Digital Theatre – Strategies and Business Models in European Theatre

A Study

EUROPEAN
THEATRE
CONVENTION

DIGITAL THEATRE –
STRATEGIES AND BUSINESS MODELS
IN EUROPEAN THEATRE

—

A Study

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FOREWORD

The COVID-19 pandemic had a devastating impact on the finances of European theatres. But there is another story: A flourishing digital theatre scene, as artists and theatre professionals experimented with all sorts of technology to maintain their relationship with locked-down audiences. Streamed performances, multi-camera captures, audio productions, zoom theatre, augmented reality walks, video game collaborations…somewhere in Europe, a theatre tried it.

At the European Theatre Convention, 'digital readiness' is one of our three key strategic priorities for the period 2021–24. We are therefore committed to exploring this phenomenon in more detail. What impact has the boom in digital experimentation had on artistic performances and ticket sales? On the development of digital strategies and business models? And perhaps most importantly – what conditions are needed to sustain or further experiment these developments across Europe?

We are delighted to have partnered with the Academy for Theatre and Digitality in Dortmund and the researcher Dr. Katie Hawthorne to answer these questions in this landmark study, *Digital Theatre – Strategies and Business Models in European Theatre*. This comprehensive survey of strategic thinking from 2019–22 – the first time these questions have been asked on a European scale – gathers data from 19 theatres in 17 countries. It provides data on digital productions, budgets, ticket sales, investments, personnel and training, and areas of digital growth, challenge, and disagreement. And it reveals some outstanding digital innovation by theatres in Europe, from low-budget experimental laboratories in Ukraine to a transformative approach to digital programming in Sweden. It states an impressive rise in digital ticket sales of 772% during the first year of the pandemic. The study also finds a clear need for additional support to help theatres overcome the financial, technical, and artistic barriers that stop them from adopting a longer-term approach to digital strategies - or from valuing digital work in the first place. Without regulation of the rights for online, cross-border digital work, or a sustainable financial model for artists and professionals to be remunerated, it looks challenging for theatres to carry out and invest in digital work.

There is still much to explore, but this study equips us with deep, cross-European knowledge about the vital developments in digital theatre and business models in European theatres. This will become increasingly relevant and important as theatre establishes itself in a digital sphere, and the concept of 'discoverability', or being able to find theatre when looking for other cultural experiences online, becomes more commonplace. We hope you enjoy exploring the study, and that it serves as inspiration for digital developments in your own theatres and cultural environments.

Heidi Wiley
Executive Director, ETC

Executive Summary

This study analyses the evolving role of digital theatre in Europe. A survey was sent to ETC Member Theatres in April 2022 and nineteen theatres from seventeen European countries responded. The breadth of this study makes it the first of its kind; it offers unique insight into the opinions and strategic approaches held by European theatres, as well as the challenges and successes that these theatres have experienced when producing different forms of digital theatre. The survey was designed to collect quantitative and qualitative data for theatre produced in the years 2019, 2020 and 2021. As such, this study presents the impact of the COVID-19 pandemic on the development and role of digital theatre in Europe. Theatres also answered questions concerning the role of digital tools and technologies in 2022 and beyond, providing valuable insight into the perspective of European theatres regarding the viability and creative possibilities for digital theatre in the short- and long-term future.

Digital theatre is a broad term, and the creative and distributive possibilities of digital technologies in the theatre continue to expand. This study argues for greater specificity when discussing the role of digital tools and techniques in the theatre and uses three key terms to distinguish between certain types of digital theatre. Digitally distributed theatre is used to describe theatre that is broadcast from the stage to remote audiences, including live-streams, simultaneous broadcasts, and broadcasts of pre-recorded performances. Digitally mediated theatre describes the integration of digital technologies within a performance to mediate the audience's experience and could, for instance, involve the use of smartphones or tablets. Digitally located theatre is theatre which takes place in a digital-first location, such as performances which are created specifically to be experienced on Zoom, or in virtual reality environments.

Key Findings

The COVID-19 pandemic reduced European theatre ticket sales by two thirds. Reported ticket sales reveal that, on average, sales in both 2020 and 2021 were equal to 1/3 of 2019's sales.

Digital theatre grew by 772% between 2019 and 2020 and remained stable in 2021, based on ticket sales.

However, **theatres also report difficulties in tracking, quantifying and qualifying viewership for digital theatre,** particularly for digitally distributed and located performances. It is disputed if "clicks" can be correlated with more traditional forms of viewership, and many theatres could not or did not provide such data in 2020 and 2021. Had they done so, it is likely that ticket sales (expanded to include a wider definition of viewership) would be considerably higher.

There is a lack of consensus regarding the ticket price of digital distributed theatre. In 2021, **53% of theatres were willing to charge for digitally distributed theatre** (increased from 38% in 2020). This is despite **38.3% of theatres (across 2019–2021) reporting the cost of producing digitally distributed theatre as a challenge.**

Digitally mediated theatre is most highly regarded in terms of artistic innovation and creative expression: respectively, 64% and 74% of theatres report digitally mediated theatre to be a success in this way.

Theatres believe **digitally located theatre can reach "new audiences".** In 2021, 83% of theatres which created digitally located theatre reported that it had reached "new audiences". Theatres also discussed its potential to reach audience members who may not be able to attend their venue in person.

Overall, European theatres find the **cost of producing digital theatre is challenging or prohibitive.** 34% of theatres that do produce digital theatre report it to be a challenge, whilst 22.1% of theatres which have not produced digital theatre report it to be an obstacle. Theatres also report difficulties in negotiating contracts and rights for digitally distributed and located theatre, with some reporting this to be a major contributor to rising costs.

As such, hybrid programming (i.e. the production of digital and non-digital offerings during a season) is considered to be beneficial in terms of creative diversification, flexibility and reaching "new" audiences, but is not always financially possible. **26.3% believe hybrid programming to be "financially beneficial" but 42.1% of theatres disagree.**

Digital growth is visible in staffing, too. **Roles with digital remits in European theatres increased by 268% between 2019 and 2021**, and now encompass a far broader range of job titles. However, the proportion of freelance or short-term contracted staff with digital roles also increased, from 42.42% in 2019 to 63.7% in 2021: care must be taken to ensure that digital creatives and technicians have access to stable employment opportunities.

78.9% of theatres agree that digital theatre helps to train staff in new skills. 49.3% of theatres reported a 'lack of skills' to be a challenge when creating digital theatre in 2020, but by 2021 this figure drops to just 20.1%. This drop is particularly heightened for digitally mediated theatre: 62.5% of theatres felt they lacked the necessary skills in 2020, down to 10% in 2021.

Digital theatre remains divisive. Of the theatres which did not produce digital theatre, 74.3% attribute this to a "lack of interest" from the creative team. It is clear that such theatres hold strong opinions about digital theatre, and many believe it to be in direct opposition to their definition of theatre-making. There are also concerns that digital distribution could replace opportunities for international touring.

Digital Theatre – Strategies and Business Models in European Theatre

by
Dr. Katie Hawthorne

Introduction

This study consults nineteen theatres from seventeen European countries to present a comprehensive survey of digital theatre and digital strategies in the years 2019 to 2022. Data has been collected on productions, budgets, ticket sales, investments, personnel and training, and areas of challenges, growth, and disagreement.

Previous research into the development of digital tools in the theatre has been country-specific or addressed arts and culture industries more broadly. This study offers an in-depth exploration of the ways in which digital tools and technologies are shaping European theatre and presents a cross-European perspective based on three years' worth of financial, operational and artistic data contributed by each participating ETC Member Theatre. This makes it possible to draw broad conclusions about the status of digital theatre in Europe, as well as to pinpoint shared challenges, divergent attitudes, and specific routes towards successful, sustainable digital strategies.

This study begins by mapping the field of digital theatre in Europe as it stood in 2019 to 2021. It quantifies the impact of COVID-19 upon affected European theatres and dissects the role that digital theatre played for some theatres in the mitigation of pandemic restrictions. As a natural consequence of this period, many theatres raise the same question: is digital theatre a short-term emergency solution, or a long-term investment?

Ticketing data (and other means of quantifying audience numbers) are used to examine the rise of specific forms of digital theatre over time, whilst information on personnel, training and investments in hardware and software depicts digital growth behind the scenes. Information on pricing reveals wide-spread uncertainty regarding the market value of digital theatre, whilst many theatres report that the cost of producing digital theatre is a considerable challenge to overcome.

This study examines 'success' in digital theatre and asks: what metrics can we use to measure this? What kinds of narratives, aesthetics and experiences are being explored through digital technologies? What is the relationship between artistic innovation, profitability, and the interest of a theatre's audience? On the other hand, this study also presents the 'challenges' and 'barriers' experienced by theatres in the production of digital theatre. What unique challenges are posed by digital forms of theatre, and what obstacles are preventing theatres from digital exploration? What other forms of infrastructure (for instance in terms of ticketing, marketing, and copyright) are required to ensure the success of a digital production?

Moreover, why is digital theatre still a controversial topic? Many responding Member Theatres feel strongly opposed to digital forms of theatre, and these opinions resonate throughout many areas of this research. It is clear, too, that the theatre industry requires more precise language to facilitate discussions of digital theatre – for instance, to delineate between the use of digital technologies to distribute a performance, in contrast to the embeddedness of digital tools within the dramaturgy of a theatrical work.

In 2022, the European Commission launched the Digital Decade policy programme, which plots a path to a "successful digital transformation in Europe by 2030". It covers four key areas – digital skills, digital infrastructure, digital business, and digital public services – with an emphasis on creating sustainable changes that can drive social, economic and environmental benefits. This study offers unique insight into the digital transformations already occurring in European theatres, with particular reference to skills and business models, but it also contextualises the challenges faced by theatres which might seek such a digital transformation.

A minority of theatres in this study had a demonstrable interest in digital technologies, narratives and business models prior to the COVID-19 pandemic, but it is clear that 2020 was an important milestone for digital theatre in Europe. This study reveals the accelerated digital growth of that period, and the impact it had in terms of skills and training, artistic ambition, and the development of audiences for digital theatre. However, it also reveals how this growth is not necessarily stable. One recent UK report identified a "pull back" from digital theatre since pandemic restrictions were lifted.

This study reveals that many European theatres are caught between the perception of digital theatre as a short-term solution, and the financial, technical, and artistic barriers that can obstruct a longer-term adoption of digital strategies. In recognition of this, two case studies are presented as examples of successful, transformative digital strategies, from theatres in Ukraine and Sweden. This study also makes policy recommendations, based on the experiences of ETC Member Theatres, to ensure the future implementation and sustainability of digital artistry, innovation, and strategy in European theatre.

Part One

Research Context, Key Terms and Methodology

Although this study, 'Digital Strategies and Business Models in European Theatre', focuses in large part on the impact of COVID-19 on digital theatre in Europe, it is essential to note that digital theatre, in a variety of forms, was already established in many European houses prior to the pandemic. For instance, the founding of the Academy for Theatre and Digitality in Dortmund in 2019 is a pre-COVID milestone for the implementation of, and experimentation with, digital tools and technologies in theatres across Europe. Similarly, schemes such as PlayOn! have been assisting and funding theatres in cross-institutional digital research in the years 2019 to 2023. The European Theatre Convention has an established history with digital theatre, including research papers, training workshops and research programmes, and in 2016 launched the European Theatre Lab: Drama Goes Digital project, which explores digital strategy for European theatres.

Prior academic study includes this researcher's doctoral thesis, 'Contextualising Liveness: Digitally Distributed, Digitally Mediated and Digitally Located Theatre in Edinburgh and Berlin, 2017-19', which analysed and compared digital theatre in two European capitals and found a notable increase in productions, research, and development to have occurred in those three years alone. In England, in the same period, the Arts Council commissioned NESTA to produce a major investigation into the use of digital technologies in arts and cultural institutions. NESTA's work underpins 'Digital Strategies and Business Models in European Theatre', but in several instances this study finds there to be considerable differences between the experiences and opinions of European theatres, just a few years later.

For instance, NESTA's 2017 report had an emphasis on digital marketing, and found "distribution and exhibition" to be the area where digital technology is considered least important.[1] In contrast to those findings, the 'Digital Strategies' study finds digital distribution to be the most prevalent point of engagement between European theatres and digital technologies:

1 NESTA, *Digital Culture* (2017), 10.

77.7% of tickets sold for digital theatre between 2019–2021 were for digitally distributed productions.

The same NESTA report noted a "significant rise in the number of theatre organisations engaged in live streaming" yet found "theatre organisations [to be] less likely than the sector as a whole to sell productions and merchandise online".[2] On page 24, this study examines the pricing structures used by theatres to sell digitally distributed and located theatre, and finds a lack of consensus regarding the perceived market value of theatre that is accessed online. It is also clear, from the experiences of contributing Member Theatres, that more development is needed in the platforming and hosting of these performances online.

While NESTA's report finds a "lack of time and funding" to be "the main barrier to [...] digital ambitions", this study reports other contributing factors which prevent or deter theatres from producing digital theatre.[3] This study finds that cost is certainly a challenge to the production of digital work, according to 34% of contributing Member Theatres, but additional factors include a perceived digital fatigue in audiences (an area which would be fruitful for further study), as well as a lack of artistic interest, the notion that digital technologies may erode traditional forms of theatre, difficulties with negotiating digital rights, and a lack of knowledge-sharing between likeminded institutions.

In 2019, NESTA published the final report of the Digital Culture Survey. It found that the uptake, or interest in, digital technologies had plateaued in English arts and culture institutions, after a period of heightened activity in the years previous. This could imply that interest and implementation had waned, or that the required knowledge and infrastructures had already been acquired during those years of heightened growth, leading to a period of relative stability. In many ways, the 'Digital Strategies' study identifies the beginning of a similar trend post-COVID. The quantity of digital theatre in Europe grew dramatically between 2019 and 2020, but this growth becomes more stable in 2021. Throughout Parts Two and Three, this study explores the sustainability of such growth in terms of staffing, pricing, financial investment and artistry.

There has been specific research into the impact on the arts during the

2 NESTA, *Digital Culture: Theatre Factsheet* (2017), 3.
3 *Theatre Factsheet*, 7.

height of COVID-19, as in the UK-focussed 'Digital Access to Arts and Culture' which examined an eighteen-month period across 2020 and 2021. In that period, the researchers note that much "digital programming was mostly necessity-driven, and consequently the focus of discourse in the arts and culture sector was on how to use digital as an alternative to in-person arts and culture".[4] The researchers note that this has led to a "degree of simplification, resulting in an artificial binary in which liveness and digitality were somehow seen as existing in competition with each other. This binary is no longer useful. There is no zero-sum game here".[5] The report's focus is on the "significant accessibility benefits, in particular for d/Deaf and disabled, clinically vulnerable, and older people" created by streaming programmes, and other forms of online programmes for arts and culture.[6]

However, the 'Digital Access to Arts and Culture' report also describes a "pull back" from regular streaming content, due to factors including "low revenue, limited funding, a public funding structure that favours one-off projects, the absence of a digital rights framework, and uncertainty about what content works best".[7] For this reason, the report's authors argue that a "future focus on hybrid programming is essential", to make arts and culture "more inclusive".[8]

This argument is examined throughout 'Digital Strategies and Business Models', as this study tests the feasibility of hybrid programming from the perspective of participating ETC Member Theatres. It finds that many theatres agree that certain forms of digital theatre can be beneficial in terms of accessibility and inclusivity, but that the financial cost of producing digital and non-digital theatre simultaneously can be a major obstacle. However, readers will find in the Folkteatern case study an example of how digital flexibility can become an asset to a theatre. Moreover, the concluding remarks to this study present the support needed for European theatres to continue, or begin, to work in such a way.

Key Terms

One challenge for a survey of this nature, and for the development of digital technologies within the theatrical field more broadly, is the development

4 Richard Misek, Adrian Leguina, Kadja Manninen, *Digital Access to Arts and Culture* (2022), 7.
5 Misek et al., 7.
6 Misek et al., 5.
7 Misek et al., 9.
8 Misek et al., 9.

of a shared vocabulary. This study uses three terms – digitally distributed, digitally mediated, and digitally located – in order to better reflect the diversity of theatre which uses digital tools and technologies, and to more accurately describe modes of digital creation and distribution.

Digital theatre, as a descriptor, must be approached with care. The term has become "largely synonymous with digital broadcasting techniques" and can also imply that there is a firm division between digital and "non-digital" theatre.[9] On the contrary, this study uses "digital theatre" to refer to a field of digitally aided theatrical work that is ever-expanding. There is no single form, technology or aesthetic which defines digital theatre, and as such it is used broadly and liberally in this study. However, it is evident that, for many theatres in this survey, "digital" theatre still equates to screen-based (and often livestreamed) work, and that this belief has informed their survey responses. This is explored in greater depth on page 44.

These terms are not mutually exclusive: a performance could be described by all three terms at once, or it could fit into different categories over the course of its existence – as this study explores more deeply in Part Four.

Digitally Distributed Theatre

Theatre which is broadcasted from where it is taking place to remote audiences. For instance, from the stage in a theatre to international audiences watching in a cinema, or at home. This includes live-streams with both in-house and remote audiences, as well as the broadcasting of previously recorded performances.

Digitally Mediated Theatre

The use of digital technologies within the dramaturgy of a performance to mediate the audience's direct experience of a performance. This could be through the use of a smartphone, tablet, or app, and includes hybrid theatrical experiences which combine 'live' performance with virtual or augmented reality elements.

Digitally Located Theatre

Theatre which is made for, and takes place in, a digital location. For instance, this could include productions created specifically for Zoom, or hosted entirely on digital platforms. This also includes performances solely accessible through virtual reality environments.

9 Katie Hawthorne, 'Digitally Distributed, Digitally Mediated and Digitally Located Theatre in Edinburgh and Berlin, 2017-19' (PhD diss., University of Edinburgh, 2022), 15.

The survey asked respondents to choose the most appropriate label for their work, and to provide further detail if necessary.

Methodology

This study is based upon the results of a survey developed on behalf of the ETC and sent to all Member Theatres across Europe in April 2022. Nineteen theatres, representing seventeen countries, provided data for this study. This includes theatres that gave partial answers in certain areas. The survey asked each respondent for quantitative data on production budgets, ticket sales, artistic outputs, investments in hardware and software, personnel and training, and used Likert scales to assess strategic approaches to digital theatre, for the years 2019, 2020 and 2021. It also asked open-ended questions regarding areas of success, challenges encountered, and attitudes and approaches towards digital theatre in the short and long term. As such, it presents a uniquely broad perspective on digital theatre in Europe, from the perspective of theatres in 2022.

A pdf of the full survey can be downloaded here:
https://tinyurl.com/4zrtwvv5

Qualitative interviews were also conducted to create "best practice" case studies featuring two theatres with contrasting digital experiences. This study is also informed by academic and industry research, as well as prior reports published by the European Theatre Convention.

ETC recommended that participating theatres should form a small working group, where possible, to facilitate the collection of data from different departments (finance, marketing, artistic, etcetera.). A wide range of personnel undertook the role of lead survey respondent, with job titles including: Education Programs Coordinator, Head of Theatre, Communications Director, Head of Drama, Library, Archive & International Relations, Executive Director, Curator, Producer, International Development, Dramaturg, Director, Marketing Manager, Artistic Director, Head of Engagement, CEO. Each of these roles offers contrasting perspectives on the inner mechanisms and strategies of those theatres. As a result, each response is shaped by, and unique to, the individual members of staff who filled out the survey on each theatre's behalf. Moreover, it is possible that the effort required to complete such a survey could have filtered out theatres with ambivalent attitudes to digital theatre.

There are limitations to the knowledge that can be gathered in such a manner. For instance, the survey asked several questions pertaining to each theatre's audiences, some of which required theatres to judge their audiences' enjoyment of a production, and whether a production reached an "existing" or a "new" audience. As explored in a prior ETC study, assumptions should not be made about what audiences do and do not want without asking audience members directly.[10] However, it was important to ask these questions in this research, as it permits insight into the perspectives of the theatres, as organisations, on this topic. Still, we cannot take the answers to questions of this nature to accurately reflect the opinions of specific audiences and audience members, particularly as each theatre has its own methods of understanding the interests and needs of its audiences.

To achieve comparable data, the survey requested information for each calendar year, rather than for each theatrical programme or season. Many ETC Member Theatres run on different schedules, and financial years are calculated differently in individual regions. It is also important to note that many, but not all, of the theatres included in this survey are repertory, which will have influenced the way that theatres approach research, development, and programming.[11]

This study asked for sensitive information from participating theatres, and as a result their answers are presented anonymously (except for the case study theatres, who gave written consent to be identified in such a way). Where necessary, data has been redacted to preserve anonymity. It is also important to highlight that the theatres involved in this study cannot be considered representative of their country. Rather, this study intends to present an overview of the status of digital theatre in Europe, as well as the specific challenges, attitudes and successes experienced by the contributing theatres.

10 Achim Müller, *Audiences for European Theatre* (2015).

11 A repertory theatre is a theatre which has a body of work that is performed over several seasons, by a resident company of cast and crew. For instance, in a repertory theatre, a certain production might be performed monthly over a period of several years. In contrast, a non-repertory theatre might operate on a production-by-production basis, with fixed run-times and new creative teams for each new production.

Part Two

Digital Theatre in Europe – A Status Report

The Impact of COVID: Digital Theatre as a 'Solution'?

Year	Total tickets sold *(number of answering theatres)*	Digitally distributed *(number of answering theatres + theatres that did digitally distribute but lack ticket numbers)*	Digitally mediated *(number of answering theatres + theatres that did digitally mediate but lack ticket numbers)*	Digitally located *(number of answering theatres + theatres that did digitally locate but lack ticket numbers)*	Total digital tickets sold	Digital theatre % of total tickets	COVID closures *(average days per calendar year) [percentage of calendar year]*
2019	1,526,817 *(15)*	11,754 *(4)*	3,803 *(3)*	2 reported shows, no numbers	15,557	1.01%	n/a
2020	513,571 *(15)*	97,179 *(9+1)*	34,700 *(8+3)*	3,800 *(3+4)*	135,679	26.4%	206 *[56.2%]*
2021	434,369 *(15)*	116,948 *(9+8)*	16,986 *(5+4)*	5,459 *(2+6)*	134,483	30.9%	124 *[33.9%]*

This chart shows the impact of COVID-19 restrictions on ticket sales, in the years 2020 and 2021. Ticket sales in 2020 dropped to 33.6% of 2019 sales, and lower still to 28.4% in 2021. In contrast, digital theatre grew by 772% between 2019 and 2020, and remained stable throughout 2021 in terms of total digital tickets sold – although the diversity of those digital performances continued to evolve. The greater decline in tickets overall in 2021, despite fewer COVID-related closures on average, can be partially explained by the growth of digital theatre, and the difficulties experienced by some theatres in quantifying the number of tickets sold, or the total online viewership, of digital forms of performance.

Theatres reported difficulties in tracking or quantifying viewership for digital theatre, particularly for digitally located theatre, and for digitally distributed theatre in 2021. Nine theatres provided data for digitally distributed performances in 2020 and 2021, but in 2021 an additional eight theatres created work in this field but were unable to provide data on tickets or viewership. For digitally located theatre in 2020 and 2021, most participating theatres were unable to provide audience data. This speaks to the changing role of the audience in digital theatre, as theatres expressed doubt over counting "clicks" and the difficulties in analysing viewership through different digital platforms. This is compounded by a reluctance on the part of many theatres to charge, or even ticket, digital productions.

This study finds that only 53% of theatres are willing to charge for digitally distributed theatre, which is explored in greater depth in the Pricing section below.

Statement	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Digital theatre is a short-term solution to pandemic restrictions	0	4	2	11	2
Digital theatre is important to this theatre's long-term strategy	1	5	6	4	3

68% of theatres agree or strongly agree that "digital theatre is a short-term solution to pandemic restrictions". All the theatres which "disagree" that "digital theatre is important to this theatre's long-term strategy" agreed instead that it is a "short-term solution", displaying their conviction that digital theatre is an emergency alternative, rather than a longer-term commitment.

However, of the seven theatres which agree or strongly agree that digital theatre is important to a long-term strategy, four opted to "disagree" with the suggestion of digital theatre as a "short-term solution". This indicates a similarly strong yet opposing opinion, that digital theatre is considered a long-term strategy rather than a short-term solution. 36.8% of theatres agree or strongly agree that digital theatre is important to their long-term strategy, while 31.5% of surveyed theatres "neither agree nor disagree" over the importance of digital theatre to long-term strategy, and 31.5% disagree or strongly disagree that digital theatre has a role in their long-term planning. These mixed results reflect a high degree of uncertainty over the role of digital theatre in the long term, as well as the feasibility of maintaining digital theatre alongside established theatrical practices.

Pricing and Ticketing for Digitally Distributed Theatre

Note: It is important to recognise that there are several gaps in this data: the numbers provided by theatres do not always add up, which could reflect internal debate or uncertainty about the digital remits or job descriptions of some roles. Missing data does not necessarily imply a zero sum.

This section focuses on digitally distributed performances and analyses ticketing strategies for live-streamed and broadcasted theatre. It reveals a widespread indecision over the market value of digitally distributed theatre: many theatres do not charge for live streamed or broadcast theatre, whilst others charge as much as they would for 'in-house' performances of the same production. Regardless of pricing, few theatres are willing to pronounce digital distribution a success on the basis of ticket sales.

Over three charts, which show the ticketing and pricing in 2019, 2020 and 2021, we can see changing strategies, an increase in free digitally distributed theatre in 2020, and the difficulties in measuring audience attendance in digital theatre. We can also see a preference for broadcasted theatre, rather than live-streamed theatre. This distinction is important: this study uses broadcast theatre to refer to pre-recorded performances that are then broadcast, in contrast to productions which are live-streamed as the performance occurs. Broadly speaking, it is a more complicated feat to produce a live-stream, in contrast to a performance recorded for future broadcast. A live-stream may require the use of multiple cameras and the real-time directing of those cameras, in addition to reliable internet, the ability to work around any audience present for the performance, and a waiting, remote audience ready to watch the production. This could be through home streaming, or through an arrangement with another venue such as a cinema.

2019	Number of productions that were digitally distributed	How many of those productions were live-streamed?	How many of those productions were broadcast as a recording?	The cost of a ticket for digitally distributed theatre (euro)	The cost of a ticket for an equivalent, in-house production (euro)	Total ticket sales for digitally distributed theatre in 2019	A success on the basis of ticket sales?
	1	1	1	6–10	6–10	10000	No
			2	1–5	15+	404	No
	1		1	*Free*	11–15	1200	No
	4	0	2	*Free*	15+	150	No
Total	6	1	6			11,754	0%

In 2019, few theatres participated in digitally distributed theatre. Pre-recorded broadcasts were the most prominent form of digitally distributed theatre, and it is notable that the theatre which reported the highest ticket price (6-10 euro, the same as an in-house production at that theatre) also sold the most tickets (10,000). This theatre also had the lowest annual production budget of all surveyed theatres in 2019, at 3000 euro in total.

Despite this, the theatre does not report it to be a success on the basis of ticket sales. Instead, this theatre reported challenges regarding the cost to produce such a work and judged it successful on the basis of artistic innovation and expression.

2020	Number of productions that were digitally distributed	How many of those productions were live-streamed?	How many of those productions were broadcast as a recording?	The cost of a ticket for digitally distributed theatre (euro)	The cost of a ticket for an equivalent, in-house production (euro)	Total ticket sales for digitally distributed theatre in 2019	A success on the basis of ticket sales?
	10	2	8	*Free*	11–15	0	No
	14	5	9	6–10	15+	5419	Yes
	6	6		6–10			No
	4	2	2	*Free*	15+	20,000	No
	17	17	0	6–10	6–10	2530	No
	1	0	1	*Free*	*Free*	600	No
	77	8	28	6–10	15+	2266	Yes
	4	1	3	*Free*	*Free*	640	No
	11	3	8	15+	15+	10232	Yes
	96	1	95	*Free*	15+	47492	No
	6	0	6	*Free*	*Free*	*uncountable*	No
	3		3	*Free*	11–15	8000	No
	17	0	0	*Free*	*Free*	*uncountable*	No
Total	266	45	163			97,179	23%

In 2020, broadcast recordings were the most prevalent form of digitally distributed theatre. In the 'Successes' section, this study looks in more depth at the eagerness of some theatres to create digital performance archives. Only one theatre in 2020 displayed a preference for live-streamed performances (17 theatres in total), and in this instance it charged 6-10 euro, equivalent to an in-house production. In general, all theatres which produced three or more live-streamed performances charged for the tickets. This could suggest that the effort of producing live-streamed performances has encouraged theatres to charge. The three theatres which reported ticket sales to be a "success" all charged for their productions.

In contrast, the theatre which broadcast the highest number of recordings (95) opted for free ticketing, as did each theatre which produced two or fewer live streams.

There is no discernible correlation between ticket sales and pricing. One theatre sold 10,232 tickets at 15 euro each, whilst another 'sold' 640 free tickets. Likewise, one theatre reported 47,492 audience members across 96 live-streams and broadcasts in total, whilst a theatre with four productions in total had a viewership of 20,000. This suggests that the nuance of viewership is more contextual than this broad study can account for, and likely contingent on the specific relationship between each theatre and its audiences. Once again, we also encounter difficulties in quantifying audience numbers for digital theatre, indicated by missing data and answers of "uncountable". In 2020, there was no established or commonly agreed-upon value for digitally distributed theatre across Europe.

2020	Number of productions that were digitally distributed	How many of those productions were live-streamed?	How many of those productions were broadcast as a recording?	The cost of a ticket for digitally distributed theatre (euro)	The cost of a ticket for an equivalent, in-house production (euro)	Total ticket sales for digitally distributed theatre in 2019	A success on the basis of ticket sales?
				Free	11–15	–	No
	2	0	2	15+	15+	5653	Yes
	9	9	0	6–10	–	–	No
	2	1	1	*Free*	15+	15000	No
	1	1	1	*Free*	1–5	0	No
	7	7	0	6–10	6–10	1690	No
	4	0	4	*Free*	*Free*	–	No
	6	1	5	6–10	–	1863	No
	1	0	0	–	–	–	No
	22	4	18	6–10	15+	13124	No

2020	Number of productions that were digitally distributed	How many of those productions were live-streamed?	How many of those productions were broadcast as a recording?	The cost of a ticket for digitally distributed theatre (euro)	The cost of a ticket for an equivalent, in-house production (euro)	Total ticket sales for digitally distributed theatre in 2019	A success on the basis of ticket sales?
	1	0	6	*Free*	*Free*	0	No
	11	5	8	6–10	6–10	1278	Yes
	6	6		5+	15+	20037	Yes
	69	0	69	*Free*	15+	53303	No
	4	0	4	*Free*	*Free*	0	No
	1		1	*Free*	6–10	5000	No
	1	0	1	6–10	–	–	No
Total	136	35	114			116,948	3 (17.6%)

In 2021, broadcast recordings remain the most common form of digitally distributed theatre. There are almost half as many digitally distributed productions as in 2020 (most likely attributable to heavier COVID restrictions in that year) but reported ticket sales are higher: productions are down by 49% but ticket sales increase by 20%, even though several theatres are unable to provide ticket data for 2021. This is noteworthy on several counts: it could suggest that theatres are becoming more accomplished at marketing digitally distributed theatre, or that audiences for the form are growing. Throughout Part Three this study explores how many theatres have reported a digital fatigue in their audiences, but these audience numbers appear to contradict that perception.

In terms of pricing, theatres which produce more than two live-streamed performances continue to charge for tickets, as in 2020. In general, a greater number of theatres are willing to charge for digitally distributed productions in 2021: 53% of theatres charge in 2021, over 38% in 2020. Once again, the few theatres which describe ticket sales to be a "success" all charged for their productions. It is also striking that many of the theatres which do not charge for digitally distributed theatre are unable to provide audience data: without the financial transaction of a ticket, it appears to be more difficult to quantify or evaluate the number of viewers.

Between 2019 to 2021, only 13.5% of theatres reported success based on ticket sales for digitally distributed theatre. Theatres which report success based on sales have always charged for these productions but, overall, these theatres remain a minority. The number of theatres willing to charge for digitally distributed theatre appears to be rising, but 53% of theatres continue to offer digitally distributed productions for free – despite 38.3% of theatres reporting that the cost of producing such theatre is a challenge. However, it should also be noted that some theatres in this study argue that free tickets for such work is part of a strategic approach: see the Folkteatern case study on page 46.

This discussion of digital audiences continues throughout Part Three, in which factors such as "new" audiences and audience enjoyment are also evaluated as metrics for success in digital theatre.

Investment: Skills, Hardware, Software

In 2019 two theatres (out of the nineteen surveyed) offered digital training to staff members. In 2020, four theatres offered digital training. In 2021, five theatres offered digital training. These training opportunities included digital marketing and data analysis and training in financial software, as well as training specific to the creation of digital theatre, regarding the use of new platforms for theatrical means. This small number of theatres reporting specific training is striking in comparison to the number of theatres which reported digital theatre to be beneficial in terms of bringing new skills to their workforce.

Statement	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Digital theatre helps this theatre to train its staff in new skills	0	3	1	11	4

15 theatres (78.9%) agreed or strongly agreed that "digital theatre helps this theatre to train its staff in new skills". This implies that training in digital tools and technologies is, for the most part, occurring in an unstructured and un-funded manner – and yet the production of digital theatre is a significant upskilling opportunity. As a result, this study advocates for funding sources to support theatres directly in the digital training of their staff.

Investments made in the purchasing and hiring of hardware and software for the specific production of digital theatre reflect the growth of digital theatre from 2019 to 2020 and 2021. In 2019, three theatres reported spending money in this area, with totals of 5,000, 7,400 and 25,000 euros. Respectively, these sums were used on a projector, data signal convertors, small accessories, Resolume VJ[12] software and media server; computers, graphic and sound cards, video software; computers, cameras, projectors; headsets, new microphone system. These investments, predominantly into audio-visual equipment, were made by two theatres which reported creating digital theatre in 2019, and one which did not. This reflects the embeddedness of digital technologies within established modes of theatrical production, and a weakness in the line of questioning in this section of the survey: digital hardware and software are already commonplace in many, if not a majority, of theatres – yet this is only reflected here in the response from a single theatre.

In 2020, in line with the steep rise in digital theatre production, there was considerably more financial investment into digital theatre: twelve of the nineteen theatres reported investing in hardware and software specific to digital theatre production. An average of 24,444 euro, with the highest single investment at 90,000 euro (cameras, computers, control desk and mixer, projectors, audio equipment, and software to facilitate video, lighting, and streaming). Three of the nine theatres spent 1000 euro or less, however, on cloud services, audio-visual recording accessories and a new camera, respectively. Seven of the twelve theatres specifically mention investment in audio-visual and streaming equipment, reflecting the rapid growth of digitally distributed theatre in this period. Notably, two theatres also refer to digital ticketing infrastructure: Spektrix (a cloud-based ticketing and marketing solution) and, even more specifically, a "live stream platform integrated into the website, also integrated to the ticketing system of the theatre". This calls back to NESTA's UK theatre-specific findings in 2017, that despite a significant rise in live-streaming, theatres lagged behind the arts and culture sector as a whole in terms of marketing and selling productions online. In this study's section on 'Successes', we follow up with these two theatres specifically, in terms of reported successes regarding ticket sales and audience reach.

In 2021, four further theatres invested in digital platforms and infrastructure. One theatre spent 23,000 euro on a "new digital theatre web platform […] for live audio theatre broadcast and events", another spent 5,142 euro on a new website for the theatre, and the third spent 9,040 euro on 200 terabytes of Vimeo storage – a video hosting platform. The fourth reported staff training in "data analysis, direct marketing and social media management". These four contrasting investments call attention to the infrastructure required, and costs accrued, for a theatre to have an online presence and to produce, host and market digital theatre. Twelve of nineteen theatres reported investments into hardware, software and training in 2021; eleven of those theatres had also made investments in 2020. Investments averaged at 10,550 euro across ten theatres (two theatres did not provide the costs of their investments), and again focused on purchasing and/or hiring equipment to support audio-visual production. Importantly, one theatre also noted the unpriced cost of research and development – a topic this study returns to in the Folkteatern case study on page 46.

These varied investments suggest that digital theatre is not a cheaper alternative to more traditional forms of theatre, an argument this study presents in greater detail throughout Part Three..

Personnel: Digital Roles and Contracts

Blue highlight indicates that this theatre created digital theatre in the relevant year.

2019

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
	5	3	0	No	2 Graphic Designers, 1 Social Media Manager, 2 Online Ticket Sales Managers
		0	0	No	
	1	1	0	Yes	Communications Officer (digital)
			0	No	
	0		0	No	
	0		0	No	
	1	1	0	No	Technical Manager

12 A VJ is the video, or audio-visual, equivalent of a DJ. In this case, Resolume is software that facilitates the live mixing of video and can include elements such as project mapping.

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
			0	No	
We don't know	5	1	4	No	Director, Dramaturg, Camera Work
				No	
	5	2	3	Yes	Audio-Video Operator, Assistant to AV Operator, VFX Artist, VJ Artist
	0		0	No	
	2	2	0	No	EDV Administrators
	6	4	2	No	2 Video Department 2 Sound Department
0.04	1	1	1	No	Sound Designer, Video Engineer
2	2	2	0	No	Social Media Management, Video Recording and Archive
2	3	0	3	No	
0		0	0	No	
0.5	2	1.5	0	No	Curator, Video Production
	Total: 33	*Total: 18.5*	*Total: 13*		

2020

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
	12	10	2	No	
4.5	15	15	0	No	Artistic Director, Dramaturg, International Manager, Marketing Specialist, Actors, Head of Theatre

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
3	6	2	4	Yes	2 Communications Staff, Freelancers employed for Filming and Live Streaming
	9	8		No	IT Manager, Social Media Officer, Dramaturg Department and Sound Engineer Department
5	2	1	1	Yes	Digital Technical Planer and Digital Light Designer, Digital Video Artist
0	0	0	0	No	
30	6	6	0	No	Technical Manager, Light Designer, Technical Coordinator, Projects Coordinators, Curator
	3	1	2	Yes	Video-Maker / Trainer, Video Manager, Apprentice–Production
	15	10	5	No	Editor, Camera Operators, Sound Designers, Director, Dramaturg
	Several collaborators	1	3	No	Artistic Director, Dramaturg and Actors
	5+ contractor	5	*contractor*	No	Camera Operator, Editor, Director, Assistants of Camera Operator, Sound and Visual Engineer
0	0	0	1	No	The Livestream Coordinator of That Day of May–Freelance Contract
0	14	14	0	Yes	EDV Administrators, Technical sStaff
	12	4	8	No	Video Department, Sound Department, External Camera Operators, External Video Director, Streaming Technicians, Platform Developers, Support
0.04	1	1	0	No	Sound Designer, Video Engineer
4	2	2	2	No	

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
3	3		3	No	
0	0	0	0	No	none
1.5	1.5	1	0.5	No	none
		Total: 106.5	*Total: 81*	*Total: 31.5*	

2021

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
0	0	0	0	No	
6	7	1	5	Yes	Communications Officer (digital), Freelance Digital Audio Producer, Freelance Filmmakers, Freelance Streaming Technicians
				No	
5	2	1	1	Yes	Digital Technical Planner & Light Designer, Digital Video Artist
1	7	7	0	No	2 Actors, 1 Digital Version and Directing, 1 Manager Project, 1 Subtitles and Translation, 1 Camera Operator
30	6	6	0	No	Technical Manager, Lighting Designer, Technical Coordinator, Projects Coordinators, Curator
				No	From 2021 the theatre started to externalise the production of broadcasting theatre performances
	50	10	40	No	Directors, Dramaturgs, Camera Operators, Sound Designers, Editors, Technical Support

% of theatre's salary costs allocated to staff with digital remits	How many members of staff with digital-related roles?	How many of those members of staff were employed full time?	How many of those members of staff were freelance, or on short-term contracts?	Did the theatre provide any digital skills training?	Job titles of all digital-related members of staff
	7	0	7	No	Project Manager, Directors, Technicians, Graphic Designer, PR Manager
	5	5	1	No	Audio-Video Operator, Assistant to Audio-Video, Operator, VFX Artist
0	5		5	No	Web Designer, Stage Manager, Video Consultants
0	14	14	0	Yes	EDV Administrators, Technical Staff
	12	4	8		Video Department, Sound Department, External Camera Operators, External Video Director, Streaming Technicians
0.04	1	1	6	No	Film Director, Sound Designer, Video Editor, Director of Photography
4	2	2	2	Yes	
2	2		2		
				No	none
1.5	1.5	1	0.5	Yes	It was the producers that worked with this together with the creative team. We also did a VR-production together with the artistic team. [condensed for clarity & anonymity]
	Total: 121.5	*Total: 52*	*Total: 77.5*		

Roles with digital remits increased year on year, both in number (by 268% from 2019 to 2021), and in the range of titles and activities. This could be because increased digital theatre production brought greater awareness to the ways in which certain roles could have digital elements, and/or because increased digital production required more personnel. We cannot know if the increased staff numbers reflect new hires, or members of the theatre whose roles expanded to include digital tasks. However, theatres begin to report outsourcing in 2020 and this increases in 2021, when the number of freelance or short-contract staff outnumber the full-time staff members with digital roles. In 2019, 42.42% of digital staff are freelance or on short contracts; this percentage dips to 31.5% in 2020 (perhaps in reflection of remote work during the pandemic) and rises to 63.7% in 2021. Still, the continued rise in freelance or contracted staff in 2021 requires further observation: care must be taken to ensure that practitioners and technicians in the digital field have stable employment opportunities, and that full-time contracts are not being replaced by less favourable employment conditions.

Attitudes to Digital Theatre

Statement	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
Digital theatre is a short-term solution to pandemic restrictions	0	4	2	11	2
Digital theatre is important to this theatre's long-term strategy	1	5	6	4	3
Digital theatre is of interest to the audience of this theatre	1	7	6	5	0
Digital theatre helps this theatre to train its staff in new skills	0	3	1	11	4
It is financially possible to run a hybrid programme of digital and non-digital theatre	1	5	6	7	0
It is financially beneficial to run a hybrid programme of digital and non-digital theatre	3	5	6	3	2
Digital theatre is an area of planned growth for this theatre	1	7	7	3	1
Digital theatre is important to the artistic ambitions of this theatre	0	7	7	3	2

The final part of the survey sent to Member Theatres was designed to reveal attitudes towards digital theatre in the present and future.[13] As this chart reveals, there are few areas of consensus.

We can see that a majority of theatres believe that digital theatre is an impactful solution to short-term emergency situations, such as the COVID pandemic. It is possible to conclude, given the rising number of theatres which have successfully created digital work in 2021, that European theatres are now better equipped to face such challenges in the future. However, without maintenance such skillsets could wane, and certainly a longer-term approach to preparedness would ensure that theatres could respond more successfully to any future challenges.

In the longer-term, 37% of theatres believe digital theatre to be strategically important. This study has shown that theatres have experienced steep learning curves when creating digital theatre, and that theatres have reported greater artistic and audience satisfaction after periods of committed research and development. In particular, the case studies from Sweden and Ukraine attest to the value of strategic long-term commitment to research and development.

There is clear agreement that digital theatre can bring new skills and training to a theatre, and this suggests that there is still much room for growth: the field is expanding, with further experimentation and learning to be done.

Audience interest has been contested throughout this study. Here the field is split once again, but as explored in greater depth in the 'Successes and Challenges' section of this study, there is often a striking difference between perceptions of low audience interest and reports of high audience enjoyment, and the development of new audiences. Theatres have raised concerns of "screen fatigue" in their audiences, but the increased ticket sales for digital theatre in 2021, despite there being fewer productions than in 2020, could suggest that audience interest is in fact rising. While digitally distributed theatre is inherently screen-based, and was the predominant digital solution utilised during the lockdowns in 2020, digitally mediated theatre is still growing. This is a much broader form of digital theatre; it often involves in-person performance, and was the most highly regarded type of digital theatre in terms of creative expression and artistic innovation. The artistic growth in this field could be responsible for the rising interest of audiences. That said, many theatres remain concerned that digital theatre would not appeal to, or reach, existing audiences, and have suggested that new approaches to marketing and communication could be beneficial.

Hybrid programmes were a key line of enquiry for this study, and theatres are divided on the matter in terms of the financial benefits. The "possibility" of hybrid programmes is marginally less divisive: seven theatres agree, while five disagree and one theatre disagrees. The financial benefits of such an approach is even less certain: two theatres strongly agree, while

13 Likert scaling is a method of questioning which measures the positive, neutral, or negative response to a statement.

three agree and seven theatres disagree and strongly disagree. These results reflect the experimentation in programming that many theatres have carried out between 2019 and 2021, but also the high production costs and steep learning curves that many theatres have reported. Overall, 35% of theatres that make digital theatre have reported production costs to be "challenging".

Previous studies have praised hybrid programmes for widening accessibility in the theatre, but it is clear that digital production is not a cheaper option than already established modes of theatre-making, and without increased financial support hybrid programming will not be sustainable for many.

Finally, the number of theatres which neither agree nor disagree with these statements is striking, and potentially indicative of a widespread absence of strategy in this area. Theatres are not necessarily rejecting digital theatre, but neither are they embracing it. This caution is understandable: this study has explored the strength of feeling regarding digital theatre as a perceived threat, and also the investments (in terms of finances, skills, equipment, and creativity) that are required to even begin to experiment with digital forms of theatre. Some theatres have reported frustration in the face of such a learning curve and are not willing to produce work of a lower standard than they would usually accept. On the other hand, we have seen that commitment to exploration, research and development has produced powerful returns.

Part Three

Successes, Challenges and Barriers

Key
Successes, reported by theatres which *did* produce digital theatre
Challenges, reported by theatres which *did* produce digital theatre
Barriers, reported by theatres which *did not* produce digital theatre

Digitally Distributed Theatre

This study has already explored digital distribution in the Pricing section on page 24, and it is important to reiterate that under this label we include live-streamed productions (the streaming of a performance while it is being performed) and the broadcasting of recorded productions. Over the three key years of data collection, we see the proliferation of digitally distributed theatre rise from four theatres in 2019 to fourteen theatres in 2020 and then seventeen theatres in 2021.

Key Successes

When evaluating the ways in which digital distribution could be considered successful, a majority of theatres reported "audience enjoyment" (68.3%) and "reaching new audiences" (68.7%).

Digital distribution appears to be the starting point for many theatres interested in engaging with digital theatre, and several theatres mentioned the appeal of digital archives of pre-recorded productions, to be used in case of emergency. One theatre recorded every play in their 2021-2022 season "for later distribution [...] and for use in case productions got cancelled due to COVID in cast". As the theatre predicted, COVID did strike. "We were able to provide ticket holders access to a pre-recorded version online."

Another theatre considered streaming to be a new form of "international distribution, making the work known and reaching new audiences". The "new audience" idea was common, with two theatres describing digital distribution as a useful way to create "educational and additional programmes". (Please note: it is important to remember that theatres did not supply data to support their claims of "new audiences", and this was judged by each theatre's own discretion. Further research here would be beneficial.)

Key Challenges

38.3% of theatres report the cost of producing digitally distributed theatre to be a challenge. However, the percentage of theatres which reported a lack of technology and skills as an obstacle in 2020 (42.8%) drops to just 11% and 17% in 2021. This indicates a sharp learning curve that has resulted in a majority of theatres having access to the equipment and skillsets required.

Several theatres reported difficulties in marketing, distributing and hosting productions online, with already-existing websites unsuited to the task. "How to distribute digital theatre to audiences who are not used to it?" asked one theatre.

Barriers

71% of the theatres which did not participate in digitally distributed theatre attribute this to a "lack of interest from the creative team", and 60% to a perceived lack of interest from their audiences. It is clear that some theatres consider digitally distributed theatre to be in opposition to their values. One theatre simply answered, "No. Theatre is meant to be live". The contestation of the 'realness' or "liveness" of digital theatre is a recurring theme amongst theatres which choose not to create digital theatre and is addressed in greater detail in the closing remarks of this study.

Digitally Mediated Theatre

Digitally mediated theatre is the broadest of the three categories for digital theatre in this study, and this breadth is represented by the variety of performances and technologies reported by the theatres. Between 2019 and 2021, theatres created performances with live camera work, the use of tablets and screens, 3D mapping and projections, experimental sound design (including audio-only productions), experimental forms of audience participation, and interdisciplinary and international collaborations. It is clear that this form of digital theatre is

continuing to expand, in a creative sense and in terms of the number of productions created.

Key Successes

Although not as common as digitally distributed theatre, digitally mediated theatre doubled in prevalence from 2019 to 2021: five theatres created digitally mediated work in 2019, in comparison to ten theatres in 2021.

It is the most highly regarded form of digital theatre in terms of artistic innovation and creative expression: respectively, 64% and 74% of theatres reported digitally mediated theatre to be a "success" on these terms. Notably, the number of theatres reporting "artistic innovation" increased each year, growing from 60% of theatres in 2019 to 70% in 2021.

A similar upward trend can be found in the "success" of reaching new audiences. 20% of theatres judged their digitally mediated productions to be successful in this way in 2019, compared to 75% in 2020 and 80% in 2021. On average, 68% of theatres believe that audiences enjoy digitally mediated theatre.

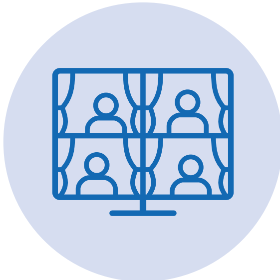
Key Challenges

42% of theatres find the cost of producing digitally mediated theatre to be a challenge. This was particularly pronounced in 2019, when 60% of theatres reported it to be a challenging factor. In 2020, 56% of theatres reported a lack of skills and technologies to be the most common challenge, but this decreased to 10% in 2021 and indicates, once again, that 2020 was a period of intensive upskilling and development in digital theatre.

In 2021, 30% of theatres felt challenged by a lack of interest from the audience, but this is contradicted by the higher proportion of theatres that believe audience enjoyment to be key marker of success. One theatre offers partial explanation for this, writing: "It was a completely new way of showing theatre and we needed more time to reach the audience. The ticket sales were small, but still important."

Barriers

74% of theatres that did not produce digitally mediated theatre attribute this to a lack of interest from the creative team, whilst 35% of theatres report a lack of skills and technologies to be an obstacle, and 26.5% find the cost of production to be prohibitive. Once again, it is clear that for some theatres this is simply not an avenue that they wish to pursue, and this attitude appears to become more entrenched over time.



Digitally Located Theatre

Digitally located productions – i.e., theatre that is created for, and exists only in, digital space – makes up the smallest proportion of digital theatre in this study. Only one theatre reported working in such a way in 2019, followed by seven in 2020 and eight in 2021. It can be seen to be a small, but growing, way of working. Many theatres in this study report using popular conference platforms such as Zoom and Skype to host their digitally located productions but more tangible forms of theatre, such as productions built in virtual reality spaces, could also fall under this category.

Key Successes

57% of theatres reported "creative expression" as a marker of success in 2021, and this rises to 87.5% in 2021. We can also see that, over time, theatres report digital skills as less of a challenge: 33% of theatres in 2019 and 2020 identified a lack of skills, but this drops to 12% in 2021. Taken together, this suggests that theatres are gaining the techniques required to produce artistically accomplished digitally located theatre.

Ticket sales are not mentioned until 2021, when a quarter of theatres begin to report success in this area. This could be linked to a high percentage of theatres reporting audience enjoyment and "new audiences" reached: 66% and 82%, respectively.

Notably, 50% of theatres believed that their audiences were not interested in digitally located theatre in 2019. This drops to 25% in 2021, after eight theatres explore such work.

Key Challenges

Although there is a trend which indicates theatres are gaining digital skills, the same cannot be said for digital tools and technologies: 33% of theatres reported challenges regarding access to necessary technologies in 2019 and 2020, this rises to 50% of theatres in 2021. This could suggest that as artistic ambitions grow, so does the theatres' interest in more complex technologies.

It could also be linked to the cost of production: 33% of theatres which did engage in digitally located work report the financing to be a challenge.

Barriers

A lack of interest from the creative team (78%) and a perceived lack of interest from the audience (50%) were the key factors for theatres not to produce digitally located work in 2019. This becomes more pronounced in 2021, when 90% of the eleven theatres which were not making digitally located work attribute this to the creative team's disinterest.

However, several other factors also appear decisive: in 2021, 36% of theatres were prevented by the cost of production and a lack of skills, and 27% by a lack of technology. 45% of theatres believe that there is a lack of interest from their audiences. One theatre explained that this form of theatre was simply not a priority: "It was not a part of our goals, [as] defined by the government."

General Successes and Challenges for Digital Theatre

The survey included free text fields for theatres to report more specific successes and challenges. These have been grouped by theme, but quotations are provided to give further context to certain topics.

Digital Theatre as Audience Development and Outreach

Theatres report digital theatre (and often digitally distributed theatre in particular) to be a means of reaching audiences who may not otherwise be able to attend the theatre in person. This includes educational groups, international audiences and audiences who are prevented from visiting the theatre due to financial or health reasons, as well as new demographics. One theatre described the "ambition to do live-streaming on a regular basis to reach out to new audiences and to audiences that are not able to travel (seniors, disabled people, schools outside the region)".

Reaching Audiences

The question of marketing and distribution was raised by many theatres. One theatre described this as the "biggest fail" of their digital programme, and another reflected that their methods of distribution needed greater thought. Some theatres described how their websites were not fit for hosting digital productions, while another hopes to create a "virtual hall and digital foyer" to facilitate distribution, and to provide a digital social space for their audiences.

All but one of the theatres in this study are publicly funded, and several described digital theatre to be beyond the duties given to them by their government or funding body. This division between digital theatre and the social responsibility of the theatre is interesting, not least because other theatres describe the potential for digital tools to deepen their relationships with new audiences. Further research could contextualise these concerns and learn if governments and funding bodies are actively discouraging theatres from digital exploration, or simply not encouraging it as a priority.

Quality

On the other hand, several theatres describe the difficulties in balancing digital research and development with producing their expected programmes. "Our technology was not appropriate, and the quality of our materials was not very high" writes one theatre. "It can be frustrating to start with and it takes time to learn," writes another. "But it's worth putting the time into [these new formats] so that it becomes a good experience for the audience."

Flexibility

For several theatres, flexibility (rather than hybridity) is the goal. In clearer terms, these theatres are eager to remain open to digital choices, rather than bringing digital tools to every production. As one theatre puts it: "To diversify our offer is definitely one of the main chapters of our future agenda. On-site performances are our product, but our recent past taught us it is important to be open and reactive on the virtual and digital market".

Investment in Experimentation

Many theatres report that "long term planning" is essential to the success of digital productions and strategy, but that maintaining this investment is difficult in terms of financing, staffing and technological skill. Several write that specifically digital, long-term funding schemes would help to offset the initial investment and learning curve required to work in new ways and ease the pressure of a "first attempt" needing to be both artistically and financially successful.

Digital Rights

Digital copyright is a recurring issue, on which the ETC has published prior research.[14] There is confusion regarding the rights required when streaming live theatre or when broadcasting recordings of productions. One theatre complains that "rights holders must agree or approve [every] live stream]", and another writes that "it is now a financial liability to produce work for digital distribution", due to contracts and licensing issues, and the only possibility for sustainable distribution is in external deals with TV broadcasters. The same theatre also describes how industry-agreed payment rules require "creative teams to be paid [for streams] almost as if a further live performance had taken place". Cross-European legislation on this matter would assist greatly and be particularly useful for improving conditions for distribution and collaboration.

Difference between Documentation and Performance

The introduction of digital theatre appears to have blurred the line between documentation and performance for some theatres. While some theatres are eager to create digital archives of pre-recorded productions, others remain committed to using digital technologies in live performances.

Terminology

This study has proposed three categorisations for digital theatre, not least to address the differences between digitally archived and distributed recordings and theatre performances that take place in a fixed time, in a physical location, and incorporate digital tools and techniques. Many theatres displayed concern that they had "confused" the labels in their replies to the survey. It is clear that the industry needs specific language to talk about the nuances of digital theatre, but these labels are still negotiable and are certainly not yet commonplace.

Digital as the Anti-Theatre

Many theatres conveyed strong feelings against the use of digital technologies in the theatre, as is evident in the "lack of interest" discussed in the section above. Many theatres see digital (in the most general sense) to be the opposite of "live" theatre, and even as an existential threat. One theatre shares the concern that digital distribution will replace

14 Maxime De Brogniez and Antoine Vandenbulke, *Performing Arts Recordings and Broadcasts*, (European Theatre Convention, 2022).

international touring, while others write, simply, that “digital or online space is not [a] real space for theatre”.

Part Four

Case Studies

From ‘How Was Your Morning?’ by Roxy Farhat, which performed at the Folkteatern’s Fjärde Scenen © Roxy Farhat

Case Study 1:
Hybrid Programming and a Hub for Experimentation

Folkteatern (Gothenburg, Sweden)

Joachim Nordwall, Digital Curator

The Fourth Stage (Fjärde Scenen), the Folkteatern’s digital stage, launched in September 2017. Four months later, in January 2018, Joachim Nordwall became the official curator of the space. Nordwall was already responsible for programming the theatre’s black box Little Stage (Lilla Scenen) and had proposed the creation of a digital space to the Folkteatern’s Artistic Director, Frida Röhl. He envisioned a digital performance space that he could programme in dialogue with the Little Stage, and to which he could invite collaborators to explore new theatrical and artistic forms. “When you invite people to a physical room, there’s a clear agreement on what to do: you have a stage, you have lights, you have sound. But when you work in the digital space, it’s only your mind that puts the limits.” In this case study, Nordwall explains how an integrated, hybrid approach to curation has allowed the Fourth Stage (and, in turn, the Folkteatern) to become a laboratory for experimentation.

Interconnected Programming

Nordwall programmes across the Little Stage and the Fourth Stage with both spaces in mind, resulting in artistic and logistical benefits. “Sometimes I book physical performances for the black box [Little Stage] that I’ll also use for a digital piece. There can be a connection, and it can help with funding, too. To have [the artists] already in the house makes it so much easier.”

He highlights one commissioned work as a particular success: ‘I Breathe’ by Spanish artist Cha Blasko explores air quality and pollution indices in real time (based on hourly readings) and transforms that data into sound, presented as an interactive audio-visual installation. It is permanently hosted on the Fourth Stage’s web site, but ‘I Breathe’ also exists as an in-person performance, wherein Blasko uses the digital installation like an instrument. He has performed in such a way to a sold-out audience in the Little Stage and continues to tour the work in other venues.

“Every time he presents it, it wakes up [online],” explains Nordwall. “More guests and visitors come [to the site].” This new kind of touring, which is both screen- and stage-based, proposes an interesting model for commissioned artists to work in longer-term partnership with a theatre. It also shows how theatres can connect with new and international audiences, as the performance travels further afield, as well as how digital theatre can exist both on- and offline.

Measuring Success

The Fourth Stage is funded project-by-project, a process that Nordwall finds time-consuming and occasionally frustrating, but also which allows the work to be adventurous and without the pressure of ticket sales. “If it is commercial, of course it’s great, but [it means we can keep] the online things free – you don’t have to sign in or anything and I think that’s important, at least at this stage.”

Cha Blasko’s ‘I Breathe’ has had over 10,000 unique views since its premiere in 2020, not including the audience members who have interacted with it in physical theatre venues. For Nordwall, this is a “great success”. The least-viewed Fourth Stage works have around 100 views but, for comparison, this is greater than the 60-person capacity of the Little Stage.

For Nordwall, audience numbers are not a key marker of success in this field. More important is the ability to produce experimental work, and to make it accessible to anyone who might be interested. The Fourth Stage, and associated programming, remains free, in alignment with the theatre’s historical connection to workers’ unions. “We always want to be available, to have low ticket prices, and I think it’s important for [digital work] to be free because then more audiences are willing to take a chance,” says Nordwall. “Keeping it free also allows other theatres to see what we’re doing. It should be open source, so we can say: this is where we are in this process, where are you?”

Meeting New Challenges

During COVID, the Fourth Stage was the Folkteatern’s only available platform for performance. Suddenly, the theatre’s entire cast and crew were available to explore digital possibilities, and the result was ‘Urgent Drama’, a series of filmed theatre works. On reflection, Nordwall says, “I think we were ready, in a strange way, because everything was there. We made eleven or twelve films in three or four months – and then we were burned out after that.”

But despite the Fourth Stage proving invaluable to the theatre’s response to the pandemic, Nordwall is concerned that this crisis period has limited perceptions of what digital theatre can be. “It was not my intention for the Fourth Stage to become a platform for film. One of the main problems with digital stages is that it’s [seen to be] documentation of physical performances, and I’m not interested in that. It should be something else, something different.”

Another major challenge revolves around digital copyright, and how to keep collaborative or commissioned works online for long periods of time. “No rights organisation in Sweden can tell us how to do it,” explains Nordwall. “We’ve found our own system on how to agree the rights with artists and directors, but it’s a lot of my work right now.”

He also notes that marketing digital theatre is far from simple. “We’re really good at selling tickets to a theatre play, but not really good at finding viewers for experimental digital art. I’ve been putting ads in experimental music magazines, finding other angles. I want anyone who’s interested to find a way in.”

Finally, Nordwall hopes for longer-term funding opportunities for digital arts, akin to schemes for music and theatre in Sweden. “There’s nothing like that yet. It’s frustrating that we have to start from zero each time.”

Looking Forward

Nordwall believes that the field of digital theatre needs open communication: “Sometimes I feel that we are working on similar things from separate islands. I would like to have a platform with likeminded theatres, to actually talk about these things on a regular basis.”

He also hopes that perceptions of digital theatre will continue to expand: “It can be a misunderstanding, that if you make digital art it should be possible to put it on a website. Now I’m working with people who are making performances in rooms, with an audience, with a start and an ending. Technology is not only lights, cameras or microphones: can we actually find new ways for theatre? New interactions?”

He credits Artistic Director Röhl for continuing to believe in the Fourth Stage: “She sees the value of experimentation going on next door to classic texts on the big stage, because it makes the house more interesting. My dream is [for audiences to say]: they think about things here.”

Digital room during the conference “Prostir – a country of common values”, curated by Andrii Palatnyi in Fastiv, Ukraine, 2020
© Oleh Pereverziev

Case Study 2:
Digital Repertoires and Simple Tools

Dakh Theatre - Centre of Contemporary Arts and GogolFest (Kyiv, Ukraine)
Andrii Palatnyi, Actor, Director, Curator and Producer

According to Andrii Palatnyi, digital theatre was at “point zero” in Ukraine prior to 2020. “It was like, ‘Yes, there were some trends in Europe, but we don’t have the management or the money for this.” On behalf of Dakh, an independent theatre in Kyiv, and GogolFest, a non-profit organization and the largest multidisciplinary festival of contemporary arts in Ukraine, Palatnyi had searched for international collaborations that might supply digital funding and skills, but the pandemic arrived before these plans could materialise. Still, this attitude gave Dakh a head start: “It was already in our minds before COVID, and that gave us the energy to immediately jump in”. In this case study, Palatnyi shares how the development of a digital repertoire has supplied the theatre with the means to persist, despite an increasingly “unclear” future.

Take the Risk

As an unsubsidized theatre, the COVID pandemic was a financially precarious time for Dakh. To Palatnyi it was clear that restrictions on gathering together in-person required new forms of theatre, and that Dakh should approach this challenge with their usual mentality. “We already had the expertise and the skills to do big things with little money,” he explains. “It’s all connected to the nature of your organisation, your philosophy, your aesthetics, your ambitions.”

As a first step, a “laboratory” was created through GogolFest with a broad goal: “To find digital solutions, without knowing what to expect”. In the first three months of lockdown, three pilot prototypes were created. Each production used digital technologies in different ways, and focused on how simple digital tools (such as hand-held cameras) can change the dynamic between performers and audiences. Palatnyi attributes this fast-moving, free-thinking period to providing a firm artistic foundation for Dakh’s digital work to come.

Still, he acknowledges that the time was not without challenges: “When there’s a lack of experience and skills, there is a fear to take this risk. You don’t know what you’ll receive in return. You’ll spend resources and it could cause problems. For sure, part of your team will say, ‘This is not theatre’. But other people say, ‘Okay, this is interesting. I feel a potential’. One of my aims [now] is to help people fight this fear.”

Artistic Experimentation as an Investment

One of the productions born of this experimental period is Alone [Digital Odyssey], directed by Dakh founder Vlad Troitskyi. The work is a journey between two worlds in a “maximum online and offline experience”, with an innovative use of digital screens. In line with COVID guidelines, Alone can hold twenty audience members at a time, split into two groups. Palatnyi believes that this experimental format, combined with the use of screens to focus the gaze, resulted in a particularly heightened theatrical experience.

Alone received funding from bodies including ETC and the European Union’s Creative Europe Programme, and Palatnyi explains that “the main monetisation of digital productions is not in direct selling” – at least, not at the moment. He describes each digital production as an investment in the future, in terms of the skills and artistry gained, but also for the theatre’s legacy. “It’s an investment in the team, and an investment in the audience,” he says. “We’re finding new formats, new types of connection and communication between the audience and the theatre.”

Building Resilience

Central to Palatnyi’s digital strategy is the creation of a digital repertoire. This is not only an archive of digital productions, but a strategic way of working that encompasses three main forms of digital project: offline productions adapted for online presentation; digital-only productions built specifically to exist in digital space; digital productions that can be adapted for physical presentations.

“If you use these points as navigation, then you’re always in the middle of the crossroads,” he says. “For me it’s absolutely strategic, this idea that everything could change but the life of the production will continue. That’s why I trust digital theatre, it gives you all of this opportunity.”

He points to simple changes, like digital subtitles as well as long-distance international collaborations, as further ways that digital theatre can expand the reach of a theatre, nationally and internationally. In 2021, GogolFest included the iStage festival in Mariupol as a “laboratory of contemporary theatre ideas”. It was part of an effort to extend the festival, originally founded in Kyiv, across the entirety of Ukraine, and the hybrid programme included screenings, broadcasts, on-stage performances and discussions. “The mission was to create a link between Ukrainians,” Palatnyi explains. “It was spreading, linking, and creating one big connection through a cultural bridge, in our country and between countries. We tried to find a new architecture for audiences, to create an environment in which all these people could meet.”

Looking Forward

Since the full-scale invasion of Ukraine by Russia in February 2022, this goal has become far more pronounced. Dakh has continued to produce innovative work, founded on the company’s experience in working remotely. The ‘Art Resistance Programme’ has included works such as Alarm, an audio-visual installation first presented in Berlin in 2022, and Danse Macabre, a musical documentary “in the present tense” that Palatnyi describes as deceptively simple in terms of technology: “We use a lot of LED [lights] and loop pedals to create a complicated sound environment.” On reflection, he credits that intense period of digital experimentation in 2020 for the scale of Dakh’s current vision: “All that knowledge gave us the capacity to make bigger things.”

Palatnyi says that Dakh needs more partner organisations and more specialised technological assistance to continue this work, but that he still has faith in a "simple is accessible" approach to digital theatre.

"From a small idea it's become a big story," he says. "It's something that's changed totally our understanding [of] who we are and what we do. It's something I can recommend to other artists: just go in and see what happens."

Part Five

Conclusion: The Future of Digital Theatre in Europe

Digital theatre in Europe is at a crossroads. This study on digital theatre, digital strategy, and digital business models in European theatres between 2019-2022 has detailed the substantial digital growth which occurred in 2020 and 2021, but it has also identified numerous obstacles and challenges which may prevent, or even undo, such growth in the years to come. This conclusion summarises the learnings from this study and proposes strategic and policy-based recommendations for on-going and sustainable development in this field.

The question of digital theatre as a short-term or a long-term strategy has been central to this study. Thirteen of nineteen theatres agree, or strongly agree, that digital theatre was a short-term solution to pandemic restrictions. But in the longer-term, theatres are divided. Seven see digital as important to their long-term strategy, six do not, and six could neither agree nor disagree on the matter.

Many theatres benefitted from the production of digital theatre during the COVID-19 pandemic and found it to be an important way to continue to create artistic work, and to remain in contact with their audiences. For the theatres without prior knowledge or interest in digital ways of working, this was a sharp learning curve: we have seen that reports of a lack of skills and technologies were more numerous in 2020 than in 2021. It appears that one year of concentrated engagement in this field provided a great deal of training, and it is noteworthy that artistic and creative satisfaction with digitally mediated and digitally located theatre was highest in 2021 (the latest year that this survey covers in full). Even during extremely challenging times, this suggests that investment in digital theatre has clear creative benefits.

In many ways, this period of growth – in skills and artistry, not just in the quantity of productions – reinforces the message from theatres with a more prolonged period of engagement with digital theatre. Theatres which had explored digital tools, technologies, and dramaturgies prior to the pandemic tend to advocate for a longer-term, slow-but-steady approach to digital theatre. Experimentation takes time, as does the creation of financial and logistical infrastructure that can sustain new production and distribution models. In the Folkteatern's case, this patience has been rewarded by a sustainably flexible way of programming: a performance can be stage-based and then hosted online, or vice versa. This is similar to Dakh's strategically flexible approach to a repertoire, in which a production can be digitally archived, adapted for digital performance, or adapted from a digital to a physical mode of presentation. Creative and responsive, these approaches are not so concerned with the consistent production of an always-hybrid programme, but about responding to the needs and the nature of a performance, as well as the context in which it is to be performed.

Beyond its use in an emergency, we have seen that digital theatre can have many other social benefits. Theatres have reported that digitally distributed and located forms of theatre could form a vital part of outreach and inclusion strategies, and theatres believe that digital theatre more broadly can reach "new" audiences; in particular, those who might otherwise find it difficult to attend the theatre due to financial, geographical, or health-based constraints. Partnerships with likeminded charities and organisations, as well as institutional funding and support, could help to develop this further.

However, many theatres report that cost is a challenge (or even wholly preventative) when it comes to producing digital theatre. There is a rising trend in outsourcing certain roles and equipment – i.e., partnering with a television broadcasting company, or hiring a freelancer. This takes pressure off theatres from making major, costly investments, but it also creates a more precarious environment regarding staffing, artistic copyright, and the in-house development of expertise. Several theatres report ongoing difficulties regarding digital copyright, and consistent legislation and guidelines are required to better protect theatres, external artists and technical partners.

Moreover, many theatres remain reluctant to charge full prices for digital productions. This study focused on the pricing for digitally distributed production (still the most prevalent form of digital theatre in Europe), but further market-based research would help to provide guidance in this area. This study has proven that theatres which do charge for digital theatre are more likely to report "success" on the basis of ticket sales. This reluctance could be linked to a persistent perception that digital theatre is not 'real' theatre. For some theatres, this concern manifests in cheaper or free ticketing (despite production costs), but for others it is evident in a rejection of digital theatre and performance. A minority of theatres in this survey strongly disagree that digital theatre is important to their artistic ambitions, or that it has a place in the future of their institution. This is partially due to artistic preference and indeed, a lack of creative interest is the foremost reason for theatres not to have created any form of digital theatre. However, there are also concerns regarding digital replacements for international touring and collaboration.

Another major barrier to the long-term adoption of digital production and strategy is the structure of theatres' funding. Many theatres report that digital funding tends to be short-term and project-based, rather than granted with a longer-term view. On one hand, as the Folkteatern case study demonstrates, project-based funding can result in cheaper, or even free, access to digital performances. On the other hand, it restricts long term planning, encourages short-term contractual labour, and drains time and resources through regular reapplications for financial support. For digital growth to be truly sustainable, theatres must be supported in planning for their futures.

This study has demonstrated the increasingly important role that digital theatre plays in Europe. Digital tools and technologies proved invaluable in emergency circumstances, but action must be taken so that those skills and artistic developments do not get lost. Digital theatre can function as a short-term solution to restrictions on physical gathering, but a longer-term strategy is certainly more sustainable in terms of artistry, expertise, and audiences. More stable forms of financial support will not only prepare theatres for any future crises but encourage experimentation and innovation in still-expanding forms of artistic performance.

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Katie Hawthorne is a researcher and writer based in Scotland. Katie completed her Ph.D at the University of Edinburgh in 2022, with a thesis which explored how "liveness" in theatre and performance is evolving through the use of digital tools and technologies. She has presented her research at international conferences from Shanghai to London. Katie is an alumna of the Academy for Theatre and Digitality's Fellowship programme, and is currently working on the creation of a new research archive for the Academy. Outside of theatre, Katie is an award-winning culture journalist, with by-lines in publications including The Guardian, The Scotsman, and The Stage.

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ABOUT THE STUDY

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EUROPEAN THEATRE CONVENTION

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Digital Theatre has flourished since the start of the COVID-19 pandemic: experimentation with streaming, multi-camera-captures and augmented reality has become commonplace in many European theatres. But what impact has this had on artistic performances and ticket sales? Have new digital strategies and business models been created? And most importantly – what conditions are needed to sustain these digital developments across the continent?

Digital Theatre – Digital Strategies and Business Models in European Theatre is part of a study series commissioned by the European Theatre Convention (ETC), the largest network of publicly-funded theatres in Europe. It collects responses from 19 theatres in 17 countries for the period 2019–22, and provides data on digital productions, budgets, ticket sales, investments, personnel and training – and also areas of digital growth, challenge, and disagreement. It is the first study to look at these questions on a European scale.