

**OPERA IN IRELAND:  
AUDIENCE DEVELOPMENT PROJECT 2014**

**PROJECT REPORT  
FOR ARTS AUDIENCES  
& THE ARTS COUNCIL**

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## INTRODUCTION

This brief report provides a summary of the Arts Audiences Audience Development Project 2014, devised and delivered by consultants Annette Nugent and Heather Maitland on behalf of the Arts Council and Arts Audiences between March and December 2014.

## CONTEXT

The Arts Council has identified the production of opera as a priority and a small number of production awards have been made over the past two years. In addition, The Arts Council continues to directly fund two companies who have a track record in the production of opera. The Arts Council and Arts Audiences wanted to help organisations in receipt of opera production awards to meet and exceed the audience targets they have set for themselves and to embed audience development expertise in opera organisations. This capacity-building project took the form of training, support and guidance in the area of audience development, tailored to the needs of the participating organisations.

## PROJECT AIMS

- To build capacity within each organisation around audience development
- To assist them to meet/exceed audience targets specified in their funding applications
- To provide the organisations with a source of audience development expertise
- To embed this expertise within the sector
- To evaluate the ongoing success of these interventions.

## DELIVERABLES

The consultants worked on behalf of Arts Audiences and the Arts Council, between March and December 2014, to deliver the following:

- A status report providing an overview of audiences for opera in Ireland
- A marketing skills audit of each of the participating companies / individuals
- Training sessions to address skill gaps identified in the skills audit
- The creation/publication of a brief report “How to market an opera production in Ireland”.

Plus, for each company:

- Support to help them develop a marketing plan for their production
- Guidance in the implementation of marketing plans
- Post-production evaluation of the marketing plans.

## PROJECT ROLLOUT

The programme of activity was divided into the following elements:

- Opera audience research
- Group sessions / peer learning
- Individual consultancy/mentoring sessions
- Evaluation / Reporting

## OPERA AUDIENCE RESEARCH

Given the dearth of information available on current audiences for opera in Ireland, the first step was to compile a “status report on Irish opera audiences” which would support the participants in their development of their marketing/audience development plans. The report covers opera audience market size and scope; audience behaviours; and comparable international research on audience attitudes and marketing effectiveness. *(See Appendix 1)*

The full status report is attached, but key findings include:

- ♦ Target Group Index projects that 4% of adults 15+ said they had been to an opera in the past 12 months. That is a projected 133,000 attenders in 2013, down from 162,000 in 2012.
- ♦ They attend occasionally: 5% of adults said they attend less often than once a year (6% in 2012). There is potential to increase this. Only 18% of respondents to research by Welsh National Opera said they did not want to increase the number of operas they saw. In the US, two thirds of people who said they were interested in opera did not attend.
- ♦ A third of attenders in 2013 were from social grades C2DE, although almost half were C2DEs in 2011.
- ♦ Almost half are aged 55+, although opera attracts a greater proportion of 35 to 54 year olds than classical music.
- ♦ Audiences are mainly local, although Wexford Festival Opera attracts far more of its audience from outside the county.
- ♦ Most opera attenders are frequent arts attenders, with either classical music or drama as their main passion. There is a big crossover with musicals. More than three-quarters regularly listen to opera on CD or radio.
- ♦ Non-attenders are put off because they think opera is incomprehensible, expensive, too formal, long and boring.
- ♦ Attenders love it because it is dramatic, thrilling, passionate, romantic and the best of all the other artforms put together.

## GROUP SESSIONS / PEER LEARNING

The project featured four group learning days, on the following subjects:

Session 1: Presentation/discussion of the status report on Irish opera audiences and inspirational presentation by former Head of Marketing at Scottish Opera;

Session 2: A customised “marketing skills audit”, based on the UK National Occupational Standards for marketing contextualised for the cultural sector (*See Appendix 2*);

Session 3: A digital marketing day, including presentation by Derek Kelly of the Gate Theatre on their extensive use of SEO and Google Ads to drive ticket sales;

Session 4: A “creating an audience development plan” day, using the AMA Marketing Map.

Attendance at the group sessions and engagement by the participants was very high, with 100% attendance by four of the six participant organisations and 75% by a fifth participant. All participants rated the relevance of the group sessions particularly highly.

The group sessions served another function as a forum for participants to get to know each other and to share knowledge as peers. The importance of sectoral sharing cannot be underestimated, particularly in a “niche” artform such as opera. Participants were encouraged to share experiences and to seek feedback and advice on specific issues from group members throughout the project.

## INDIVIDUAL CONSULTANCY / MENTORING SESSIONS

All six participant organisations received at least a half-day consultancy session focusing on audience development issues of particular relevance to that organisation / production. Participants whose shows took place later in the year were able to avail of additional sessions.

Issues specific to the individual participants that were discussed and advised on in these sessions included copywriting, image usage, print distribution, direct marketing, attracting a young audience (under 30), prioritising activity on a tight budget, developing a touring marketing pack, and the challenges of co-presenting/promoting with venues.

## EVALUATION / REPORTING

The consultants developed a project evaluation “dashboard” for participants (*See Appendix 3*), which asked all to report on the following areas:

Audience assessment: attendance and revenue outcomes, achievement of non-financial audience development objectives, qualitative look at what worked /didn’t work

Resourcing: overview of the time and budget resources allocated to marketing

Programme assessment: participant rating of, and feedback on, project sessions

Sectoral assessment: participant views on what the sector needs to prioritise to develop audiences for opera

This allowed the participants to step back and review their marketing/audience development activity post-production, to note what worked and what did not, marketing-wise, and to get a sense of how their marketing investment and audience outcomes compare to that of their opera peers.

In this regard, the dashboard measured some key audience metrics for each participant. We have calculated participant averages here, against which participants can benchmark their individual situations. Where possible, we have also provided 2013 Theatre Forum benchmarking comparative figures as well, to give participants a sense of how opera compares to the wider performing arts sector in Ireland.

<b>Metric</b>	<b>Opera Audience Development Project participant average</b>	<b>Theatre Forum Audiences for the Performing Arts 2013 average</b>
% of attendance capacity achieved	57%	56%
% of attendance target achieved	89%	-
% of revenue capacity achieved	35%	53%
% of revenue target achieved	73%	-
Average ticket offer price	€35.19	€16.62
Average ticket yield	€22.01	€15.79
Marketing spend per seat on sale	€7.31	€2.25
Marketing minutes per seat on sale	14 minutes	4.2 minutes
Return on marketing investment	€1.54	€7.28

The dashboard also gave participants an opportunity to reflect on and articulate audience development issues that need to be addressed by the wider opera sector that may not be possible to address within the context of individual production presentations. These are addressed in the conclusions section below.

## KEY PROJECT ISSUES

The consultants recognised, articulated and built the programme of activity to work around a number of contextual difficulties, as follows:

Variance among participants: with entities in the Irish opera sector ranging from Wexford Festival Opera to new and production-specific entities such as Wide Open Opera, the consultants recognised the difficulty in pitching group events / training at a level to be helpful and appropriate to all participants. Bespoke individual support, as well as group training, was factored into the project to address this.

Time frame: the project began in March 2014 and three of the six participant productions took place before the end of June 2014. The short lead-in time between consultant appointment and shows significantly limited the possible impact of participation in the project, but it is hoped that future opera productions by the participants will benefit from skills learned. Was such a project to be run again, we would propose timing it to take place immediately after opera production grants were awarded, to ensure participants would have the maximum time possible to incorporate learnings into their marketing/audience development activity.

Resources: taking into account the extremely limited staff, time and financial resources available to many arts organisations for marketing, it was vital that both expectations and proposed solutions were appropriate and at a scale that each participant could realistically engage with. The individual consultancy sessions were particularly useful in this regard, as specific situations could be taken into account in the advice/direction given.

Dearth of opera data: prior to this project, there was a total lack of data about opera audiences in Ireland. As part of this project, the consultants gathered and analysed Irish opera box office data, creating an extremely useful body of knowledge about Irish audiences for opera that did not exist before.

Getting buy-in: For the project to be useful, it was key that production company staff and trustees were fully involved in setting objectives, interpreting information and identifying appropriate actions. The consultants fully acknowledge the skills and knowledge of the staff, board members and stakeholders that we interacted with on this project, and we thank them for their enthusiastic participation.

## CONCLUSION

Combining best industry practice with the audience insights gleaned from the “Status report on opera audiences in Ireland”, the consultants have created a Guide to Marketing Opera in Ireland (see *Appendix 4*). This document will be published by Arts Audiences and available as a resource to any organisation looking to present and promote opera in Ireland.

As well as show-specific marketing challenges, there was much discussion throughout this project about broader sectoral issues impacting on the development of audiences for opera in Ireland.

**Outlined here are four issues that the consultants and participants agree should be prioritised to further the cause of opera audience development in the coming years in Ireland.**

### 1. AUDIENCE INSIGHTS

Regular, up-to-date data / analysis on Irish opera audiences.

A dedicated annual research project on opera audiences in Ireland would be optimal to provide opera presenters with knowledge to assist their marketing / audience development planning. If this was not possible, other options include extracting opera-specific data from TGI; re-analysis of the Theatre Forum benchmarking organisations with a distinct opera category; and/or review of comparable international opera research. Without good quality audience information, opera presenters cannot hope to sustain and develop audiences for the artform.

### 2. MARKETING CAPACITY

Training programmes like this provide much needed marketing know-how to project-based organisations, which have little chance of developing their marketing efforts as they move from project to project with little or no staff infrastructure. The provision of a training programme like this one on an annual or biannual basis would be extremely helpful to those presenting opera in Ireland. For example, participants would have found the Arts Audiences Touring Marketing Training Programme really helpful, but most were not eligible to participate.

In addition, if opera is to continue to be funded on a project basis, provision needs to be made in both applicant plans and funding offers for appropriate investment in marketing. A workshop for opera project grant applicants on how to set appropriate audience targets and marketing budgets might be helpful in this regard, particularly if it was timed to take place four to six weeks in advance of the opera project grant deadline.

### 3. REPERTOIRE DEVELOPMENT

While the current Arts Council funding policy has undoubtedly encouraged innovation and creative thinking, not least in terms of repertoire choices, it has also meant that there is little opportunity for Irish audiences to experience “standard repertoire” operas, the entry point for most attendees. While there has historically been an audience for opera in Ireland, without providing audiences with a strategically planned, balanced opera offering, there is little chance of developing new audiences.

### 4. OPERA PRESENCE AND PROFILE

The opera sector in Ireland appears to be fragmented at the moment, with many participants on this project noting that they were meeting their peers for the first time through this project. There is a need to create opportunities for the opera sector to come together more often: to network, to discuss collaborations, to share insights and experiences, and to find common interests to take forward as a unified group.

One possible area of common interest that has arisen on this project is the need to advocate for greater opportunities for people to see and hear opera: to make the case for opera on TV, radio, in the park, on the school curriculum, and to find trusted and popular influencers beyond the arts world who would “normalise” engagement with opera.

## APPENDICES

Appendix I – Status Report on Opera Audiences in Ireland

Appendix II – Customised Marketing Skills Audit

Appendix III – Participant Reporting Dashboard

Appendix IV – Guide to Marketing Opera

Ends