Digital platforms and performing arts: communication of theatrical institutions, audience development, and platform strategies of industrial players.

A case study of the Gérard Philipe Theater, National Drama Center (CDN) in Saint-Denis.

Référence : Bellavoine C., Bouquillion P., Wiart L. (2018). Digital platforms and performing arts: communication of theatrical institutions, audience development, and platform strategies of industrial players. A case study of the Gérard Philipe Theater, National Drama Center (CDN) in Saint-Denis. Dans P. Bouquillion et F. Moreau, *Digital Platforms and Cultural Industries* (p.41-59). Bruxelles, Belgique : Peter Lang.

Introduction

What are the new issues raised by digital platforms for the performing arts in France, especially for the so-called "quality" public theater? This will be the main focus point of this article.

This investigation stems from a request formulated by the managers of the Théâtre Gérard Philipe[1] (henceforth TGP), located in Saint-Denis, near Paris. Created in 1960, this institution's creations are seen as being artistically demanding. The managers of the TGP were concerned about a variety of issues: the increasing role played by ticketing platforms in selling theater tickets in France; the importance of new forms of communication and public relations in connection with the Internet; the control that large industrial groups have over ticketing platforms and digital communication devices; as well as the rise of powerful players organized industrially—such as LiveNation in the live music industry. The live performance industry is indeed subject to deep transformations which tend to turn its organization into an industrial one: corporate groups such as Vivendi or Lagardère, or players from the finance world such as FIMALAC, are acquiring theaters, production companies, booking agencies, and ticketing platforms. They are also developing in digital media, especially on social networks. Furthermore, social networks, and especially Facebook, have become essential vehicles for the promotion and the marketing of shows.

The concern expressed by the TGP staff also had to do with the gap between, on the one hand, the commercial-industrial logic of the platforms and their economic stakeholders and, on the other hand, the theatrical world, which is structured by other values, rather related to artistic or political projects. In other words, will the public theater have to give up its founding principles to become compatible with the logic of digital platforms and communication? Or, will it miss out on these transformations, along with new ways of gathering audience and new resources? If so, will the public theater become even more dependent on public funding, even though the latter has tended to decrease?

We therefore sought to provide initial answers to these questions. In connection with the starting point of our research, our initial hypothesis was that ticketing platforms play an

1 Particularly Florence Guinard, Chief Administrative Officer, and François Lorin, Audience Development Manager.

important role in the industrialization of performing arts, granting strong market powers to the players who hold them (vertically integrated companies), making it possible to generate new resources especially through the monetization of data. In keeping with this hypothesis, we considered that platforms made vertical integration strategies more profitable and that the socio-economic players outside these integrated groups, and especially in the fields of the performing arts, would end up marginalized.

The verification of this hypothesis led us to carry out three series of investigations. First, thanks to a partnership with the city of Saint-Denis and the Gérard Philipe Theater, National Drama Center (CDN), we were able to examine the communication strategy of the TGP and the way it addresses digital issues. Second, we sought to situate the theatrical practices of the TGP audience regarding digital ticketing platforms and social media. Third, we analyzed what role a theater such as the TGP could occupy in digital platform strategies.

The inquiries into these three components have, of course, been conducted hand in hand. However, in order to grasp the issues raised by the development of various digital platforms (ticketing, social networks, etc.) for the performing arts, we focused on three dynamics set at the core of theater socio-economics which are nevertheless very different in nature insofar as they foster their own dynamics. These three dynamics are: communication strategies of theatrical institutions, audience development and audience members' "career" development, and the strategies implemented by industrial players investing in platforms and live performance. The issues at stake in the development of platforms for the live performance industry unfold in the friction between these three dynamics. We will present them here successively.

1. Communication strategies of the Théâtre Gérard Philipe and digital platforms

The development of digital platforms and tools in the performing arts industry disrupts how businesses usually communicate and build up relations with their audience. The overview of the French theatrical landscape issued by the TMNLab (Denizot and Petr, 2016) shows that, while digital technologies are used by theatrical institutions for basic features (websites, newsletters, social media etc.), some of their aspects remain little invested, such as the use of ticketing software in their customer relations. The lack of human resources and training on these topics tends to slow down innovative processes.

Coming to terms with this technological reality is not necessarily self-evident. These platforms sustain the development of the sales and marketing logic implemented by cultural industries. It can generate rejection from institutions attached to a more artistic vision of the cultural field. Studies have evidenced a cultural resistance to these commercial practices among state-funded theaters. Some of the more traditional players have not grasped the full measure of the behavioral mutations associated with online consumption **(**Artishoc**,** 2016**).**

In this context, our intention was to study how the phenomenon of platforms has surfaced and developed in the theatrical sector, based on the example of the TGP. A series of nine interviews was conducted with the TGP staff in charge of administrative management, communications, public relations and ticketing, but also with a city representative and with a service provider participating in the institution's activities. Our analysis is meant to clarify the communication practices of the TGP and to highlight the specificities and difficulties of the institution in its use of digital platforms and tools.

1.1 The TGP's communication strategy

The communication of state-funded performing arts falls under a dual approach, designed to address both public sponsors (local and national public authorities), which are essential to the survival of theater venues, and audiences considered as a whole.

So far, the action plan favored by cultural institutions has largely been to develop image strategies conceived for these targets, through an institution- or brand-based communication (Bourgeon-Renault, Filser, Pulh, 2003).

This approach can be observed in the TGP's communication strategy, which aims first and foremost to highlight the institution's programming and artistic creation. This approach resonates with the function of National Dramatic Centers (CDN), whose public service mission is focused on theatrical creation and distribution, through artistic projects aiming for quality and accessibility for all.[2] Communication material hence emphasizes the programming of the venue as well as practical information (schedule, prices, accessibility, etc.). Promoting the institution and its programming implies a particular effort regarding the quality of promotion material (posters, leaflets, brochures, press kits, website, newsletter, etc.) as well as press relations in order to ensure media coverage. More broadly, theatergoing practices are highlighted in their various dimensions (activities, workshops, restaurant, etc.), as well as the hospitality of the institution. This aspect seems particularly emphasized by the staff, because of the location of the venue in the Saint-Denis area. The poor image of the city and its geographical distance to the center of Paris are seen as major obstacles to high levels of attendance. Hence the idea to reinforce the positive image of the theater by communicating more strenuously on its attractive and convivial aspects and by pointing out the various logistical means implemented to facilitate the spectators' arrival (shuttles, signage, etc.).

> We try to sell a friendly image. It's not because it's located in Saint-Denis that it's not a nice place. So we're saying: you will feel good here, we go to great lengths to make sure that spectators coming here feel good. (Head of Communication).

> When we arrived, the first thing we put on the brochures had to do with how to get here and the time it takes, and if you go on the website, at the top on the first page, it says "20 minutes from Châtelet," etc. We've tried to emphasize that. We pay for a shuttle that brings people back to Paris each night, and on certain nights for a shuttle for the inhabitants of Saint-Denis who would be afraid of getting home alone. (Deputy Director)

Developing attendance and reaching new spectators are central concerns of the TGP, and must be considered hand in hand with the missions of audience diversification which grounds the action of the CDN. Sensitive to this issue, the vision of the audience that we have collected and the resulting actions are based on the consideration of sociocultural criteria (theater lovers or more distant audiences) and geographical criteria (Paris crowd, Saint-Denis crowd), expressed in terms of proximity to the theatrical institution. This focus on the public is reinforced by the tense budgetary context affecting state-sponsored theater venues (with a ceiling on subsidies and an increase on fixed costs to maintain the theater in running order) which implies finding other levers for growth and funding. In order to increase ticketing revenue, the TGP teams are making adjustments, such as reducing the number of invitations, increasing the price of expensive seats (while maintaining low prices for others[3]) or resorting to ticketing platforms (Billetréduc, Ticketac, Fnac, etc.).

The managing staff is engaged in a reflection on actions to lead towards a whole

2 The Terms of Reference for the National Drama Centers specify that they are: "institutions of reference, both at a regional and national level", "keeping our cultural heritage alive, contributing to the creation of a contemporary repertoire, and participating in the experimentation with new forms of performance" in the hope of "welcoming diverse audiences, as well as new aesthetics". *Cahier des missions et des charges des Centres Dramatiques Nationaux,* www.culturecommunication.gouv.fr, Augus 31, 2010.

3 The TGP must adapt its pricing policy to its location and to remote audiences. This involves offering a large panel of attractive prices.

customer category assimilated to the higher socio-professional categories, which were left apart by this state-funded theater. This category includes people working in La Plaine, a district of Saint-Denis which welcomes many companies and workers who only come to the city during their office hours, and live in a close system between Paris and the suburbs.

> A person has been hired to try to bring in people who don't go to the theater anymore. The executives who work in the big companies nearby have sociologically deserted the theaters. Or they go to places that stand out more, places that are easier to access, that belong to bigger circuits and are hence more visible. And so the idea was to tap into that category, trying to find some advisors or go-betweens in a way between the audience and the theater, for these targets. (Audience developer).

TGP professionals have the feeling that they must adjust their communication in order to attract this particular audience category which continues to elude their efforts. They hope that by positioning the institution on the ticketing platforms supposedly used by this category, the theater will be able to engage with this audience segment. The analysis developed by the head of the institution on this matter lies in the description of two distinct worlds which are opposed and are shifting away from each other. First, a so-called "cultural" world, comprised of "theater lovers" massively flocking to theater venues and who present no particular challenge for the TGP and its traditional communication media. This category is opposed to a second world associated with the corporate universe of big companies settled in La Plaine, which is perceived as generally ignoring the offer of state-sponsored theaters and which calls for the implementation of new means of communication with regards to digital platforms. In this perspective, the TGP has recently increased its focus on ticketing platforms, in order to offer encounter points with this potential audience.

1.2 Digital tools and platforms

The TGP's awareness of the role of digital media in the relation with the public dates back to the beginning of the 2000s, when the theater's website was first launched. This website is mostly considered as the basis of its visual identity and as a unidirectional channel designed to spread information towards audience members. Each change at the head of the TGP also goes along with a change in the general design of the website and with the creation of a new website, which allows the webmaster to archive the programming of the former management without putting in place a full-blown archival system. The newsletters are the second digital channel of communication favored by the TGP and are used in combination with programs that help manage contact lists and access a whole statistical apparatus. The institution's use of the website and newsletters does not conflict with traditional modes of communication of the theater, but rather tends to extend them into the digital universe.

On the matter of social media platforms, the TGP is present on Facebook and Twitter through its official accounts. Some employees' personal accounts are also used to relay information concerning the theater. The controversy surrounding *Exhibit B* in 2014[4]—during which many hostile comments were posted on social media—led the TGP to become more aware of how the words of the public could backfire against the institution. For the staff, it also fostered a desire to acquire a better knowledge of these tools.

> The theater's Twitter account did exist, but it wasn't active at all, not at all. When *Exhibit B.* was shown, we had great problems with organizations and also individuals. We saw it coming on

4 *Exhibit B* was a performance and art installation by South-African artist Brett Bailey, staging live *tableaux* of Black people in the spirit of 19th century "human zoos". Its presentation at the TGP sparked controversy and led to the presence of demonstrations in front of the theater.

> Twitter; the theater was insulted, artists who performed there were also attacked. On Facebook, people said: the TGP must burn. It was very violent. (Head of Communication)

> Certainly, opening accounts on social media without monitoring them on a regular basis is a very bad idea. It's typically the kind of tools that are useful only when used on a daily basis. Our time-scale doesn't allow us to be inactive for several days in a row anymore. If one doesn't use social media for what they're meant to be, it quickly leads to bad results.

Today, the expressed ambition of this presence on social media is to promote as efficiently as possible the TGP's programing and to inform the public on the institution's current events. The TGP uses social networks as a broadcasting channel, in a top-down communication approach similar to that of mass media. This mode of intervention ensures constant presence on these platforms while controlling the theater's image. Aside from this aspect, social media are used as monitoring tools which help keep an eye in real time on what is written about the shows as well as collect feedback from the audience by sharing posts from audience members. This second level of intervention has to do with an interaction strategy that includes an effort towards bloggers and trendsetters on social media, to which press kits and invitations are sent. The increasing incorporation of these categories of Internet users within the TGP's strategy is due to a recognition of their influence. It is a form of reply to the media's declining coverage of the theatrical field.

The in-house ticketing system implemented by the TGP relies on the Sirius software program, which allows to handle both online reservations and those made at the ticket booth. These reservations allow the theater to retrieve a database containing information on customers, which is then used to perform queries and send targeted offers. In addition to the direct sale of tickets, the TGP works with indirect distribution platforms, such as Fnac, TheatreOnline or Billetréduc, which sell a given number of tickets. Compared with the total number of seats directly sold by the theater, the volume of seats booked through these channels remains marginal and highly concentrated on reduced rates. On the one hand, these ticketing platforms are used to offer promotional deals and book theater seats at the last minute. On the other hand, their use corresponds to a strategy of visibility that is meant to ensure the presence and the proper referencing of shows on digital platforms, which represent significant hubs. This shows that the use of platforms does not correspond to planned purchases from frequent visitors of the TGP—who resort to other means to purchase their tickets—but rather to opportunistic purchases (interesting prices, promotions, discovery options, etc.) emanating from more occasional customers (see part 2).

Ultimately, the TGP's involvement with digital technologies is complementary with the overall strategy of the institution. It focuses on communication and ticketing services. The efforts implemented have more to do with the proliferation of channels of communication and sales, than with a change able to truly redefine practices and represent an actual priority.
The interviews led with the TGP staff reveal a lack of bearings and affinity towards these platforms, associated to the business-world, business practices and communication codes that may seem remote and hard to understand in the context of a theatre claiming an artistic vision, less subjected to the audience's ruthless reaction.

The orientations taken by the TGP are ultimately inseparable from the context in which the institution finds itself: the way it apprehends digital tools and platforms resonates with the theater's location, its institutional nature and the missions it is entrusted with. It finds an echo with the staff and its professional practices, and with the nature of the public of the institution

2. Digital technology practices in theatergoing

The second part of this research is based on the analysis of interviews conducted with 23 audience members, as part of a wider investigation dealing with the conditions in which individuals decide to go to the theater. This study combines the biographical aspects of socialization with cultural practices—old or recent, continuous or not—and the social settings in which these practices take place. Our study is in keeping with the research led on the socialization and careers of audience members (Becker 1985, Djakouane 2011, Pasquier 2012), which considers that original social situations cannot on their own determine individual practices. These practices are built, recomposed, and, in turn, they take part in the definition of individuals' social lives. Within this analytic frame, we look at how the use of digital tools participates in the definition of the conditions of theatrical practice.

Since the 2013/2014 season, the TGP—in collaboration with the local studies department of the city of Saint-Denis—has been conducting a survey based on a sample of audience members from different shows throughout the season. The 2016/2017 survey (727 questionnaires) allowed to go deeper into the topic of the use of digital tools in theatergoing practices. The results of the statistical survey painted the standard portrait of frequent theater goers: 72.5% of the respondents are executives or middle management and professional classes. Over 72% have a degree at least equal to a graduate level and 44% attend theatrical performances more than 10 times a year.

2.1 The digital environment is part of the social and professional life of the respondents.

Overall, TGP spectators scarcely use digital tools in their theatergoing practices.

The use of digital tools by TGP audience members

Learned about the TGP:	via the Internet	6.4%
Learned about the show:	via the website	6.4%
	via social media	1.5%
Facebook account:		55.2%
Twitter account:		15.4%
Share posts on shows:	occasionally	25.4%
	frequently	15.5%
Use online ticketing services		38.2%

If the collected data shows some variation in the levels of engagement according to the age of the audience members, all respondents have a digital practice associated with their theatergoing practices. The different configurations encountered depend on professional occupations (connected or not), on the networks of sociability to which they belong, and on the amplitude of their cultural practices. For many—except the youngest—the use of digital tools first occurred in the professional sphere. This observation backs national statistics according to which the use of the Internet at home is strongly related to one's familiarity with cultural facilities (DEPS, 2007). These relationships function both ways. The Internet corresponds to the "cumulative" behavior of "cultural audiences," allowing them to widen and deepen their practices. In return, the Internet can strengthen that behavior, giving access to numerous new materials and practices (DEPS, 2007).

The generation factor affects the intensity in the use of digital technologies. The younger respondents have the more varied and the more firmly established practices. As for older viewers, they often consider with a more critical eye the effects of digital technologies:

the time-consuming aspect of the Internet, the information overload associated with online requests (newsletters, …), the development of online surveillance, and the dehumanization of social relations.

We will mention three dimensions of the use of digital technologies in theatergoing practices: purchasing and ticketing, information and recommendations from legitimate players, and communication on social media.

2.2 Purchasing tickets

For frequent audience members, purchasing theater tickets initially implies taking out a subscription, in order to make the theatrical season fit in an annual *schedule* and to be sure not to miss out on any important event. Of course, the subscription also provides significant discounts.

The in-house ticketing systems provided by theaters are only the second principal purchasing mode. The relationship to digital platforms is very ambivalent. The lack of an aesthetical hierarchy implied by displaying in the same manner the most demanding creations and the most commercial entertainments is seen as an insult by these cultural enthusiasts.

> Ticketing services such as Digitick or Billetréduc harm the image of theater. As ticketing services, they can be useful, because they offer low prices, but they're not really engaging [You mean, in the way they display the shows? The way they present them?] Yes, exactly. I mean, I don't find it rewarding for theaters, because they put everything on the same level, actually.

Yet, despite the almost unanimous rejection they spark, all the audience members we have interviewed have used these platforms at least once to buy tickets. Though these services offer cheaper rates, they are also associated with less legitimate or less demanding cultural practices (entertainment), or based on other criteria, such as shows for young audiences.

2.3 Information and expertise

The more occasional theatergoing is, the more it is determined by a sociability network. The development of a fuller and more autonomous practice corresponds to the development of a form of information research in which the Internet and social networks play a crucial role: this practice develops in paralel with the information it requires.

One must already have decided to go see a play before looking up information of location and schedules on a theater's website. A first positive experience with a show or a recommendation may also may also generate interest about it. Theater websites are often used when the theater venue is already known and selected in a list of favorite places. The visit of the website will allow to follow the general programming and the calendar of the theater. Similarly, people subscribe to and read the newsletters of theaters they have selected and want to keep informed about.

Linking different elements of information can also lead to discovering new theaters. The play, the actor or the director one follows can contribute to steer a theatergoer towards a new theater, and accordingly, towards its website. The Internet makes it undeniably easier to create a path within this information. The browsing starts with a precise input: the author, the play, the actors, the theaters mark out a path in which one circulates according to the evolution of his or her practice. For example, an audience member that we have interviewed said: "I've seen an actor play at the Théâtre de la Commune. He has his own theater. He is a stage director and works in Marseille. So I will visit his website to keep informed about what he's doing, so as to know when he is in Paris, or wherever".

2.4 The hierarchy of cultural expertise

What is the real influence of blogs and fan websites in the promotion of shows? Can they offer a new approach to theatrical taste?? This study shows that information practices on the Internet or on social media do not challenge the importance of more legitimate expertise issued by traditional media. Even if some audience members tweet their opinion immediately after the show, the vast majority of our interviewees do not read amateur websites or blogs, but they will often quote renowned and recognized theater critics. We may precisely assume that the proliferation of information and offers has reinforced the importance of the most legitimate experts' selection and opinion.

> The more you consume theater, the more you want to consume, and the Internet greatly encourages you to do so. It's just like everything else. You start reading reviews, and reading one review brings you to read another, etc. I'm on Twitter and I follow the accounts of the theaters we attend but at the same time, on Twitter, you have a lot of people who are kind of semi-professional critics, who have blogs. I never or hardly ever read their blogs … often what you find are their tweets with their first reactions. But I almost never read reviews on their blogs. Instead, I will read *Télérama*, *Le Monde*, *Les Inrocks*.

2.5 Communication and social media

Most of the interviewees have a Facebook account (only 4 of them said they were not on Facebook) and even though not all of them use it as a tool for collaborative communication, they all use it as a source of information and read what is sent by their friends, even when they are not active themselves. Twitter appears to be more divided generationally, and rather linked to professional practices.

The development of amateur blogs on the theater seems to blur the line between professionals and amateurs. For three audience members we have met, the use of Twitter was complemented with the creation of websites or blogs which contained theater reviews and interviews. In return, this participated in an important increase of their theatrical attendance and developed the logistics that goes along with it. It led them to orientate their theatergoing practices towards quasi-professional aims: one developed her network while others communicated on their websites. This activity isn't a solitary one. It is grounded in a collective perspective and allows for a strong sociability around theater and blog topics. It represents a new step in the career of theater audience members, potentially leading them to a professional shift.

Ultimately, digital practices are complementary with theatergoing practices: they enhance their knowledge of the offer and represent an increase in audience members' competence as well as in the sociability that goes with it. These practices, in their various scope, tend to evolve, just like theatergoing practices themselves. They help maximize the information and organization, as well as multiply and speed up communication within these sociability networks.

The development of blogs and websites run by amateur critics doesn't seem—at least for the TGP interviewees—to truly transform the hierarchy of cultural expertise in which professionals and specialized critics still occupy the highest positions.

As such, this practice seems to fall under the notion of identity construction rather than that of challenging the established hierarchies of taste and theatrical expertise.

3. The socioeconomics of platforms and state-funded theaters

The third section of our research deals with the socioeconomics of ticketing platforms. This market has been growing rapidly, especially since dematerialized ticketing was allowed in France in 2006. In 2012, this market (cumulating sales figures from digital and material tickets) was estimated at €750–850 million, with an increase by 17.4% in two years (Xerfi Precepta, 2014, p. 107). According to another source, the ticketing market issues about 205 million tickets each year (all industries combined, except the film industry), with a growth of 20% per year affecting online services in recent years. Physical ticket sales have remained stable (between + 1 to 2% each year). In 2009, the musical industry represented approximatively half of the ticket sales (Irma, 2015). However, is it fair to consider that the strong dynamics of ticketing platforms represents a central issue for live performance organizations and particularly for state-funded theaters? In order to provide possible answers to this question, we need to examine the main socioeconomic features of these platforms.

First, fixed costs are very high. For each show, the platforms must negotiate the terms and conditions of ticket sales, put the offers online, and promote the show on the platform. These tasks imply a significant cost, all the more as they cannot be automatized. In addition, this cost does not depend on the number of tickets sold. Hence these platforms can find an advantage in focusing on shows which likely to generate the most sales. The platforms have to find a balance between, on the one hand, the diversity and wide variety of offers ("club" logic) and, on the other hand, focusing on a limited number of shows. The offer available on a platform essentially implies the presence of high fixed costs. Indeed, in order to launch a general platform of significant size, three main expenditures are required: the development of an IT system; market research on show providers in order to offer customers with a wide range of choices, and thus encourage show providers to entrust ticket sales to the platform; communication on the platform and its offers in order to develop its image and its attractiveness with regards to customers. The first characteristic of the platforms as identified by economists is the existence of externalities. According to information collected by the *Autorité de la concurrence* (the French Competition Authority) (2012), these three expenditures can represent a significant initial total cost. They represent a strong barrier to market entry. The fact that these fixed costs can be substantial explains that platforms may favor shows with the highest sales volume. The French Competition Authority highlights:

> The profitability of this industry relies on the most prominent shows, with an almost guaranteed attendance rate. Indeed, seats for these shows, ranging from middle to high prices, are sold ahead of time and allow organizers and distributors to generate significant cash money. According to a study by the SACEM, the 20 largest tours represent about 25% of the revenue for live performances

Second, it appears that platforms are not profitable in the short term, or even profitable at all. The assumption is that industrial players who own them seek mainly, through these platforms, to articulate their different activities in order to maximize their market power and, by extension, their profitability. They can also be part of vertically integrated strategies. Corporate players integrate in their structure different stages of the live performance industry, whether they are positioned in the development stage (creation and production of shows, rights and artistic career management) or in the post-development stage e (booking, festival organization, ownership or management of venues, ticketing platforms). In this regard, platforms help reinforce exclusive ties between these various activities. For example, the producer of a show presented in a venue belonging to a group which manages a ticketing platform can have no other choice but to sell the tickets via the group's platform. Within the vertical integration framework, platforms may represent an opportunity to develop externalities between those two activities. They allow for instance to combine the data collected through various channels: fanbases, ticketing platforms, online or physical sponsoring and advertisement activities, byproducts. Yet, our investigation shows that the corporate strategy of strengthening market power thanks to vertically-integrated ticketing platforms is not equally implemented. It varies according to the industrial groups' strength, interest, or sector. This even applies to players such as Vivendi in France who does not benefit from the same market power as LiveNation in the United States. However, the French state-funded live performance industry does not represent a field of major interest for industrial groups.

Third, high fixed costs and the expensive incorporation of platforms in vertically integrated strategies leads to a concentration of ticketing platform market. A small number of important players dominate the market. This might lead to the conclusion that power relations between the world of platforms and the universe of live performance—and especially state-sponsored institutions—do favor the latter, given differences in size and market power. Unfortunately, the detailed account of share distribution is only available for the music market. In 2009, one player was in a dominant position: FNAC, which represented 41% of ticket sales. Two other players represented a significant share of the sales: Ticketnet with 13% of the sales and Digitick with 4% (French Competition Authority, 2012). More recent data, corresponding to the year 2012, is available thanks to another ruling of the competition authority. It focuses on the ticket distribution market in France (it is not clear if this data includes figures for the theater). These figures are estimations passed on the authority by the economic players. The dominant position of the three aforementioned protagonists is confirmed, but noteworthy is the increasing power of Digitick. Alltogether, a noticeable increase in the role of these three groups has taken place, with combined market shares moving up from 58% to 80–100 %. Fnac: 50 to 60% market shares; Ticketnet: 20 to 30% market shares; Digitick: 10 to 20% market share (French Competition Authority, 2014, p. 8).
However, "big" platforms with high revenues coexist with "small" platforms with lower business volumes. Other elements than size are needed to distinguish them. First, "big" platforms are generally connected to industrial groups with other activities than ticket sales, while "small" platforms are most of the time independent. Digitick belongs to Vivendi, Billetréduc belongs to Lagardère, France Billet belongs to FNAC, and Ticketmaster belongs to LiveNation, which is the most important player in the live entertainment industry. In contrast, Starter (which is a "club" and not a digital platform) or Théâtre OnLine are relatively independent compared with other groups. Second, the scope of their field of intervention tends to vary. Larger companies are often less specialized, even though they mostly rely on musical events or on events and shows like sports events, who are not part of the live entertainment industry. According to the competition authority, "the 15 biggest concerts represent 15% of the benefit made by FNAC in its show segment" (French Competition Authority, 2012, p. 11). These platforms can sell tickets for theatrical events, but this is not their main field of activity. Conversely, smaller platforms can be specialized, and particularly in theater. The competition authority makes a clear distinction between general and specialized platforms:

> In France, the main distributors are FNAC, Réseau France Billet, and Ticketnet,[5] to which we must now add Digitick. These are the companies the present ruling pertains to. Other distribution networks exist, but they are generally specialized in theater tickets, such as "Ticketac" or "ThéâtreOnLine." Yet, none of these platforms are able to offer their customers the great number of collection points and the broad offer provided by Fnac, Réseau France Billet, and Ticketnet (French Competition Authority, 2012, p. 7).

Third, their areas of intervention are of different scope. The big companies can be simultaneously active in different countries. It is especially the case for Ticketmaster, which is

5 Since the Competition Authority's ruling, Ticketnet was bought by LiveNation and is now part of Ticketmaster.

active in all the countries where its parent company, LiveNation, produces and distributes shows. At the very least, these platforms all cover the main French urban areas. For instance, in June 2016, BilletReduc displayed on its website specific home pages for shows in Paris, Lyon, Marseille, Nantes, Nice, Lille, and Toulouse, while the platform's search engine also allows to purchase tickets for shows in venues located in smaller cities. On June 21, 2016, the website claimed to offer "12,379 potential events everywhere in France."[6] The Ticketmaster website specified that the company offers "a catalogue of 170,000 shows each year in France and Europe available for reservation."[7] Conversely, areas covered by smaller platforms are generally more limited. For example, the Starter Plus "club" and the Tatouvu magazine define themselves as "a consulting agency in theater reservation, and a media on theatrical events in the Ile-de-France region."[8] The TheatreOnline website only offers tickets for shows in Paris-Ile-de-France, Avignon, Brussels, and Normandy. For each of these areas, a different homepage is displayed, while some venues are described as being on the "front page" on the banner of the website. On June 21, 2016, the day we visited the website, all the "front page" venues were located in Paris (Théâtre du Châtelet, Comédie Française-salle Richelieu, Théâtre du Rond-Point, Opéra Garnier, Théâtre de la Ville). Fourth, the service is not exactly the same. Some platforms are aimed at very wide audiences, which goes along with an emphasis on the strong commercial dimension of the offer. Another possibility is to target what the network economy calls "closed audiences," and emphasize the quality and exclusivity of the offer, sometimes displaying by extension a form of elitism. Tatouvu's strategy, with its exclusive offers for subscribers, can be analyzed as such.

These three characteristics could suggest that the leverage of state-funded theaters in comparison with "big" platforms is rather weak. Yet the socio-economic characteristics of ticketing platforms could account for their having little interest in these theater venues, since the number of seats to sell is too low and they are not central players in the ongoing concentration policies being implemented in the live performance industry. However, from the point of view of state-funded theaters, the ability to control the commercialization of tickets through ticketing platforms is an issue that must be grasped with increasing urgency. State-funded theaters can hence try to strengthen their collaboration with platforms of smaller size and more specialized in theater. They can also try to manage online ticket sales themselves, resorting to specialized technical service providers. Indeed, beside ticketing platforms, a number of technical service providers exist, particularly in the field of ticket production or database management, such as Weezevent or Kyro. These companies can also provide theaters and other institutions with services allowing them to handle ticket distribution directly. This type of distribution is called direct in opposition to indirect distribution, i.e. distribution entrusted to a player of the ticketing industry. Yet, it must be noted that the distribution market is itself very concentrated, with four players holding between 60% and 100% of market shares and two smaller players: IREC Ticketing Technology: 30%-40% market share; Rodrigue: 10%-20% market share; Satori/Digitick: 10–20 % market share; Kyro Concept: 10–20 % market share (5 to 10% of which belong to Datasport); Sirius (Alcion) 5%-10% market share; Secutix (ELCA): 0 %-5% market share. (French Competition Authority, 2014, p. 8)

6 BilletRéduc website, accessed June 21, 2016 http://www.billetreduc.com/

7 Ticketmaster website, accessed June 21, 2016 http://www.ticketmaster.fr/

8 Tatouvu website, accessed June 21, 2016, http://www.tatouvu.com/w/wwa_FicheArti/webid/5/qui-sommes-nous.html

Conclusion

To conclude this first explorative research on digital technologies, ticketing platforms, and the theatrical performance industry, it appears that the communication, promotion and marketing strategies of theatrical institutions, such as the TGP, are not unaware of the digital turn and of the increasing role played by platforms. Yet these relatively new realities have been incorporated within well-established settings and characteristics of the institution and its audience without disrupting them. Similarly, the study of platforms shows that the type of performances offered by state-funded theaters is not central to their strategies.

Nevertheless, the strong competition between theatrical institutions, especially in a city like Paris, combined to a decrease in public funding, encourages institutions, including state-funded theaters, to intensify their reflection and actions regarding ticketing platforms and social media in various domains: fostering audience retention, facilitating the practices of audience members, and anticipating various expectations of communication from sponsors and patrons.

References

Artishoc (2016). *Livre blanc, Les relations aux publics connectés*, Retrieved from http://artishoc.fr/livreblanc.pdf

Autorité de la concurrence (2012). *Décision n° 12— D-27 du 20 décembre 2012 relative à des pratiques relevées dans le secteur de la billetterie de spectacles*.

Autorité de la concurrence (2014). *Décision n° 14— DCC-53 du 11 avril 2014 relative à la prise de contrôle conjoint de la société Kyro Concept par le groupe Fimalac aux côtés de la Fnac.*

Autorité de la concurrence. (2014).

Autorité de la concurrence. (2014).

Becker, H. (1963). *Outsiders: Studies in the Sociology of Deviance.* New York: The Free Press.

Bourgeon-Renault, D., Filser, M. and Pulh, M. (2003). Le marketing du spectacle vivant. *Revue Française de Gestion, 142* (2003/1),113-127.

Djakouane, A. (2011). La carrière du spectateur. *Temporalités, 14* (. doi:10.4000/temporalites.1939

Denizot, M., Petr, C. (2016). Le numérique dans les théâtres en France, TMNLab. Retrieved from: http://www.tmnlab.com/2016/11/21/letat-lieux-numerique-theatres-2016-infographie-rapport-complet/

Donnat, O. (2007). Pratiques culturelles et usages d'internet. *Culture études, 3* (3), 1-12. doi:10.3917/cule.073.0001.

Irma. (2015). La billetterie du futur : un marché en croissance pour le spectacle. Retrieved from: http://www.irma.asso.fr/LA-BILLETTERIE-DU-FUTUR-Un-marche

Pasquier D. (2012). La sortie au théâtre. Réseaux de conseil et modes d'accompagnement. *Sociologie, 1* (3), 21-37.

Pillot, J. (2014). La mutation de la filière du spectacle vivant. Xerfi Percepta.