

MARKETING OVERVIEW – 2019 Q4
BROADWAY SHOWS AND MANDELA EXHIBITION

TO Live's Marketing Department had an unusually busy Q4 period with four large events:

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| ▪ Mandela–The Exhibition | October 10, 2019 – January 5, 2020 |
| ▪ Taj Express | November 23 – December 1, 2019 |
| ▪ Bend It Like Beckham | December 7, 2019 – January 5, 2020 |
| ▪ The SpongeBob Musical | December 17 – December 22, 2019 |

Major marketing and advertising efforts around the above-noted programming began in late September to minimize competition with TIFF, and to maximize the allocated budgets for each production.

The diverse nature of the programming that we had on offer provided an opportunity for TO Live to work with a number of community partners and reach a varied demographic that allowed us to build on our community relationships. The increased ad spend allowed us to develop and execute more robust campaigns and leverage our media partnerships so that we were able to expand our presence in a very busy marketplace.

Our respective digital campaigns spoke to every age and demographic in the GTA and also supported our tourism marketing initiatives which fed into our tourism marketing strategies.

The following sections provide an overview of marketing activity for each of the four major productions in Q4.

1. Mandela – The Exhibition

Mandela – The Exhibition, built and launched at Meridian Arts Centre in October, was a first for TO Live. Activating the Gallery space with museum-calibre content brought strength to the TO Live brand and to Meridian Arts Centre.

TO Live forecasted a target of 25,000 visitors and had an attendance of over 7,600. Although we fell short of forecast, the positive long-term returns on the TO Live and Meridian Arts Centre brands are invaluable. Insights from this type of programming will be very helpful in building a series of future exhibitions.

The team was successful in attracting audiences surrounding Meridian Arts Centre (approximately 30% of visitors), as well as from downtown Toronto (21%), surrounding Toronto (15%), Ontario excluding the GTA (33%), and Canada/US/international (approximately 1-2% combined).

Partner/Promotional Support – TO Live secured two major media partners: Pattison Outdoor and the Toronto Star, delivering a combined media value of over \$3M. We also secured the help of two creative agencies: Ove and Cleansheet, who assisted in building the creative platform for the Toronto engagement.

Cross-promotions were executed with major arts organizations including the Ryerson Image Centre, Contact Photo Festival, ROM, Word on the Street, ByBlacks.com, First Fridays, the Toronto South African Film Festival, and the Caribbean Tales Film Festival amongst others.

We also engaged the Toronto Star to assist us in developing a photo exhibit based on photo archives from Nelson Mandela's three visits to Canada. This secondary exhibit took place at Brookfield Place for three weeks in September, driving awareness from downtown to uptown Toronto.

A dedicated campaign to support the holiday season was implemented and successfully saw a major upturn in visits to the exhibition in its final week.

Marketing/PR Activities – Social media was a major component in the communication of the exhibition, generating a very positive response in engagement and sentiment. Sales were tracked regularly; campaigns and digital strategies were continually updated to be responsive.

Highlights:

- Media spend totaled \$81K across print (\$16K), out of home (\$15K), radio (\$9K), TV (\$5K), digital (\$31K), and promotions (\$4K) – see Confidential Attachment 1 for details.
- Google search generated an impressive 3.22% clickthrough rate
- Our creative team produced a short clip of the Raptors 905 visit to the exhibition that was used to target NBA fans, which resulted in 19 purchases within 5 days
- Creative messaging focused on Mandela's values of tolerance, inspiration, forgiveness, and hope; featuring powerful quotes to inspire views and clicks
- \$12 ticket pricing was featured prominently in advertising to drive conversions



- The opening on October 10 included media coverage by CBC Television, along with attendance from local media personalities
- Organic social media posts delivered over 20,000 impressions and over 700 positive engagements, with patrons often expressing their gratitude to TO Live for bringing this exhibition to Toronto, and sharing the emotions they felt that this exhibition evoked

- Radio scripts featured top voice talent and a provocative narrative to spur interest, curiosity, and support
- Earned media coverage was extensive and positive with over 20.0M impressions from feature stories in *Toronto Star*, *Toronto Life*, *NOW*, *The Caribbean Camera*, and other prominent publications both online, on TV, and in print

Education and Engagement - TDSB school interruptions impacted school visits and anticipated attendance, and despite the E&E department's efforts to reach teachers and secure bookings, we did not see the lift in sales we had hoped for. Regardless, we made significant inroads in attracting students from across the GTA. Their feedback has been very positive, and they look forward to seeing other exhibitions in the future. Meridian's offer to underwrite transportation costs for students was well received, and schools were appreciative of the financial assistance.

2. Taj Express

With a market-wide decline in advance ticket sales and limited marketing budget, our efforts were focused on single-ticket sales 6 weeks before production. Sales were forecasted at 2,800 tickets; actual sales were 2,661.

Marketing/PR Activities

TO Live engaged multicultural marketing experts Ethnicity Matters to manage the paid media campaign. Total paid media spend with this agency was \$50K, across the following buys: programmatic and direct-buy digital display, a print and digital package with Star Metroland, various South Asian radio, out of home, and South Asian TV (see Confidential Attachment 1 for full media plan details).

Highlights:

- Bollywood-focused creative messaging, featuring music, dance, and theatricality
- Hindi and Punjabi translations to target a South Asian demographic
- Digital programmatic achieved 4,400 clicks with a CTR of 0.20%
- 2.6M impressions and 10,000 clicks on digital, with a CTR of 0.38%
- 6 half-page insertions in Brampton Guardian reaching 490,000 users
- 320 TV spots delivering 11.9M impressions

- 182 radio spots with a strike rate of 114%
- Bonus activities: mentions on news channels and radio, emails through media vendors, influencer ticket give-aways

The marketing team created and managed a complimentary digital campaign at a cost of \$10K which generated over \$32K in sales for a ROI of 220%

- Facebook and Instagram returned \$5.85 on every dollar spent in advertising, for a total of over \$25K in ticket sales
- Google paid search returned \$2.23 on every dollar spent, for a total of over \$7K in ticket sales
- Visitors who did not complete a transaction were retargeted with a special discount
- Influencer collaboration amplified our voice across social media and reached a younger demographic and generated a noticeable lift in sales during the week of their posting
- Organic and boosted social posts generated over 20,000 impressions and 900 engagements
- The cast appeared at Nathan Phillips Square to help promote the show


Meridian Hall – formerly Sony Centre
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Today we hung out with the cast of [Taj Express - The Musical](#) at Nathan Phillips Square, as they gave us a sneak-peek of what they've been working on.

Taj Express The Bollywood Musical Revue is on at the [St. Lawrence Centre for the Arts](#) (right next to Meridian Hall). Last show this SUNDAY!

"A carnival of young India's Bollywood culture, hip hop music and rich traditions blending amazing costumes, dance, and thrilling live music. Get on the train baby!" - Namaste News Online ... [See More](#)



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- Earned media coverage was positive, driven by invitations to the press to attend the premiere. The Toronto Star, Desi News, and other print and radio pieces helped with awareness of the show.
- Partnerships and promotional activity included street teams at cultural events during the summer to create awareness and interest among target audiences.

3. Bend It Like Beckham

Starvox Entertainment, TO Live's partner in this presentation, worked with several external agencies to manage the paid media campaign; TO Live assisted with promotions and PR in a limited capacity.

Starvox forecasted a target of 12,150 attendees and achieved a total of 12,110 attendees. Special pricing (discount codes, buy-one-get-one-free offers) aided with varying degrees in success.

Paid Media

Outdoor media and TV were two major components of Starvox' efforts communicating the musical. Media spend across print, digital, TV, out of home and events is noted in Confidential Attachment 1.

The major marketing efforts included an outdoor campaign, traditional broadcasting, and editorial/PR coverage. Another large component of this campaign were various digital advertising efforts (see Confidential Attachment 1 for full media plan).



Promotions

TO Live supported the above marketing efforts with organic social media campaigns as well as promotions with different arts and sports organizations across the GTA.

This campaign generated a total of 17,293 impressions with over 200 engagements. Messaging was centered around the production's inclusiveness and pushing the limits within constrained and traditional ideas of feminism. Additional messaging included bringing together the whole family to witness a feel-good musical that brought two different cultures together.

Messaging/Publicity

Unique campaigns, with influencer efforts, offering special pricing and dinner packages were developed with varying degrees of success.

Earned media generated over 33.0M impressions with 85% positive feedback, 15% balanced and no negative results. Daily publications (*North York Post*, *The Toronto Sun*, *The Globe and Mail*, etc.) resulted in total impressions of 11.0M. Despite the extensive media coverage and special pricing, the overall results did not meet the anticipated results.

4. The SpongeBob Musical

The national tour of The SpongeBob Musical has generally not performed well since its premiere in September. This also proved true in the Toronto market, with attendance reaching only 6,143, out a total inventory of approximately 24,000.

Marketing

Marketing efforts started with a one-week teaser campaign in April immediately followed by an on-sale campaign. Awareness was reinforced with a concurrent Google search campaign. Initial sales were very positive with a 5x return on spend, and \$17,528 in ticket purchases. The campaign also generated 141 email signups to the TO Live Insider email distribution list.

MPMG, an entertainment-focused communications agency, was subsequently engaged to manage digital marketing. This campaign invested just over \$30K into

various online marketing platforms and produced revenues of approximately \$120K - generating a final ROI of 288%.

The digital campaign played out over three phases, with supporting promotional outreach:

- Phase 1 targeted SpongeBob fans and lovers of musical theatre using a playful image of the show's pineapple artwork superimposed on the venue. Targeting a core fanbase, the sales on this outreach quadrupled their investments - creating immediate results and pre-populating remarketing lists for future phases.
- Phase 2 returns were more moderate with the greatest results coming from Facebook highlighting contributing musicians and a NY Mag feature on the original production.
- Phase 3 shifted the focus to special offers, with tremendous response.



Throughout the digital campaign, paid search advertising reached individuals seeking information on the production, drawing them back to our website and generating nearly \$50,000 in revenue.

Additionally, two online contests were held – one hosted by TO Live and the other by influencers. These contests generated nearly 3,500 entries combined.

Additional paid media included out of home, TV, print and radio for a total spend of \$169K (see Confidential Attachment 1 for full plan).

Messaging

- Restrictions placed by Nickelodeon on creative made it difficult for us to competitively position SpongeBob in the Toronto market. Being unable to reference the animated television show alienated fans and left many confused
- Approximately 40% of social media comments were negative, as SpongeBob fans felt that the musical was disconnected from, and not respecting, the original franchise (and their childhood memories). Nickelodeon attempted to address these concerns with interviews from the Director (a true fan), but the communications did not resonate
- Messaging focused on “family fun,” with key calls to action including production video and limited engagement seating
- Multiple layers of advertising with digital, radio, print, TV and out of home based on budget parameters
- \$35 ticket pricing was the most effective message

Pricing

- Special family-pack pricing (4 for \$99) and discount initiatives were offered through online retargeting, Ticketmaster audience emails, and discount platforms such as Travelzoo, Groupon, etc.
- Black Friday and Cyber Monday deals were offered
- Failure to generate sales resulted in last minute efforts to move inventory by offering deeply discounted tickets

Media & Promotions

- Worked closely with Corus on the televised premiere of The SpongeBob Musical from Broadway on December 7, to spread awareness of the show and demonstrate the quality of production value to potential audiences
- Special promotions were launched with Meridian
- Added initiatives with Cineplex, Exclaim, grassroots marketing (promotions/events) with partner marketing
- PR efforts resulted in spots in the Toronto Star, Toronto Life, CBC Radio Q, City TV, and The Morning Show, among others.

TORONTO – THE MARKET SUMMARY

TO Live certainly had a viable presence in the market throughout the Fall and into the early days of January, but our forecasts that predicted a more positive outcome did not perform in the manner that we had hoped.

Post mortems are being planned so that all departments in addition to marketing can participate in the conversation of how to improve.

The external media and marketing agencies that we employed shared their challenges in recruiting media, converting views to sales, and being able to engage patrons.

Timing, competition with other arts organizations, educational and school interruptions all formed to create challenges in realizing the sales potential. The following is an overview of the challenges present in our market that need to be considered.

This past Fall has been one of the most challenging seasons that we have faced. Mirvish Productions promoted over 12 shows, representing a huge financial thrust in the marketplace, in addition to longstanding performing arts peers including the National Ballet, Ross Petty's Panto, and The Toronto Symphony Orchestra. As an example of our highly competitive space, the Toronto production of the Broadway theatrical hit, *Dear Evan Hansen*, closed after 20 weeks due to lack of ticket sales.

We have also noticed that the ticket buying market has seen a downturn over the past year, due to several factors:

Delayed Ticket Sales Cycles

Advance ticket sales for many presentations have fallen, with patrons purchasing tickets much later and closer to the presentation. This resulted in greater discounts to augment sales as performance dates approach.

Shrinking Group Sales

Toronto has seen traditional group sales decline (i.e. group sales agencies and corporate sales purchases), replaced by a direct-to-consumer model with less favourable results in advance sales.

Many Discounts Throughout Toronto

Toronto is a very highly competitive market, and to generate ticket sales due to lack of advance sales, the marketplace has increased discounts through many third-party sales channels including Groupon, Travelzoo, Ticketmaster, Buytopia, and other discount platforms. These volume discounts – as high as 50-70% – teach consumers to wait for a better deal.

Increased Advertising Rates

Toronto media buying costs are at an all-time high, forcing us to shorten campaign durations. Coupled with less inventory available for bonus insertions or added value, media spend does not reach as wide as in previous years.

Decreased Earned Media Opportunities

With continued media consolidation, major newspapers, print publications, and broadcasters have dramatically reduced their arts and entertainment coverage. This has resulted in fewer feature articles and interviews, and less overall engagement from media outlets.

Trade Initiatives/Third Party Cultural Promotional Partnerships

Many traditional third-party promotional partnerships, e.g. corporate and media sponsorships, have shifted their dollars to sports and other live entertainment options (for example concerts and comedy). Most media outlets now require a paid buy before committing to promotional media.

Despite a challenging landscape, TO Live certainly made inroads in developing and building audiences. The additional data that we have gleaned from all ticket sales and opt in communications will provide us with more extensive insight into our patrons (present and future).