

the PHILADELPHIA

audience development

An array of cultural attractions is part of the appeal of living in a major metropolitan area. City dwellers typically have their choice of several theater companies, as well as multiple museums and galleries. Until recently, however, most cities have been served by a single opera company. This is beginning to change: Across the country, the lone local opera provider increasingly has company. New opera companies are springing up on a regular basis, allowing the opera-hungry — or the opera-curious — new ways to encounter the art form, often sharply differentiated from those offered by the establishment company.

At *Opera Conference 2006* in Seattle, a group of producers met to discuss the phenomenon of “One City, Many Opera Companies.” The response to the changing opera landscape ranged from wary to welcoming, and anecdotal evidence could be found to support a variety of positions. Whether the newer entrants were viewed as competitors or collaborators, one thing was clear: their existence changes the dynamics of producing and marketing opera. If opera providers that share a city are to further their own missions, they may benefit from developing strategies for fostering a healthy, cooperative local opera ecology.

Because of the tremendous interest in the topic, OPERA America, with the



Boyer College student Miyuki Hashimoto as Fedra in the 2008 production of Cavalli's *L'Egisto*. Photo by Temple University Photography/Joseph Labolito.

Temple University Opera Theater offers fully-staged productions featuring the students of the Boyer College music programs. These students receive professional training within the context of a large, modern research university. Last year, performances included *L'Egisto* (Cavalli) and *L'Enfant et les sortilèges* (Ravel) / *Le Rossignol* (Stravinsky).

generous support of the William Penn Foundation, commissioned **TRG Arts** and **Shugoll Research** to provide the industry with a better understanding of the impact of having a relatively large number of opera companies in one community. Philadelphia — with seven opera providers — was selected for the study.

Of particular interest was the relationship among the audiences: Did they inter-relate or crossover among companies? Were they different demographically? How do they perceive opera in Philadelphia? The research also sought knowledge that could help each of the seven companies build and maintain audiences. Excerpts from the

LPHIA project: in a lively opera ecology

study — both TRG’s database analysis and Shugoll Research’s attitudinal research — are provided below. For detailed findings, log in to www.operaamerica.org to view the full report.

FROM THE EXECUTIVE SUMMARY BY TRG

The Philadelphia market supports a robust array of opera offerings from seven companies: Opera Company of Philadelphia, Center City Opera Theater, ConcertOPERA Philadelphia, Opera North, Academy of Vocal Arts Opera Theatre, Curtis Institute’s Curtis Opera Theatre and Temple University.

Dual-pronged research was designed and implemented in April and May 2008 to measure and illuminate understanding of this model multiple-company opera community. To examine patron behavior, TRG conducted a proprietary database study of four years of transactions (subscription and single ticket purchases, as well as donations) among 36,000 patrons of the five Philadelphia opera companies that could provide study data. TRG’s project partner, Shugoll Research, studied perceptions and attitudes through a mail survey of a selected sample of those 36,000 patrons.

Expectations and Surprises

At the outset of this work, there was an expectation that Philadelphia’s opera patrons would demonstrate crossover

behavior among several of the companies performing in their community. The research findings proved otherwise. Some 94% of the operagoers studied are



Curtis Opera Theatre’s 2007-2008 production of Mozart’s *Le nozze di Figaro*. Photo by David Swanson.

The **Curtis Opera Theatre** is the performing entity of the Curtis Vocal Studies Department. Each season the Curtis Opera Theatre presents at least four fully-staged performances and concert productions in the Prince Music Theater, Perelman Theater at the Kimmel Center for the Performing Arts and the Curtis Opera Studio. The 2008-2009 season includes *Don Giovanni* (Mozart), *Impressions of Pelléas* (Debussy/Brook), *The Medium* (Menotti) and *Il viaggio a Reims* (Rossini). Curtis students will also be featured in a production of Berg’s *Wozzeck*, presented by Kimmel Center Presents in association with Opera Company of Philadelphia.



The Opera Company of Philadelphia's East Coast premiere production of DiChiera's *Cyrano*. Photo by Kelly & Massa Photography.

Opera Company of Philadelphia (OCP) bills itself as the city's "only producer of grand opera." The company, which was established in 1975 through a merger of the Philadelphia Grand Opera Company and the Philadelphia Lyric Opera Company, performs in the historic Academy of Music. The company's 2008-2009 mainstage season opens with a new production of *Fidelio*, designed by acclaimed sculptor Jun Kaneko, and continues with productions of *The Italian Girl in Algiers*, *Turandot* and *L'Enfant et les sortilèges/Gianni Schicchi*. In the intimate Perelman Theater — with only 650 seats — the company will present Britten's *The Rape of Lucretia*. OCP patrons will also be offered the opportunity to purchase tickets to Berg's *Wozzeck*, presented by Kimmel Center Presents in association with the Curtis Institute of Music.

ticket buyers for only one of the seven companies. Just 6% were crossover ticket buyers for two or more companies (also called multi-buyers). Nine out of 10 multi-buyers attended Opera Company of Philadelphia, the city's largest company that stages the most performances.

The attitudinal research, detailed below, yielded another surprising finding: Philadelphia operagoers do not appear to be aware of the rich opera landscape in their city.

The research team observed that the level of crossover and levels of awareness and familiarity combine to create an audience-building opportunity for Philadelphia's opera companies. Operagoers need

to know about and understand the performing options available to them before making any purchase decisions. Clearly, each of the companies will benefit from sharpening their communications messages, as well as increasing the reach and frequency of well-targeted ticket offers.

The Power of Community

Further analysis revealed that even the relatively low level of crossover activity creates audience development opportunities for all seven companies.

Transactional data showed that Opera Company of Philadelphia (OCP) is generating 85% of all new ticket buyers for the city's other opera companies. (This is

unsurprising, given that OCP produces and markets opera on a greater scale than any other company studied.) Patrons who first attend OCP and then cross over to make a purchase with one of the other companies represent a significant portion of the other companies' new patrons. Crossover patronage overall accounts for 29% of new patrons at the Academy of Vocal Arts, 23% at Center City Opera and 24% at the Curtis Institute.

OCP benefits from communal patron behavior in Philadelphia, as well. The benefit was found in further examination of the way patrons are retained as they move toward greater investment within the organization and the community. While the patron migration study found that OCP brings in the largest number of new patrons, it also revealed that OCP has the highest rate of patron attrition. (In this study, attrition is defined as patrons who were active anytime during the study period and were no longer active by the end of the study period.) OCP's attrition rate is 74%; its colleague companies' is 53%. Sadly, as TRG studies and other industry research has documented in recent years, losing three out of every four new patrons is normal in American performing arts organizations.

The silver lining in this situation appeared in data analysis of patron retention. TRG compared the behavior of patrons with transactions in only one company (unique buyers) to behavior of patrons with multi-organization transactions. Patrons who attended more than one opera company had a retention rate of 85%, while those with transactions at only one company had a retention rate of 50%.

This, TRG concludes, is good news — especially for Opera Company of Philadelphia. The company accounts for 90% of crossover with the other opera companies. OCP also has a program that communicates schedules for other operas in the metro area. The data suggests that OCP's practice of encouraging crossover ultimately can help OCP retain patrons

Buyer Frequency	All Organizations	Active in 2007	Inactive in 2007	Attrition Rate	Retention Rate
Unique Buyers	36,325	18,093	18,232	50%	50%
Multiple Organization Buyers	2,380	2,015	365	15%	85%

over time as it creates patronage for the other companies.

Opportunities, Assets and Further Inquiry

The cross-pollination of audiences within a community has benefits for organizations in Philadelphia as this study and other TRG work in the field has corroborated. Increasing crossover will create new buyers for some companies and stronger patronage through retention at other companies. Joint discussion of these findings already has generated productive dialog among Philadelphia’s opera companies. They are looking for more ways to collaborate effectively and with cost-efficiency. This study also contributes to the industry’s growing evidence surrounding the significance of patron retention to audience development and growth. Stronger, longer retention patterns for multi-buyers reported here should encourage each of the companies to work for repeat and crossover attendance. As noted above, OCP is able to market on far greater scale than any of the other local providers, so it is the best-positioned to develop audiences for opera in general. Given the demonstrated link between crossover attendance and retention, OCP has a vested interest in encouraging its patrons to attend opera at other local companies. (Currently, only 10% of OCP audiences exhibit crossover behavior.)

The smaller opera companies make very specific contributions to Philadelphia’s opera ecology. Their marketing efforts are more targeted. They do not present as many barriers — or perceived barriers — to attendance (e.g., formality, inconvenience, expense). The data show that patrons of smaller companies are much more likely than OCP patrons to

attend opera at multiple companies; they also exhibit greater loyalty.

These findings further suggest that Philadelphia’s major pipeline for new opera patrons, the Opera Company of Philadelphia, is over-acquiring new patrons and under-retaining them. The company immediately recognized both its immediate requirements for reducing patron attrition and the value of its leadership in promoting the whole opera community. OCP already is initiating strategic thinking that can have benefits

community-wide, as well as to its own audience development efforts.

Philadelphia’s opera companies have an additional asset for patron prospecting and retention. They share participation in the Philadelphia Cultural List Cooperative provided by the Greater Philadelphia Cultural Alliance. The Cooperative is an approval-based online resource for exchanging lists and patron information. It offers each of the participating companies access to prospective patrons already doing business in Philadelphia’s broad and



Nina Yoshida Nelsen and Angela Meade as the sisters Dorabella and Fiordiligi in the Academy of Vocal Arts production of Mozart’s *Cosi fan tutte*. Photo by Paul Sirochman.

Like the Curtis Institute of Music, **The Academy of Vocal Arts** (founded 1934), offers tuition-free training to exceptionally talented and committed young singers who have the potential for international careers. Students are presented in professional performances to a wide community. The 2008-2009 season includes Donizetti’s *Anna Bolena*, *Don Pasquale* and *Lucia di Lammermoor*, as well as Respighi’s *La fiamma*.

diverse cultural and arts community. The study team notes that the Cooperative will continue to be an invaluable tool in audience development efforts for Philadelphia's opera organizations. The overarching need to convey each company's unique position in Philadelphia's rich arts and cultural landscape is clear. Individual company perception issues were not explored in this study. However, the overall findings suggest that communication of each company's brand and unique patronage propositions is critical. Specific refinements for each company would be better informed by further brand analysis and patron perception research. Meanwhile, this study's attitudinal research findings provide sound overall parameters that can be considered for immediate application.

ATTITUDINAL RESEARCH BY SHUGOLL RESEARCH

In addition to understanding whether opera lovers realize the depth of programming in the Philadelphia area, the project team used the opportunity to collect information that would help each company build audience and increase donors. The goals of the attitudinal research are to:

- Determine attitudes about opera in Philadelphia
- Assess awareness of and attendance at opera companies
- Determine obstacles to attending opera in Philadelphia
- Assess factors affecting interest in attending and supporting opera
- Assess method for learning about opera in Philadelphia
- Determine a profile of Philadelphia opera lovers

Methodology

TRG pulled a sample from the databases of five Philadelphia opera companies that agreed to participate in the research: Center City Opera Theater, Curtis Opera Theatre, Opera Company of Philadelphia, Temple University Opera Theater and The Academy of Vocal Arts Opera Theater. Lists included representation of subscribers, donors, individual ticket purchasers and prospects.

The lists were populated to include as many contacts as possible from the smaller companies so as not to skew the response rate toward the larger companies. The distribution of names provided to the sample was fairly similar across organizations. Mail surveys were used to reach as many contacts as possible from the various company databases. The questionnaire was developed by Shugoll Research, and the comments of TRG, OPERA America and the

local Philadelphia companies were incorporated.

A total of 5,393 surveys were mailed and were distributed across the various subgroups for each company. A total of 702 surveys were collected, yielding a response rate of 13%. The margin of error for a sample size of 702 is +/- 3.8 percentage points at a 95% significance level.

Conclusions and Recommendations

Implications and recommendations are based on study findings and the interpretation of those findings by the analyst.

Opera lovers in the Philadelphia area are not fully aware of the diversity of opera offerings available. Most do not realize there are more companies in the area than similar metro areas, and they have only average satisfaction levels with the opera



Sharon Rhinesmith, Ross Druker, Sungji Kim, Ernest Jackson and Matthew Brouillet perform in ConcertOPERA Philadelphia's 2007 production of Daniel Francois-Esprit Auber's *Fra Diavolo*, conducted by Dan Rothermel. Photo by Christopher Lupone.

Since 1995, **ConcertOPERA Philadelphia** has provided a venue for rising professional singers to gain experience. The concert format "allows one to intimately experience the beauty and intricacies of the music and follow the story line in a simpler setting." In spring 2008, the company presented Auber's *Fra Diavolo* at St. Monica's Parish Auditorium (Berwyn, PA) and Philadelphia's Ethical Society Building. Upcoming concerts include *Lakmé* (2009) and *The Bohemian Girl* (2010).

Center City Opera Theater was founded in 1999 with three objectives: to produce well-known, new and less-familiar opera and musical theater in an intimate setting; to provide opportunities for emerging opera and theater professionals who are becoming known for their excellence; and to be an active arts educator in the Philadelphia metropolitan area. The company, which has already presented two regional premieres (Adamo's *Little Women* and Floyd's *Of Mice and Men*) and commissioned a new chamber orchestration of Liebermann's *The Picture of Dorian Gray*, has commissioned a new opera from composer Peter Westergaard and librettist Renee Weiss: *The Always Present Present*. In spring 2009 they will present Puccini's *Madama Butterfly*.

offered in the area. Perhaps as a result, two moderately important reasons respondents give for not attending more opera are that they say they cannot find enough operas they want to see and they perceive that only a small number of operas are offered each year. These findings suggest the benefit of potential collaboration of companies to promote the richness of opera in the market. While the smallest companies would clearly benefit from this increased exposure, building opera awareness will also increase the audience for the larger companies.

New York opera companies draw away a portion of the audience that could be patronizing local companies. This leaves Philadelphia operagoers with less money remaining to spend on hometown companies. This is another justification for a collaborative effort to credential Philadelphia-area opera and increase opera attendance locally.

Name recall (unaided awareness) of smaller companies in the market is very low, and familiarity with what those companies produce is even lower. This hugely diminishes the potential market for these companies. These companies must increase their awareness among consumers. Since marketing budgets at small companies are usually limited, lower-cost tools such as e-mail blasts and public relations efforts to plant stories in the local media should be employed. E-mail to a company's current database can help make these people more familiar with what a company does. To increase its awareness

and broaden its market, a smaller company might trade e-mail lists with other smaller companies so its message reaches new people.

Smaller companies with more moderate ticket prices should promote the fact that they provide opera that is accessible to all. The leading reason people say they don't attend more opera is the high cost of tickets. Offering discounted tickets is likely to motivate someone to try a new opera company. Given the market's lack of familiarity with smaller companies, it is likely consumers are unaware of the current accessibility of prices.

There is a potential audience for companies that perform lesser-known titles in the classic tradition (as opposed to contemporary opera) and those that cast young, emerging professionals in leading roles. Audiences have moderate interest in trying a new company that offers this programming, and these attributes should be clearly communicated. Other attributes that some find appealing are promotion of

opera education in the community, availability to racially diverse audiences and performances in intimate settings. Positionings that do not resonate are providing performance opportunities for African-American artists, staging lesser-known contemporary operas, casting college and graduate students in lead roles and presenting operas in English. Companies committed to these types of work must communicate to the public why they are important and deserve support.

Audience members may be motivated to try a company that performs in convenient venues. Companies, especially smaller ones, should concentrate on marketing to those who live and work within a 10-mile radius of their venue. This finding also justifies bringing work (whether staged performances, concert versions or artist appearances) into the community (at theaters, schools, churches and synagogues, recreation centers, etc.). Factors of moderate potential to inducing trial of a company are free parking and communicating how a company is different from others.

The most important driver of subscribing is past experience with a company. This underscores the importance of inducing trial, even if done through discounting. Other factors important in choosing to subscribe that must be clearly communicated to potential buyers are exchange privileges, best seats, same seats for each performance, discounts and that subscribing ensures that you will see some opera each year.

Opera North, Pennsylvania's only African-American opera company, was founded by Sister Mary Elise of the Sisters of the Blessed Sacrament to create performance opportunities for gifted African-American vocal artists, musicians and conductors. For the past 30 years, the company has continued to fulfill this vision by presenting opera productions, recitals, concerts and Black History programs that feature celebrated and rising African-American artists, as well as providing an array of education and outreach programs — the company's Opera in the Schools reaches 3,200 children each year. The company's 2008 season featured concert performances of three operas by prominent African-American composers: *A Bayou Legend* (William Grant Still), *Blake* (H. Leslie Adams) and *Egypt's Nights* (Leslie Savoy Burrs).

Strategies with the most potential to motivate donations are showing potential donors that a company needs all levels of donations and appreciates even small gifts, and communicating that donations allow a company to do the highest quality of work. While Philadelphia's opera companies can use these findings in creating development messages, they must realize that the most persuasive messages often vary from company to company.

Direct mail and e-mail, in addition to The Philadelphia Inquirer, are the ways operagoers most often get programming information. Companies should utilize these media if their resources permit.

Looking Forward

As with all research efforts led by OPERA America on behalf of its members, the final report is really the first step. This summer, the Philadelphia opera community began a concerted effort to work together and develop initiatives that responded to the findings in the report. "The research has given us a quantifiable reason for OCP to work with others in our community for cross-promotion," says David Devan, managing director of Opera Company of Philadelphia. "The smaller companies are very good at retention. Their numbers may be smaller, but they are committed. On the other hand, their attraction efforts are not as effective, because they can't market on the same scale that we can. If we work together, we hope we can maximize our strengths. I think being in a multi-opera community provides more opportunities than barriers.

"The study indicates far less crossover than any of us expected," continues Devan. "Clearly just putting the information out there — listings on our Web site — isn't doing it. That's too passive. We have to be targeted and direct to change behavior. We want to work on targeting a set of customers who have been in our system for three years but who have not attended opera elsewhere. What happens if we offer them a discount to see *Lucia* at AVA? The research shows that the more opera people see, the more opera they will see." ©

Special thanks to TRG Arts and Shugoll Research, as well as all the companies that participated in this project. Have a question you'd like to investigate? OPERA America is pleased to partner with its member companies on regional research projects that may illuminate a particular issue for the field. For more information, contact MScorca@operaamerica.org.

The future of opera is at **Curtis** today.

Golijov's *Ainadamar*, 2007-08 season

THE CURTIS INSTITUTE OF MUSIC

Bachelor of Music
Master of Music in Opera
Professional Studies Certificate in Opera

Unparalleled performance opportunities
Top-tier faculty of leading musical artists
Master classes with artists of international stature
Merit-based full-tuition scholarships for all students

Mikael Eliassen, Artistic Director of Vocal Studies and the Curtis Opera Theatre

See the Curtis Opera Theatre season at www.curtis.edu