

Transforming Arts Organizations Worldwide

Demystifying Digital Monetization

March 29

A Team Effort

ABA Research Team



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Our Sincere Thank You to our Members, Arts Organizations and Video Streaming Platforms Who Participated in This Research



Agenda for Today's Conversation

01

Assessing
the
situation

02

Defining
What We
Want To
Achieve

03

Fine-
Tuning
Pricing and
Packaging

04

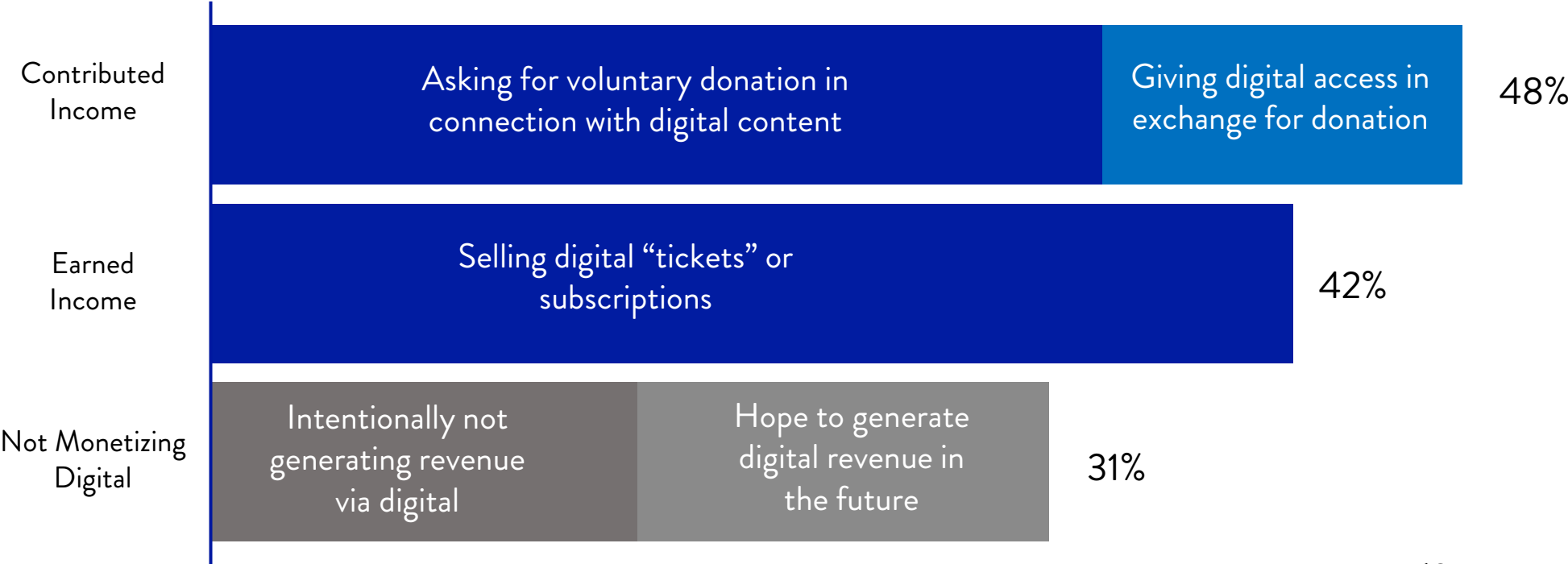
Aligning
Technology
Choices with
Objectives

05

What Should
We Take
Beyond the
Pandemic

Most Arts Organizations Are Trying to Monetize Digital

Focus of Monetization Activities by Arts Organizations



n = 62

Source: ABA's Arts Organization Coronavirus Response Benchmarking Survey, October 2020

We Have So Many Questions

Top Questions

- Who's able to get a lot of views, and what content are they using?
- How can we re-use content for different purposes and to appeal to different audiences?
- How are organizations charging, and is anyone making money?
- Have organizations had more success charging for content individually or bundling it?
- Is it worth acquiring high-end equipment, or are we better off renting (or foregoing it altogether)?
- What are the pros and cons of different third-party platforms for sharing our content?
- What's worth continuing when we return to in-person performance?
- Is there anything new we should focus on when we return to in-person?

What's In Today's Session

- Audience considerations
- Packaging, pricing decisions
- Video streaming platform choices
- How audiences may change when we return to in-person

We provide frameworks, case studies and examples that reflect the current state of digital in the arts

What's - Not - In Today's Session

- Production details like camera and production costs
- Content questions like successful length and quality bar for content
- Educational content ecosystems topics
- Union negotiation tactics

Our Slack channel and peer sessions are great places for these questions

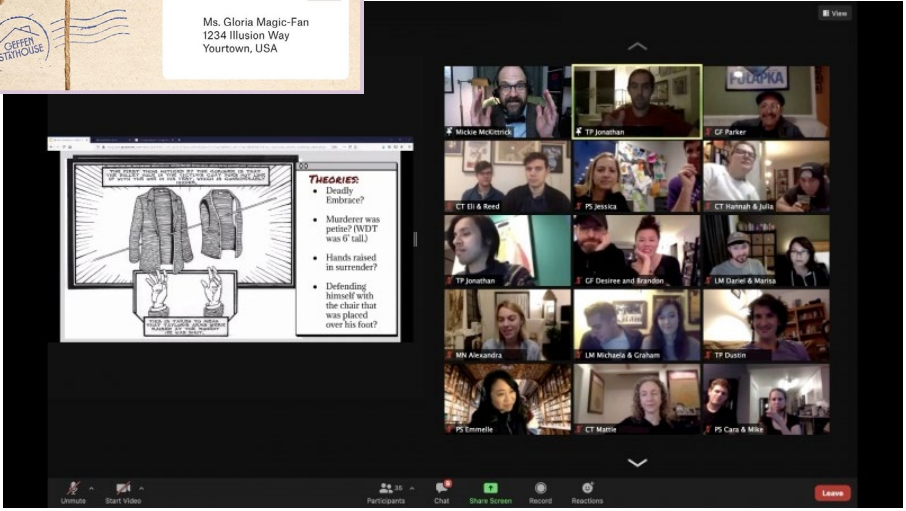
Our Wildest Aspirations

Two organizations have succeeded in their digital efforts in ways we all hoped for

GEFFEN PLAYHOUSE



- Digital first
- Full connective experience
- Ticket sales in seven figures



[Click here for the full Geffen Playhouse case study](#)

National Theatre

- Monthly/annual subscription or pay-per-view
- Large archive plus monthly new releases
- 15MM viewers, >25,000 donations in 16 weeks



Unmissable theatre, whenever you want it

The all-new National Theatre at Home is a streaming service offering unforgettable British theatre available to watch any time, anywhere.

You can choose to subscribe, or pay for a single play.

Watch National Theatre Live recordings, filmed in high definition for cinema to capture all the twists and turns, laughter and heartbreak. Plus, for the first time ever, we're releasing a treasure trove of plays from the National Theatre Archive.

[Visit National Theatre at Home](#)

Subscribe today and enjoy:

- New plays every month, so there's always something new to look forward to.
- Unlimited access. Watch whatever you want, whenever you want with no time-limits.
- Watch at home or on-the-go, on any internet browser or through the National Theatre at Home app, available on iOS, Android, Amazon Fire TV and Roku TV.
- Early access to new titles and exclusive behind-the-scenes content.

Share the magic of theatre with friends and family.

National Theatre at Home is your theatre, any time, anywhere.

[Start watching](#)

[Click here for the full National Theatre case study](#)

The Hard Reality

1. Not Break-Even

During the pandemic, few organizations will see direct revenue from digital that exceeds costs.

However, digital value propositions have helped to retain subscription and contributed income.

2. Donation Success

For most organizations, donations have proven to be the biggest monetization success.

Many have been pleasantly surprised about the number of donors reached through digital channels.

3. Audience Learning

Earned revenue efforts are unlikely to generate significant income in the near term.

They do provide some income, however, along with data about what audiences want and value.

4. Improving Economics

The future of digital monetization looks much brighter when digital revenues need only provide incremental revenue rather than replace huge portions of lost revenue.

5. Future Value

Future digital value propositions may be just as likely to be have indirect path to revenue:

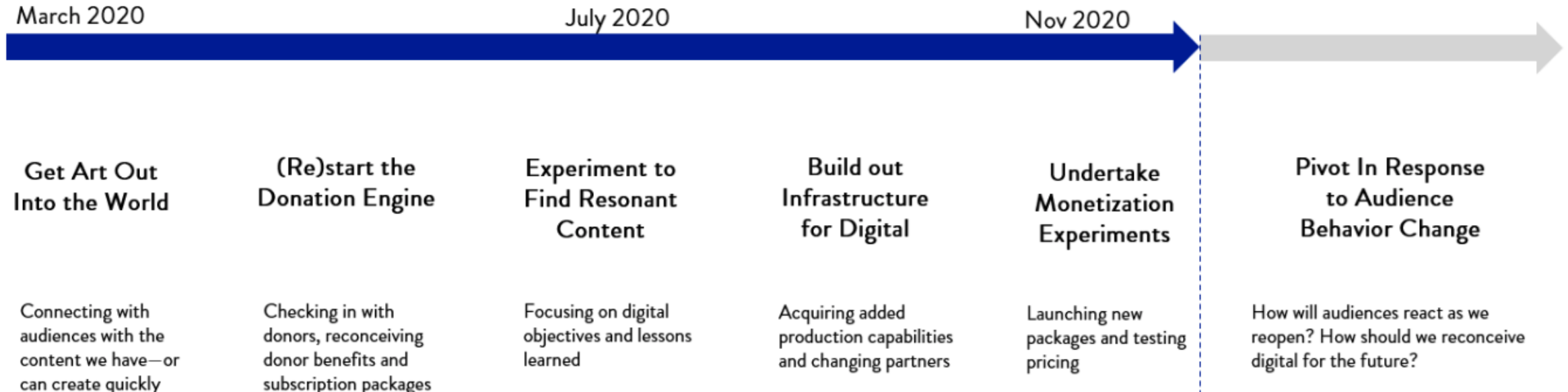
- Finding new audiences
- Engaging donors
- Building brand loyalty

AMS Audience Report—March 2021

90%

...say that online programs will play a small role or no role in their cultural life once facilities open.

Keeping One Eye on the Horizon



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situation

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Achieve

03

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Packaging




04

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Technology
Choices with
Objectives

05

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Pandemic

Your Target Audience Drives Your Monetization Approach

	Who	Why	How		
	Target Audience	Monetization Objective	Content	Packaging & Pricing	Distribution
	Single ticket buyers	Earned income from tickets	Live individual performances	Premium ticket prices	<ul style="list-style-type: none"> • Zoom • Audience lists
	New audiences	Earned and contributed income	Newsletter, classes, films, digital events	Free membership + add-ons	<ul style="list-style-type: none"> • YouTube and Zoom • Membership lists
	Existing subscribers	Earned income from retention of subscription revenue	Digital season of individual performances	Subscription package	<ul style="list-style-type: none"> • JW Player • Subscriber list

A Little Give For A Lot of Get

Members provide just a few pieces of information to join...

Membership Sign-Up Process

Don't miss out

Become a FREE member today and you'll hear about our latest films, tours, events & classes, and ways to support us.

First Name Last Name

Email Address

You can unsubscribe via a link in each email or by logging into your account. [View our privacy policy.](#)

Let us know your interests so we can send you more relevant updates, offers and information

PERFORMANCE

Family shows

Films

Performances on stage

CLASSES

Adult classes

Associates

Dance health programme

SUPPORT

Ways to support SB

Only after hitting “Subscribe Now” are members then asked to select their interests and also provide their address, phone number, and consent to receive emails.

...and gain access to a suite of benefits

1 Member-only film releases & events

AVAILABLE FROM THURSDAY 25 FEBRUARY

This film follows four dancers as they explosively intertwine and interact on a dark and empty stage, reflecting the labyrinth of sound and changing tempos created by the drums.

Dark Full Ride was first performed on stage as part of the 2013 Edinburgh International Festival and was filmed in a Covid-safe environment in December 2020.

As a Member, you don't have to do anything to view *Dark Full Ride*! A viewing link will be sent to this email address around 5pm on Thursday 25 February 2021.

To ensure you're always first to hear about our films, log in and update your interests [here](#).

2 Backstage magazine & email updates



3 Access to purchase ballet classes

Class
Improvers Ballet

Please sign up for free Membership to be able to book.

BECOME A FREE MEMBER TO BOOK CLASSES

Along with the free content, membership creates direct pathways to ticketed classes and donation-based films. This link is one benefit of a freemium model, which can help shift free users into paying customers.

Membership as a Community, Not a Transaction

1 From the first email members receive, it's clear they are becoming part of a community, creating a more emotional – and less transactional – connection to the company.

2 The authentic tone, with friendly and conversational language, conveys there is a genuine desire to make a personal connection with each new member.



WELL, HELLO THERE!

You've joined our free membership programme, and we're really chuffed to welcome you into the Scottish Ballet community.

This means you have access to exclusive films, events and classes, and we'll be keeping you up to date with all our news. You'll also receive a digital subscription to Backstage, our company magazine, and special perks from our pals.

We're Scotland's national dance company. Based in Glasgow, we aim to bring the best of ballet to audiences at home and abroad, promoting Scotland's pioneering spirit far and wide. Right now we're busy making some incredible films to share with you – find out more below.

CAN WE GET TO KNOW YOU A WEE BIT BETTER?

If you haven't already, please take a moment to complete your online account. That way you'll be ready to book whatever takes your fancy, and we can send you more of the stuff you're into.

COMPLETE YOUR ACCOUNT

3 The request for data is bookended by two descriptions of what the member will get out of the program, keeping the emphasis on the “what I get” more than the “what I give.”

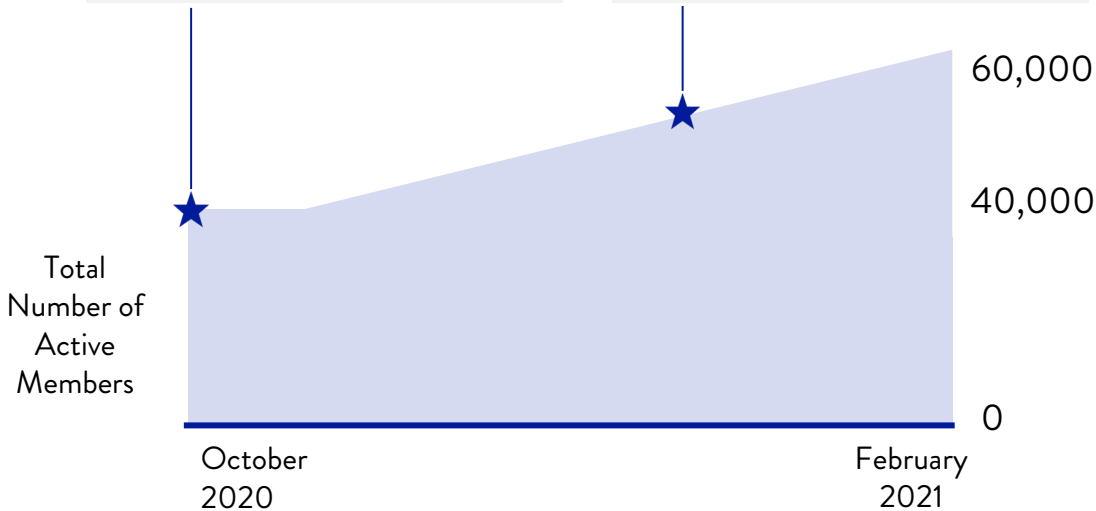
Off To A Fast Start

Active* Membership Growth

*Active members are members who regularly open communications and interact with content. 60,000 active members – and growing – demonstrates that members see value from their membership.

Scottish Ballet first automatically converted their 40,000 existing active newsletter subscribers into members, asking them to update their preferences

An additional 11,000 members signed up after The Secret Theatre. The rest came from other channels, including 5,000 after the Ballet added a site pop-up



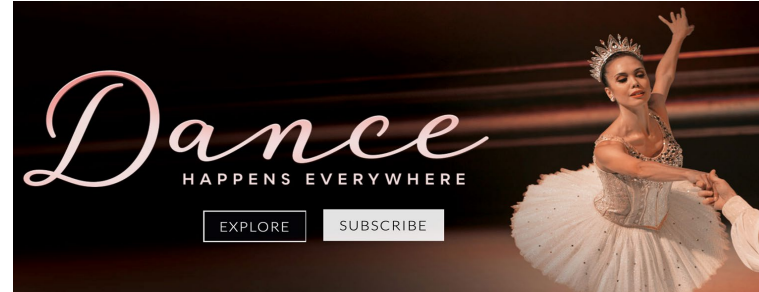
Impact of Membership on Programs

The Secret Theatre	50% of viewers donated, with the most common donation of £10
Online classes & events	Significant increases in revenue (compared to live) due to higher capacity and lower costs to execute
Donor acquisition	Active conversion of free members into paying 'Friends' after each event using targeted messaging

Revenue generation increases are largely due to digital being much more scalable

[Click here for the full Scottish Ballet case study](#)

PNB's Pricing Anchors From Live Subscription



Digital Subscription \$190

- 6 performance events with a mix of new and archival video
- All bonus content: exclusive behind-the-scenes footage, interviews, galleries, etc.

Designed for existing subscribers who had renewed before the COVID-19 pandemic hit

Price set at lowest price level for live subscription

Performances designed to match the cadence of an in-person season.

Digital Plus Single Ticket \$39

- All base level content
- Exclusive behind-the-scenes footage, interviews, galleries, and other content
- Access to additional archived productions

Approximately one third of single ticket buyers chose this option

Digital Single Ticket \$29

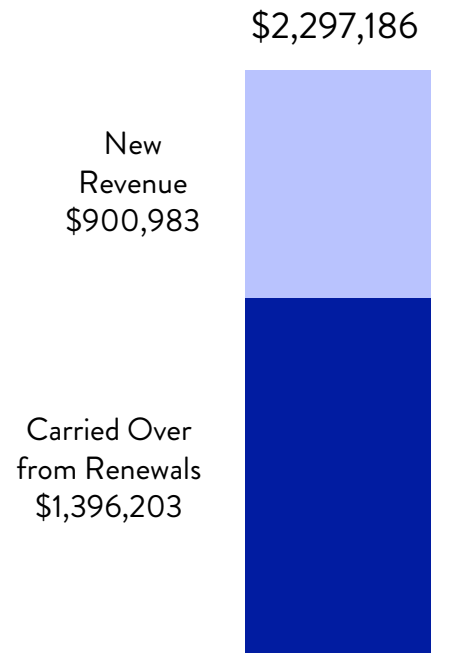
- Access to 1 performance event during the viewing window
- Informal welcome to the event

Approximately two thirds of single ticket buyers chose this option

Off to a Strong Start

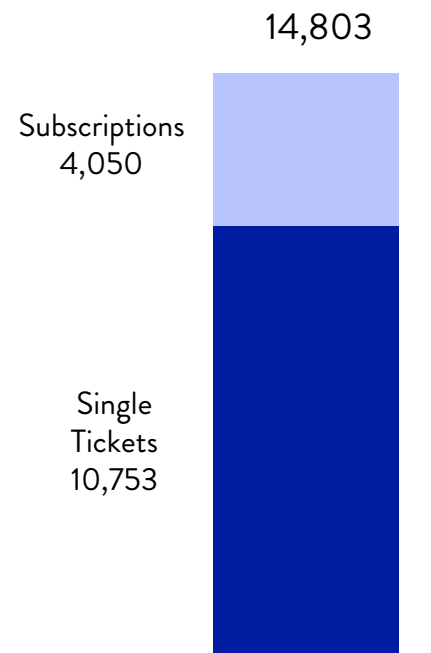
Digital Revenue

Reps I-III & Digital Nutcracker
10/2020 – 2/2021, USD



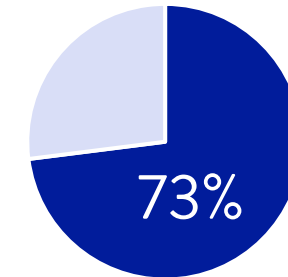
Digital Patrons

Reps I-III & Digital Nutcracker
10/2020 – 2/2021



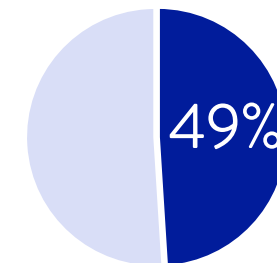
[Click here for the full PNB case study](#)

Audience Completion Rate of Primary Content*



*Includes Archival Footage, New Productions

Audience Completion Rate of Premium Content**



**Includes Interviews, Galleries, Additional Archival Content

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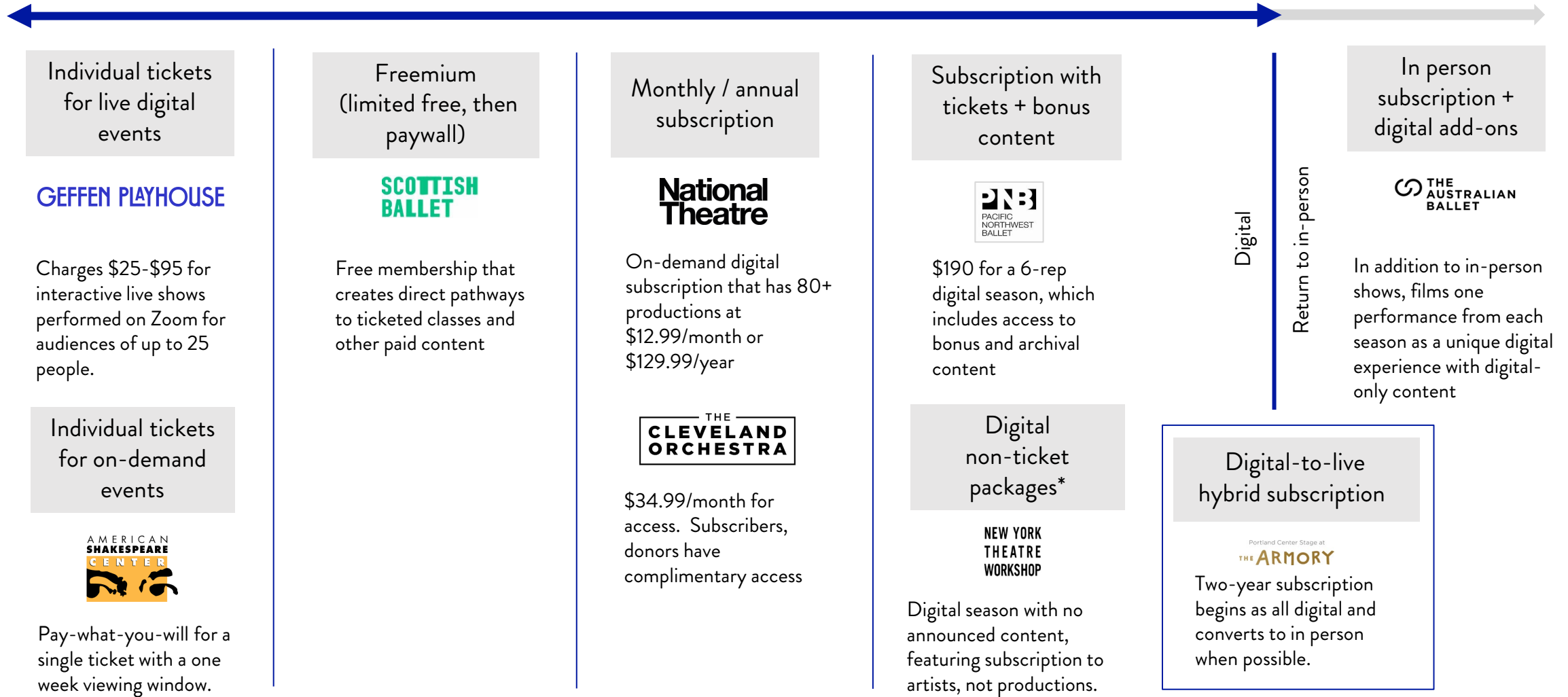
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Technology
Choices with
Objectives

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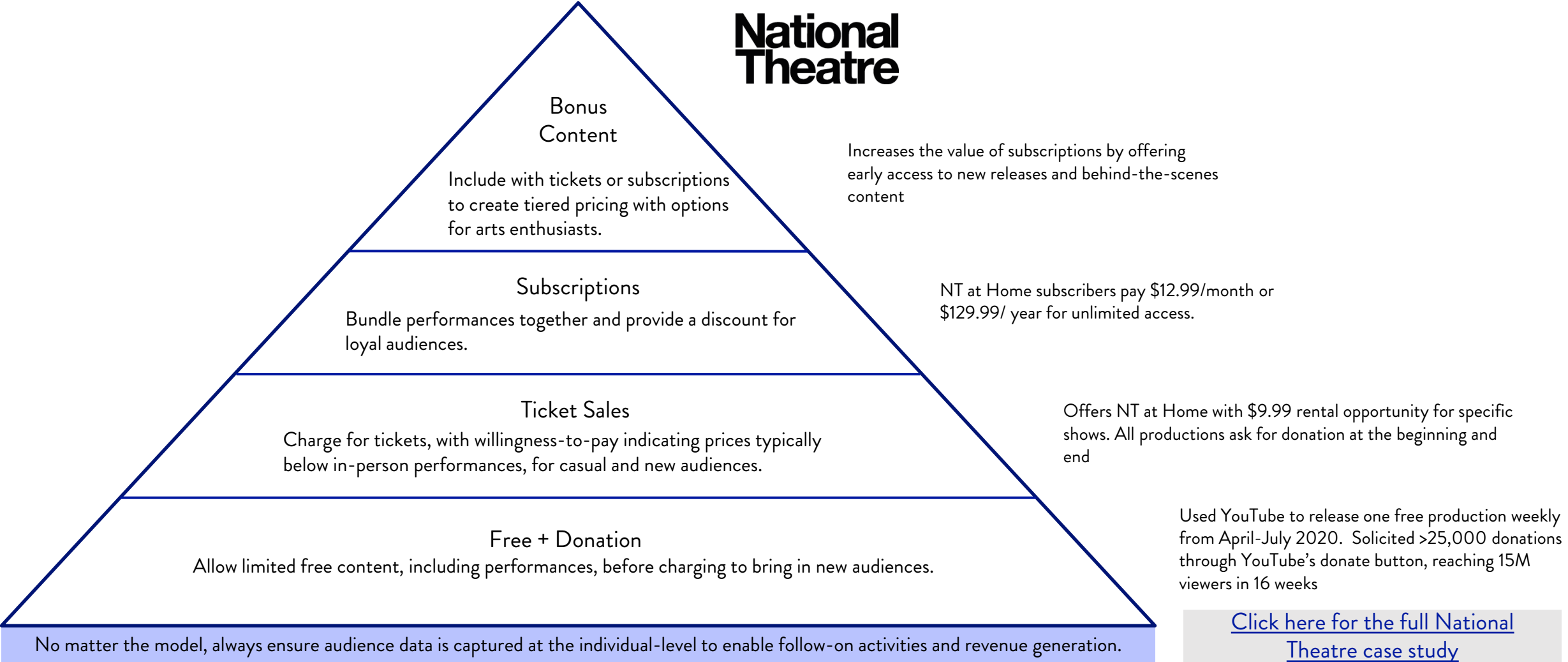
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Beyond the
Pandemic

Common Digital Packaging Models



Always Use Models in Combination to Maximize Revenue

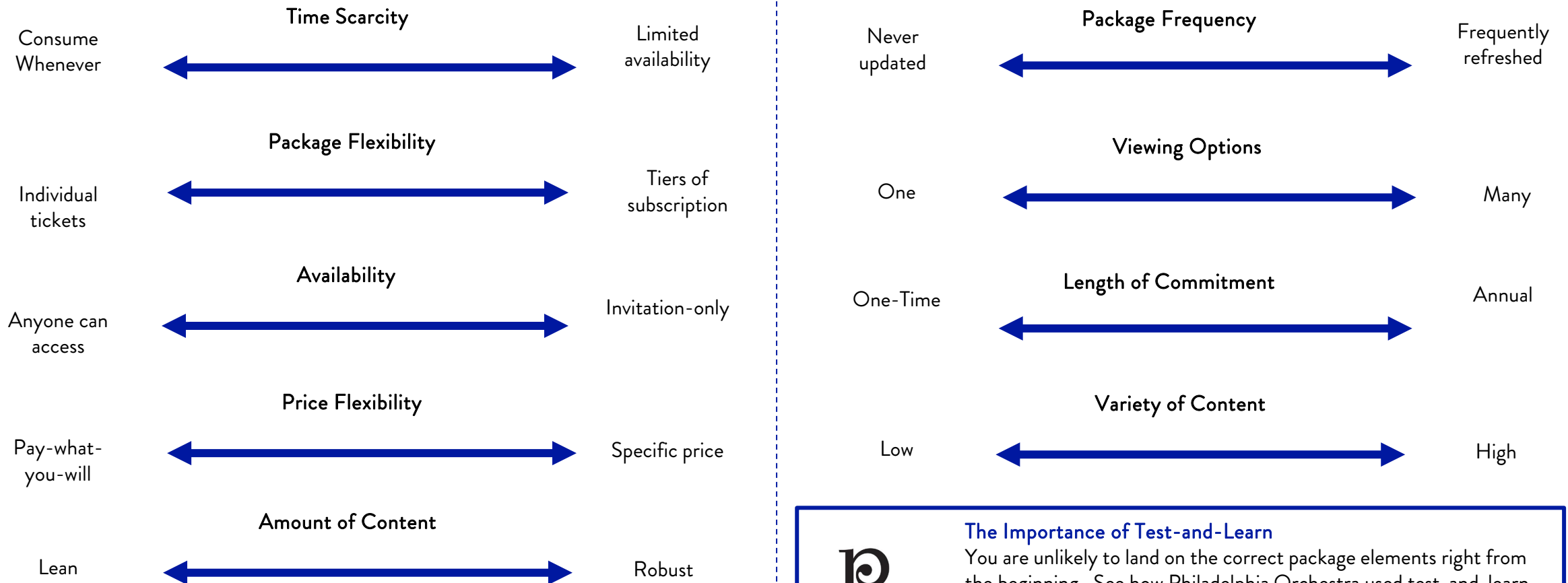
**National
Theatre**



No matter the model, always ensure audience data is captured at the individual-level to enable follow-on activities and revenue generation.

[Click here for the full National Theatre case study](#)

Elements of Packages



The Importance of Test-and-Learn

You are unlikely to land on the correct package elements right from the beginning. See how Philadelphia Orchestra used test-and-learn techniques to understand audience preferences for content, paywall and pricing.

[Click here for the full Philadelphia Orchestra case study](#)

What Can Pricing Research Tell Us about Pricing in the Pandemic?

Decoy Pricing

Creation of a pricing option whose primary purpose is to highlight the better value of another option results in more sales of the higher-price option.

The Power of “9”

Prices that end in 9 are selected more frequently than both more expensive and less expensive alternatives.

The Power of Three

When given three options framed as increasing quality, most people buy the middle option, regardless of price.

Anchoring

People pay more when they are exposed to higher numbers (or luxury context) before making decisions to buy, even if those numbers aren't associated with price.

The Right Conditions for Pay-What-You-Will

- Low marginal cost
- Fair-minded customer
- Product that can credibly be sold at wide range of prices
- Strong relationship between buyer and seller
- A very competitive marketplace

Freemium

Freemium plans can convert more customers, but dropout at higher rates and many continue to use for free.

Pay What You Will

Allowing customers to pay what they will can in some cases result in a high gross if customers identify with the seller.

Pay What You Will + Suggested Price

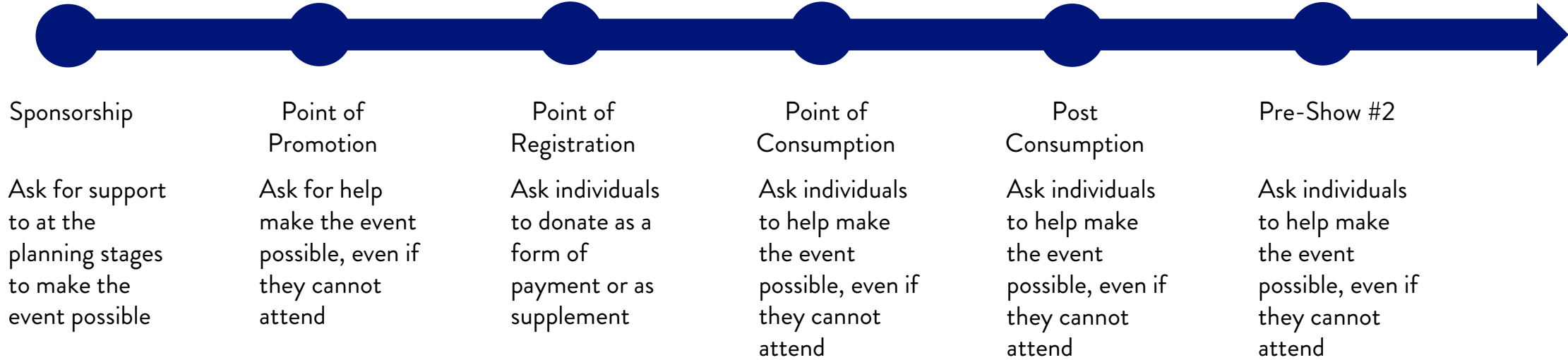
This combination yields higher revenue, but less over time than standard pricing options.

Pay What You Will + Donation

In many settings, this combination yields more total revenue than either “fixed price” or standard “pay what you will.”

Source: <https://cxl.com/blog/pricing-experiments-you-might-not-know-but-can-learn-from/#:~:text=Lots%20of%20entrepreneurs%20struggle%20with%20pricing.&text=Also%2C%20it's%20worth%20remembering%20that,Right%E2%80%9D%20can%20actually%20exist>).

It's (Almost) Never a Bad Time To Ask for a Donation



Donations may be the only thing you can do depending on your union agreements

Clever Ways Organizations Have Framed the “Ask”

Connect Ask with Concrete Situations



American Shakespeare Center offers a sliding scale from \$15 to \$100 with phrasing to “Pay the price that works for you. When you choose your price, please consider the number of people who might be watching with you.”

Create A Mindful Decision with an Auto-Populated Amount



Scottish Ballet customers were obliged to enter “£0” if they did not wish to donate as they completed the registration process.

Integrate the Ask into the Performance at Moments of Higher Giving Openness



Van Gogh Museum’s virtual exhibits place donations buttons near book clubs and live Q&A sessions to replicate the immersive experience of an in-person visit.

Frame the Ask as a Live Performance Ritual



National Theatre frames their request for a donation after their digital productions as a “form of applause,” which has been effective messaging.

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What We
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Achieve

03

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Tuning
Pricing and
Packaging

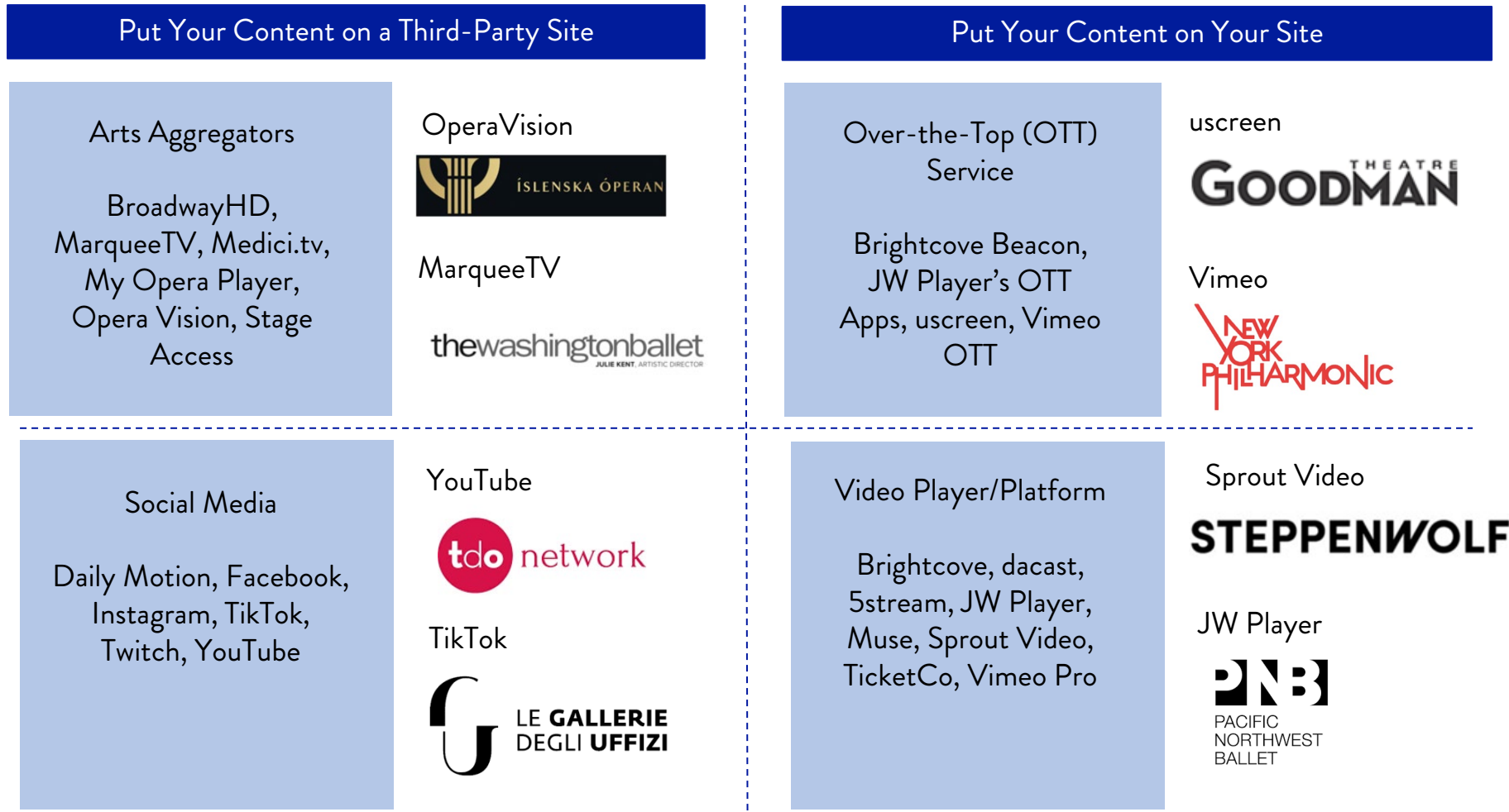
04

Aligning
Technology
Choices with
Objectives

05

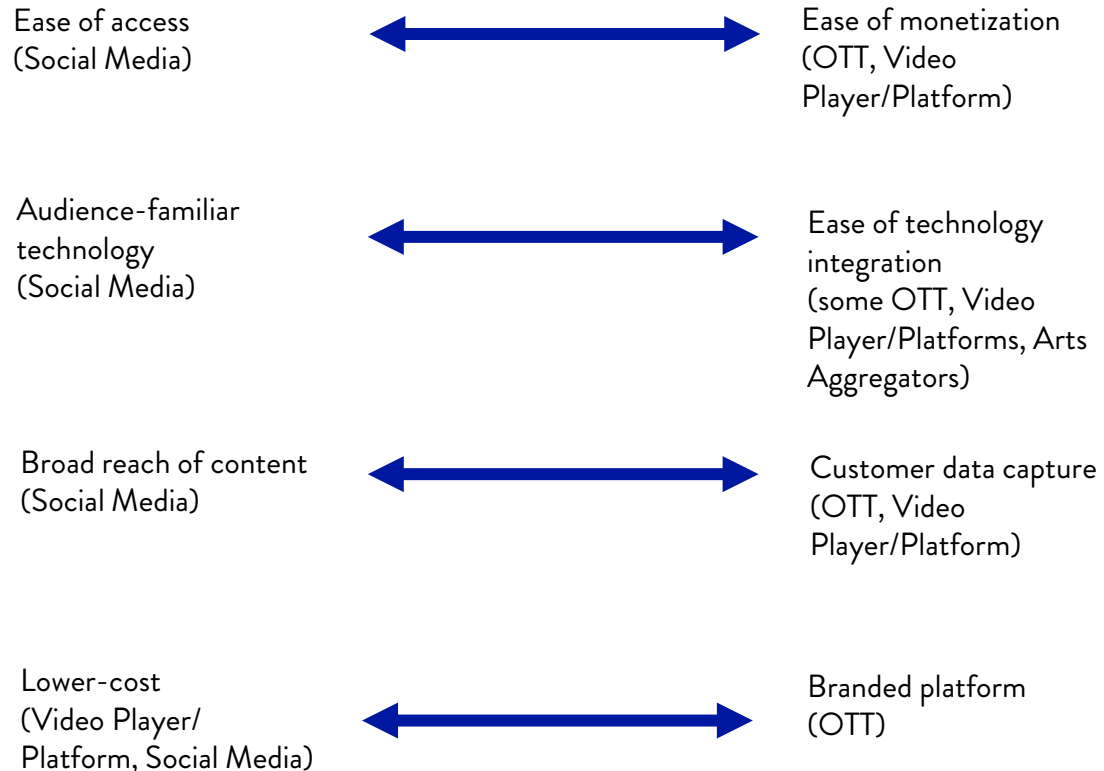
What Should
We Take
Beyond the
Pandemic

Key Categories of Video Streaming Platforms

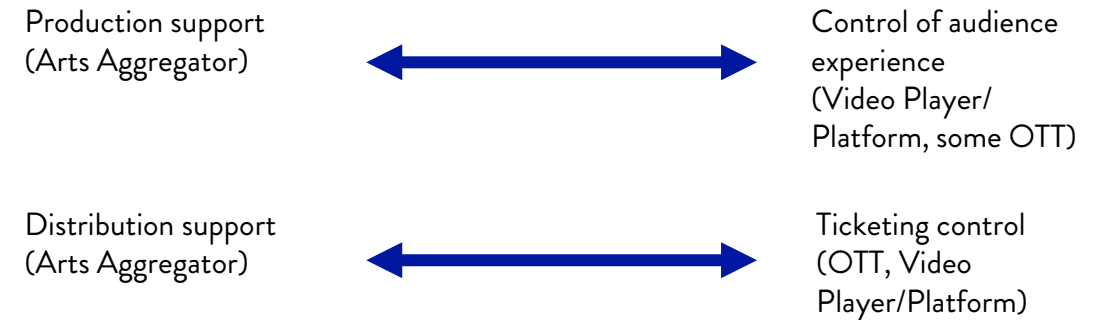


Common Trade-Offs Between Platforms

Audience-Friendly vs. Organizational Benefit



Expert Support vs. Control



Staying In the Driver's Seat During Platform Searches



Platform Considerations

- Ease of Technology Integration: Ticketing software, CRM
- Ticketing Control: Control over ticketing structure, prices
- Customer Data Capture: Type of data captured, how data is shared
- Level of Support: Level of technical, consultative services
- Customization/Branding: White-label, ability to modify to suit specific needs
- Cost: Total cost to partner, including implementation costs
- Reach of Content: Built-in audience size, how audiences will become aware of it
- Control of Audience Experience: Includes areas like live vs asynchronous, performances vs bonus content, experience components, limits on geography/time
- Ease of Use: Steps audience members take to use, familiarity with platform, integrated into website
- Ease of Monetization: Ability to fully monetize using any/all models, flexibility in packaging options
- Production and Distribution Partnership: Level of collaboration and combined efforts with production, marketing and distribution of content



Step 1: From the List of Standard Platform Considerations, Draw Up Your Requirements List

- Have a team discussion using the considerations as a starting guide to surface previously unknown requirements and encourage healthy debate
- Answers to questions about considerations (e.g., 'Is ease of technology integration important to us?') turn into platform requirements
- Address the trade-offs that will have to be made to get critical requirements
- Create a list of 'must haves' and 'nice to have', as well as 'must not haves' requirements



Step 2: Use Your Requirements List as a Checklist When Talking to Platform Vendors

- When speaking with each vendor, have requirements list handy and use it take notes for each requirement
- Use the requirements list to guide the conversation to ensure all your requirements are covered and avoid the vendor steering the conversation to focus on their strengths
- Enables an apples-to-apples comparison between vendors, as you can compare your notes from each vendor conversation

Video Platform Takeaways



1. Put Content on a Third-Party Site

2. Leverage Technology to Put Content on Your Site

	1. Put Content on a Third-Party Site				2. Leverage Technology to Put Content on Your Site			
	Social Media		Art Aggregator Platform		Over-the-Top (OTT) Service		Video Player/Platform	
	YouTube	Facebook	MarqueeTV	Stage Access	Vimeo OTT	uscreen	Sprout Video	JW Player
	Increased opportunity for audience expansion and development due to existing user base and/or broad reach				Increased control of arts organization to define the purchase and viewing experience			
Notable Feature	<ul style="list-style-type: none"> Playlists 	<ul style="list-style-type: none"> Share button 	<ul style="list-style-type: none"> Post-production support 	<ul style="list-style-type: none"> Revenue sharing, content ownership 	<ul style="list-style-type: none"> High-quality streaming 	<ul style="list-style-type: none"> Integrated payment, CMS 	<ul style="list-style-type: none"> 30-day free trial 	<ul style="list-style-type: none"> Plug-in player
Strengths	<ul style="list-style-type: none"> Familiarity with Ease of use Broad community 	<ul style="list-style-type: none"> Part of daily routine Broad community Connected to social marketing efforts 	<ul style="list-style-type: none"> In the company of world-class art organizations Built-in arts audience Highly collaborative Range of ticketing options 	<ul style="list-style-type: none"> In the company of world-class art organizations Built-in arts audience Highly collaborative Joint marketing 	<ul style="list-style-type: none"> Building out arts segment Tessitura integration White-label product with seamless website integration 	<ul style="list-style-type: none"> Has many features built-in; limits need for API integration Flexible uses Tessitura integration Arts org experience Easy-to-use 	<ul style="list-style-type: none"> Platform is easy to use Clear pricing model Flexible uses 	<ul style="list-style-type: none"> Tessitura integration Arts organization experience In combination with JW Player OTT apps, flexible uses
Limitations	<ul style="list-style-type: none"> Monetization limitations Crowded space Hard to collect audience data 	<ul style="list-style-type: none"> Monetization limitations Hard to search/find content Hard to collect audience data 	<ul style="list-style-type: none"> Best for high-production value Part of a larger group of arts orgs 	<ul style="list-style-type: none"> Best for high-production value Part of a larger group of arts orgs 	<ul style="list-style-type: none"> Little one-off customization Support is largely technical Arts organization responsible for marketing, distribution 	<ul style="list-style-type: none"> Support is largely technical Arts organization responsible for marketing, distribution 	<ul style="list-style-type: none"> Support is largely technical Arts organization responsible for marketing, distribution 	<ul style="list-style-type: none"> Requires technical resources to implement Arts organization responsible for marketing, distribution
Others	Instagram, TikTok, Daily Motion, Twitch		Medici.tv, BroadwayHD, My Opera Player, OperaVision		Brightcove Beacon, JW Player's OTT Apps		Brightcove, Vimeo Pro, dacast, Muse, TicketCo, 5stream (also has production)	

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the
situation

02

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What We
Want To
Achieve

03

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Tuning
Pricing and
Packaging

04

Aligning
Technology
Choices with
Objectives

05

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We Take
Beyond the
Pandemic

It's Not Whether, but How

Challenges Too Great

Where will we find our future audiences future audiences?

How do I appeal to younger generations?

How do we compete with health and human services causes for donor attention?

How do we innovate the artform without risking our (fragile) finances?

Opportunities Too Tempting

Sizing new audience markets and encouraging trial

Testing the appeal of innovative or non-traditional content

Enhancing the attendance experience (especially for younger audiences)

Expanding the reach of community engagement activities

Capabilities Too Valuable

Videography, editing, production

Digital emotional connection

Platform selection and management

Audience preference testing

Digital rights negotiation and partnerships

Three Distinct Digital Phases Coming Up

Nov 2020

Summer 2021

Transition Period

Post Pandemic

The Immediate Focus

Deliver on the promises you've made to provide digital seasons to audiences

Reinforce new digital behaviors you want to continue

Test new ways to ask for donations

Double-down on emotional messaging with donors

The Intermediate Focus

Identify audience behaviors that could impact your long term strategy and set up ways to monitor them

Embed yourself in (new and old) habits

Engineer moments of (digital) delight for audiences and donors

Message to capture part of "splurge" money consumers are planning to spend

The Long-Term Focus

Identify the audiences we'd like to use digital to help build

Research the digital experience that resonate with specific audiences

Build build test-and-learn capabilities to constantly improve experiences for target audiences

Use digital experiences to advance your mission/community engagement

Use digital to communicate purpose and build emotional connection around shared values

The Australian Ballet: A Lasting Hybrid Model

What Was It?

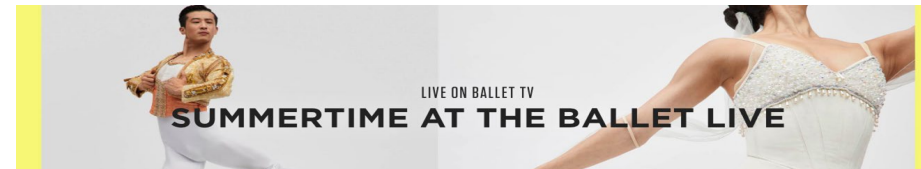
A stream of the live performance of Summertime at the Ballet was presented as a unique live stream experience.

How Did They Do It?

- 3-4 cameras, filmed once during a live show
- Streamed on a microsite via 5Stream
- Received support via corporate sponsorship

What Did They Charge?

Tickets were \$25, with a 10% discount for subscribers.



In 2021, for the first time ever we are live streaming a performance direct from the venue, with **Live on Ballet TV** - an exciting new way to experience The Australian Ballet in real-time from anywhere, **supported by our Principal Partner Telstra**.

Ballet fans across the world can get front-row seats to watch our upcoming performance of *Summertime at the Ballet* streamed LIVE from MCA, Melbourne Park. Watch the performance from the comfort of your own home and enjoy bonus commentary from David Hallberg and guests, as well as live interviews and behind the scenes footage exclusive to the live stream.

Summertime at the Ballet will be live streamed on Sunday 28 February at 11.45am AEDT. The stream will be available to watch LIVE or at your convenience over the following 48 hours.

The live stream can be accessed by any device without needing to download any software or applications and can be cast to a Smart TV. Full information will be provided along with your link to view, 48 hours before the stream begins.

Live on Ballet TV offered the opportunity for ballet fans to get an in-depth, inside look at a performance - much like televised sports - including:

- Pre-show talks with ballet experts
- Interviews with dancers fresh off the stage
- Pre-recorded behind-the-scenes videos during intermission

The company framed the livestream as a virtual seat to the performance. This gave the viewer the feeling they have their own seat in an audience, providing a more concrete and exclusive value.

Audience members had flexibility in watching, either live or for 48 hours after, allowing for all viewing habits to be accommodated

[Click here for the full Australian Ballet case study](#)

The Right Questions Depend on the Audiences We Seek

	Digital As Stand-Alone Experience		Digital As Complement To Live			
Audience	<p>Global Arts Lovers</p> <p>Arts fans who have adapted to digital productions and continue consumption</p>	<p>Access Seekers</p> <p>Loyal audiences who would have foregone the live experience due to age, location or ability</p>	<p>Current/ Emerging Donors</p> <p>Enhancement to subscription or thank you for donors</p>	<p>Subscribers/ Members</p> <p>Enhanced subscription packages with additional flexibility, content variety</p>	<p>New Local Audiences</p> <p>Supplementary content that can encourage a sense of welcome to encourage in-person attendance</p>	<p>Non-Afficionados</p> <p>Supports the audience motivation (e.g., digital discussion groups, family guides, special group tours)</p>
Questions	<p>Can our brand compete globally?</p> <p>How much digital consumption will continue?</p>	<p>How large is our digital-only audience?</p>	<p>Will digital attract new donors?</p> <p>Can digital increase contribution amount among donors?</p>	<p>Does digital content encourage subscription purchase post-pandemic?</p>	<p>Do certain kinds of digital consumption encourage live attendance better than others?</p>	<p>Do digital experiences improve stickiness?</p>

We Can Help You Plan Your Digital “Offsite”



Team Offsite Agenda

Discover <i>Appreciate What Is</i>	Dream <i>Imagine What Might Be</i>	Design <i>Determine What Should Be</i>	Deploy <i>Experiment with What Could Be</i>
<p>✓ What do we like most about our current digital efforts (or others)? Which aspects of our current experiments do we want to perpetuate?</p> <p>Scalable classes More inclusive galas Tools to help our advocates spread the word Building emotional attachment to the org</p> <p>Which audiences have proven most interested in our digital offerings?</p>	<p>✓ What do we want to be known for as an organization in ten years? How do we want to innovate the field?</p> <p>✓ What new audiences are we most interested? How might digital play a central role in helping us to advance these aims? How can we equip those who love us most to spread the word?</p>	<p>What specific audience(s) do we want to go after first and what is our monetization objective?</p> <p>✓ Who should be on the (diverse and cross-functional) design team? Moments of struggle for the target audience Audience habits we can embed in Touchpoints/Moments of delight Experiences we want to create</p> <p>✓ How specifically will we build customer voice into the design of the offer? What partners could help us improve the initial concept?</p>	<p>✓ How can we experiment with aspects of the total experience before assembling an initial offer? How do we plan to measure progress? How do we plan to get customer feedback and incorporate it into improvements? What would cause us to terminate the strategy or allocate more resources?</p>

The Conversation Continues

This Week

Peer Sessions

- Goal-Oriented Packaging & Marketing
Wednesday 3/31 Noon EDT/ 5 BST
- Developing Successful Online Content
Thursday 4/1 Noon EDT/ 5 BST

Slack

- 50+ executives joining the conversation around digital

Want an invite? Just write us in the chat

Ongoing

Digital Platform Open House

- We invited platform vendors for two private Q&As in mid-April
- Invite coming soon

Digital Strategy Workshop

- Your membership includes access to a workshop to help think through (or revisit) your digital strategy

We Can Help You Plan Your Digital “Offsite”



Discover

Appreciate What Is

- ✓ **What do we like most about our current digital efforts (or others’)?**
Which aspects of our current experiments do we want to perpetuate?

Scalable classes

More inclusive galas

Tools to help our advocates spread the word

Building emotional attachment to the org

Which audiences have proven most interested in our digital offerings?

Dream

Imagine What Might Be

- ✓ **What do we want to be known for as an organization in ten years?**
How do we want to innovate the field?
- ✓ **What new audiences are we most interested?**

How might digital play a central role in helping us to advance these aims?

How can we equip those who love us most to spread the word?

Design

Determine What Should Be

What specific audience(s) do we want to go after first and what is our monetization objective?

- ✓ **Who should be on the (diverse and cross-functional) design team?**

Moments of struggle for the target audience

Audience habits we can embed in

Touchpoints/Moments of delight

Experiences we want to create

- ✓ **How specifically will we build customer voice into the design of the offer?**
What partners could help us improve the initial concept?

Deploy

Experiment with What Could Be

- ✓ **How can we experiment with aspects of the total experience before assembling an initial offer?**

How do we plan to measure progress?

How do we plan to get customer feedback and incorporate it into improvements?

What would cause us to terminate the strategy or allocate more resources?

We've Learned a Lot

ABT's Digital Offerings (as of February)



“Before the pandemic, we created a plan to expand our digital work that spanned five years. Within three months of the pandemic, we had accomplished all the targets we had planned to take in five years.”

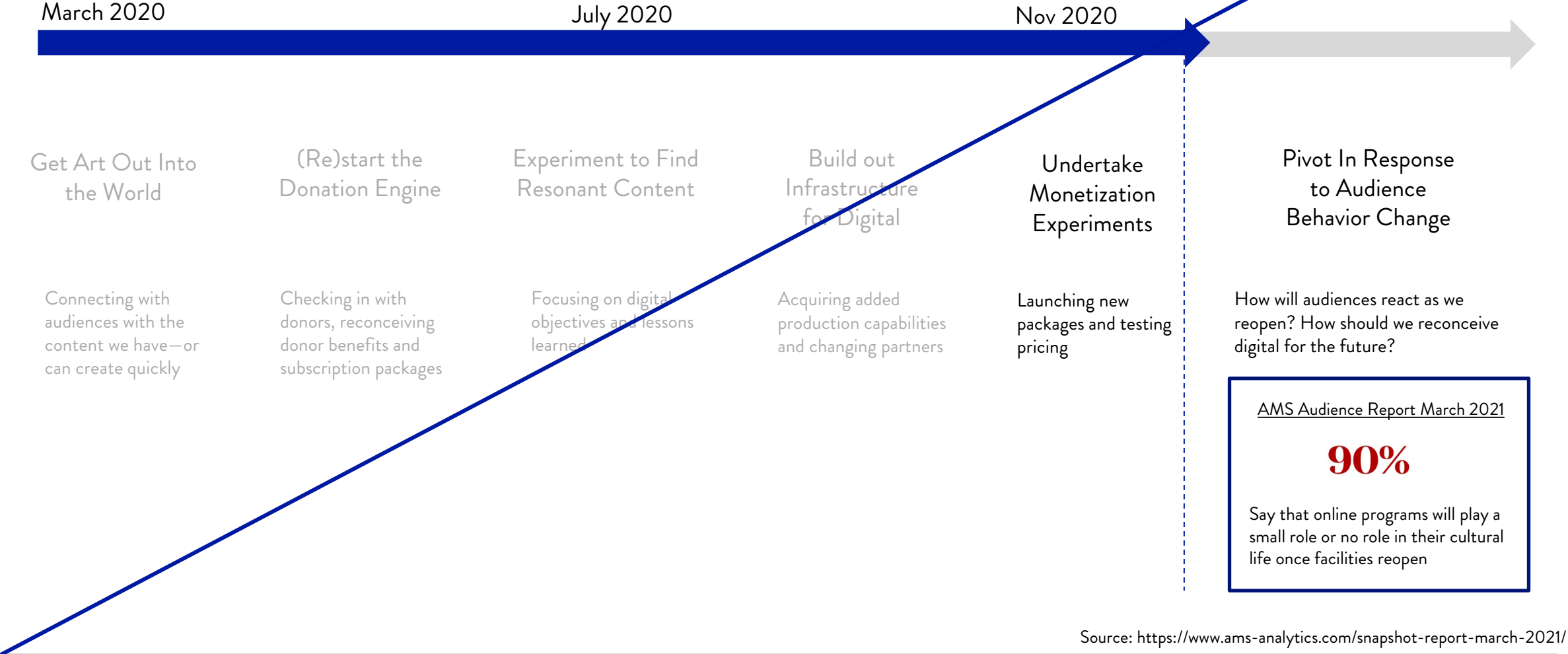
-ABA Theatre Executive

Poll

What audiences has your digital strategy focused on monetizing so far (pick all that apply)? Only choose a category if it is your deliberate approach to reach out to/encourage a purchase or donation from that audience, not if they happened to also purchase/donate.

- A. Members and/or Subscribers
- B. Mid-to-Large Donors
- C. Casual Visitors and/or Former Attendees
- D. New Audiences who are Arts Lovers
- E. New Audiences who are Arts Novices
- F. Master Email List
- G. Other (write response in the chat)

We're Exhausted, But We're Not Done



AMS Audience Report March 2021

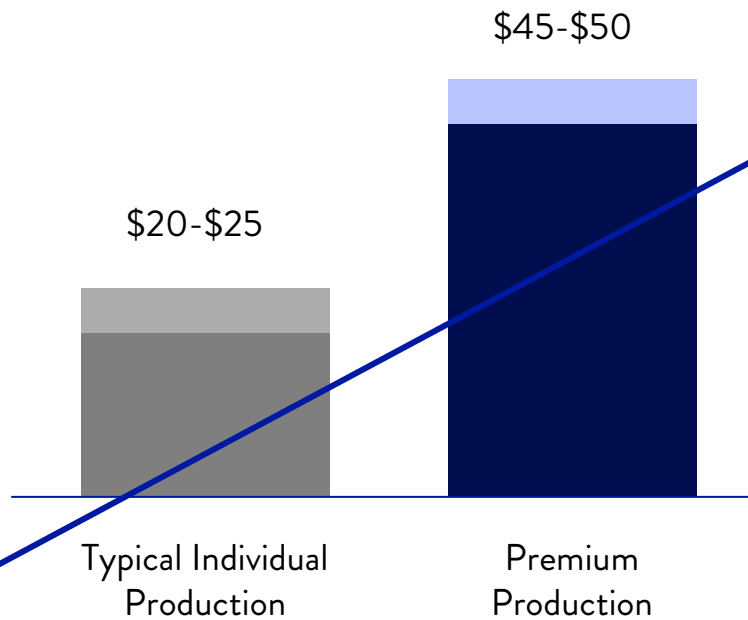
90%

Say that online programs will play a small role or no role in their cultural life once facilities reopen

Source: <https://www.ams-analytics.com/snapshot-report-march-2021/>

The Science Is Settling about the Value of a Ticket

Individual Ticket Price Averages
Marquee TV



Ask yourself...

Are you setting price to maximize income or to establish an anchor for value?

Fun Ideas for the Transition

Transition Period

Relevance

Engineer Moments of Delight



Find ways to be relevant at times of emotional importance

Shape New Habits



Embed yourself in consumer routines with new offerings

Meaning

Visibly Take Care of Your People



Pandemic data show consumers want to buy from enterprises that support their teams

Connect to Purpose



Customers want to buy from organizations with a purpose, especially those using their shared values to help people in the pandemic

Your Peers in Today's Session

Introduce Yourself in the Chat and Share One Digital Monetization Experiment You Admired

You Have Done the Hardest Part



Wallpaper
Cleaner

Oil and gas
furnaces began
replacing coal
heating in
homes.



Door-to-Door
Bookseller

People
preferred the
perfume give-
away to the
books.



Online
Dating Site

Users preferred
easy posting of
self-made videos
over
matchmaking
capabilities of
the site



Computer
Game

Game was
unsuccessful,
but people really
liked the
colorful,
interactive chat
functionality

We're Exhausted, But We're Not Done

March 2020

July 2020

Nov 2020



Get Art Out Into the World

(Re)start the Donation Engine

Experiment to Find Resonant Content

Build out Infrastructure for Digital

Undertake Monetization Experiments

Pivot In Response to Audience Behavior Change

Connecting with audiences with the content we have—or can create quickly

Checking in with donors, reconceiving donor benefits and subscription packages

Focusing on digital objectives and lessons learned

Acquiring added production capabilities and changing partners

Launching new packages and testing pricing

How will audiences react as we reopen? How should we reconceive digital for the future?

AMS Audience Report March 2021

90%

Say that online programs will play a small role or no role in their cultural life once facilities reopen

Source: <https://www.ams-analytics.com/snapshot-report-march-2021/>

The Australian Ballet: A Lasting Hybrid Model

What Was It?

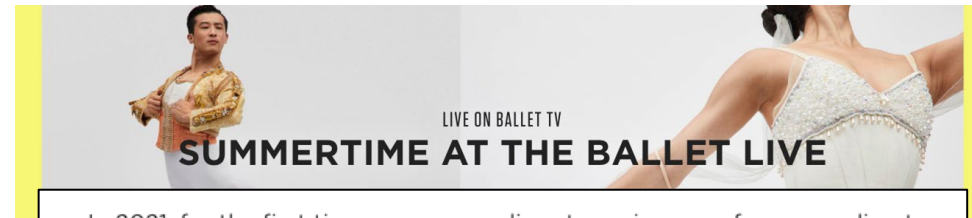
A stream of the live performance of Summertime at the Ballet was presented as a unique live stream experience.

How Did They Do It?

- 3-4 cameras, filmed once during a live show
- Streamed on a microsite via 5Stream
- Received support via corporate sponsorship

What Did They Charge?

Tickets were \$25, with a 10% discount for subscribers.



In 2021, for the first time ever we are live streaming a performance direct from the venue, with **Live on Ballet TV** - an exciting new way to experience The Australian Ballet in real-time from anywhere, **supported by our Principal Partner Telstra.**

Ballet fans across the world can get front-row seats to watch our upcoming performance of **Summertime at the Ballet** streamed LIVE from MCA, Melbourne Park. Watch the performance from the comfort of your own home and enjoy bonus commentary from David Hallberg and guests, as well as live interviews and behind the scenes footage exclusive to the live stream.

Summertime at the Ballet will be live streamed on Sunday 28 February at 11.45am AEDT. The stream will be available to watch LIVE or at your convenience over the following 48 hours.

The live stream can be accessed by any device without needing to download any software or applications and can be cast to a Smart TV. Full information will be provided along with your link to view, 48 hours before the stream begins.

Live on Ballet TV offered the opportunity for ballet fans to get an in-depth, inside look at a performance - much like televised sports - including:

- Pre-show talks with ballet experts
- Interviews with dancers fresh off the stage
- Pre-recorded behind-the-scenes videos during intermission

The company framed the livestream as a virtual seat to the performance. This gave the viewer the feeling they have their own seat in an audience, providing a more concrete and exclusive value.

Audience members had flexibility in watching, either live or for 48 hours after, allowing for all viewing habits to be accommodated

We Need To Answer Two Questions

Who Is Our Post-COVID Target Audience?

Many of us created a digital (monetization) strategy in reaction to the pandemic.

Is our current target audience the best one for:

- The transition period?
- The post-covid era?

How Will We Test Future Monetization Assumptions?

Our new approaches will make assumptions about audience behavior post-pandemic and the role of digital.

- Do we understand these assumptions?
- What data will enable decisions about resourcing?
- Can we create flexible structures to change approach?

The Role Of Digital For Future Audiences

Digital As Stand-Alone Experience

Digital As Complement To Live

Audience/
Role of
Digital

Global Arts Consumption

Accessible Arts Experiences

Donor Delight

Package Enhancement

New Audience Welcome

Live Experience Enhancement

Arts lovers who have adapted to digital productions and continue consumption

Loyal audiences who would have foregone the live experience due to age, location or ability

Enhancement to subscription or thank you for donors

Enhanced subscription packages with additional flexibility, content variety

Supplementary content that can educate and encourage live attendance

Supports the audience motivation (e.g., digital discussion groups, family guides, special group tours)

Critical
Questions
to Test
Assumptions

Can our brand compete globally?

How large is our digital-only audience?

Will digital attract donations?

Does digital content encourage subscription purchase post-pandemic?

Does digital consumption lead to ticket purchase?

Do digital experiences improve stickiness?

How much digital consumption will continue?

Do donors value digital benefits?

The Challenge of the *Moment* Starts With Small Steps

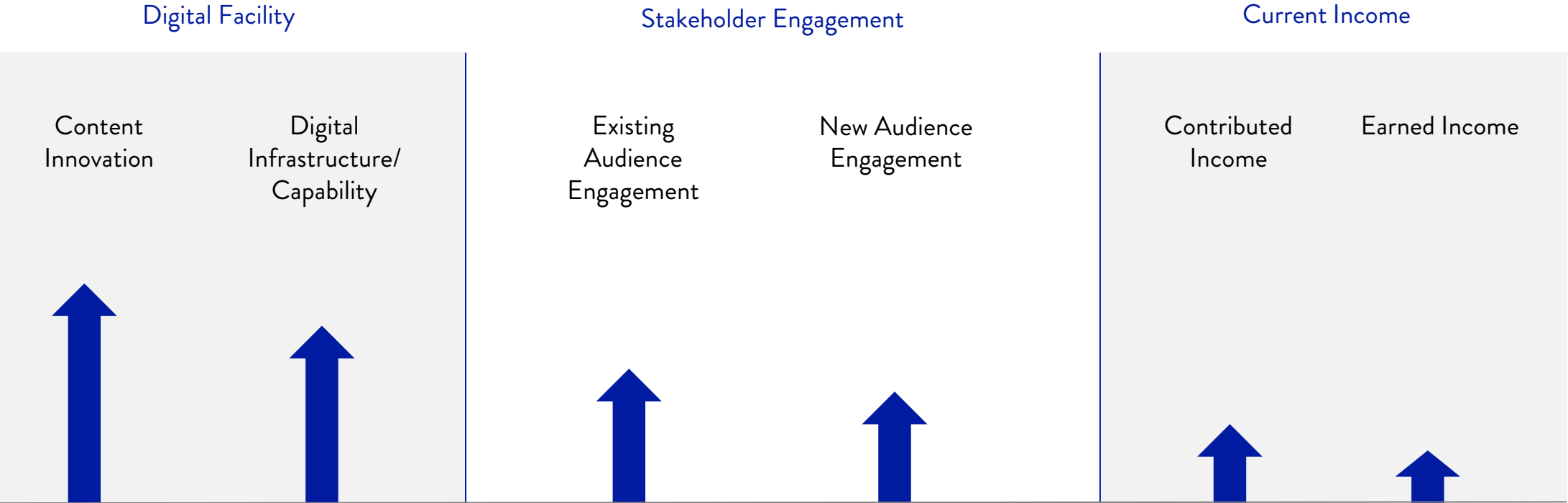
1. Keep learning from the now: Experiment with ways to ask for donations. Test and learn with pricing and messaging
1. Keep the loyal engaged for the future: Give donors/subscribers a digital way to spread their enthusiasm
2. Start to evaluate your post-pandemic digital objectives: Run a digital objectives workshop with us or engage your advisor in a conversation

Your Target Audience Drives Your Monetization Approach

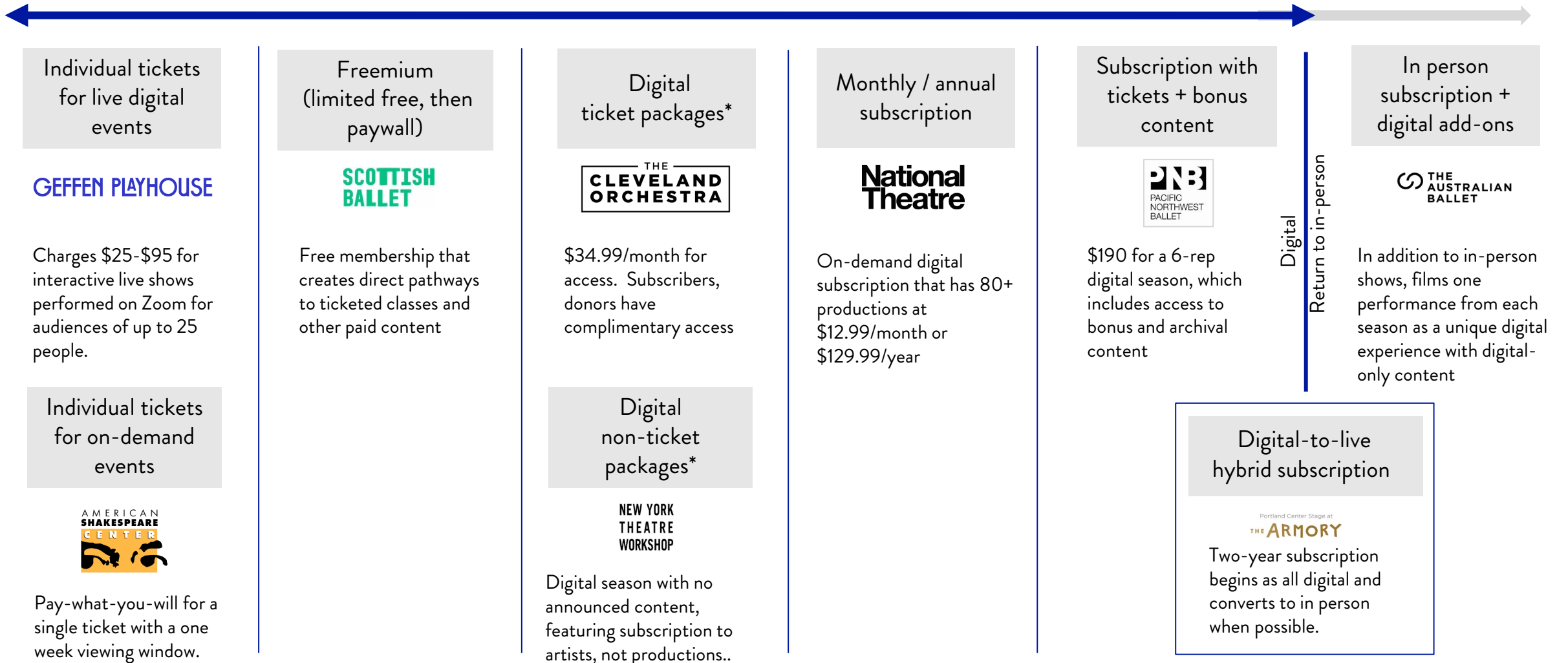


Target Audience	Monetization Objective	Key Questions		
		Content	Packaging & Pricing	Distribution
Single ticket buyers	Earned income from tickets	What is most likely to stand out, drive press attention, and appeal to our audience base?	How can maximize individual ticket pricing?	What platforms can most people use?
New audiences	Earned and contributed income	What content will appeal to new audiences and create pathways to future engagement?	How do we get audience information, to reach out for future monetization opportunities?	What familiar platforms can enable private experiences? How can we make the donation experience seamless?
Existing subscribers	Earned income from retention of subscription revenue	What content most interests our most loyal audiences?	How can pricing maintain integrity of subscription cost structure?	How can the experience most mirror our live experience in terms of quality, value and branding?

For Most, Monetization Lags Behind Other Digital Progress



Common Digital Packaging Models



The Hard Reality

Not Break-Even

During the pandemic, few organizations will see direct revenue from digital that exceeds costs. However, digital value propositions have helped to retain subscription and contributed income.

Donation Success

For most organizations, donations have proven to be the biggest monetization success, with many pleasantly surprised about the number of donors reached through digital channels.

Audience Learning

While earned revenue efforts are unlikely to generate significant income in the near term, they do provide some income, along with data about what audiences want and value.

Improving Economics

Despite the limited direct income from digital, the future of digital monetization looks much brighter when digital revenues need only provide incremental revenue rather than replace huge portions of lost revenue.

Future Value

Future digital value propositions may be just as likely to be have indirect path to revenue:

- Finding new audiences
- Engaging donors
- Building brand loyalty

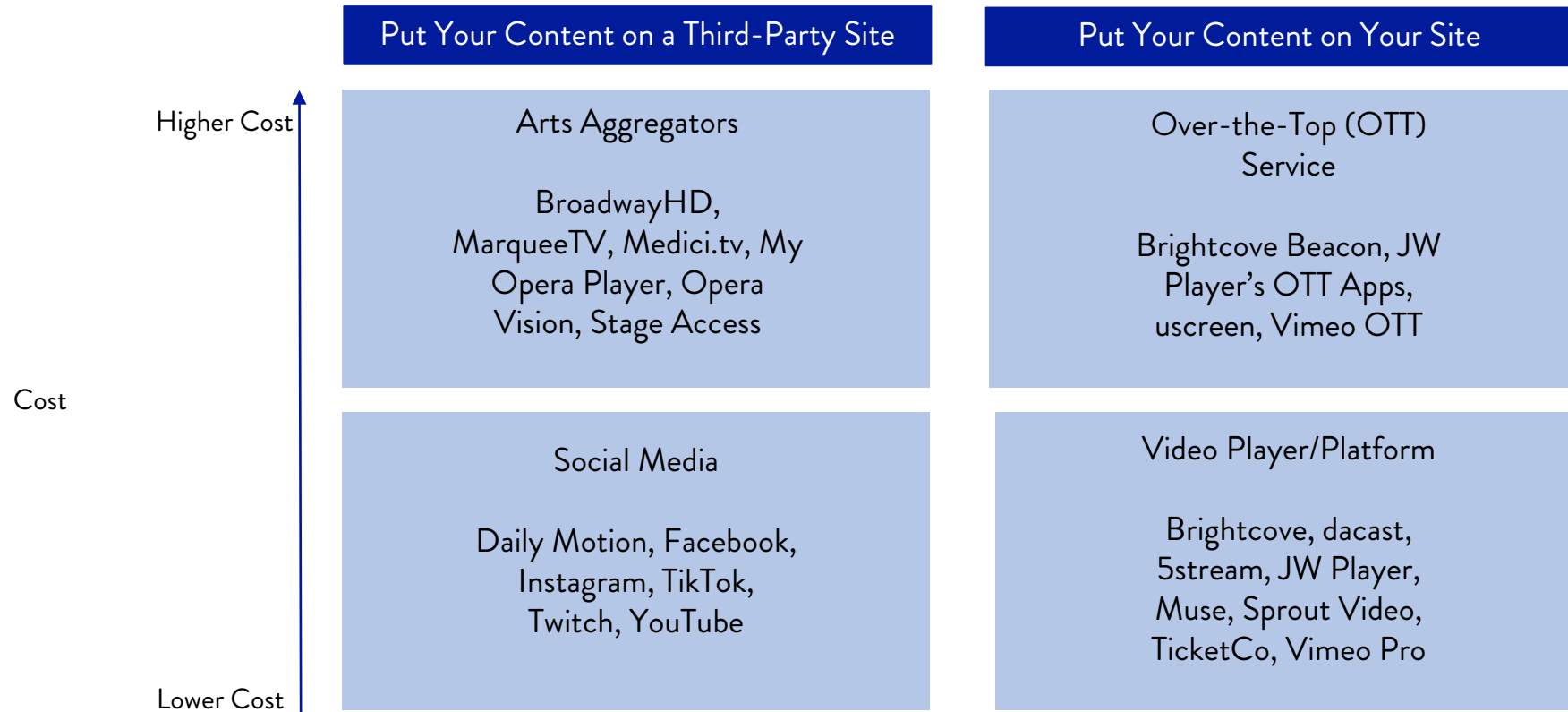
The Challenge of the Moment

1. Experiment (A/B) with ways to ask for money
2. Give donors/subscribers a digital way to spread their enthusiasm – equip advocates?
3. Incorporate some piece of digital enhancement into every in-person experience
4. Name an audience that you want to reach on digital – your target audience will likely change after you return to in-person at scale

Key Categories of Video Streaming Platforms

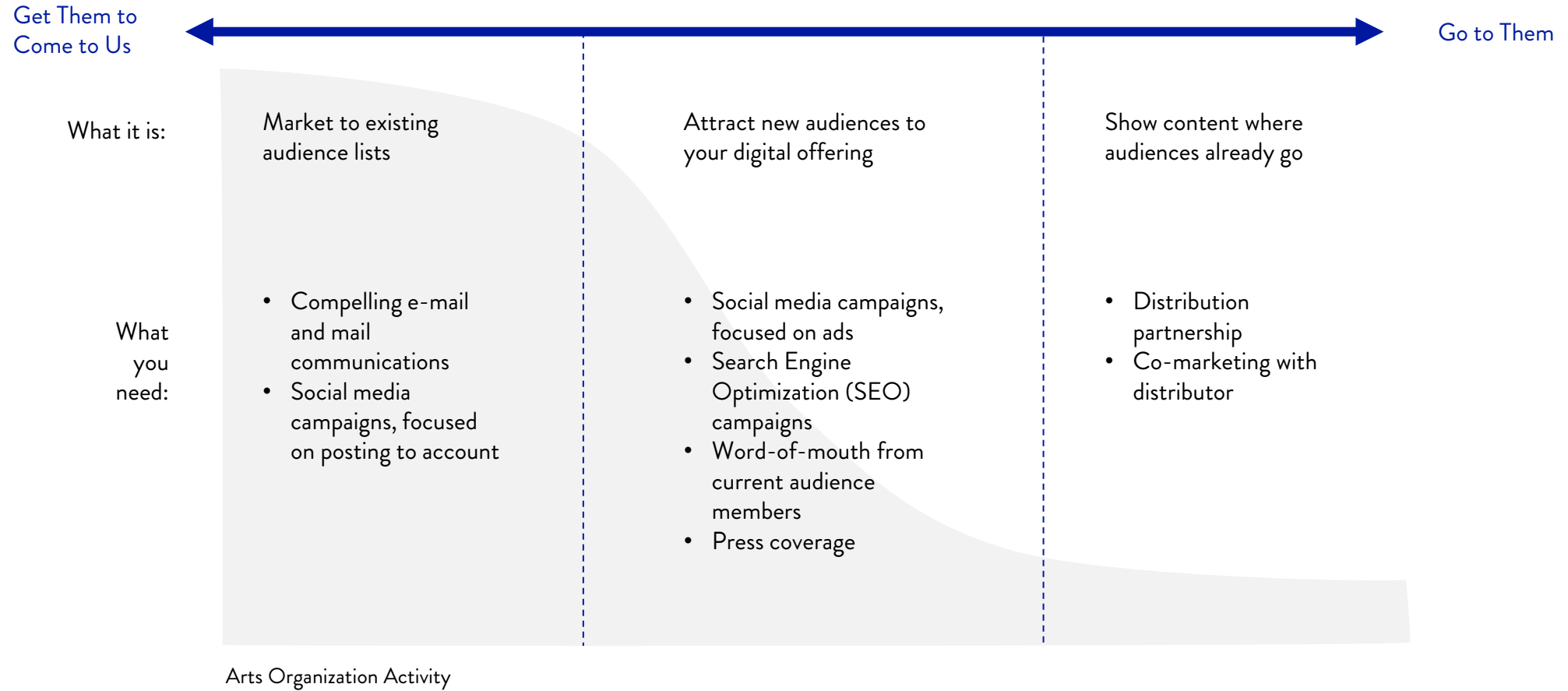
LARA

Maybe an example for the platform section? Or pictures?



Range of Ways to “Get Found”

LARA
Needs more teachy



The Australian Ballet: A Lasting Hybrid Model

What The Australian Ballet Does Well

1

Recognizes opportunities to create unique value through digital

- Identifies - through viewing and purchase data - that backstage access highly engages core audiences in digital.
- Decides to work towards a hybrid digital and live performance model once reopened.
- Prioritizes the behind-the-scenes content that audiences respond to when designing hybrid products.

2

Takes inspiration from sports broadcasts

- Looks to an industry who has struck a great balance between live and virtual - sports.
- Builds a full digital experience around the performance, emphasizing its immediacy and focusing on the artists.
- Content includes pre-show analysis, behind the scenes footage at intermission, and interviews with dancers fresh off the stage.

3

Designs a digital product that appeals even to live audiences

- Creates content that adds a unique “digital-first” value to a live performance.
- Provides audiences who attend the show live with an opportunity to go even deeper, which may even make them want to “re-watch” the show digitally.
- Offers stand-alone value to digital-only audiences, as the online content is engaging on its own.

You Might Consider This Model If You Are Asking These Questions....

How do we capitalize on new digital appetites our audiences have formed during closure?

How can we create digital products for our audience without cannibalizing our live performances?

We Have So Many Questions

Content

Who's able to get a lot of views, and what content are they using?
How can we re-use content for different purposes and to appeal to different audiences?

Packaging & Pricing

How are people charging, and is anyone making money?
Have organizations had more success charging for content individually or bundling it?

Technology

Is it worth acquiring high-end equipment, or are we better off renting (or foregoing it altogether)? What is the least expensive way to meet our quality bar?

What are the pros and cons of different third-party platforms for sharing our content?

The Future

What's worth continuing when we return to in-person performance?

Is there anything new we should focus on when we return to in-person?

What's not in today's session

- camera and production costs
- successful types and quality of content
- educational content
- how to negotiate with unions

(talk about it in Slack, please!)

Source Materials

1. Research Questions and Project Planning
2. Complete Set of Consideration Findings
3. Monetization Audit Results
4. Highlights from Secondary Research
5. Arts Organization Interview List

Research Question and Scope

Your Big Question: “What are best practices for distributing and monetizing digital content?”

Digital Monetization Strategies

- What are effective pricing strategies for digital content?
- Does the receptivity to monetization differ by audience segment, especially by age?
- How financially successful are digital subscriptions vs. donation-based performances vs. pay-per-view performances?
- Is there a correlation between sponsorship and digital subscription? Does paid content drive up donations?

Digital Content Best Practices

- What type of content is used for each of the monetization models? Is there an optimal content length?
- How should content be released – all at once or over time?
- Can we re-purpose digital content for different audiences and/or purposes (e.g., YouTube and then gala)?

Platform Options

- What are the main platform options, and what are the capabilities/business models/pros and cons of each?

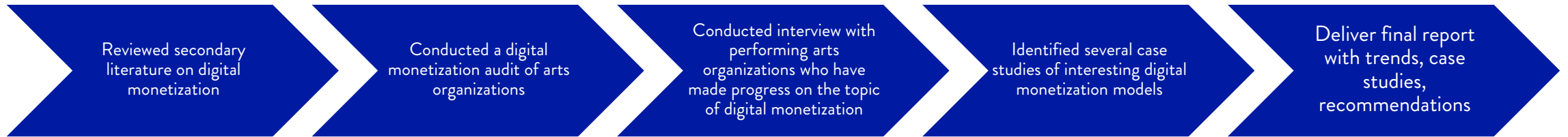
Digital-Live Relations

- What is the customer journey from a new audience member to a free performance to a deeper relationship?
- What role does digital play as we get back into live performances and seasons, but continue with digital programming?

Considerations and Restrictions

- Union restrictions around charging for content versus offering it for free
- Copyright and licensing restrictions

Review of Project Process



Process Details:

- 30 arts organizations contacted, including ballet companies, theaters, operas, orchestras, museums, and performing art venues
- 17 interviews completed
- Video platform research completed, including conversations with 6 platforms
- Secondary research completed
- Review of arts organizations' current monetization models completed
- Existing ABA digital monetization data analyzed

When Deciding on a Monetization Model, Remember That...

- Digital allows you to reach new and lapsed audiences, but it is a question of ‘should you’ not ‘how you’. While many arts organizations started monetizing digital content to retain subscribers, they have found that new audience members (including those from other states and/or countries) have also shown interest – and this has led to efforts to find ways to retain these new audience members. Some arts organizations have resisted efforts to expand to new audience members, largely because it does not align with their digital content strategy and goals – and especially given the resources required to expand to new audiences and compete in a global marketplace.
- To stand out, tie digital content into your organization’s mission/values and make it something that you can uniquely do well. It’s quickly becoming a noisy and saturated market. To break through that noise, it’s critical to deliver content that only your organizations could do that is also highly relevant to patrons. ABA’s work on shared values is highly relevant here.
- Digital marketing tactics and/or partnerships are critical to gain digital audience awareness. Arts organizations report using digital ads (usually on social media platforms), search (being mindful of new search patterns of audiences during the pandemic) or partnering with other arts organizations to increase awareness of their digital content offerings. This is coupled with e-mail and social media campaigns. Digital marketing rules like storytelling are very relevant here. Unique uses of technology as platforms, such as Tik Tok and video games, have garnered significant word-of-mouth buzz and introduce the arts organization to new, often younger, audiences.
- Monetization may not directly result in significant revenue, and that might be ok. Given the lower price point of digital content compared to live, most digital content is not likely to generate significant revenue regardless of expanded reach, especially due to the cost to create and distribute digital content combined with the volume of digital content that can be created with current resources. However, revenue generated plus additional goals like philanthropic giving, increased audience engagement, broader audience reach and brand awareness may together result in a ‘positive ROI’ for digital content initiatives.

Audience Consideration Findings

- Digital allows you to reach not just current subscribers and audience members, but it is a question of ‘should you’ not ‘how you’. While many arts organizations started monetizing digital content to retain subscribers (often by extending subscriptions until live performances return), they have found that new audience members (including those from other states and/or countries) have also shown interest – and this has led to efforts to find ways to retain these new audience members. Some arts organizations have resisted efforts to expand to new audience members, largely because it does not align with their digital content strategy and goals – and especially given the resources required to expand to new audiences and compete in a global marketplace.
- Digital audience research is a must. Progressive arts organizations are using a variety of research tools from design charrette to A/B testing to audience surveys to heatmaps to understand digital audience needs, preferences and behaviors. Many research tools and data are free or low-cost, but the resource to analyze that data is not.
- Digital vs live personas a possibility (especially) when live performances return. Some arts organizations believe that they have uncovered an audience who prefers digital, either because they cannot or do not want to attend live performances. There is an open question as to the size of this market, however.
- Digital fatigue is also a rising concern that needs to be mitigated. For more see content considerations findings.
- Digital marketing tactics and partnerships critical to gain digital audience awareness. Arts organizations report using digital ads (usually on social media platforms), search (being mindful of new search patterns of audiences during the pandemic) or partnering with other arts organizations to increase awareness of their digital content offerings. This is coupled with e-mail and social media campaigns, although those target existing subscribers and patrons. Digital marketing rules like storytelling are very relevant here. Unique uses of technology as platforms, such as Tik Tok and video games, have garnered significant word-of-mouth buzz and introduce the arts organization to new audiences
- Mitigate Potential Cannibalization of Subscriptions By Creating Distinct Value Propositions. There is a fear that current subscribers will shift to lower price digital packages or buy single digital tickets, especially when many typical subscriber benefits are unavailable and are being replaced with the same digital offerings. There are three ways to mitigate this: a) make subscriptions more valuable (for example, being able to keep one’s seats), b) sell digital in packaging that delivers a different value than what the subscriber would get (for example, delayed access, limited time access) and c) instead of having digital packages, attach digital to other offerings like donations. Most arts organizations seem to be either focusing on a) or b).

Content Consideration Findings

- Find the Unique Thing You Do Well, Especially as the Saturation of Digital Content Increases. Simply having digital content will not be sufficient to monetize that content, as that content must also deliver value to audiences above-and-beyond what they could access for free. Audiences have a hard time seeing the differences in content quality, especially because they are inundated with digital content right now. Leading organizations have figured out the unique thing they do well that helps them stand out from the crowd including: interactive content, leveraging star power (either in a 1:1 Masterclass-like setting or in a production), educational content, health and wellness, classes, timely/relevant content.
- Consider Shorter Individual Content Pieces, Packaged Together. Audience members prefer shorter content pieces (on average around 20-30 minutes and no more than 60 minutes), but arts organizations also report that audience members engage in multiple shorter content pieces tied together (for example, individual content pieces like a short performance, a backstage look, a meet the artist, an introduction to the performance).
- Create Digital Experiences Centered Around A Performance. Arts organizations report higher levels of engagement with performances as compared with other content (e.g., behind the scenes, Q&A) but also find audiences respond well to the idea of a ‘house party’ or a multi-pronged digital experience with introductory and closing content the surrounds the performance so they get a similar feeling to a live experience. Within this digital experience it is important to provide things not available in the live performance, with some organizations experimenting with a play-by-play commentary not unlike live sports.
- Space Out Content Releases Over Time to Promote Sustained Engagement. While it is true that not all digital audience members watch content on its release date (most arts organizations report that around 25% watch on release date and 75% watch on demand at a later date), it is important to time a release schedule that builds excitement, promotes repeated behavior and reminds the audience of their relationship with the arts organization. This allows for more success in asking for donations and other relationship-building activities, while giving marketing something new to keep talking about.
- Guide Audiences to the Content They Will Value. Audiences are overwhelmed with the amount of digital content, even within an arts organization. Instead of labelling content type type (e.g., yoga/ballet class, educational program, performance) consider labeling it by the audience member’s goal they are trying to achieve (e.g., Want to relax? , Want to Learn?).

Monetization Consideration Findings

- Consider First the Goal of the Digital Content Initiative, Then The Monetization Model(s) That Align With the Goal. The monetization model(s) should connect back to the target audience and goal clearly. For example, if the goal is to engage current subscribers then pricing might mirror a digital subscription to tap into their annual giving habit. But if the goal is to increase accessibility, a pay-what-you-can model may be more appropriate. Arts organizations report that they have different monetization approaches for different digital content pieces, resulting in a mix of free and charged-for content, as they found their goals and capabilities for content pieces differ. Many combine charging a ticket/subscription price with a donation ask, and some extend popular content to distributors to broaden reach.
- Willingness-to-pay for a Ticket is Becoming Clear, With Prices Far Below Typical Live Performances. Marquee TV is seeing an audience willingness to pay \$20-25 for a typical individual production and \$45-50 for a premium individual production. Some degree of experimentation at the start will likely be necessary to understand your audience's willingness to pay. Some arts organizations see charging, even a nominal fee, to be critical to increase audience commitment/as having signal value.
- Always Ask for a Donation – and Be Creative About the Ask. Whether content is free or has a fee, asking for a donation is a smart idea. Whether its requiring the attendee to input '0' into the donation box, anchoring the attendee on what an appropriate donation is based on number of people enjoying the production or the cost to produce the production, providing transparency into what their donation would cover or framing up the donation ask in terms of what type of applause the attendee would like to give – there are a variety of techniques based in behavioral economics that will spur donations.
- If A Production is Donation-Only, Ensure You Can Capture Audience Data. Several arts organizations have reported success in asking for donations for content, especially holiday content, instead of charging for it. However, if content is free and does not require registration, they also find they do not know who is viewing their content and cannot capture any information about viewers. Some organizations require a free registration to capture that information.
- Regardless of monetization scheme, high-quality digital content is unlikely to see revenue that exceeds costs. Most arts organizations say that their digital efforts have been loss mitigation tactics, and some call them loss leaders for brand awareness and strength, audience engagement and philanthropic giving. Most organizations report making in the mid-to-high five figures on their larger digital initiatives (some of which cost 300k to 400k to create), and usually no more than \$100k to \$115k (including subscription extensions and donations). There are exceptions however where a particularly popular new digital piece has the potential to be successfully distributed across multiple channels, over time and may eventually turn a profit – this is a rare occurrence however.

Platform Consideration Findings

- Platform choice is often a trade-off between having control and reach. Organizations that use YouTube cite its broad reach, ease of use for audiences and familiarity for audiences, but acknowledge they have to play by YouTube's rules especially when it comes to monetization. Organizations that use JW Player, Brightcove and Vimeo cite their ability to control the experience/quality and ability to integrate into their website and CRMs/ticketing platforms, but acknowledge that this limits their reach to new audiences and puts more of the technical responsibilities on their shoulders, and there are additional costs involved. Organizations that use arts streaming platforms like MarqueeTV cite their ability to leverage its built-in arts audience and get support from the platform to manage distribution and quality control, but acknowledge that they must work with MarqueeTV's policies and processes and there are additional costs involved. Few organizations consistently use Zoom beyond smaller events like Q&As or classes. Some organizations had previous distribution agreements with movie theaters, radio stations and/or television networks.
- Create a Seamless Purchase Path and Experience for the Audience Member. It's critical to map out the purchase journey for audience members from their perspective to identify pain points in that path and mitigate or eliminate them. The resulting purchase journey should be seamless and extremely user friendly to prevent potential audience members from abandoning their journey. Thinking through things like what device (eg., computer, phone, roku, smart tv) audience members will be using, what questions they may have on their purchase journey, what the audience member will have to do to access the content, and other considerations will help to define the purchase journey.
- Think multi-channel/platform with it comes to distribution of large, highly successful content. For new digital content that has proved to be extremely successful, consider the long-term distribution plan for this content to recoup costs. This could include partnering with other arts organizations, licensing the rights to movie theaters or other tactics to broaden distribution.
- Internal resources direct platform decisions. Those that have decided to use arts streaming platforms like MarqueeTV report that their decision was due to small teams and limited internal capacity and/or capability to manage distribution and/or quality control.
- But (some) platforms making it harder. Vimeo and YouTube have recently removed non-profit clauses that allowed arts organizations to monetize their views, so arts organizations now much pay for that service. On the other hand, Vimeo and JW Player are reportedly trying to make it easier to integrate Tessitura into their platforms.

Coordination Consideration Findings

- Unions have been open to making limited concessions during the pandemic, but there are limits. Most arts organizations who have engaged with their unions have found that they have been open to negotiating limited side agreements for digital content, especially if the current agreement does not have very specific digital specifications. Those who have had existing digital agreements have had more challenges. However, all agreements will only be valid for short periods of time so renegotiation will be coming quickly.
- Unions have not paid much attention to donations, but this may change. Some arts organizations have been able to work around their current agreements by providing content for free and asking for donations. However, as some have had great success with donations – bringing in tens of thousands of dollars – they know that they will need to work with unions to figure out the rules of the road for donations as they become a form of monetization.
- It is extremely time intensive to get the rights for digital content. One arts organizations reported having two staff members working on getting the all the rights for full length digital productions, and they are able to get the rights for 2 productions a month.
- There is general agreement that now is the time to re-think digital agreements. Most arts organizations agree that the digital content landscape has dramatically changed during the pandemic and sped up trends that would have probably taken 5-10 years to develop. They feel that their agreements are outdated, especially those who have detailed digital agreements, and there needs to be a way to renegotiate those agreements for everyone to benefit - because right now often no one, not even artists or performers themselves, are seeing the benefits they should/could.
- Create a cross-functional team to develop digital content. Because digital content creation and distribution involves individual from marketing, sales, artistic, IT, video/sound, production staff and more it is critical to bring this group together with a common goal, clear lines of ownership and high levels of transparency and communication. One arts organization drafted a mission statement and artistic plan for their digital content that was used by their cross-functional team.

Monetization Audit

Full list available at: <https://docs.google.com/spreadsheets/d/16xaraYPS9u6l1d0zdrFCq3B3ihhzM1rMCAc2lx6tcoc/edit?usp=sharing>

Highlights From Secondary Research

- ‘All Arts Organizations Are Media Companies Now’: How the Pandemic Is Transforming Theater ([Variety](#)): theater artists and companies are using this moment to rethink what theater can look like alongside technology. This article explores how digital can be its own complete form of theater that co-exists with traditional theater in the future. Examples include audio plays, theater via ‘The Sims,’ and site-specific plays for the internet.
- Playing To Music Lovers in the Pandemic ([Forbes](#)): an interview with Executive Director of the Los Angeles Chamber Orchestra, Ben Cadwallader. He discusses the thought process behind their sponsored hybrid offerings during COVID-19, asking “how do we create something so that, if people experience the taping live, they still want to rush home and watch the episode?”
- AEA/SAG-AFTRA agreement paves way for digital theater options post-pandemic ([San Francisco Chronicle](#)): AEA now has jurisdiction over digital work that replaces a live stage show or whose digital audience supplements a live audience during the pandemic.
- The San Francisco Symphony Plunges Into a New World ([New York Times](#)): The San Francisco Symphony commissioned a work specifically for digital medium, featuring a whole cast of prominent artists.
- Netflix & Disney+ Pull Back Curtain On Ballet To Bring Representation, Joy Of Dance To Holiday Season Limited By Lockdowns ([Deadline](#)): the rise of dance films on major streaming platforms has opened up new opportunities for the artform.

Arts Organization Interview List

COMPLETED

Pacific Northwest Ballet	National Theatre
Houston Grand Opera	Goodman Theatre
ROCO Houston	Thyssen-Bornemisza National
Australian Ballet	Museum
Philadelphia Orchestra	Geffen Playhouse
San Francisco Opera	Scottish Ballet
Metropolitan Museum of Art	American Shakespeare Center
Alley Theatre	Marquee TV
New York City Ballet	Opera Philadelphia

CONTACTED

Boston Ballet	Berlin Philharmonic
San Francisco Ballet	Center Theatre Group
Dallas Symphony	Arts Laureate
Milwaukee Repertory Theatre	
Detroit Symphony Orchestra	
Louvre Museum*	
Nederlands Dans Theater	
BalletX	
Steppenwolf	
Unitel	