ESO

"I think the average age is late 50's or 60's. Pretty typical audience may be a little more heavy towards females, higher education, higher income levels. Pretty standard." Cleveland

"Already comes is in the physical concert hall, generally older people, and they watch classical music on a regular basis." GSO

"It is first and foremost our existing audience, our subscribers and donors." Pasadena

Finding 8: Core audiences going digital

Their users are to a great extent the same demographic that show up in the concert hall. Oxford lieder for example managed to get a very large number of their core audience with them as they held and all-virtual festival:

"We lost about 25 % of our regular bookers, but that still quite good. **75 % of our regulars went digital**. We made up that 25 % plus another 17,5 % in new people. So, we increased our audience with 17,5% and the average spend went up." Oxford

Finding 8: Core audiences don’t always go digital

Wimbledon, on the other hand, was disappointed with how few of their regulars accepted the digital version:

“I was disappointed in how few of our normal audiences took up this digital version of the festival, but I can understand it because most are over 65. A lot of people are not so keen on putting in passwords, and navigating the system. That is a big problem with our audience.” Wimbledon

Finding 9: You have to help your audience go digital

Many of the case interviews touched on the subject of having an older core audience that might not be very comfortable online. While Oxford showed that the majority of a core audience can move online, there is a point to made for helping them in the transition. GSO stated that it took a long time for them to build the subscriber base, but looking at Oxford there are things that can be done to make it easier:

Finding 9: You have to help your audience go digital

´"We make **little digital events over the year**, to get people used to it, making a mini weekend festival to get people accustomed." Oxford

"Simplicity is key!"

"We still **did a printed brochure** and everyone on our postal list received one. We burst in sales when that arrived. It helped with our regulars to see that brochure, that things was as usual, just online."

"Some of our audience were nervous with how their tickets would work and the whole platform, so we had a **test event** for them."

"We had a clear FAQ. instructional videos and sheets they can read **for guidance**."

Finding 10: National or international audience?

The digital focus on core audiences also means that many of the case studies direct their attention to a national audience rather than an international audience. There is admittedly a difference in the potential market when you are targeting nationally if you are in the USA compared to Sweden:

"At the regional theater we only were focusing on L.A., the great of the Los Angeles area - but through this we brought advertising agency AKA. They have a good reach and a good understanding of a national scope. We truly looked at our target audience art pay entries national - that helped us target the communities with the greatest participation in the arts in the country. It was like **New York, L.A., Chicago, Boston and also Cleveland and Ohio,** that we would neve have thought of." Pasadena

Finding 10: National or international audience?

But some of the case organizations were surprised to discover that the digital appealed to an international audience much more than a national one.

"We were trying to reach our core regional audience but ended up firstly hitting an entirely different group which was a Swedish people living abroad and people interested in classical music throughout the world. Some of our **hardcore fans are from Brazil and Canada**. It was not until COVID-19 that we saw a considerable rise in locals using our platform."

GSO

Finding 10: National or international audience?

But as GSO noted, delivering content to an international audience is different than to people in your area.

"It's two different things having content that works with international audiences and national audiences. Content with Swedish hosts has more of an interest with the national audience and not so much with an international audience. So, translations are like priority number 3 for us. When we do have the time to work translation into the production it enhances the quality of the content. "

Finding 10: National or international audience?

One of the things GSO also noted of importance and one of the things that drew the international audience was:

"You need to be very unique, put something out there that will actually be interesting to an audience. You need a voice and a special sort of content."

A part of GSO'S voice is this distinctly **Swedish mark on their content**. They say 'God Kvell' even though they continue in English and have clips of the hosts outside in the Swedish nature. This works as an appeal to the regional audiences, because it feels grounded in their home region, but also to the international audience as an exotic sense of place and voice unique to Sweden.

Finding 10: National or international audience?

Oxford Lieder festival went more directly for an international audience, running Facebook campaigns in US and Japan:

"We had new people who had never come to the festival sign up, they came primarily from abroad. We sold in 25 countries, **most in the US. Some in Japan**." Oxford

Finding 11: New old audiences - Too old to attend in person?

Both Cleveland and Oxford Lieder mentioned that they had seen an increase of digital users that were too old to go to the concert halls, but that these audiences often needed a younger family member to help sort of the technical side of logging in and setting up the concert to watch online.

"We found that - we are all struggling with subscribers getting older. There are people every year telling us they don't get out as much anymore. So we had some subscribers that actually came back and enjoyed this. It is not a huge number but it has been a noticeable number." Cleveland

Finding 11: New old audiences - Too old to attend in person?

“We have people saying ‘I am at home caring for my elderly mother, but she could never come to the concert because she is too frail - but now we could watch the festival together on the screen. One couple who live some 100 miles away, they have always been regulars, coming to everything. But they wrote us last January saying, sorry we are just too old, we can’t come anymore. Please take us off the mailing list.’ And we said ‘sure, but let us at least keep you updated with what we are doing.’ They said, ‘fine.’ And then of course we went digital. They bought a pass, saw everything and renewed their support.

We lose people every year, I mean some of them die, but this is an audience that is now really engaged with the idea to connect online, with some help. We tend to chase the younger generation but going digital has lots of opportunities for elders as well.” Oxford

Finding 12: Target audiences by their need

GSO had particular success with targeting new audiences by targeting very specific needs:

"We segment other audiences, building on the idea that there are people out there that use classical music from a completely different point of view than our core audience, but we think that they might be interested in becoming a core audience, and so we did an analysis of who they might be, where might they be and how would they find us, who are their friends. And we build a pattern out of it and took one of these tiny groups and asked, what kind of concert would these people watch. From that we made concepts like our yoga audiences, targeting specifically people who likes to do yoga and likes to have music while they do it. And it was a huge success. We segment curious groups by looking at their need. They might not be interested in the subject - classical music. We solve their interest in getting to know classical music without leaving their comfort zone. And the yoga segment is very comfortable in their yoga mat. Through that they might also be able to see the benefits of looking for that music and go into a concert hall and challenge themselves, veining them into the classical music. The yoga segment has no idea what a classical concert looks like, so anything goes." GSO

PLATFORM

CONTENT, VOICE & USER JOURNEY

Finding 13: Digital formats and content

- The concert / performance
- Interviews either live or recorded and edited in postproduction
- Q&A at the end of the performance, where people could send questions either via chat or email.
- A chat function that people could use while watching a live stream
- Study session - a sort of educational entertainment like showing related art from the period of the composer and talking about common themes.
- Content targeting very specific needs in very specific groups like yoga concerts for yoga practitioners
- Podcasts
- Documentaries
- Masterclass – for students of music, learn from the legends.
- Story telling for children
- Study music
- Discussions among the artist
- Hosts / presenters either live or recorded and edited in postproduction

Findings 13: Audience feedback on content

While most couldn't really tell much of their audience's preferences there were a few insights that have been listed below as quotes.

The curated content, concerts that were **prerecorded and the edited** with shifts in scene, host and added content other than 'just' the concert saw increased popularity at GSOPlay:

"We do see bigger number of views on curated concerts like the National Dag Concert.[…] The curated content, that kind of programming reaches a wider audience. We can also make it available for a longer period, which is beneficial." GSO

"Our classical curiosa is just a lecture, one man, sitting at a piano, playing, talking and showing some pictures. The first day we had 15.000 viewers, finding it and seeing it all the way through."

GSO remarks that **shorter formats** generally works better for digital.

"We take the livestreams and make them into video on demand afterwards, but if the orchestra and the soloist is okay with it divide them into 20-minute separate videos, so we get a double output."

Findings 13: Audience feedback on content

Livestream seem to have a more international than regional appeal:

"The livestreams are far more important to an international audience than the video on demand." GSO

GSO talks about the importance of realizing that **people have different expectations to the digital than the concert hall** and sometimes require more than just recording a concert:
"We produce some things specifically for digital consumption." GSO

There are a group of audiences that uses the livestream as a very social event online:

"The livestreams are extremely important for the orchestra; they are also very important for a few thousand people. They use that as a community - regulars - and social interaction" GSO

Findings 13: Audience feedback on content

Smaller ensembles have a broader appeal:

“People are interested in these smaller constellations. But at the marketing department we have to be more conscious about how we make them visible and where and to what audience, because they **have potentially a large audience, but not necessarily within the core audience** and not necessarily among the people we know and who know us. It has potential but runs the risk of disappearing.” GSO

Producing content for a digital audience can require more of the production:

“**When it comes to theater live-stream performances you have to have a TV-director as well as the theater director.** For instance, for the novella of the beast the TV-crew was following the rehearsals for a couple of weeks to actually get to know the performance. Because the live-stream is live-edited/filmed - so they have their own script-book in a way in order to know what to film when on stage. This is quite a difficult job.” Det Norske Teater

Findings 13: Audience feedback on content

Having other formats with elements of different kinds of art that speaks into the same theme as the music have a lot of entertainment value:

> "The study concerts: We could show some spaces that people aren't allowed in like at the museums, and show them objects they would never see, and people really liked it." Oxford

Having a festival pass that gives access to everything might make people much more curious about content they wouldn't normally use:

"I got feedback that people were a little more adventurous than usual. They liked the idea that they could try something out. If they didn't like it, they could just turn it off. Like we had three world premieres that got more attention than usual. Contemporary music got more attention" Oxford

Finding 13: Digital formats and content

A more advanced production with more than one camera allows a different kind of dynamic and intimate feel than you would get if you sat in the audience seats.

Briefer formats – 20 minuts to 1 hour

More curated content concerts

Most of the case studies used their own website as platform

Finding 14: Digital support

"The audience would call when the concert started desperate to log but unable to make it work." Wimbledon

- Instruction videos helped guide the digital audience
- Sometimes it was difficult for them to even find the login or how to buy digitally / access the content you bought.
- Guides to the best experience – set up with your tv.

RECOMMENDATIONS

WHAT TO DO?

Recommendations

1
Price fencing and differentiation

Looking at the material we recommend creating multiple packages, allowing the audience to customize their own experience and to encourage more sales. Having different tiers of prices to choose from will encourage the users to choose higher priced packages. We recommend the following digital packages:

Recommendations

1
Price fencing and differentiation

Package	Price
Single performance ticket of the customers own choice	100-250 NOK
Bulk discount on 2 or 3 concerts, say 15-20% off.	
1 day pass. Gives access to a specific day worth of performances.	400 NOK
Festival pass. Gives access to all digital events	1000 NOK

Recommendations

1
Price fencing and differentiation

All of the above have a limited time to watch on demand - 2 weeks after the festival ends. One of the things that made people purchase the higher packages was the added on-demand time. That's why we propose you add this top tier package:

Package	Price
Exclusive festival pass - same as a festival pass but with 3 weeks of on demand time. Potentially 1 exclusive concert that can only be accessed with this pass.	1200 NOK

Recommendations

1
Price fencing and differentiation

Digital ad-on tickets

We also recommend that people who buy tickets for the concert hall experience can purchase a digital ad-on with a discount to encourage visitors at Bergen to also use the digital content.
For an **added price of 80 NOK for example they can buy a concert online** or even buy access to the recording of the concert they watch in the concert hall if they enjoyed it and want to see it again. Make sure to suggest this to people who buy a single ticket to a concert in Bergen. This is a great sales argument for people who cannot visit all the days of the festival, but who don't want to miss certain performances.

Recommendations

1
Price fencing and differentiation

Differentiating prices on single performances

In NPU's study and the example with Det Norske Teatret, we could see that the average price for a theater ticket in Norway is potentially more expensive than in the rest of the world right now. As we are setting a standard in Norway for pricing digital content, there is a case to be made for setting the price right for the Norwegian market, but at the same time not discouraging international audiences. That is why we recommend you price your performances separately. A text/language-based theater performance in Norwegian can be priced higher, because it is of less interest to an international audience.

Recommendations

2
Exclusive online content

If you want to make the digital more attractive to the regular users, we recommend having something online that cannot be accessed in-person. This way the audience who wants the full festival experience will be nudged online. The exclusive content can be a concert. You can also add the reverse concept, one or more concerts that cannot be seen online, only in-person.

Recommendations

3
Develop formats focusing specifically on Bergen/Norway and brand

From Oxford we can see that there is a definite sense of where you are in the world ingrained in the festival. GSO noted that the use of certain Swedish words and having footage from the Swedish nature was of interest to the regional audiences as a feeling of belonging and recognition while the international audiences experienced it almost like digital travels or tourism. Having a voice that is based around the setting of the festival can be a digital selling point.
Having a unique voice in general sells better than being very broad online. Oxford did attribute some of their success to being more niche and they cut away everything that wasn’t directly related to the core product that their audiences came to them for.

Recommendations

4

Make a study of the audience behavior during the festival

As you can tell from the market research there is a clear lack of data about user behavior and journeys digitally. These data could serve to strengthen your business model and targeting as well as your digital programming. As no such detailed data exists, we recommend that you use this festival to study your audiences online, mapping their behavior and improve your chance of digital success over the next years.

Recommendations

5
Market to international audiences

Both Oxford, GSO and Wimbledon noticed that a significant part of their new users were international and as GSO showed us, the international audiences were interested even before COVID. The case studies in this analysis reported that US (especially Boston, New York, Cleveland, Chicago & L.A.), Canada, Brazil and Japan users consumed digital concerts abroad. Looking at our own overview of festivals, there is potentially a market in Germany as well, since so few festivals are active there at the moment.

This does mean that you will have to consider the program and platform's appeal to an international audience. First priority here is language barriers. If you have an international English website, English speaking presenters at the performances and interviews, you are more likely to attract the international audiences.

Recommendations

6

Market to your regulars

The oxford example showed us out of their regulars 75 % were willing to follow them online - when there was no in-person festival available. Especially core audiences who lived in England but more than 30 km away were very interested to buy digital tickets, because they couldn’t attend as much as they wanted to.

Recommendations

7

Help your audience become digital

In the example with Wimbledon there was little effort made in preparing the audiences to become digital, while Oxford put a lot of time and effort into it. You have to focus on **getting your regular audiences to see the benefit of using the digital** and making them comfortable so they feel like trying it out. Oxford did have some small *digital concerts before the festival.* This meant that they stayed relevant digitally for the audience and the audiences grew accustomed to the fact that the festival delivered digital content. There must also be a focus on the platform and *making it very easy and simple to find what you want and to log in.*

Recommendations

7
Help your audience become digital

Having something *printed or a program that also includes the digital* strategically in the communication can help sales and assure the audience that the digital program will be straight forward and just like they know it from their usual visits. Have **a test event** that people can try logging into long before the festival, so that they can try the online system. Have very **clear instruction videos** on the basics like how to log in, how to set up your computer with your television, how to navigate the digital site and potentially videos of people getting ready and dressing up to watch it with red wine on the sofa or whilst dining.

Recommendations

8
Create socializing options online

While it is true that some do not like a live chat function during their concerts the social element of a festival and the sense of community is important. GSO reported that some of their most hardcore fans is very fond of having the **possibility to chat** with others that share the passion for the orchestra. We recommend having a chat function but make sure it folds in and out when you click on it, so that you can choose if you want to see it or not. Those that had success with chats also had a **live moderator** sitting on the chat during the performance, facilitating the social experience by asking questions or answering them.

Recommendations

8
Create socializing options online

Another social element that we recommend is a red-carpet studio, like **an online foyer before the concerts** with a host that can talk about highlights of the festival so far, do interviews, answer questions from the chat and set the mood for the concert. This is also a great *opportunity to sell more* to the people who only bought one ticket, by talking about the coming events or advertising the great show that they did last night with a video clip and mention that you can still watch on demand.
Remember that *some wants the experience to be free from disturbances*, so your platform has to be able to turn of chat functions.

Recommendations

9

Continue selling /marketing throughout the festival

Oxford reported that they still sold tickets after the festival because of the on-demand period following the festival. They used the clips from the festivals to sell tickets and access to the on-demand content.

Recommendations

10

Sell the rights of the festival performances to libraries, nursing homes or schools afterwards.

Your content can be used afterwards by institutions in Norway or elsewhere, by letting people purchase a license to watch it, that could pay for the rights from the artists and with a little extra to either pay for administration or to get extra income after the festival ends.