



## Shaping Ireland's Future

### Report 5: Entertainment & The Arts

Topline report

*Absence makes the heart  
grow fonder*

Prepared by B&A

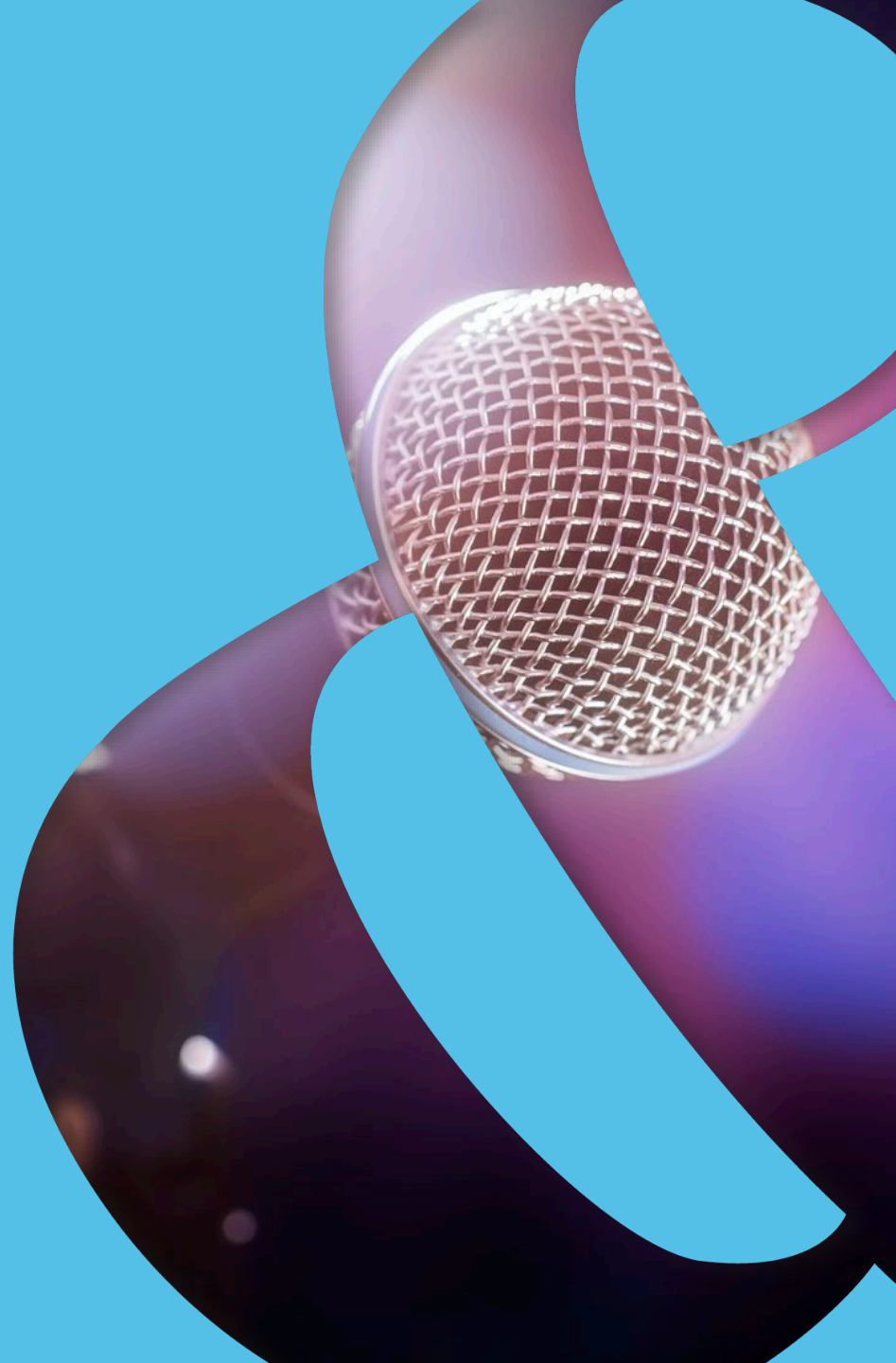
 @banda\_ie

 @behaviourandattitudes

 Behaviour & Attitudes

*Contact B&A for the full data presentation  
[maggie@banda.ie](mailto:maggie@banda.ie)*

[www.banda.ie](http://www.banda.ie)



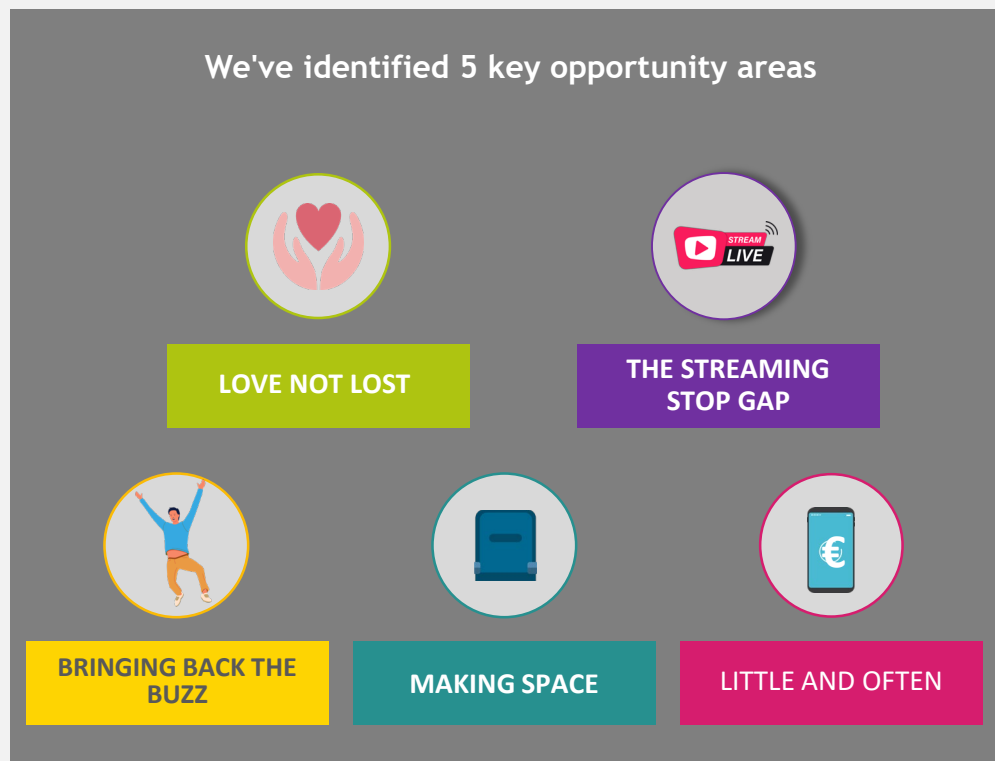
As Ireland continues to adapt to a post-Covid world, B&A is looking at the challenges and opportunities faced by key sectors in the economy.

### Next stop. Entertainment and the Arts

In this report, we focus on the entertainment and arts sector which has faced enormous challenges since the pandemic hit in March.

However we are heartened to see the strength of feeling from consumers who have clearly missed this sector badly. There is a huge amount of goodwill and desire to support, looking for the right channel.

Read on for more details.





## There's a lot of pent-up demand for live events as and when they are able to recommence.

In a regular year, **93%** of us attend some kind of live events (**3.4 million**).



Since the pandemic, only **50,000** of us have been able to avail of live events (socially distanced, for as long as they were allowed).

### When we get the chance:



**53%**

of the population (2 million of us) are keen to attend a concert/event.



**41%**

(1.5 million) are keen to go to a play in a theatre.



**25%**

(900,000) want to attend a classical music concert

Entirely in synch with the current zeitgeist, one of things we are most missing is the arts' ability to *'take us away from our day to day lives'* (53%)

“

*I don't know how long it will be before I'm able to, but the first gig after all this will be something special. I can feel the excitement.*

Dublin, male, 25-35

“

*Concerts are the thing I've missed the most since lockdown began. It will be a happy day when I'm back.*

Cork, female, 55-60

Live event: Live professional arts and entertainment event such as a concert, play, music gig at a local venue.

# Opportunity 2: The streaming stop gap



THE STREAMING  
STOP GAP

Streaming live events has been a good way of tiding us over for the minute with **37%** of us having watched a live streamed event with **9%** paying to do so.

The popular music industry is dominating the world of streaming accounting for **74%** of all streamed events attended.



Suggesting significant opportunities for other types of live events that are accounting for a smaller percentage right now.

For example ...

Classical music



15%



A play in a theatre



9%



Comedy gig



8%



*...of all live streaming*

While streaming has its limitations, it's delivering the goods to some degree with **55%** of those partaking describing themselves as 'delighted' with the event itself.

## Opportunity 3: Bringing back the buzz



BRINGING BACK THE  
BUZZ

While live streaming is a good way of staying connected with live event, it doesn't deliver *everything* we enjoy about live performances.



Of those that have live streamed an event, the elements that disappointed were:

Less of a shared experience

52%

Lack of buzz with other attendees

50%



*It's hard to create that sense of 'occasion' by yourself at home. When you go to a gig, there's so much more to it. It should feel more special than Netflix and a cup of tea on a Tuesday night.*

*Dublin, Female, 35-45*



*So much of the experience of going to a play or concert is what happens around it. Going into town, meeting friends for a drink, the buzz when you come out of the show. It's the whole experience that people miss.*

*Dublin, Male, 45-55*





**Almost half the population would be happy to go back to live events before all restrictions are lifted**

However, capacity will be a big determinant:



**50% capacity** is the point where most people start feeling comfortable.



Just **17%** would attend an event at  $\frac{3}{4}$  or higher **capacity**, but that figure rises to almost **60%** if this space is at **half capacity or lower**.



Face masks are a price we are willing to pay with just **20%** not prepared to wear one to go to a live performance.

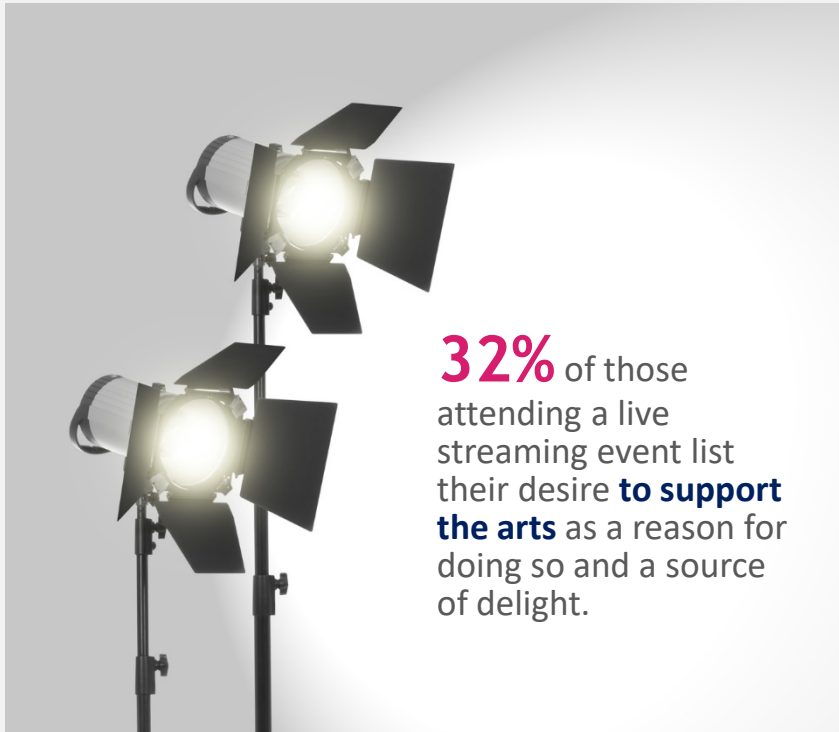


*I'd definitely be up for it at level 1 or 2, with social distancing and masks being worn. If I thought the venue was being responsible, then for sure.*

Dublin, male, 35-45

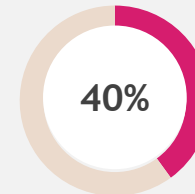


There is a clear desire to support the arts/entertainment sector at this challenging time.

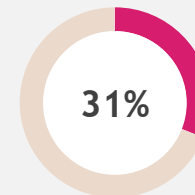


**32%** of those attending a live streaming event list their desire **to support the arts** as a reason for doing so and a source of delight.

The trick in maximising revenue for the arts is to charge small amounts for popular shows



Would pay €5 to stream a variety show with proceeds going to the arts.



While, 31% would pay €7.50 for streaming of a professional play/musical.

Once-off payments are more popular with consumers than subscriptions and they're very interested in easy ways to pay (text/Revolut).

# Opportunities for all 5 key areas

## Ways to win

- There is a **strong desire** among consumers to get back to live events, so it's important to be **ready to hit the ground running** as soon as it's possible – the demand will be there.
- **Escaping the everyday** is a huge driver for attending events anyway – and the experiences of 2020 have sharpened that considerably – so escapism is something to think about when designing upcoming events for spectators.
- **Half capacity** is the point where the majority of audiences feel comfortable as restrictions lift, so planning should factor that in. Ample safety measures will drive confidence, particularly for older customers. Face masks aren't a barrier to attendance for the vast majority.
- In the meantime, **streaming is a good fall back** and there are clearly opportunities for subsectors like classical music and comedy to take a larger share of the market here.
- There are some needs however, that streaming struggles to meet. **Socialising with friends and creating a sense of buzz around the event** are naturally difficult to do. It's worth thinking about how we can think outside the box to deliver these missing pieces. Social media could be utilised to bring people together when experiencing live streaming. Partnerships with food/drink/takeaway companies could be considered as a means of making these occasions more special and important for those participating.
- There is a clear desire among the people to **support the arts/entertainment sector** financially. A central campaign for this may be useful, as the goodwill is not necessarily being channeled in an effective way.
- **Little and often** seems to be the right approach with charging for streaming. There is good appetite to pay small to medium fees for shows with broad appeal in terms of content. Establishing habits and routines with this kind of content would really pay off.
- **Making payment easy** for viewers is also an important consideration.





# About B&A



- B&A is Ireland's largest and most experienced independently owned research company.
- We pride ourselves on having the most experienced director team in Ireland.
- Established over 30 years ago, Behaviour and Attitudes provides a full range of market research services, ranging from CAPI, CATI, online and of course qualitative.
- Specialist sectors include: Retail & Shopper, Technology & Telecoms, Media, Financial, Political & Social, Automotive, Healthcare and Public Sector & Utilities.

For more information please visit our website at:  
[www.banda.ie](http://www.banda.ie) or contact us on +353 1 2057500



*Marketing Society Research Excellence Awards  
25 time award winners, including 5 Grand Prix  
in 11 years.*



# B&A research services during Covid-19



## B&A Online Omnibus Survey

A twice monthly omnibus survey amongst a representative sample of 1,000 adults aged 16 years plus. Surveys costed on a per Question Unit basis.



## Online Forums

Collaborative virtual discussion space where we interact with participants over a 3-5 day period. Respondents can be shown stimulus, asked to comment on various topics and material and probed on their answers. Respondents can comment on each other's answers and react, build, question.

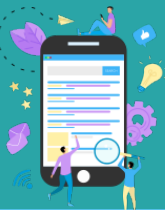


## B&A online Acumen Panel service

Access to the full breadth of ad hoc quantitative research applications, via our online panel of 30,000 + consumers. From fully representative nationwide surveys, to smaller surveys amongst niche markets and audiences.

## Online digital ethnography

Respondents use mobile devices to answer our questions and show us their world. We have our own digital ethnography app for this purpose, allowing respondents to capture answers to our questions in the form of video, photos and text responses. Our moderators are on hand to follow up 24/7, probing for more info, clarifying points and setting new challenges.



## B&A Online Client/Customer Surveys

Gauge accurate and timely feedback from your own customer base by way of carefully designed CEX, Communications, Client needs etc surveys. All conducted to the highest levels of GDPR compliance.



## Virtual depth interviews

In depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



## B&A Telephone Unit

B&A continues to provide a full suite of Consumer and Business to Business Telephone research applications through our panel of CATI-at-Home interviewers across the country.

## Online Web Journey

In-depth interviews with research participants, conducted in the comfort of own homes. We use a variety of platforms such as Skype, Zoom, Teams to talk to participants easily, watch their non verbal response, show stimulus and interact on a personal level.



## Virtual Focus groups

Focus groups conducted via an online platform that respondents log on to. Fully audio and visually enabled allowing us to moderate via camera, interact with respondents in real time, show all manner of stimulus and interactive tools and observe their responses at first hand.



## Remote Shopper Journey

B&A has a great deal of experience in 'shopper pathways' research. This uses technology to access a shopper experience in the moment. The respondent is unaccompanied but is wearing glasses that records the trip while they explain their selection. We then re-run the video with them in order to delve deeper into their thinking, reaction to display, pricing, branding and more. This provides a remote means of accessing shopper journeys which is extremely important in the current Covid environment.



For further information contact any of our senior research team: [elaine@banda.ie](mailto:elaine@banda.ie), [maggie@banda.ie](mailto:maggie@banda.ie), [niall.brennan@banda.ie](mailto:niall.brennan@banda.ie)