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Europeana Space Project

Market Analysis For Dance: Extract From D5.1

5th February 2015

This document contains an extract of the main points referring to DANCE from the Europeana Space report D5.1 (Market analysis) circulated in July 2014. For full reference, please see the full D5.1 final report.

1. Introductory Overview

Dance, as a visual form of art, can strongly benefit from a deep digitization process. Given its visual nature it has the chance of being innovative and cutting edge on the web. As more and more people are getting involved in dance, in a variety of ways, Europeana can become an interesting content provider or bridging platform for those who work in this field. The market of people involved in dance can be split into two main segments: professionals (researchers, teachers, choreographers and pro dancers) and non-professionals (dance fans).

The number of professionals can be estimated in the order of 73,000 all over Europe, with the most part in the UK (40,000). All these people can strongly benefit from systems and software that can help them deepen their research and facilitate their creative job.



The dance fans segment has been estimated at around 26.8 million people while considering that approximately 38% of people in Europe have been directly involved in this

activity but only 40% of them are 'digitally active' (i.e. they use the Internet for cultural purposes at least once a month). Dance mobile applications are already commonly used and, given that the usage of mobile devices (tablets and smart-phones) is increasing, they are likely to use more and more this kind of software for their recreational purposes¹.

The main business models can be grouped as follows:

- Dance learning mobile app, that is the development of app that could contribute to provide a digital tool to those people interested in the field,
- The development of a software to be used as a service (SaaS) that will be useful in the creation of choreographies that can be visualized through digital tools, in order to improve the learning aspect.

The business models are highlighted using the structure of the business model canvas (as proposed by Osterwalder & Pigneur 2010).

1. Business Models: Dance Learning Mobile App

Dance is an extremely wide discipline and, in relation to several factors, many business models can be implemented in a variety of ways. For example we can:

- in the dancing game field: sell a game online, offline, with in-game purchases, with advertising or with a related e-commerce;
- in the dance learning field: make a teaching app (on sale, with advertising, with premium content) or a video website (with advertising, with product sales, freemium);
- in the marketing software industry: creating software that helps dance creators market their ideas;

¹ For more detailed information on market size and potential, please refer to paragraph 6.1.2 and 6.1.3 of the D5.1 final report.

- in the organizational software industry: to help dance events managers to organize and manage those events.

We decided, then, to use two criteria to deepen our research: existence of business examples that could help us in defining revenue metrics and similarity with Europeana Dance Pilots.

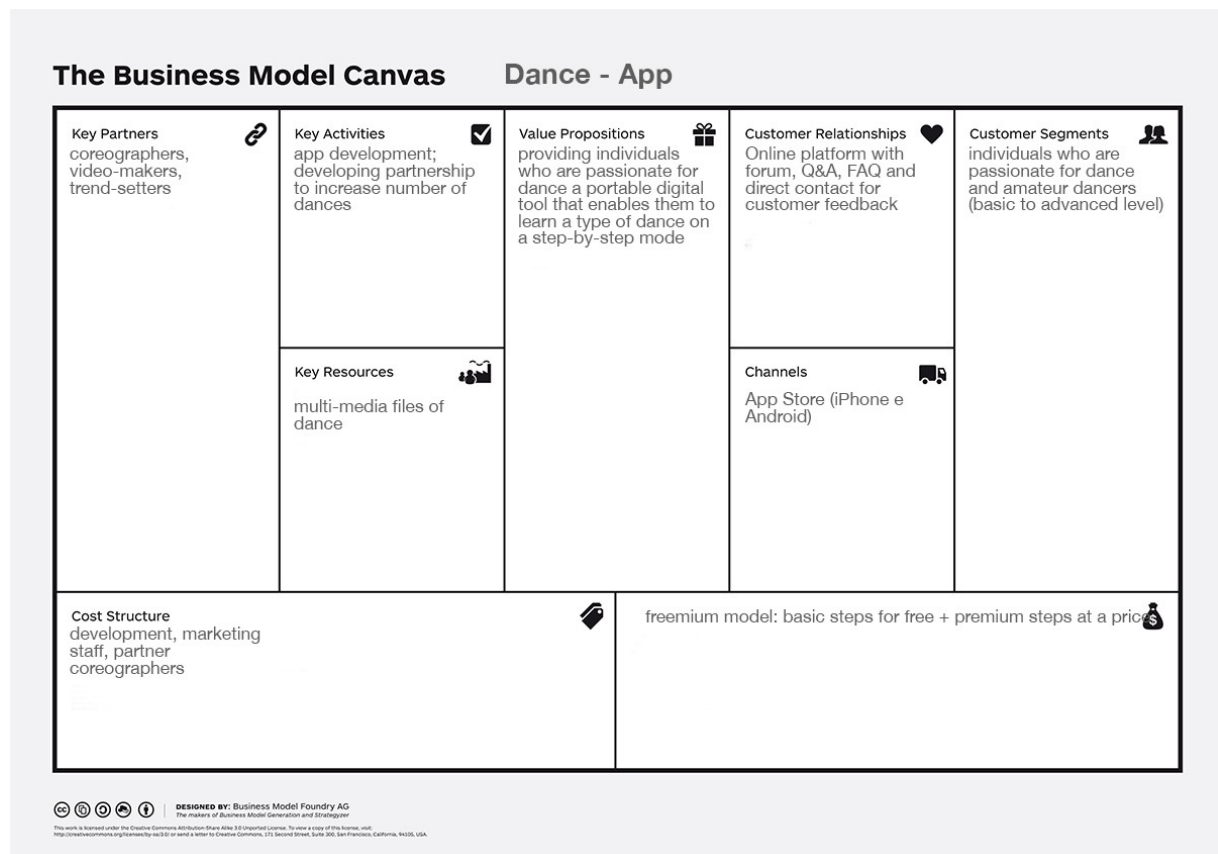


Fig.1: Business Model Canvas for the App Model

One of the main new trends of the dance business is digital learning: the use of digital devices for the purpose of learning a defined kind of dance. Examples of this trend are learntodance.com (that offers free basic lessons and paid premium lessons), dancewithmadhuri.com (offering dance lessons with a gamification process) directly on the web.

There are also dance apps that use devices like smartphone or tablet to teach learning. Some examples are “go dance” has been downloaded more than 1.1M



times and generated more than \$2.2M, or “Zumba Dance” that has been downloaded 152,000 times generating revenues of more than \$758,000, or “Pocket salsa”.

One of the main examples of dance teaching using modern instruments is Pocket salsa. This App, available for iOS (iPhone and iPad) and Android uses video for teaching, step by step, all the different kind of salsa dance from all the South American countries has been defined as the best salsa app and the “closest thing to a private lesson”. The best features include:

- short clips to learn every single step, plus integrated clips to put them together and develop a complete dance knowledge;
- even available offline;
- salsa beats learning with instrument videos;
- premium videos (in-app purchase).

This app is heavily pushed in the market by the owner’s website addicted2salsa that, with more than 10,000 views per week is ranked among the best 1,500 “arts and entertainment” websites in the world. The app has been downloaded more than 171,000 times and generated, only with direct sales, more than \$660,000 in revenues.

Even if with a completely different subject than Europeana, this is an interesting example of how popular a dance app can be and, consequently, generate revenue streams. Similarly to Pocket Salsa, DanceSpaces can use content with the same characteristics:

- short clips: as statistics says that, on Internet, the average video should be, approximately, 30 seconds long;
- even available offline: not everybody is constantly connected;
- deepen contents: people interested in dancing an historical and traditional dance are interested even in more facts than the mere dance itself (particular clothes used, history of instruments, etc.).

2. Business Models: Software For Developing Choreography

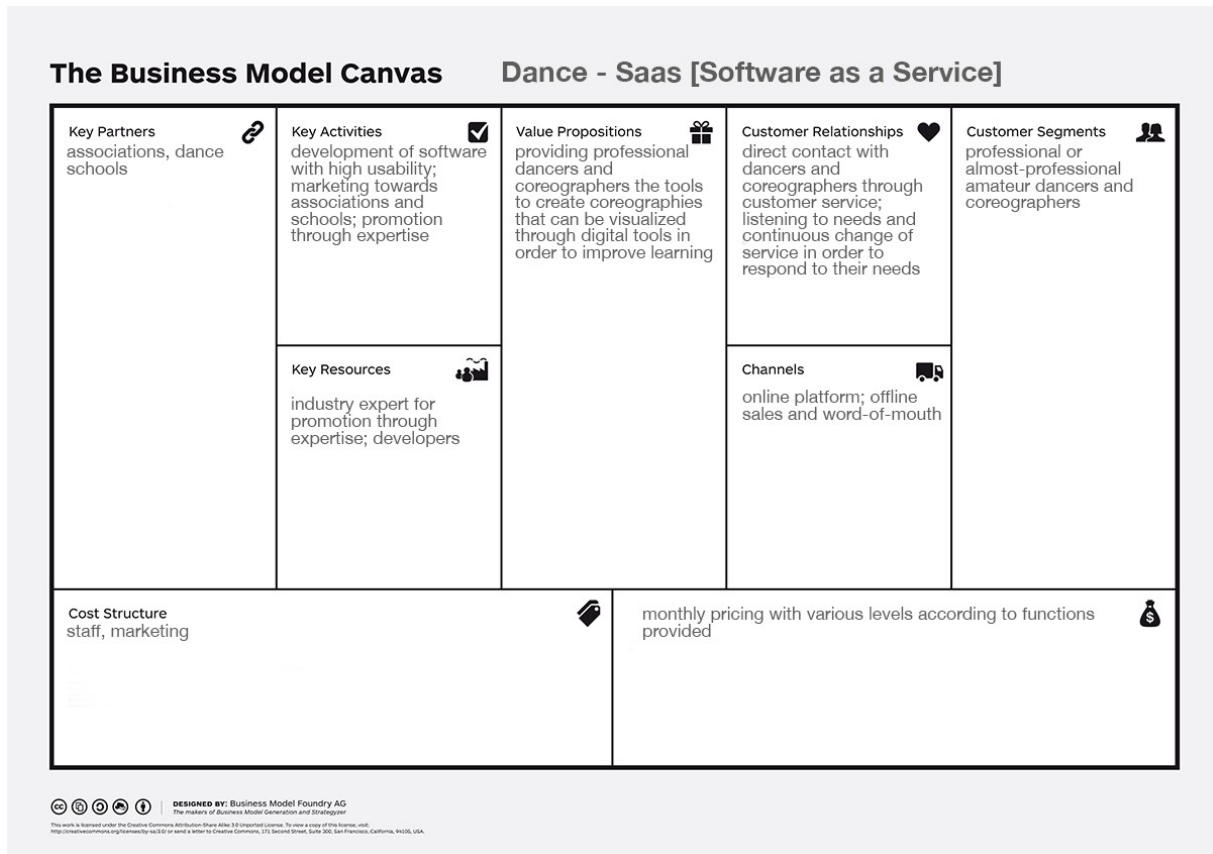


Fig.2: Business Model Canvas for the SaaS Model

Choreo Pro is a software, released as SaaS (software as a service), that allows choreographers to easily create their own choreographies, carry them everywhere, share them with dancers and other artists and highlight particular moments. In the past choreographers had to rely solely on performance videotapes rewinding them continuously to show special moments, take notes and train dancers. Its main features consist in visualizing, integrating and documenting the work in several dance discipline such as ballet, modern dance, hip-hop, contemporary and many more. It has several tools like dance counts, media editing, dancers information, motion, score and dancers information.

PRICING: basic \$240 per annum;/ pro \$360 per annum



Choreo Pro is similar to Europeana Space Pilot DancePro, mainly for his target customers: professionals in the dance industry. Every time a project is developed for professionals, more than projects developed for private consumers, it's incredibly important that the quality of the output (normally a so called MVP - Minimum Viable Product is not enough to meet professionals needs). On the other side professionals, normally, can bring more constant revenues.