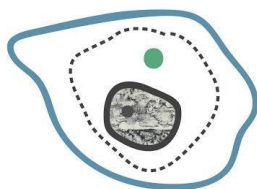


# Evaluation of Live Streaming Activity and its Potential For CHARTS Members

This report, by Tim Wright on behalf of Inner Ear for CHARTS, evaluates the efficacy of live streaming for CHARTS members against the backdrop of wider industry trends. The report includes our analysis of audience engagement and behaviour for the CHARTS Showcase Event. It draws on original case study interviews, conducted by Fay Young on behalf of Inner Ear for CHARTS, with CHARTS members experienced – or interested – in live streaming events. The case studies and statistics reports are presented in full as an appendix. Additional case studies, recommendations and advice are included in our separate best practice guide report.



**CHARTS.**  
ARGYLL & ISLES



**Scottish  
Government**



**Scottish Rural  
Development  
Programme**



The European Agricultural Fund  
for Rural Development  
Europe investing in rural areas



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# Executive Summary

- Live streaming has significant possibilities for the CHARTS membership group.
- The ability to reach widespread remote audiences meets an identifiable global demand for Scottish culture, presenting a good opportunity to develop increased awareness of the goods and services of members.
- Engagement driven by live streamed events is high when compared with typical CHARTS membership engagement figures.
- Current user and customer characteristics of existing CHARTS members – in large part from outside the Argyll area – aligns well with streaming audiences.
- Technical constraints – notably connectivity and broadband availability – do present obstacles. The picture is improving but more work is needed to address perceptions of frailty. Connectivity challenges can be overcome through a versatile approach to live streaming and technical innovation, but that should not overshadow the need for better broadband.
- Attitude of CHARTS members towards live streaming matches other UK experience in the culture, heritage and arts sector (and the CHARTS membership profile) seems to offer many organisations well suited to live streaming.
- Collaboration offers the opportunity to create a sustainable series of live stream events with commercial potential.
- Emerging trends within tourism – for example, demand for sustainable growth and authentic experiences – offer good opportunities to develop live streaming across the CHARTS area.

# Introduction

Live streaming is emerging as one of the most compelling ways of sharing original material with a wide spread audience. It shrinks the real and notional distance between participants. It offers audiences access to unique and authentic events and connects the creative originators with their audience in real-time. It is interactive and “high touch” engagement (i.e. it is relatively “hands-on” and brings people close together – the higher the touch, the richer the engagement). The ability to deliver such events has also become increasingly affordable and viable due to readily available, low cost equipment and widely used online distribution channels like Facebook, YouTube and Twitter.

It is also increasingly popular with audiences. In 2018 Ofcom revealed that streaming services had outstripped Pay TV services for the first time and that music streaming revenues were exceeding those from physical sales.<sup>1</sup>

This growth is, at a technical level, through the use of ubiquitous tools and equipment – like smartphones – to make the streams widely available, reaching geographically remote participants at relatively low cost. Already a \$30 Billion industry by 2016, it is predicted to grow to a \$70 Billion one by 2021<sup>2</sup>.

Both supply and demand side factors are combining to speed the adoption of live streaming, while technical and financial barriers are tumbling. As a result there is rapid growth in live streaming across many sectors in many areas.

One area where there has been considerable growth in the effective use of live streaming is in culture, heritage and arts. These, then, are the focus of the CHARTS initiative, exploring the appetite, uptake and potential impact of live streaming for the CHARTS membership.

It is possible for us to evaluate and consider this through an analysis of the direction of travel and prevailing characteristics of live streaming on the culture, heritage and arts

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<sup>1</sup> TV streaming services overtake pay TV for first time

<https://www.ofcom.org.uk/about-ofcom/latest/media/media-releases/2018/streaming-overtakes-pay-tv>

<sup>2</sup>

<https://www.prnewswire.com/news-releases/video-streaming-market-worth-usd-7005-billion-by-2021---online-video-streaming-has-increased-viewership-60---research-and-markets-300267717.html>

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sectors more widely. We will also analyse the specifics in the context of the unique circumstances of those sectors as they exist in the catchment area of CHARTS projects. Through this we can explore both the current position in the CHARTS area and membership and also future possibility and potential based upon a wider analysis of what is happening more broadly – and to what extent the CHARTS experience mirrors and reflects a broader experience.

We suggest two specific lenses of analysis: firstly, the content producers themselves and secondly the consumers of the material ( the audience). Within this we consider three aspects in our evaluation:

- Practicality
  - explores the appetite for live streaming amongst originators and audience, the capability to deliver, and its suitability for the sectors addressed by the CHARTS membership.
- Impact
  - considers what live streaming can typically deliver and the experience of live streaming in the CHARTS area so far.
- Opportunity
  - investigates potential to address the needs of the CHARTS membership.

Our approach to the evaluation was to consider our core data sources as those appropriate within this bounding framework in terms of both its scope and ambition.

We have adopted a mixed methodology which includes desk based research, interviews and engagement and case study material. We have utilised both primary and secondary sources including raw data, and consolidated overviews, third party reports and references, along with specific data analysis based on proprietary reporting drawn from live streaming exercises. We have also explored both qualitative and quantitative sources such as streaming statistics and counts, alongside interviews, case studies and vox pops.

The analysis – structured along the three key elements of Practicality, Impact, and Opportunity – seeks to explore the implications and findings for the two core participants. We include and cite references where appropriate providing a bibliography of core and commonly referenced documents and sources.

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# PRACTICALITY

## Appetite For Live streaming – Content Originators

From the content originators' stance there is strong evidence to support the idea that live streaming is increasingly seen as an important mechanism for providing content to audiences and users of the products and services across the arts sector.

In their extensive report "Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution" based on a comprehensive sample the Arts Council of England concluded:

"There is strong appetite amongst organisations to create live to digital: almost all organisations surveyed who produced live to digital in 2016/17 said they would like to continue doing it and 99% of organisations view live to digital as having been a positive experience"

We also know that from CHARTS' own research<sup>3</sup> its membership is increasingly digitally engaged with 94% seeking to make greater use of broadband technologies to help deliver culture, heritage and arts activities. Moreover, 86% have a website, and almost a third of organisations use broadband for live streaming. Since this area of interest has been added to the profile matrix for members<sup>4</sup> a number have already begun signing up and registering formally as wishing to engage with live streaming either as content originators or as participants.

We also have evidence of engagement from members interested in the possibilities of live streaming ranging from information provided in case study interviews and in commentary at engagement events such as the first CHARTS Live lab workshop. For example, Janet West of the Cowal Highland Gathering, which has made use of live

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<sup>3</sup> CHARTS Baseline Review and Summary, October 2018

<sup>4</sup> Working with Icecream Architecture, we added a question to the matrix of questions as part of the CHARTS membership directory profile:

"Are you interested in remote participation in events (for example concerts, workshops, talks, tours, etc.)?"

*[Select either or both options.]*

As an organiser/host?

As a participant/audience member?

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streaming, is emphatic about the need for it: “We have to have it. We need live streaming. Overseas viewers double our audience.”

We can also reference numerous other comments demonstrating an appetite from the CHARTS membership to explore the possibilities of live streaming. This is a selection:

“As a contemporary abstract painter, I'm intrigued by the idea of using something like Periscope to give people glimpses of process.”

*CHARTS Live Lab Workshop Comment*

“This is an excellent initiative by CHARTS Argyll.”

*CHARTS Live Lab Workshop Comment*

“Periscope would be a great way to broadcast artist workshops with Cowal Open Studios.”

*CHARTS Live Lab Workshop Comment*

“There really is huge potential in Argyll for live streaming and getting its huge talent resource out to the world.”

*CHARTS Live Lab Workshop Comment*

There are, however, some notes of caution which should also be considered. Giles Perring, for example, who is a live streaming user, questioned if audience numbers would justify “costly investment in infrastructure” and was concerned that there might not be demand for live streaming small local events to bigger centres of population.

There was evidence that much of any caution that was expressed was founded in concerns over the practicalities of live streaming, an aspect we consider specifically further on.

## **Appetite For Live streaming – Audiences**

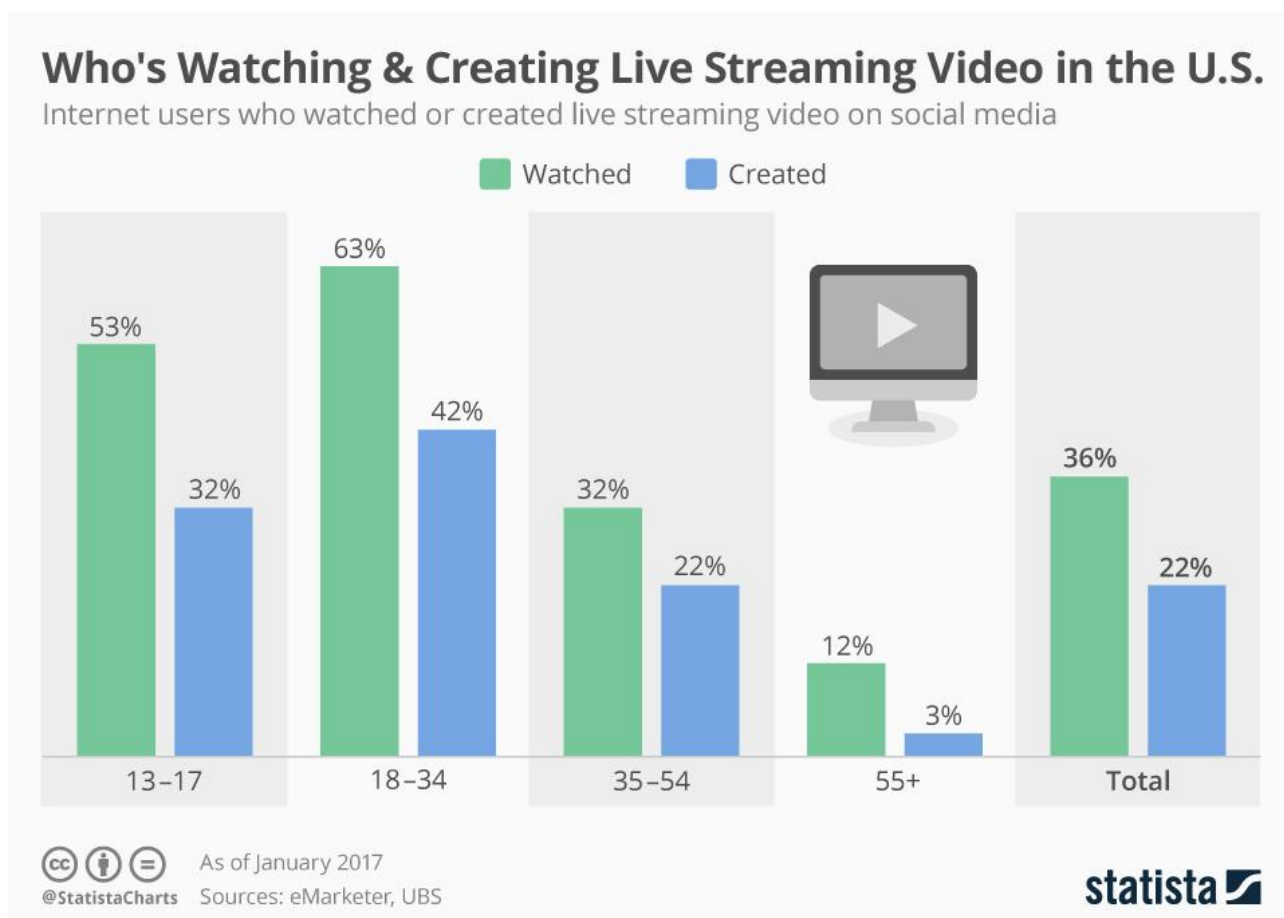
Drawing again on the Arts Council England survey, they found a growing appetite amongst audiences for live streamed content with 41% of their respondents anticipating engaging with live to digital on at least a monthly basis with “convenience and access” being the most common motivations for consuming live to digital. Convenience is

typically characterised as “allowing you to engage with content at a time and place that suits you” and “allowing audiences unable to attend because of time, geography, price or ticket limitations.”

The demographics of streaming audiences is of interest not least because of the breadth of uptake and consumption but also how the groups adopting this align with the target audiences of CHARTS members.

Once again drawing on the Arts Council England report, live streaming attracts a typically younger and more diverse audience than live theatre and Event Cinema: 71% of respondents ages 16–24 have streamed; 55% of respondents ages 25–44 have streamed; and under 30% of those 45 and older have done so.

Looking at US statistics (see the graph below “Who's Watching & Creating Live Streaming Video in the U.S.”) – relevant specifically because of the typical reach of live streamed content as we will show below – both emerging and existing audiences are increasingly turning to streamed content as a valid and acceptable source.



<sup>5</sup> Who's Watching & Creating Live Streaming Video in the U.S.  
<https://www.statista.com/chart/8237/users-watch-create-live-streaming-video-on-social-media/>



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Looking more specifically at the CHARTS area experience we can evidence participation numbers through the static analysis that is included below and through commentary from content creators like Cowal Highland Gathering which can count their “attendance” as doubled if virtual streamed engagement numbers are included.

But we can also identify a more emotional attachment to remote participation through some of the commentary attached to live streamed events in the CHARTS geographical area or area of interest. See, for example, the comments posted on the CHARTS Showcase Event Facebook Live stream, World Pipe Band Championships 2019, the World Highland Dancing Championships at Cowal Highland Gathering 2019 and the Piping Live! 2019 festival. Commentary includes considerable numbers of positive statements regarding streaming as an acceptable means of accessing the events, but more particularly how it is appreciated by audiences unable to reach the events in person:

“Really enjoyed the whole event, packed with shows and activities, truly embracing the rich art, culture and heritage of the region!”

“Thanks a lot for making it possible to follow this competition from the other side of the globe.”

“Regardless of the occasional technical difficulty... I greatly appreciate the opportunity to watch and listen in!”

“Watching from Up State NY. Thanks for the Live stream option! Wonderful”

“It's amazing to be able to enjoy this from Modesto, California.”

“Watching from Westchester Ohio!”

## **Suitability of Live Streaming for CHARTS membership**

The ability to reach a geographically dispersed audience is one of the most significant characteristics of live streaming. The nature of the interaction is often a rich one. This could potentially take the form of indirect marketing to draw in visitors, build greater engagement and deeper relationships. Showcasing and celebrating the rich creative and cultural offer of the region could provide an opportunity to extend engagement into

commercial activity. As such, this offers much to the CHARTS membership which already acknowledges that a significant part of their engagement and use comes from beyond the immediate Argyll and Isles area. According to CHARTS own data, 48% of CHARTS members do more than 50% of their business outside the Argyll region and 55% of venues and attractions attract more than half their visitors from outside Argyll and the Isles. 30% attract more than 80% of their visitors from outside the region. Any activity that facilitates the building or enhancement of that dynamic is surely a positive one.

Whilst the use of social media by CHARTS members is moderate in terms of gross numbers of hits and followers, most members are active digitally already with a recognition that digital is a channel they need to engage with. Some do readily embrace this with the use of rich media facilities such as YouTube to host relevant material. Eilidh Steel and Mark Neal, for example, make good use of video via Facebook and YouTube and recognition of the value of rich media extends into members who might not immediately be thought of as being open to its advantages. The Archipelago Folk School might not immediately be thought of as a rich media opportunity but it is clear that they recognised a boat launch event segment on Landward TV series was a highly shareable item.

But evidence would suggest that some sectors are more readily embracing the opportunity of streaming than others. The performing arts perhaps understandably more ready and willing to see the opportunity than “non performing” arts.

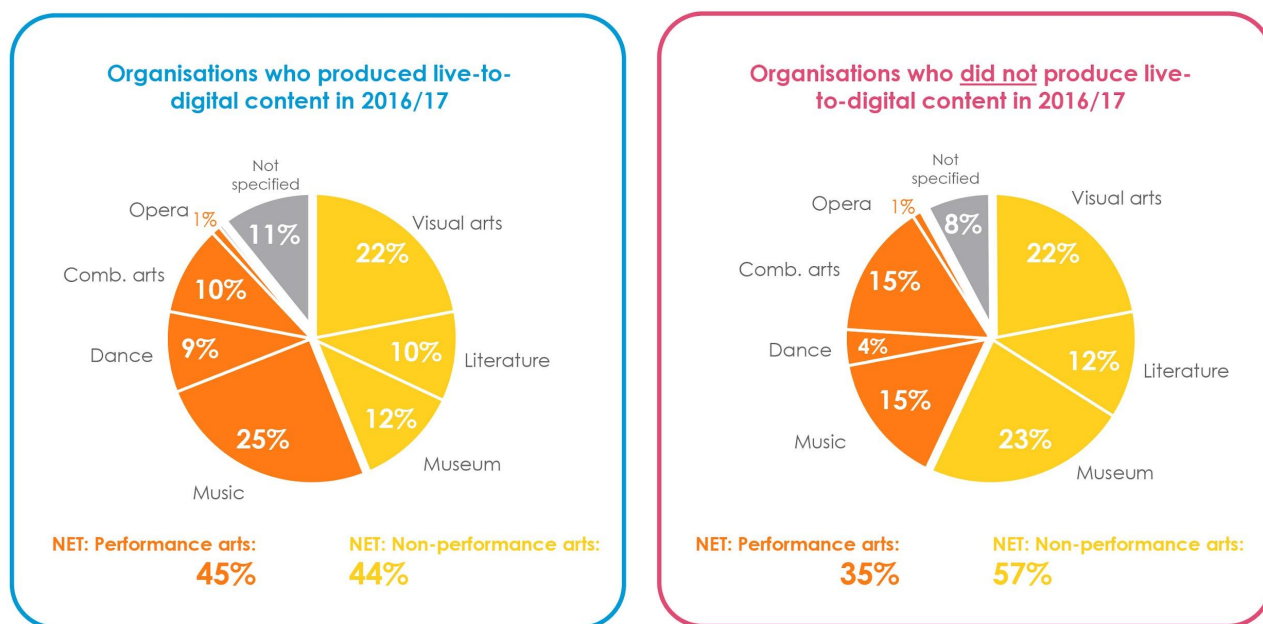
In the Arts Council England Report, 58% of organisations surveyed who had *not* produced live to digital were non performing arts. In its words:

“museums, galleries and literature organisations have to work harder to translate their often static ‘real world’ offer into a dynamic live to digital experience”

Their assessment is that as music, dance and opera organisations produce “live” experiences in the nature of their output it is less of an intellectual leap or practical step to convert that activity into a live streamed event than for other cultural and heritage bodies that don't “perform”. A more comprehensive breakdown is shown in the pie chart, below<sup>6</sup>.

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<sup>6</sup> Pie chart from Arts Council England Live-to-Digital Report  
<https://www.artscouncil.org.uk/sites/default/files/download-file/Live-to-Digital%20in%20the%20Arts%20Final%20Report%20%2025%2005%2018.pdf>



Source: B2B survey conducted by MTM. Q61: In which one of the following areas is your organisation most active. Base: Organisations who produced live-to-digital in 2016/17 (n=138) Organisations who did not produce live-to-digital in 2016/17 (n=73)

The range of organisations and individuals in the CHARTS membership is not categorised in the same way as the Arts Council England report. However, using data that we exported from the CHARTS membership database in August 2019, we can explore the membership broadly to say that it has 191 members (of 400 total members) who identify as being within the broad categories of Cinema, Heritage, Music and Theatre. By comparison with the Arts Council England data presented in the pie charts above, this would suggest that a significant proportion are readily able to adopt some element of live streaming in what they already do either as content creators or as venues hosting content creators.

As was recognised by a contributor to the CHARTS Live Lab live streaming workshop event: “Even just promoting the heritage of the collection, community, culture etc. is worth its weight in gold.”

## Technical Capacity to Live Stream

A key element in the ability of any organisation’s ability to utilise live streaming is the infrastructure that underpins the reliable distribution of data. It is this aspect which appears to most concern CHARTS members. There is a perception that current

broadband penetration is simply too limited or unreliable to sustain a viable live streaming experience to audiences.

From CHARTS own membership research, 55.6% do not consider broadband speeds to be sufficient for what they wish to do currently and what they aspire to do<sup>7</sup>. Comments such as “stone-age broadband” reflect a general perception that the frailty of infrastructure represents a significant limiting factor in uptake. Questions such as “How do you cope with a location with poor or no broadband and no 4G?” cropped up at the CHARTS Live Lab workshop.

The limitations are not just to personal accounts but also concerns over the connectivity of venues that could be used for live stream events were also expressed:

“I mostly have to stream via 4G, as most of the venues lack broadband.” CHARTS Live Lab Workshop

Whilst this is undoubtedly the lived experience – and it will be a difficult perception to challenge – there is also undoubtedly some hope for progressive change. The arrival of 4G does offer some potential relief from reliance on broadband fibre infrastructure. Isle of Jura until recently had typical connectivity 1 Mbps download, 0.4 Mbps upload speeds but 4G is offering an alternative. Facebook recommend at least 4 Mbps upload bandwidth for live streaming<sup>8</sup>.

There is also significant progress on broadband roll out – albeit treated with some scepticism in the comments and anecdotes received in our engagement.

Superfast Broadband (ie greater than 30 Mbps) coverage in Argyll and Bute has grown from 55% in July 2016 to 82.9% available Q2 2019. 11.5% have below 10 Mbps of whom 3.7% have less than 2 Mbps. But a key consideration of the figures in terms of broadcasting live stream events is upload capacity and the figures suggest that the growth of download speeds are outstripping the growth of upload speeds. Mean maximum upload speeds in Argyll and Bute were 5.2 Mbps whilst mean download speeds were 24.2 Mbps in Q2 2019<sup>9</sup>.

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<sup>7</sup> CHARTS Broadband Review 28/06/19

<sup>8</sup> <https://www.facebook.com/help/1534561009906955>

<sup>9</sup> <https://labs.thinkbroadband.com/local/argyll-and-bute.S12000035>

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The Scottish Government has made a commitment that all Scottish premises will be able to access broadband with a download speed of at least 30 Mbps by 2021<sup>10</sup>.

Some correspondents suggested that by ensuring key venues and hubs in the CHARTS group had broadband of sufficient capacity, it would offer a network of points suitable for live streaming.

## **Skill and Resource Capacity**

The experience in the CHARTS network of constraints of time and capacity to undertake new or demanding activities is not unique to them, but is undoubtedly a factor in the capacity of the members to take on live streaming. Anecdotally and through case study interviews, members expressed concerns about their abilities to take on more activities that are not commercially focused, or where a significant amount of work is contributed by volunteers as is the case in much of the Heritage sector. Whilst the skills required to produce basic live streaming are not excessive, there is undoubtedly some perception that it will require some up-skilling.

“It would be great to learn how we can do things in small scale. Baby steps. Your "very simple" is overwhelming.”

*CHARTS Live Lab Workshop Comment*

Again we can draw on the Arts Council England survey to support the idea that activities such as live streaming an event have a role to play in demystifying the process. Their extensive survey found that greater understanding of live to digital and its benefits increases the propensity for organisations to undertake it.

But lack of resources is a key barrier. Lack of money in particular is still the biggest barrier to CHARTS members' growth according to their own research. This corresponds with the findings of the Arts Council England research which found that cost and lack of staff time are significant barriers to producing live to digital amongst many organisations.

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<sup>10</sup> Reaching 100% – Superfast Broadband for All

<https://www.gov.scot/publications/reaching-100-superfast-broadband/pages/1/>

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“Those who hadn’t produced live to digital also tended to have lower turnover with over half reporting under £100k.”

Such a metric applied the CHARTS membership would include most members that have shared this type of financial detail.

One potential way forward would be to encourage partnership working as this is the typical mode of overcoming the barriers found in the Arts Council England survey.

## IMPACT

Whilst we have offered statistics for the growth and impact of live streaming in both a global and wider UK context, it is important to explore the detail of live streaming events that are either directly in the CHARTS region, or close enough in terms of content to bear comparison with CHARTS activities. To this end we have explored the statistics associated with a series of live streamed events: the World Pipe Band Championships 2019, Piping Live! festival 2019, the World Highland Dancing Championships at Cowal Highland Gathering 2019 and the CHARTS Showcase Event Oban 2019. These events are not wholly comparable in terms of their format and model of distribution but have sufficient commonality to offer considerable insight into typical characteristics and, through that, the potential of such activities when more widely applied.

The range of viewers extend from more than 80,000 for the World Pipe Band Championship to over 4,000 for the Oban event. These figures represent numbers to date. It is important to remember that in most cases live streaming creates an archive video which is an enduring asset available to view *after* the event and so these numbers will increase further over time. But within this range there is considerable alignment in trends and characteristics. It is reasonable to suggest that those trends and characteristics might be typical for these types of events generally.

One striking and important indicator is that for each and every one of these events – based on the comparable statics, every one had more viewers from Outside of Scotland than inside and a significant number from Outside of the UK.

The range of Outside of Scotland viewers runs from 60% to 80% and an average of 71%.

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Further analysis tells us that if we explore the viewers from Outside of the UK we find a range of 15% to 60% at its highest and an average across the events of 43%.

This has quite profound implications. The CHARTS Showcase Oban event, for example, achieved 61% of its viewers from outside of Scotland. The effective targeting of groups with an interest in Scottish culture, heritage and the arts achieved significant penetration and emphasises the importance of effective and considered targeting for streaming events as with any other outreach activity. But it also emphasises the capacity to connect very widely by using the inherent reach of digital channels and the global interest in such material.

This characteristic of streaming of culturally specific content is highly significant for heritage groups and all those drawing on culturally significant aspects of any creative genre. Perhaps unsurprisingly, countries with diaspora ties to Scotland figure as significant areas of interest. For example, 26.8% of viewers of Piping Live! were from the US and 13.2% from Canada. 19.2% of Cowal Highland Gathering viewers were from Canada.

If we focus on the Oban CHARTS Showcase Event, it is also notable that in the course of just seven days the event had achieved 4,267 unique views with more than 2,000 of these accessed via the CHARTS Facebook page, with an accompanying uplift to the likes and follows on that page. With an estimated reach of more than 11,000 from these digital channels it is clear that this type of content and this type of event has a tremendous capability of driving engagement and traffic to otherwise less active pages – with all the serendipitous discovery and awareness-raising opportunities that emerge from that.

To put this in a little context, CHARTS membership analysis<sup>11</sup> suggests that the average visitor numbers to members venues is around 10,000 per year. This streamed event achieved 42% of an annual average within seven days.

Other analysis of streaming data reveals common characteristics across these types of events.

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<sup>11</sup> CHARTS Baseline Review and Summary, October 2018

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Mobile is the preferred mode of access for viewers but mobile viewers tend to have a lower average watch time than those accessing through static viewing points such as desktops or connected TVs.

Popular content sharing platforms such as Facebook and Twitter are very popular access points for viewers, no doubt because of their familiarity. This experience mirrors the findings of the Arts Council England report which recognised that easy to use online platforms like Facebook and YouTube offer a low risk, low cost means of arts organisations undertaking live to digital activity.

There also appears to be an understandable correlation between the proportion of live viewing and catch up viewing and the penetration to locations outside the UK. We would expect that this is the result of time zone differences influencing the preferred time and therefore mode of access.

## **POTENTIAL**

In analysing live stream activity for the CHARTS membership it is important to explore how this activity might address some of the already identified needs of CHARTS members, and how it sits with emerging trends likely to affect CHARTS members in the coming years.

### **Growth**

CHARTS own research suggests that some 90% of CHARTS memberships have growth aspirations in the next three years. Expected growth areas are:

- 66.8% anticipate growth via events and services
- 11% through products
- 22.2% through increased visitors / membership

At the same time we also know that transport constraints remain a barrier as 54% of organisations say that they are highly reliant on transport to carry out culture, heritage



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and arts workshops and events and 58% of organisations say that they are highly reliant on transport for customers to be able to reach them.

Clearly there is a significant opportunity to address both the targeted areas of growth and the constraints placed upon members through greater use of smart digital strategies of which live streaming is well suited.

Referring to wider experience of live streaming in the arts and cultural sectors, the Arts Council England survey found that the key reason for producing live to digital is to reach a larger and more diverse audience. 37% of the organisations surveyed who undertook live to digital in 2016/17 say reaching a larger audience is the main reason for creating live to digital events. Organisations view live to digital as having the potential to serve audiences who would otherwise be excluded from their work because of location (67% want to reach national audiences; 61% want to reach international audiences). Other motivations include boosting the organisation's public profile and building brand (70% and 58%).

Creating novel and new event formats and driving up engagement via streaming is entirely and demonstrably possible. Let us not lose sight of the fact that the Cowal Highland Gathering can account for a significant number of attendees from its live streamed offering and the Oban CHARTS Showcase Event achieved attendance figures equivalent to 42% of the typical annual CHARTS venue attendance figures in just seven days.

The ability to drive cross sales and other commercial transactions from that digital engagement should not be taken for granted but it is wholly possible. By accessing these services digitally the user is not constrained by any transport frailty and this chimes well with CHARTS members' views that increasingly online sales channels routes for goods and services is indeed reducing reliance on transport.

If we consider that 48% of CHARTS members do more than 50% of their business outside Argyll and Bute and 30% of members have more than 80% of users from outside the region then the characteristics of the live stream audience seem to align extremely well with these markets.

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Furthermore, 71% of individuals/businesses want to source collaborators. It is our experience that properly constructed crowd engagement models underpinned by activities such as live streaming can yield valuable and extended network development and source collaboration opportunities when sought.

Building on that audience growth and new product aspiration from CHARTS members we can once again point towards the Arts Council England report which highlighted that live streaming more interactive artworks using social media;

1. increased incorporation of the medium into artistic practice
2. produced more partnerships between organisations of different types
3. and make historical sites and museum collections more accessible for educational purposes.

## **Funding**

Lack of funding is commonly sighted amongst CHARTS members as a constraint to growth so it is worth considering if live streaming has any role to play in addressing this shortfall. Indeed its potential for commercial exploitation was explicitly raised in case study interviews but with some scepticism.

We do know from the English experience and based on the Arts Council England survey that only a small percentage of arts organisations view live to digital as a means of revenue generation: 93% of organisations surveyed who undertook live to digital in 2016/17 do not cite revenue generation as a reason to create live to digital and only 9% say live to digital contributes to their financial stability. That said, just over a quarter of respondents expect it to do so in the future.

Clearly some of this could be via the sort of commercial cross-selling activity that might be driven from a wider digital engagement underpinned by streaming. Some may be via pay to view options, although we would need to acknowledge that thus far, based on the experience of the Cowal games, these types of approaches can impact viewing numbers significantly so a balance would need to be struck.

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Patronage is an important and significant emerging commercial model – as exemplified by the use of platforms like Patreon<sup>12</sup>. Increasingly used by creatives and those with access to unique material collections (which is non-generic creative content e.g. one-off performances; a one-of-a-kind wood carving; otherwise unavailable tours and behind the scenes access), patronage models have become popular commercial models in recent years underpinned by the same characteristics of engagement as crowdfunding. Whilst there are numerous platforms, Patreon does offer excellent insight to the possibilities. In May 2018, Patreon announced that it had 100,000 creators and 2 million monthly patrons supporting them. Its payouts to creators have doubled in recent years, from \$150 million in 2017 to more than \$300 million in 2018 – and Patreon anticipates to continue that trend by paying out more than \$500 million in 2019.

Live streaming access to content creators underpins the majority of patronage models and as such the CHARTS group could and should consider this option based on its experience in the limited number of live streaming events it has undertaken.

In considering the use of patronage models a number of key questions should be asked to offer insight into some measure of success. We can ask these questions in the context of CHARTS experience and offer.

### **How Unique Is Your Creative Project?**

Clearly the CHARTS community has a compelling collection of creatives offering highly distinctive and unique creatives events, products and services. In addition it has an extensive group of custodians and curators of highly unique and fascinating heritage materials. Whilst individually this might be difficult to sustain for just one CHARTS member, collectively there is a significant opportunity here.

### **How Strong Is Your Brand?**

Evidence from the streaming events of cultural and heritage events it is clear that there is a strong international awareness of the Scottish cultural brand as exemplified by CHARTS members.

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<sup>12</sup> From Wikipedia: “**Patreon** (/ˈpeɪriən/) is a crowdfunding membership platform based in the United States that provides business tools for creators to run a subscription content service, with ways for artists to build relationships and provide exclusive experiences to their subscribers, or "patrons".”  
<https://en.wikipedia.org/wiki/Patreon>

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### **How Valuable Are the Benefits You're Offering?**

Exclusive access to events and collections do carry value over and above the generic fees charged for standard admission to CHARTS members goods and services.

### **How Large is Your (Engaged) Audience?**

We can evidence that it is possible to create wide and deep audiences through the use of live streaming. Again whilst this might be difficult to sustain individually the collective muscle of the CHARTS membership could be compelling. These numbers will be important as it is possible to generate financial predictions from them based on typical conversion models in patronage scenarios.

### **How Good Are You at Promotion & Marketing?**

It is evident that with suitable curation live streaming can penetrate markets quickly – as evidenced by the Oban Showcase event.

### **Do You Have an Emotional or Political Appeal?**

The emotional charge associated with Scottish based content is exposed to a diaspora shows strong emotional engagement.

### **What Medium Do You Use?**

The CHARTS membership is a broad and diverse group with the potential to operate in multiple media and performance formats many of which readily lend themselves to a live streaming format.

With these considerations in mind it is not unreasonable to assert that through coordinated action across the CHARTS membership a compelling and diverse live stream offering could potentially create some revenue stream. However, further work would need to be undertaken to firm up any predictive model of possible cash flow and commercial viability.

## Emerging Tourism Models

Given that large numbers of consumers of CHARTS members' goods and services are from outside the immediate Argyll and the Isles area it is important to consider what emerging trends are likely to influence tourism in the coming years and how live streaming may play into that to the benefit of CHARTS.

The OECD identify four 'mega-trends' that will likely transform tourism by 2040. They describe these as:

- evolving visitor demand;
- sustainable tourism growth;
- enabling technologies; and
- travel mobility.

Digital factors will impact upon each of these elements. It is worth exploring the role of live streaming because significant emerging trends in the digital environment might evolve to meet these mega-trends.

Enabling technologies and peer-to-peer/shared usage platforms continue to create new tourism marketplaces and business models. This means that new products and services driven by technology are likely to become significant. In looking ahead the OECD emphasises the importance of remote experience particularly through immersive and 3D technologies. But the founding element, and the most readily available aspect now, is the live experience via streaming. In the view of the OECD, in order to capitalise on these changing trends, policy and industry decision makers will need to consider how to more effectively develop and connect travellers with more remote destinations, where appropriate. This could provide diverse and distinct experiences outside of traditional tourism destinations and support the sociocultural and economic development of local communities. So tasters and remote immersive experiences are important and will increase. Live streaming offers a highly accessible test-bed to explore this opportunity.

Generation Z (born in the late 1990s to early 2010s) and Millennials (born in the early 1980s to mid-1990s) will both represent important market opportunities in the tourism sector by 2040. Both of these demographics have grown up with technology and were raised with the Internet, which will play a key role in how they access, navigate and

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interact with different tourism models. Whilst these people may be future tourists they are typically current consumers of streamed media. Referring to statistics cited earlier, we can see that younger groups are the heaviest consumers of streamed media: 71% of respondents ages 16–24 have streamed according to the Arts Council England report.

Utilising streaming as a mechanism of building a recognition of the CHARTS area as a destination of choice based on what those consumers are increasingly seeking will be key. We can also acknowledge that in many respects the CHARTS members are very well provided with what are increasingly preferred characteristics.

Data indicates that Millennials take more trips annually compared to other generations – at four or more per year. However, trips tend to be shorter in duration compared to other demographic groups (Globetrender, 2017). Furthermore, they are more likely to pick travel experiences that they consider to be “authentic” – preferring to head off the beaten track and “live like a local” (Future Foundation, 2016). Millennials surveyed in the United States, United Kingdom and China valued experiences more than ownership (Airbnb, 2016). When combined with a second nature use of digital technologies, this group are more likely to create their own travel itineraries than to rely on the advice of travel agents or participate in package tours.

This local authenticity and the ability to plan effective and targeted short trips can be facilitated by the use of live streaming and through the emphasis on the unique and authentic nature of much of the CHARTS areas offering. Emerging generations’ preferences for unique, customised, and sustainable travel experiences could lead to a shift away from more traditional sun, sea and sand, and attraction based tourism. Generation Z, for example, appears to be highly influenced by social media and recommendations by peers when making travel decisions.

A further issue may be that of the impact and awareness of climate change. The tourism sector is estimated to contribute approximately 5% of global greenhouse gas emissions (UNWTO, 2017b). Transport is responsible for around three quarters of the tourism total (aviation accounting for 40% and cars for around 32%). The provision of remote experiences via streamed media may well be seen in the future as a preferred method of access. The most prepared areas will benefit from that. The most active early adopters are likely to establish their credentials most strongly. Live streaming and the rich media resources developed from that process could well play an important role in this.

# Recommendations

In the context of this evaluation, we offer the following recommendations for the CHARTS organisation to consider on behalf of its members. Working with a selection of its members, CHARTS could co-curate some events and activities that could be live streamed. While some of the key examples we cite in this evaluation are from traditional culture, the principles we discuss can be applied to many artforms, genres and practices. These ideas below could be streamed simply using a smartphone with some accessories (as per the advice we share in our “Best Practice Guide To Live Streaming Culture, Heritage and Arts Activities”), the recordings made available and CHARTS members encouraged to try streaming their own activities.

- **Craft:**
  - Live streaming the making of a boat at the Archipelago Folk School. Using a fixed camera (on a tripod or clamped to a branch or something in the workshop) the process of making an oar or shaping the hull of a boat could be live streamed. While this would not be fast-paced, exciting live TV, it is the kind of thing that would capture the interest of audience members who were curious about the process. People could drop in and out of the live stream to find out how the boat building process was going. Information about the school and its courses could be put on-screen from time to time — either by overlaying graphics or simply by placing a text card in shot.
  - Live streaming a boat launch from the Archipelago Folk School. With a roaming camera, follow the action live as a newly finished boat is launched. Appeal to the friends and family of the people who built the boat and anyone interested in woodworking, engineering and sailing.
  
- **Museums and Galleries:**
  - Live streaming a first look tour of a new exhibition. Using a roaming camera, give the audience privileged access to a new exhibition with a talk by the curator who invites questions from the online audience.
  - A behind the scenes live streamed tour of items from the collection which are not on display. Drawing inspiration from the seminal Radio 4 series in association with the British Museum, “A History of the World in 100 Objects

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- <sup>13</sup>”; items from the collection could be described to inform viewers and entice them to visit the museum or gallery.
- School group Q&A sessions could include questions from pupils watching online (as we did with Glasgow Museums when Dippy was with them<sup>14</sup>).
- Theatres:
    - Backstage tours live streamed using a roaming camera could unveil part of the magic of live theatre and give audience members a sneak peak behind the curtain. Rifle through the wardrobe department or explore the props table (like the backstage access we provided with Scottish Ballet to their production of Hansel and Gretel<sup>15</sup>). Invite questions from the audience and offer a discount to come to the show — or watch it online.
    - With a fixed camera, offstage or overhead, live stream a rehearsed reading (which we used to do with Stellar Quines<sup>16</sup>) and provide fans the opportunity to experience a work-in-progress. Include the option for a discussion with the playwright and/or director.
    - With a fixed camera from an audience point-of-view, live stream a post-show discussion (like the simple one we did with Luminate for their 2013 show Broth<sup>17</sup>) and include questions from the online audience.
  - Visual art:
    - Using a fixed overhead camera, live stream the creative process as an illustrator, painter or sculptor makes new work. At times during the programme, the artist could involve the online audience by answering questions posed by the online audience.
  - Gaelic:
    - Broadcast performances in Gaelic, including song, spoken word and theatre.
    - Curate Gaelic-language roundtable discussions about cultural, heritage or artistic activities and live stream them to reach Gaelic speakers in the region — and beyond.
    - Provide Gaelic commentary as additional live streams to augment existing coverage of high profile events like Cowal Highland Gathering.

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<sup>13</sup> [https://www.britishmuseum.org/explore/a\\_history\\_of\\_the\\_world.aspx](https://www.britishmuseum.org/explore/a_history_of_the_world.aspx)

<sup>14</sup> <https://blogs.glowscotland.org.uk/glowblogs/STEMcentralinmotion/2019/03/22/dippy-live/>

<sup>15</sup> <https://livestream.com/innerear/events/2624727/videos/37571578>

<sup>16</sup> <https://www.stellarquines.com/artist-development/rehearsal-rooms/number-10/>

<sup>17</sup> <https://livestream.com/accounts/3661274/events/4367669/player>



# Showcase Streaming Statistics

Some explanation of the Livestream and Facebook Live statistics for the CHARTS Showcase Event live stream will be useful in understanding reach, engagement and potential for development. Analysis and evaluation of this live streamed event are referred to throughout this report.

Focusing specifically on the numbers, you can refer to the documents provided as external appendices:

- 190920\_Livestream\_Analytics-Overview.pdf
- 190920\_Livestream\_Analytics-Detail.pdf
- Facebook Insights Data Export (Video Posts) – CHArts Argyll and Isles.csv

The Overview analytics report is from Livestream.com, the industry-leading live streaming platform with which Inner Ear has an Enterprise account. We sent the Showcase Event to Livestream and, from there, simulcast it to five Facebook Pages. The relatively small number of viewers watching on Livestream (104) found the event because they follow Inner Ear on Livestream. The majority of the viewers (4,493) watched on Facebook Live streams.

The average watch time on Livestream event is 18:14, which is equal to about  $\frac{1}{3}$  of the programme duration. This figure compares very favourably with industry averages reported by Livestream, which are 3.5 minutes on mobile, 4.1 minutes on tablets and 2.6 minutes on desktops<sup>18</sup>. Facebook Live average watch time<sup>19</sup> is considerably shorter at 35 seconds. However, while this appears to be low, the figure compares favourably with the average watch time of Facebook videos, which is 10 seconds<sup>20</sup>. Facebook Live videos are reckoned to attract three times the views of on-demand videos<sup>21</sup>.

The Detail report by Livestream provides interesting geographic demographics. The Facebook Insights report provides useful information on number of views of the stream.

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<sup>18</sup> <https://livestream.com/blog/62-must-know-stats-live-video-streaming>

<sup>19</sup> <https://www.facebook.com/business/help/1794520550789165>

<sup>20</sup> <https://sproutsocial.com/insights/facebook-stats-for-marketers/>

<sup>21</sup> <https://marketingland.com/6-metrics-measure-success-facebook-videos-224452> and <https://mediakix.com/blog/facebook-live-statistics-video-streaming-to-know/>

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## Conclusion

With reference to the examples cited, the experimental use of live streaming in the CHARTS geographic area of Argyll and the Isles has demonstrated a level of audience acceptability comparable with other Scottish cultural, heritage and arts live streamed events. Its ability to rapidly reach extended audiences which reflect the typical consumer types of CHARTS members goods and services is apparent and well demonstrated and its capacity to drive engagement and awareness is also visible. This experience is demonstrably comparable with other reposted live streaming usage in the culture, heritage and arts sectors.

Audiences are ready, willing and able to access materials streamed to them and clearly value the opportunity to access otherwise unavailable authentic events. For the content creators, the use of live streaming offers some strong opportunities to address some specific needs and matches well with the ambitions of the CHARTS membership.

Technical capacity and skill constraints do exist but there is an improving picture and effective collaboration between the membership could produce a rich mix of compelling content.

The benefits of streaming to the CHARTS members could be realised in a number of ways from simple awareness raising, to potential direct and indirect revenue generation and, importantly, positioning the area to take advantage of the emerging trends in tourism which are important sources of customers for the CHARTS membership.

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Why You Should Care About Live Streaming in 2018 – Neil Patel 2018 – [www.neilpatel.com](http://www.neilpatel.com).

OECD (2018), OECD Tourism Trends and Policies 2018, OECD Publishing, Paris. <http://dx.doi.org/10.1787/tour-2018-en>.

Livestream Analysis Statistics of:

- World Pipe Band Championships 2019
- Piping Live 2019
- Cowal Highland Games 2019
- CHARTS Showcase Event Oban 2019

CHARTS Baseline Data Reports (provided to us by Icecream Architecture).

We also conducted our own original research in the form of case studies (see appendix one, below), questions that we asked interview subjects of the Five Shorts Films that we produced and some social media analysis.

# Appendix 1: CHARTS Network Case Studies

To gain a deeper understanding of the experience, needs and wants of CHARTS members regarding live streaming, we conducted interviews and produced five case studies:

1. Giles Perring, Sound of Jura Island Studio, Jura
2. Jamie Smith, St Mary's Space, Appin
3. Janet West, Cowal Highland Gathering, Dunoon
4. Jennie Larney, Oban Phoenix Cinema, Oban
5. Stacey Walton, Rothesay Pavilion, Bute

## CHARTS case studies – an overview

The CHARTS network was conceived through the desire to create a sustainable future for the Culture, Heritage and Arts sector in Argyll.

[chartsargyllandarts.org/about](http://chartsargyllandarts.org/about)

Argyll is breathtaking: flick through the CHARTS directory and see the many creative people who live and work in this extraordinary landscape. But what is it like to develop an innovative project in an environment where mountains block mobile signals, and storms can disrupt travel by road, rail or sea for days on end? What are the opportunities and challenges of living and working in Argyll?

These case studies explore how technology such as live streaming might connect creative cultural enterprises with wider audiences, enabling sustainable growth and supporting the local economy. Although a small sample of a fascinatingly diverse community, there are revealing overlaps in concerns about the obstacles to developing viable projects. Conversations raised complex philosophical questions such as “what is culture?” and “is streaming a truly live experience?” But, at the risk of over-simplification, we might identify an ABC of topics for further discussion – AUDIENCE, BROADCASTING, CONNECTIVITY – key to them all is connectivity.

## Audience

Live events can have local, national or international appeal. On the Isle of Jura – with a population of 200 – musician Giles Perring holds weekly musical events for enthusiastic but small social gatherings. Occasional events in Jura Village Hall have not proved as popular and Giles doubts that there would be demand for live streaming small local events to bigger centres of population.

In contrast, the annual Cowal Highland Gathering reaches an international audience of tens of thousands via live streaming from Dunoon Stadium – doubling the number of people in the ground. In August 2019 more than 44,000 people – online and in person – saw the highland dancing championships. To put that in context, Dunoon has a population of around 13,200 (15% of the Argyll and Bute population).

In Oban (population 8,000) the community-owned Phoenix cinema uses live streaming to provide a programme of the kind of high quality national cultural events available to people in cities. Would Oban audiences be interested in events streamed from smaller centres? Cinema manager Jennie Larney stresses the importance of knowing your audience.

“Feasibility studies are essential. You have to do your homework. We’re all competing with Netflix and Amazon and live streaming might not be the answer. Rather than talking about culture you might focus on selling the experience. That’s what you are doing.”

Cultural hubs in charismatic buildings could hold potential for live experience. St Mary’s Space – a beautifully restored church in the scattered community of Appin – attracts audiences travelling considerable distances for an adventurous programme of events in an intimate space. Could live streaming reach a much bigger audience? Who would benefit? And can the spectacular Art Deco Rothesay Pavillion, re-opening in 2020, help to revive the Isle of Bute economy? The population (currently around 6,500) has been steadily declining in recent years, but there are high hopes for the tourist appeal of the restored pavilion. Will streaming attract audiences both real and virtual?

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## **Broadcasting**

Telephone, radio and television are traditional means of keeping in touch with a wider world – and, broadly speaking, have been available to everyone even in the most physically challenging locations. New technology offers new possibilities to transmit and receive both information and live events – from DIY transmission on handheld mobile devices, to highly skilled tech crews recording and streaming events using specialised equipment. But infrastructure – masts, exchanges, cabling – is far from universal.

## **Connectivity**

C stands for many words crucial to success: community, collaboration, communication, competition, culture! It's not all about tech. Good human communication benefits from face to face, person to person connection between and within businesses, enterprises, institutions and agencies. But the biggest obstacle to creative enterprise in Argyll and Bute is lack of digital connectivity.

Internet connection for many island and mainland communities varies enormously, but it is often unreliable and sometimes unavailable. Oban has the great advantage of fibre optic connection but in other places uploading or downloading large files can be painfully slow. With 4G spreading, access to live streaming is increasing.

Better connection – via mobile phone or broadband – can speed communication and the potential for collaboration across scattered communities. Technology can enable a 'joined-up' virtual 'cluster' of talented people, sparking mutually beneficial innovative ideas – the kind of inspiring energy you find in urban hotspots of creativity.

## **Conclusion – the need for critical mass**

This is where CHARTS networking can help to create the “critical mass” mentioned in the case studies. Everyone interviewed sees value in collaboration. But – at the time of interviews conducted in August-September – no-one was clear about what CHARTS is or does.

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Constructive feedback includes suggestions for devising the directory so that members can see at a glance who does what and where they are. Face to face meetings are important too – but travel can pose obstacles so locations need to be carefully chosen. To quote Stacey Walton on Bute: “Networks are a great resource but we need to use them regularly. The more we use them the better they work.”

There are overlapping frustrations and difficulties. But perhaps the most striking thing is the enthusiasm and sense of commitment underlining each case study. Everyone interviewed loves what they do and where they have chosen to live. They just need a chance to share it more widely.

“We need to be in touch with people who can make things happen. Real collaboration means to engage, promote and support each other in real time. Not just to tick a box in a funding application.”

*Janet West, Cowal Highland Gathering*

## **Case Study 1: Giles Perring, Sound of Jura Island Studio**

Giles Perring is a composer, musician, producer, community arts activist who owns and runs the Sound of Jura Island Studio ([soundofjura.com](http://soundofjura.com)) on the Isle of Jura.

“Maybe we will pull this off. Audiences want some sense of authenticity. They will be seeing something that could go totally wrong. That’s what excites me about this experiment on 14 September.”

Giles Perring has mixed feelings. Live streaming does not particularly interest the musician who runs a croft as well as a recording studio looking out to the Sound of Jura (a four mast schooner sails into view during this FaceTime interview). That’s partly because until recently island broadband has been severely limited (1MG download, 400K upload).

But, although arrival of 4G makes his CHARTS participation possible, Giles questions the demand for live-streamed island events. Would audience numbers justify costly investment in infrastructure? Would Oban and the rest of the world be interested in events broadcast from Jura Village Hall? Could such “quasi-live” events ever compete with what is available through YouTube, Netflix, Facebook...?



Living on an island is a challenge. “It makes demands of you. But you learn you can survive.” Giles, who moved to Jura from London with his family 13 years ago, now feels no need for “consuming culture”. He doesn’t miss theatre, concerts, art exhibitions, “just another industry, financial transactions”. But he does see great value in online social connectivity, especially for young people, in isolated communities. And weekly music gatherings in his house are a real-life social activity, “nothing bought or sold” – people go back down the road “singing new songs”.

For Giles, the phone is simple, direct and offers more interesting potential for “just doing it”. He is open to experimenting with “Something more garage. More hand held. More immediate.” Like his phone-in CHARTS music event on 14 September.

Overall, having abstained from earlier CHARTS events – “Locations were often too far away and tech links were rubbish” – Giles is optimistic about new developments in the organisation. He sees a chance for him to “step sideways” and demonstrate how to “do it yourself.”

## **Case Study 2: Jamie Smith, St Mary’s Space**

Jamie Smith is a musician, composer, recording engineer, educator and co-proprietor of St Mary’s Space creative arts space in Appin ([stmarys.space](http://stmarys.space)).

“I have a question for you. How do you make money from Live streaming?”

There are challenges to living and working in a converted Victorian church of great charm surrounded by breath-taking highland beauty. Those Argyll mountains tend to get in the way of digital connection.

Jamie and Charlotte Smith run St Mary’s Space, Appin, an enterprising creative hub, 25 minutes drive from Oban, combining recording studio with arts workshops and live events. Connectivity is a vital means of communication with a widespread online following. But until recently, social media posts took hours on “stone age broadband” (1.3 MB download, 0.3 MB upload). Now a 4G phone router speeds connections (15-17 MB

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download, 3MB upload) opening new potential. An external aerial should make it better still.

So Jamie is cautiously interested in live streaming. Gigs at St Mary's attract enthusiastic audiences from a scattered local community and much further afield – fans travelled from London and north England for world music stars Caitrin Finch and Seckou Keita. Performances wrap around the audience in an intimate setting. “The venue looks fantastic, and I can see how simple audio and even a single camera could put digital audiences in the best seat.”

Mobile devices already capture special moments. Professional video equipment and collaborative partnerships could enhance that experience. “We have all the audio gear we'd need, and we know good film-makers. But we can't ask them to do it for nothing. We're all tired of unpaid work.”

Self-contained enterprises like St Mary's tend to survive with “no budget, no backing – and no permission”. Time is precious. Small creative companies cannot afford to add more layers of work and responsibility without certain reward. “How do we do it?”

CHARTS, to Jamie, offers a chance to create a valuable database, to connect the essential “critical mass” of talent in a region of richly diverse but scattered skills. “I don't yet know enough about how CHARTS works. But it begins to feel do-able.”

### **Case Study 3: Janet West, Cowal Highland Gathering**

Janet West, from Pure West Media, is the PR and marketing manager for Cowal Highland Gathering which hosts the World Highland Dancing Championships in Dunoon each year ([cowalgathering.com](http://cowalgathering.com)).

“We have to have it. We need live streaming. Overseas viewers double our audience.”

Janet West speaks with passion and from experience. For the last seven years she has been managing PR and marketing for Cowal Highland Gathering using every available platform.

During that time, live streaming has reached hundreds of thousands of overseas fans unable to make their way to the Cowal peninsula in person. Now, over the last weekend of August, family and friends tune in from USA, Canada, Australia and New Zealand to watch highland dancing championships live from Dunoon Stadium.

Dancing is the high point of the three-day programme since the major piping championships relocated to Belfast in 2014.

Live streaming connects Dunoon with an enthusiastic new audience. But connectivity can be painfully slow in a stadium filled with up to 23,000 people – many on mobile phones. Janet remembers early experiments, “a dongle suspended on a 20-foot metal pole from a window, the signal strength depending on how hard the wind was blowing.”

Professional live streaming solved tech problems but costs money (roughly £13,000 for three days). Lack of funding adds obstacles. Last year’s trial of pay-to-view saw the audience drop by 80%. This year’s free-to-view (with a budget for one day’s streaming) drew 21,000 unique views for the Saturday finals.

“It’s frustratingly hard to get this across. I see profile pictures of young dancers with the Manhattan skyline behind them and wonder what they will make of Dunoon. They love it. They are so excited to be here. Yet it’s easier to engage international film crews than Scottish media.”

Can CHARTS help? “I don’t know. We’re always open to joined up working. If CHARTS can put us in touch with ways to make that happen we’d love to engage reciprocally. To promote and support each other. For the good of Dunoon, Argyll and Scotland. If this championship leaves Dunoon it’s not going anywhere else in Scotland.”

## **Case Study 4: Jennie Larney, Oban Phoenix Cinema**

Jennie Larney is the manager of the Oban Phoenix Cinema ([obanphoenix.com](http://obanphoenix.com)) in Oban.

“Culture doesn’t just drop down on your head from the sky. Creative ideas come from many conversations between people.”

Managing a community owned cinema involves conversations with many different people. When Jennie Larney is shopping in the local supermarket she quite often meets people keen to know what is – or isn't – screening at Oban Phoenix Cinema. And why. "Usually people are satisfied when I give a good reason for the programme – it's my job to know stuff."

And "knowing stuff" also involves close engagement with local people. "We have a good board and great team of staff but we couldn't do it without the community. They are our shareholders. We take a lot of opinions on board."

Oban Phoenix was set up as a social enterprise six years ago and live streaming soon became an important part of the varied monthly programme. Oban has a population of around 8,000 including surrounding areas. Add tourists and that can grow to around 30,000. Unlike smaller, more isolated Argyll communities, the town has reasonable fibre optic broadband and performance should improve further with a switch from cable to land satellite.

Now, as well as the weekly film screenings, there are between two and four screenings of live events from companies like the National Theatre, Royal Shakespeare Company, Glyndebourne Opera.

"It's not massively profitable but that's not what a social enterprise is about. We wanted to give local audiences the same culturally enriching diversity that you get in bigger centres of population."

Some screenings are more popular than others, "we keep trying with ballet." Regular audience surveys make sure the cinema is in touch with local tastes and interests. "It's not just down to someone having a bright idea..."

Which is why the social enterprise also invests in training. Contributing to local skills and opportunities for young people, paying the living wage, Oban Phoenix is proud of being a community asset.

Advantages of being part of CHARTS? "I'm not really sure what CHARTS is and does. I need to find out."

## Case Study 5: Stacey Walton, Rothesay Pavilion

Stacey Walton is the digital and event coordinator for Rothesay Pavilion, Isle of Bute ([rothesaypavilion.co.uk](http://rothesaypavilion.co.uk)).

“Good creative networks are like going to the corner shop instead of a big supermarket...it’s like finding who can I work with right here on the island?”

Collaboration is part of Stacey Walton’s work; co-ordinating live and digital events with artists and record labels. Now living on the Isle of Bute, she also works with the Rothesay Pavilion restoration campaign along with Glasgow Coffee Festival and the National Whisky Festival.

All thanks to good internet connection and public transport. “For business meetings in Glasgow I can be there, door to door, within 90 minutes. That’s less time than it took me to get across London.”

But when it comes to tourism, the Isle of Bute has suffered, perhaps, in comparison with places like Eigg and Skye enjoying a more romantic island image.

That could change when the beautiful A-listed Art Deco Rothesay Pavilion reopens in 2020 as an arts, music and dance centre – a “stunning building” the Financial Times described it recently. There’s room for 800 in the main hall and 150 more in the exhibition space. With investment in human skills and technology, live event streaming could help to connect the island with a wider world. Stacey sees great opportunity for using digital technology and social media engagement to attract people “doon the watter” once more. Both online and in real life. “Welcoming an informed audience, holiday makers and day trippers, interested in architecture, arts and dance, the history of coastal communities...”

Can the CHARTS network help? “Creative conversations need face to face meetings. CHARTS is good at sending out weekly updates but they are not very eye catching, and we could do with more regular meetings. The directory shows there are so many creative people on the islands, and in isolated places, but it could be better organised to show who is doing what so that we can connect more easily.”

## Appendix 2: Live Streaming Audience Statistics

As part of this evaluation we compiled data from the showcase event live stream and analysed CHARTS social media account growth.

- CHARTS Showcase Event Livestream Analytics (please see separate report files).
- CHARTS Showcase Event Facebook Live Insights Compilation (please see separate report files).

### Overview of CHARTS Social Media Account Growth

We measured the popularity of CHARTS social media accounts when we started working on this project on 9 July and then again at the end of our contract on 24 September. Here are the numbers before we got involved, after our efforts, the percentage growth during the time that we were working on the project and a comment on contributing factors to take into account. It should be noted that some of this growth would have happened anyway because of the ongoing social media engagement activity by Icecream Architecture.

#### Facebook

- Before: 803
- After: 1,140
- Growth: 42%
- Comment: The majority of Inner Ear marketing and promotions efforts were concentrated on Facebook. This platform indicated the highest number of followers and level of engagement in the beginning of the project - given the timescales we understood the most sensible option to be to go where the CHARTS network already congregate and engage online. This effort is demonstrated in the significant increase in followers of the CHARTS Facebook page.

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## Twitter

- Before: 462
- After: 468
- Growth: 1.3%
- Comment: As indicated, the efforts to engage CHARTS members in live streaming were channelled through Facebook. This made most sense strategically given the time constraints of the project. Where applicable, relevant information such as Showcase and CHARTS Live Lab posts were pushed through this platform in order to drive traffic back to Facebook.

## Instagram

- Before: 419
- After: 517
- Growth: 21%
- Comment: After a period of steady growth on the platform throughout the project, content shared post-event from ICA (images of Showcase performers, makers and shots from the day and evening) is experiencing a higher level of engagement when compared to the dataset from the previous period. This demonstrates both the visual impact and the realised potential for increased reach the CHARTS Showcase continues to generate post-stream.

## YouTube

CHARTS did not have a YouTube channel until we suggested that one was created. We created a trailer for the Showcase Event which we posted on the YouTube channel. The Five Short Films will be hosted on that channel too and it can be used to host future CHARTS content. Because the channel is so new and has hardly been used, we have not included it with other CHARTS social media metrics.