

## Theatre

Two hundred and sixteen Theatre organisations participated in the 2019 Digital Culture survey which evaluates how arts and cultural organisations in England use digital technology. They include organisations of different sizes from across England, giving us a picture that reasonably reflects how the Theatre sector is using technology to support its work.<sup>1</sup>

### Importance of digital technology

Most important for →

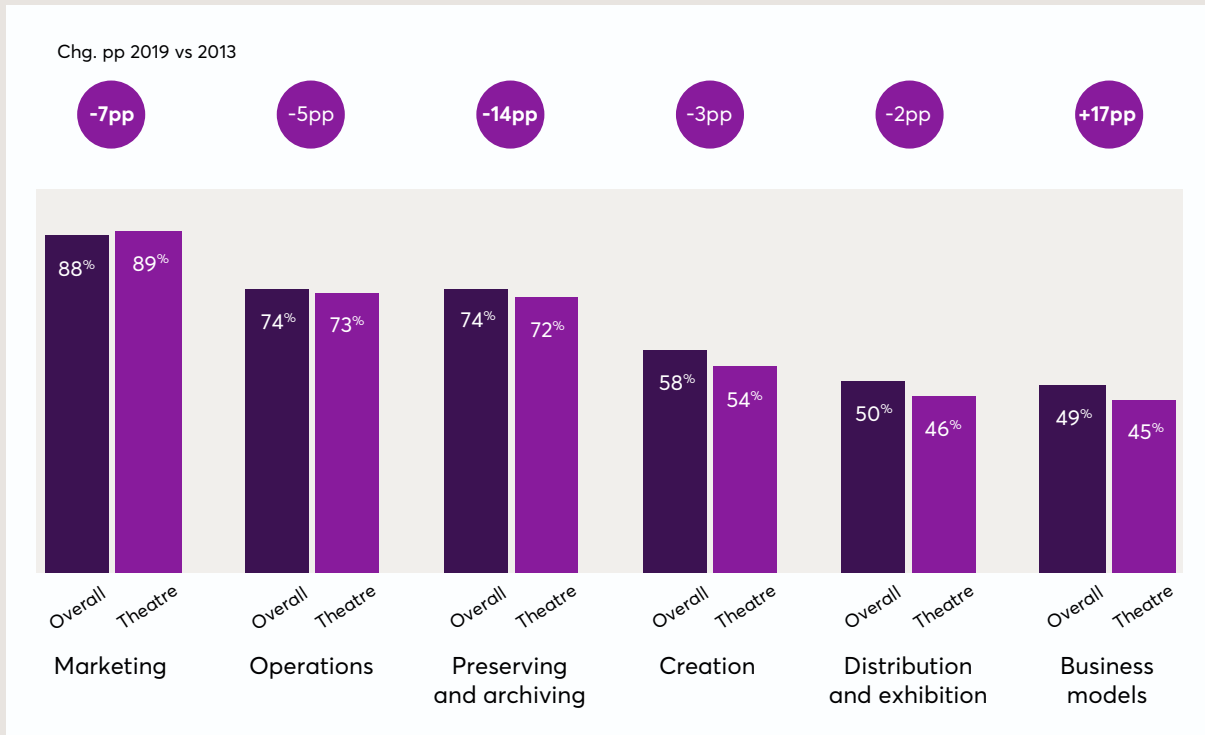
Marketing

Least important for →

Business models

Overall, Theatre organisations' perceptions of digital technology being essential/important are approximately in line with the arts and culture sector as a whole. The area where most Theatre organisations perceive digital technology to be essential/important is marketing (89 per cent of Theatre organisations vs 88 per cent of the whole sector), followed by operations (73 per cent vs 74 per cent) and preserving and archiving (72 per cent vs 74 per cent). The business areas where Theatre organisations are less likely to say that digital is essential/important compared to the sector overall are creation (54 per cent of Theatre organisations vs 58 per cent of the sector), distribution and exhibition (46 per cent vs 50 per cent) and business models (45 per cent vs 49 per cent).<sup>2</sup>

Figure 1: Importance of digital (essential/important) to different areas – whole sector vs Theatre, 2019



How important is digital technology to your organisation overall, at the present time, in each of the following areas? 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold.

Base: 2019 – all respondents (n = 1,113), 2019 – Theatre organisations (n = 211); 2013 – Theatre organisations (n = 221).

Mirroring the sector overall, the proportion of Theatre organisations that consider digital technology to be essential/important for business models has increased significantly since 2013 (from 28 per cent in 2013 to 45 per cent in 2019). However, perceptions of digital being essential/important have declined for all other areas, with the biggest drop seen for preserving and archiving (86 per cent of Theatre organisations in 2013 vs 72 per cent in 2019).<sup>3</sup>

## Digital activities

Top digital activities →	Email marketing, publishing content on free platforms, publishing content onto our own website
More likely than other artforms to do... →	Email marketing, using crowdfunding platforms

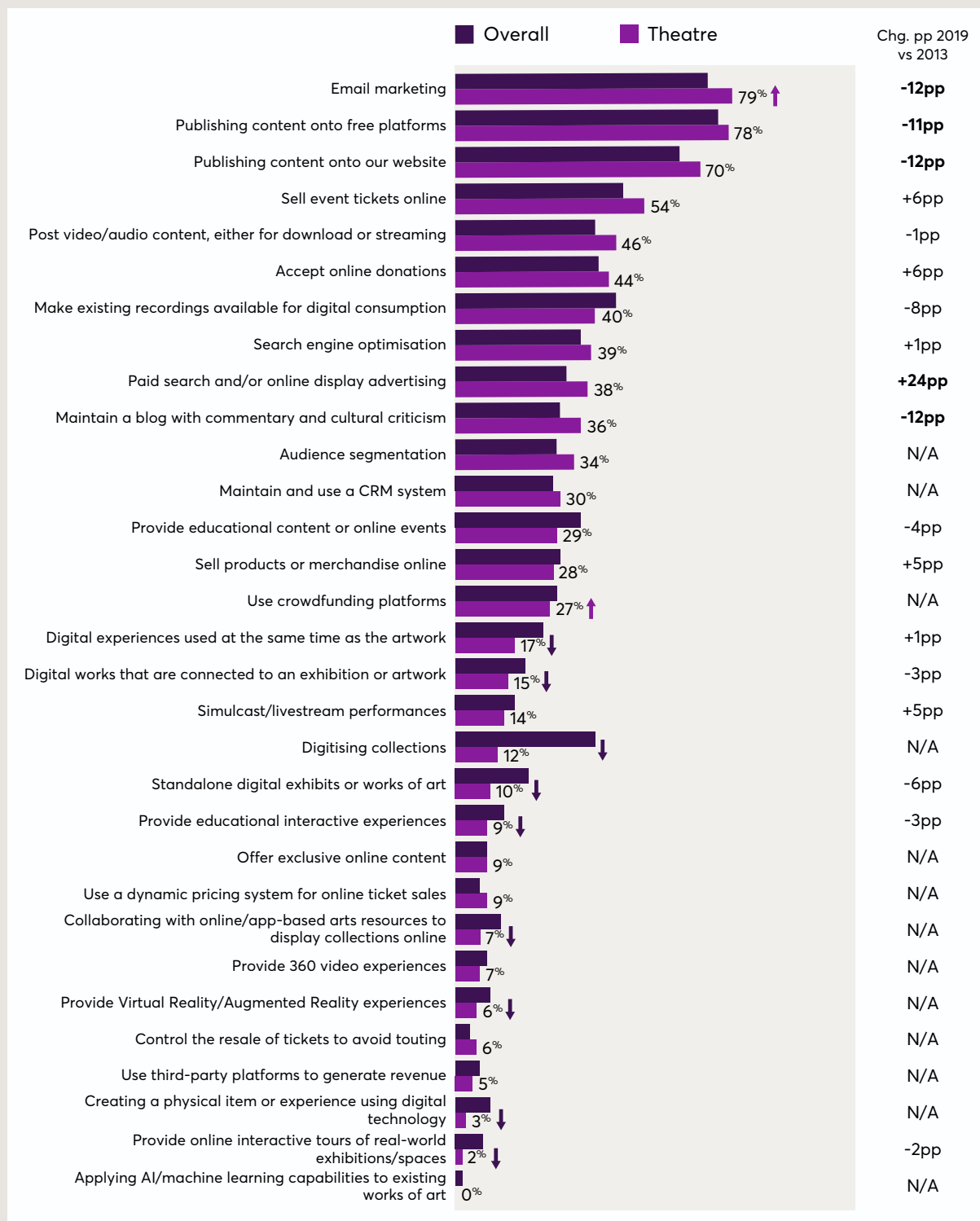
Theatre organisations on average carry out the same number of digital activities compared to the sector as a whole, engaging in eight digital activity types.<sup>4</sup>

There are two digital activity types that Theatre organisations are notably more likely to do compared to the sector overall. These are email marketing (79 per cent of Theatre organisations do this vs 72 per cent of the sector overall) and using crowdfunding platforms (27 per cent of Theatre organisations vs 19 per cent of the sector). Theatre organisations are significantly less likely than the sector to engage in nine of the thirty-one activity types tested in the survey, most notably standalone digital exhibits or works of art (10 per cent of Theatre organisations vs 21 per cent of the sector) and digitising collections (12 per cent vs 30 per cent).

Compared with 2013, Theatre organisations carry out slightly fewer digital activities on average, with the average number of activity types dropping from 8.6 to 8.1 in 2019. Most individual activity types tested in the survey have declined amongst Theatre organisations over this period. The largest declines have been for maintaining a blog with commentary and cultural criticism (48 per cent of Theatre organisations did this in 2013 vs 36 per cent in 2019), email marketing (91 per cent in 2013 vs 79 per cent in 2019) and publishing content onto our website (82 per cent in 2013 vs 70 per cent in 2019).<sup>5</sup> The sector overall has also seen declines in these activity types since 2013.

On the other hand, seven digital activity types are reported to have increased since 2013 amongst Theatre organisations. The largest increase is in paid search and/or display advertising, which 14 per cent of Theatre organisations did in 2013, compared to 38 per cent in 2019. This activity type has seen a similar increase across the sector as a whole. There have also been notable increases among Theatre organisations in revenue generating activity types: selling event tickets online (48 per cent of Theatre organisations in 2013 vs 54 per cent in 2019), accepting online donations (38 per cent vs 44 per cent) and selling products or merchandise online (23 per cent vs 28 per cent). Simulcasting/livestreaming performances has also increased since 2013, from 9 per cent to 14 per cent of Theatre organisations.<sup>6</sup>

Figure 2: Digital activity types for Theatre organisations vs overall sector 2019 (and change from 2013)



Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector. N/A is stated where question was not asked in 2013.

Base: 2019 – all respondents (n = 1,134), 2019 – Theatre organisations (n = 216); 2013 – Theatre organisations (n = 221).

Seventy-four per cent of Theatre organisations now have a mobile-optimised web presence, in line with the sector average of 73 per cent.<sup>7</sup> The proportion of Theatre organisations with a mobile-optimised web presence has increased dramatically, from just 24 per cent in 2013.<sup>8</sup>

Of the fifteen social media platforms listed in the survey, Theatre organisations use an average of 4.6 compared to 4.2 amongst the sector overall. For both Theatre and the sector overall, Facebook remains the most prevalent platform (96 per cent of Theatre organisations have an active profile vs 92 per cent of the sector). Theatre organisations are also more likely than the sector overall to be active on the next most popular social media platforms, Twitter (87 per cent of Theatre organisations vs 83 per cent of the sector), Instagram (69 per cent vs 65 per cent) and YouTube (61 per cent vs 47 per cent).<sup>9</sup>

Theatre organisations are as likely as the sector overall to engage in the data-driven activities tested in the survey: both averaging four activities. The only data-led activity which proportionately more Theatre organisations do compared to the sector overall is use audience/visitor data to personalise different marketing, sales and/or fundraising campaigns for different types of user (39 per cent of Theatre organisations do this compared to 31 per cent of the sector). Conversely, the only data activity which proportionately fewer Theatre organisations do is use analytics and insight from audience/visitor data to improve our website (30 per cent of Theatre organisations vs 39 per cent of the sector).<sup>10</sup>

Since 2013, six of the fifteen data-led activities tested have become less prevalent amongst Theatre organisations. The most notable declines are in using data to identify and engage with our most valuable audience members, visitors and supporters (48 per cent of Theatres did this in 2013 vs 37 per cent in 2019) and using data to develop our online strategy (48 per cent in 2013 vs 38 per cent now). These data-led activities have also declined amongst the sector overall since 2013.<sup>11</sup>

## The positive impact of digital

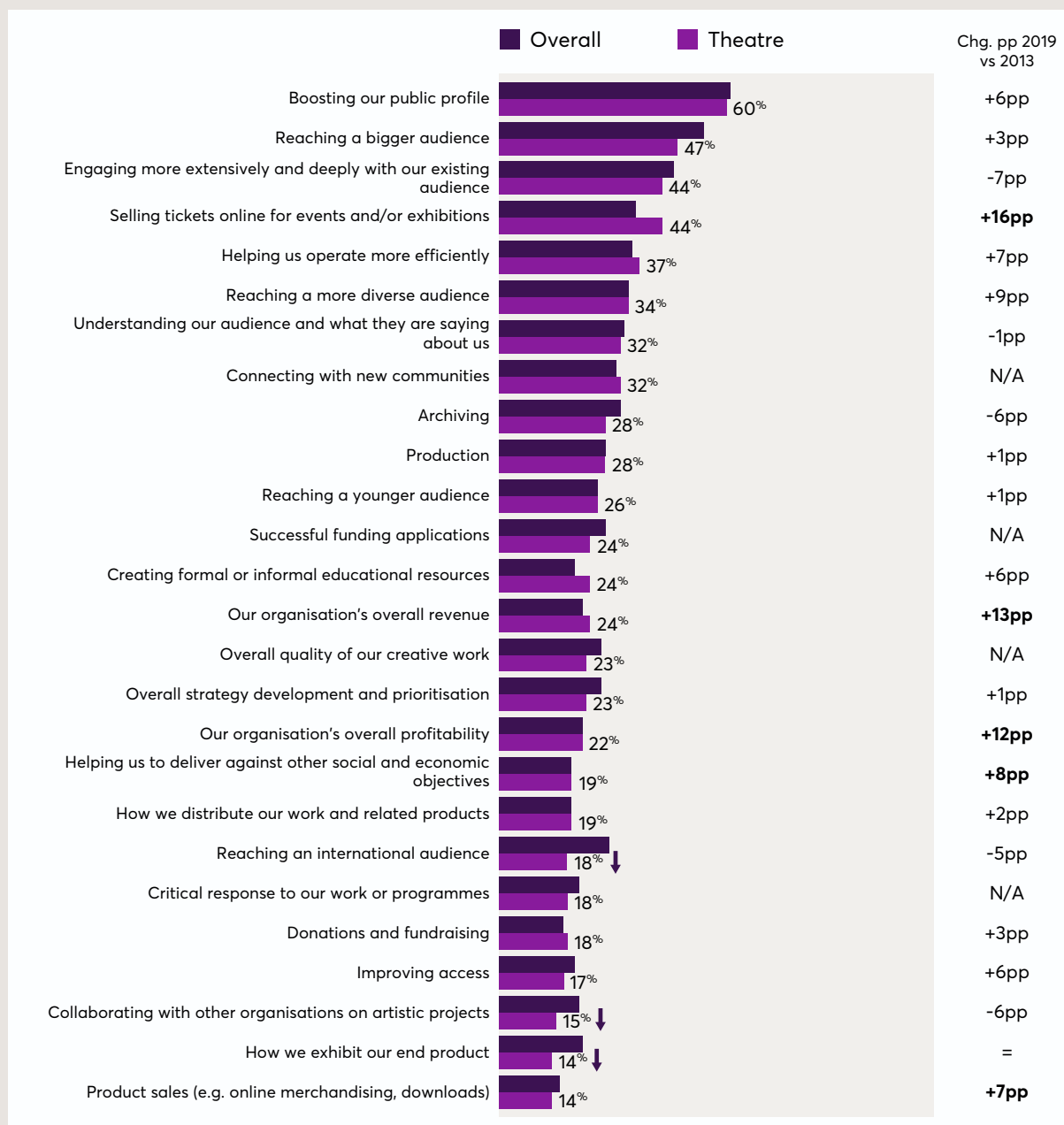
Proportion seeing major/fairly major positive impacts overall →	68 per cent (vs 67 per cent for the whole sector)
Main area of positive impact →	Boosting public profile

In the Digital Culture survey, organisations were asked how great an impact they felt digital technology had on their organisation's ability to fulfil its mission successfully. Overall, 68 per cent of Theatre organisations report a major/fairly major positive impact (scoring four or five on a five-point scale) on their ability to carry out their mission, in line with the sector average of 67 per cent. This proportion has increased from 63 per cent of Theatre organisations in 2014 (the first time this question was asked).<sup>12</sup>

Organisations were also asked whether they felt their use of digital technology had a major positive impact, a minor positive impact or no positive impact, on a list of business areas. Across the twenty-six business areas tested, Theatre organisations tend to report proportionately similar levels of major positive impact compared to the sector overall. However, Theatre organisations are more likely to report a major positive impact from digital technology for selling tickets online (44 per cent of Theatre organisations vs 37 per cent of the sector); whereas they are less likely to report major positive impact for reaching an international audience (18 per cent of Theatre organisations vs 29 per cent of the sector), how they exhibit their end product (14 per cent vs 22 per cent) and reaching a bigger audience (47 per cent vs 54 per cent).<sup>13</sup>

Since 2013, the proportion of Theatre organisations reporting a major positive impact from digital has increased across most business areas tested. The largest increases all relate to revenue generation: selling tickets online for events and/or exhibitions (28 per cent of Theatre organisations reported a major positive impact in 2013 vs 44 per cent in 2019), our organisation's overall revenue (11 per cent vs 24 per cent) and our organisation's overall profitability (10 per cent vs 22 per cent). There have however been declines in some areas since 2013, notably: engaging more extensively with our existing audience (51 per cent of Theatre organisations reported major positive impact here in 2013 vs 44 per cent in 2019), collaborating with other organisations on exhibitions or artistic projects (21 per cent vs 15 per cent) and reaching an international audience (23 per cent vs 18 per cent).<sup>14</sup>

Figure 3: Proportion of Theatre organisations reporting a major positive impact of digital technology on business areas (Theatre vs whole sector, 2019)



Thinking back over the past twelve months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? 'Chg. pp' = Change in percentage points. Statistically significant changes 2013–2019 (at a 95 per cent confidence level) highlighted in bold. Arrows show statistically significant differences vs whole sector. N/A is stated where question was not asked in 2013.

Base: 2019 – all respondents (n = 997), 2019 – Theatre organisations (n = 189); 2013 – Theatre organisations (n = 221).

## Management factors

Biggest barrier →	Lack of in-house staff time
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Theatre organisations cite the same top three barriers that hinder their ability to achieve their digital aspirations as the sector overall. However, unlike the sector overall, Theatre organisations identified lack of in-house staff time as the most prevalent barrier (rather than the second most prevalent); 73 per cent of Theatre organisations reported this as a barrier vs 68 per cent of the sector. The next highest reported barriers amongst Theatre organisations are lack of funding to allocate to digital projects (68 per cent of Theatre organisations vs 70 per cent of the sector) and difficulty in accessing external funding for digital projects (55 per cent of Theatre organisations vs 58 per cent of the sector).<sup>15</sup> Both lack of funding to allocate to digital projects (77 per cent in 2013 vs 68 per cent in 2019) and difficulty in accessing external funding for digital projects (63 per cent in 2013 vs 55 per cent in 2019) have fallen amongst Theatre organisations since 2013.<sup>16</sup>

Compared to the sector overall, Theatre organisations are more likely to report lack of strategy/planning as a barrier (29 per cent of Theatre organisations report this vs 23 per cent of the sector) and lack of expert advice (40 per cent of Theatre organisations vs 35 per cent of the sector).<sup>17</sup>



Figure 4: Perceived barriers to achieving digital aspirations, felt by Theatre organisations (Theatre organisations vs whole sector, 2019)



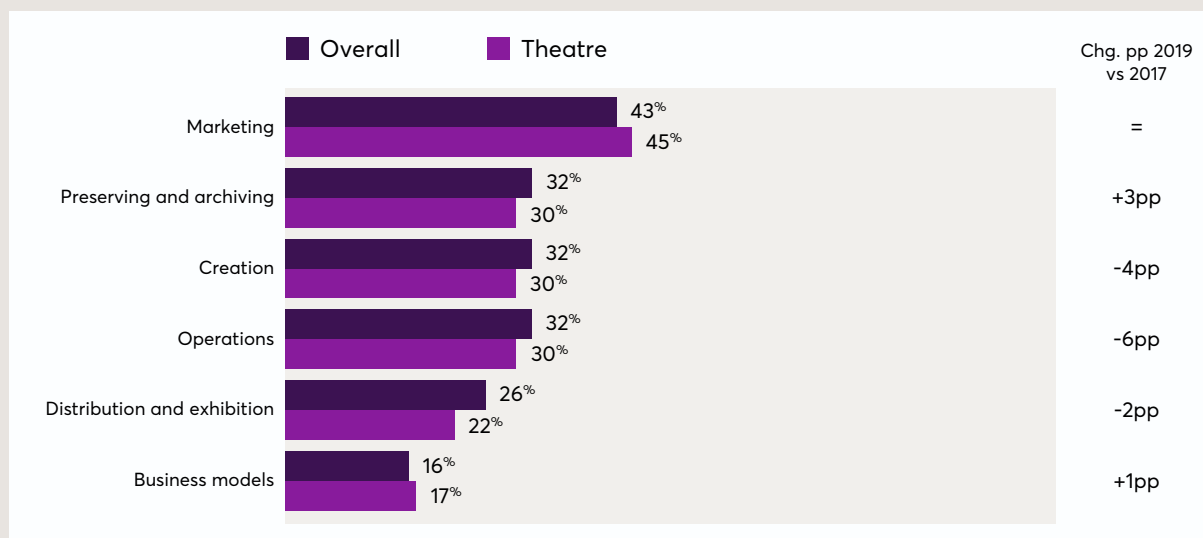
To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? 'Chg. pp' = Change in percentage points. N/A is stated where question was not asked in 2013.

Base: 2019 – all respondents (n = 976), 2019 – Theatre organisations (n = 188); 2013 – Theatre organisations (n = 218).

Overall, Theatre organisations report similar digital skills levels compared to the sector overall. Theatre organisations report slightly lower levels of advanced skills across four of the six skills areas tested in the survey and slightly higher levels in the other two.

The two areas where Theatre organisations report slightly higher levels of advanced digital skills are marketing (45 per cent of Theatre organisations report advanced skills vs 43 per cent of the sector) and business models (17 per cent of Theatre organisations vs 16 per cent of the sector). In line with the sector, Theatre organisations report the highest proportion of advanced skills in marketing.<sup>18</sup> Theatre organisations are less likely than the sector as whole to report advanced skills in distribution and exhibition (22 per cent of Theatre organisations report advanced skills in this area, compared to 26 per cent of the sector).

Figure 5: Proportion of Theatre organisations that report their organisation to have advanced digital skills (six–ten out of ten) compared to their peers



For each of the following areas, how advanced do you feel your organisation's digital skill levels are compared to your peers? 'Chg. pp' = Change in percentage points. N/A is stated where question was not asked in 2013.

Base: 2019 – all organisations (n = 965), 2019 – Theatre organisations (n = 188); 2017 – Theatre organisations (n = 271).

Since 2013, the Digital Culture survey has also asked organisations to look at a list of skills and capabilities in eleven key digital technology areas, rating each one according to whether they feel well-served or under-served for their needs. This takes account of external options as well as internal resources; feeling 'well-served' may involve having sufficient in-house skills or could be achieved through accessing skills and expertise externally.

Theatre organisations report feeling well-served for their needs in an average of 4.8 areas, compared to 4.6 amongst the sector overall. In four out of the eleven business areas fewer Theatre organisations report feeling well-served for their needs compared to the sector. The most notable difference is for digital commissioning and partner management where 14 per cent of Theatre organisations report feeling well-served versus 25 per cent of the sector. Conversely, Theatre organisations are proportionately more likely than the sector overall to say they are well served for their needs in digital marketing (76 per cent of Theatre organisations vs 66 per cent of the sector) and digital production (40 per cent vs 30 per cent).<sup>19</sup>

The proportion of Theatre organisations feeling well-served for their needs in digital production has declined notably since 2013: 40 per cent of Theatre organisations feel well-served for their needs in this area now compared to 53 per cent in 2013.<sup>20</sup>

## Endnotes

1. Please note, our sample size of Theatre organisations (n = 216), allows for a margin of error of +/- 7 per cent at a 95 per cent confidence level. Please see the main report for details of our calculations of statistical significance.
2. Q10. How important is digital technology to your organisation overall, at the present time, in each of the following areas? Base: 2019 – all organisations (n = 1,113), 2019 – Theatre organisations (n = 211).
3. Q10. Base: Theatre organisations in the following years: 2013 (n = 221), 2019 (n = 211).
4. Q12. Now thinking about your organisation's digital activities, please indicate which of the following your organisation currently does. Base: 2019 – all respondents (n = 1,134), 2019 – Theatre organisations (n = 216).
5. Q12. Base: Theatre organisations in the following years: 2013 (n = 221), 2019 (n = 216).
6. Q12. Base: Theatre organisations in the following years: 2013 (n = 221), 2019 (n = 216).
7. Q23. Does your organisation currently have a web presence that is optimised for mobile devices? Base: 2019 – all organisations (n = 1,003), 2019 – Theatre organisations (n = 190).
8. Q23. Base: Theatre organisations in the following years: 2013 (n = 219), 2019 (n = 190).
9. Q18. On which, if any, of the following social networks/websites does your organisation currently have a regularly active profile? Base: 2019 – all respondents (n = 1,029), 2019 – Theatre organisations (n = 195).
10. Q16. Thinking about how you use audience or visitor data (generated either via your own website, social media, offline engagement or a third-party platform such as Audience Finder), which of the following activities are you doing? Base: 2019 – all respondents (n = 1,036), 2019 – Theatre organisations (n = 197).
11. Q16. Base: Theatre organisations in the following years: 2013 (n = 217), 2019 (n = 197).
12. Q35. Overall, how great an impact do you feel digital technology has had on your organisation's ability to fulfil its mission effectively? Answer scale: five-point scale from no impact at all (1) to major impact (5). Base: 2019 – all respondents (n = 994), 2019 – Theatre organisations (n = 189); 2014 – Theatre organisations (n = 247).
13. Q28. Thinking back over the past twelve months, would you say your organisation's use of the internet and digital technology has had a major positive impact, a minor positive impact, or no positive impact at all on each of the following? Answer scale: three-point scale from no positive impact at all (1) to major positive impact (3). Base: 2019 – all respondents (n = 997), 2019 – Theatre organisations (n = 189).
14. Q28. Base: Theatre organisations in the following years: 2013 (n = 221), 2019 (n = 189).
15. Q37. To what extent do you see each of the following as barriers to achieving your organisation's aspirations for digital technology? Base: 2019 – all organisations (n = 976), 2019 – Theatre organisations (n = 188).
16. Q37. Base: Theatre organisations in the follow years: 2019 (n = 188), 2013 (n = 218).
17. Q37. Base: 2019 – all organisations (n = 976), 2019 – Theatre organisations (n = 188).
18. Q67. For each of the following areas, how advanced do you feel your organisation's digital skill levels are compared to your peers? Base: 2019 – all respondents (n = 965), 2019 – Theatre organisations (n = 188).
19. Q45. Here is a list of skills and capabilities in key areas relating to digital technology and digital R&D. Please rate each one according to the extent to which your organisation is well-served or under-served for its needs in these areas. Base: 2019 – all organisations (n = 969), 2019 – Theatre organisations (n = 188).
20. Q45. Base: Theatre organisations in the following years: 2013 (n = 218), 2019 (n = 188).

## Learn more about the Digital Culture 2019 survey findings

The Digital Culture 2019 report and factsheets are brought to you by Arts Council England and Nesta. Click [here](#) to read the Digital Culture 2019 report.



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