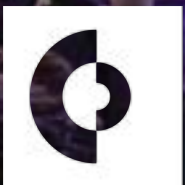




**“IT'S PASSIONATE ...
IT'S POSH, BUT THEY
HAVE GOT SOME
BANGERS.”**

WHAT THE UK PUBLIC REALLY
THINKS ABOUT OPERA, AND WHY



LIDLAW
OPERA
TRUST



PUBLICFIRST

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Authors: Seb Wride, Mike Crowhurst, Jules Walkden, Ed Dorrell, Denise Baron

FOREWORD

For more than three centuries, opera has delighted, inspired and challenged UK audiences.

In recent years, heated discussions have taken place over the health and future direction of the art form, set against a backdrop of funding cuts, rapidly changing consumer habits and so-called “culture war” controversies. Questions about which operas should be performed, at what scale, where, by whom, and for which audiences have been fiercely debated.

Regardless of where one stands on these issues, we ought all to agree that it is vital to keep the thoughts and feelings of both the current and potential audience at the forefront of our minds. Opera’s success will always be predicated on its appeal. Increasing the number of people who experience and engage with opera is the surest way to ensure a bright future.

This is why I am fascinated by this new report, which provides detailed insights into what the UK public really thinks about opera and why.

The report confirms some of what we might already have known; for instance that, today, live opera tends to attract a relatively specific segment of the population. While it’s important to note that the same could be said for almost any cultural activity, specific associations with exclusivity and high cost do raise a barrier-to-entry.

Crucially, the report also busts a number of hardy myths. It finds that, in fact, attending an opera is a goal for many people, that opera definitely can captivate the young and that some of opera’s traditions and conventions can actually help to motivate new audiences, rather than deter them.

I hope and expect that the report will inspire new ideas and inject fresh energy into already lively discussions about opera’s future.

My thanks to the Laidlaw Opera Trust for commissioning such a timely and valuable contribution.

Richard Davidson-Houston
Managing Director
Glyndebourne



EXECUTIVE SUMMARY

This report summarises the results of a landscape piece of research into opera in the UK. Public First ran a representative poll of 4,012 adults in the UK, and 4 focus groups, with a focus on understanding the barriers to live opera performance attendance and how the sector can counteract them. The report shows:

- **Opera has many positive perceptions, particularly in that it is considered a truly unique experience.** 71% of the public say that opera is a unique art form, citing the sound of the vocalists and the combination of drama, music and visual art as the main reasons for this. The public was more likely to say that it was impressive rather than underwhelming, and that it was timeless rather than outdated.
- **But Opera suffers from limited awareness and personal connections.** 42% of the population has never met an opera fan, meaning they have no personal connection to the art form, something which our groups showed to be particularly important for attendance as many would prefer to go with some friends rather than alone.
- **The representative population used in this research demonstrates a gap between interest and attendance.** Many people expressed an interest in attending an opera despite never having attended before. 56% of the public said they would consider attending an opera in the future, but only 30% report ever having attended a live performance. 43% of those who have never attended an opera before, express an interest in doing so at some point.
- **And people respond well when they see opera.** The vast majority in our sample who have attended an opera described the experience as positive overall (76%). Our research allowed us to show participants clips of opera performances and see how they responded. We found that this tended to make perceptions more positive. In our survey, the clips of more traditional opera performances were particularly well received, although in our groups the non-traditional ones had the bonus of surprising and intriguing participants more.
- **There are some key barriers to attendance, mainly around the perceptions of cost, the length and the feelings that opera is for other people.** Cost was frequently the main barrier to attending opera performances, and our research demonstrates that while a majority expect an average London opera ticket to cost over £75 (54%), only 10% of the public would be willing to pay that much. Our groups demonstrated how the concern about cost had less to do with it

being completely unaffordable, and more to do with the worries about taking a risk with that much money when they were unsure if they would enjoy it.

- **And while opera compares favourably to some of the more comparable art forms (like Ballet and Greek Plays), the public would prefer to see a movie or a musical.** Our research does identify some interesting trends, such as women preferring to attend an opera (47%) to a football match (38%), and men preferring to attend an opera (56%) than a ballet (16%). When compared in detail to musicals, we find that opera has the advantages of being seen as extravagant, but suffers from being seen as too long. For those who would prefer to see an opera instead of a musical, it is largely because it would be a more memorable experience.
- **Using a novel segmentation, we identify the core parts of the future opera audience.** This analysis demonstrates how different groups of interested people could be unlocked through artistic decisions. At the core of the analysis are: a group who would be most appealed to by traditional performances (who have often attended in the past and could be encouraged back), and a group who are more interested in novel and experimental takes in the genre, who could be persuaded to attend for the first time through this approach. The segmentation demonstrates the tension in both sustaining and growing the opera audience.
- **Based on these findings, the report identifies 5 key challenges facing the sector:**
 - The substantial number of people who have no touch-point with opera performances at all.
 - The perception that opera is expensive.
 - The different and sometimes actively conflicting views of potential audiences.
 - Opera attendance is surrounded by stereotypes.
 - The pros and cons of being a “once in a lifetime experience”.
- **The report then identifies 5 opportunities for the sector which can guide its response:**
 - Focus on growing the pool of people who are aware of opera performances.
 - Look beyond cost as a barrier to attendance.
 - Lean into the unique experience of opera.
 - Deliver a balance of different types of performances, and tailor marketing appropriately.
 - Move beyond opera as a “one-off” experience.

A NOTE FROM THE LAIDLAW OPERA TRUST

The Laidlaw Opera Trust commissioned this work because we believe that opera is a uniquely thrilling art form which should be accessible to all. The thrill of live opera, with its ability to capture the most intense emotions and help us understand each other and life's biggest themes: love, loss, joy and hope, should be part of everyone's cultural capital.

However, there is a concern in the sector that the general public does not think that it is for them; that it is in fact, elitist, inaccessible and even irrelevant. With mature audiences and reduced state funding, this has led to opera companies fearing for their futures. With their audiences, literally and figuratively dying, how will this uniquely thrilling art form survive? We commissioned this research in part to provide some of the answers to these fears. More fundamentally though, we wanted to give the sector the knowledge it needs to attract and welcome everyone to experience the joy of opera.

We wanted to better understand the truth behind the concerns, and discern myth from reality about who attends opera – why and why not. How important really is perception of ticket price, and how does this perception stand up to reality? What level of interest is there in going to an opera performance for the first time, and what do those considering this value in a night out? Where are the touch points that can be used to encourage first-time attendance? What do non-opera-goers think of when they think of opera? Which types of works and performances appeal to which categories of audience?

We hope that the results of this research enhances understanding to inspire new thinking and ideas in building opera audiences. How do we create a new, diverse, wide and enthusiastic generation of opera fans?

Audience comes first; the rest follows. Funding bodies need to justify spend on all forms of music, wider audiences are more attractive to corporate sponsors, higher profile brings more potential revenue streams.

After all; what is opera without an audience?



INTRODUCTION

We set out to understand the perceptions of opera among the UK public. By this we mean the whole public, not just those who have attended an opera in the past, who have expressed interest in opera or who have strong views on the art form. We believe that the research reported here represents among the largest, most detailed and most general studies of this subject undertaken in the UK.

By conducting the research in this way, we have spoken to many people who have no interest in opera whatsoever. However, as the research will show, interest in attending opera is more nuanced. Throughout this research, we show how even those who look like write-offs for the sector may have an interest in attending, for the right opera, at the right price. Equally, some of those who express high interest in the art-form, and have attended themselves in the past, may be the first to show disinterest in new directions for the sector. Having access to such wide data means we can untangle these ambiguities.

Our research has a number of objectives, and provides a wide-ranging resource for those in the sector on the attitudes and perceptions of the art-form in the UK. We cover everything from how people respond to video clips of real life operas, to how they would respond to hypothetical new opera directions, to some of the key landscape aspects of who is attending opera at the moment and what will keep them coming back.

Overall though, this piece is intended to help the sector understand better how it is perceived, while helping opera companies understand how to grow their audiences going forward. We had a particular interest in opera attendance, over and above engaging with the art form at home. Many of our forward-facing questions directly look to provide insight into live opera audiences. There is a myth-busting aspect to this work too; the results of our research did throw up some surprising, and counterintuitive, findings.

METHODOLOGY

This report summarises the results of two strands of research undertaken by Public First. Public First conducted a nationally representative survey of 4,012 adults. The survey was conducted online, from the 26th-31st January 2024.

Public First also held four online focus groups between 20th and 22nd May 2024 exploring attitudes to opera amongst key demographic groups identified by our polling. All groups were recruited to contain a mixture of gender, socio-economic background and ethnicity, with all participants confirming that they were open to attending an opera performance in future and that they had some adjacent interests - e.g. theatre.

The groups were then divided into the following demographics and locations:

- **Group 1:** Under 30s who have never been to the opera (London)
- **Group 2:** Over 30s who have never been to the opera (Manchester)
- **Group 3:** Mixed age group who have been to the opera at least once (Cardiff)
- **Group 4:** Mixed age group who go to the opera occasionally (London)

SOCIO-ECONOMIC GRADE (SEG)

Socio-economic grade (SEG) is a commonly used metric in social research, which loosely measures “class”. It is based on a person’s career (specifically, the main earner in a household), and gives them a category depending on a combination of seniority, and type of job. Broadly the categories are as follows:

ABC1 - Typically office workers, non-manual roles

A - Higher managerial roles

B - Intermediate managerial roles

C1 - Junior and analyst roles, including University students

C2DE - Typically manual workers

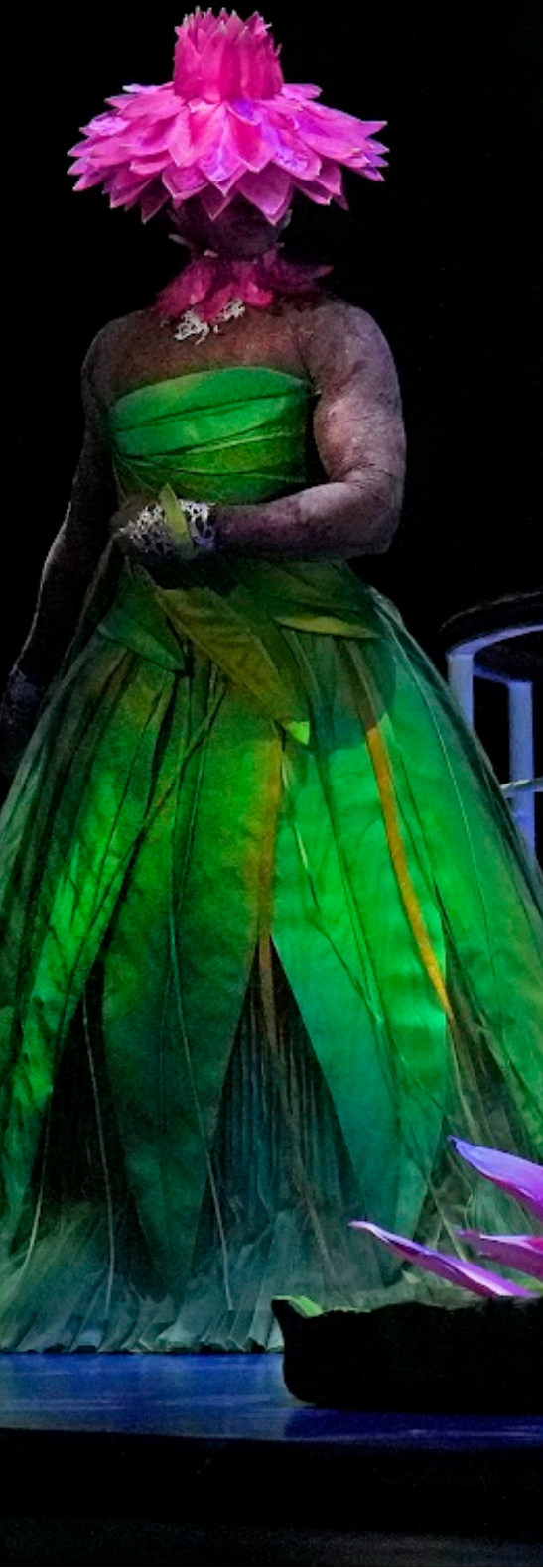
C2 - Skilled manual jobs

D - Unskilled manual jobs

E - Combination of those on welfare, state pensioners, and those out of work

It is not a perfect measure of what we mean by “class”. It correlates with income and with education, but not precisely. However, it is a useful shorthand measure, and will be referenced throughout this report.

SECTION 1



WHAT DOES THE UK PUBLIC THINK ABOUT OPERA?

Our research enabled us to explore in detail the attitudes towards opera as an art-form among the whole population, including those who have never attended themselves, and even those who don't know a single person who has.

71%

Say that opera is a unique art form

38%

Say that to "have the experience" is a reason they would attend

19%

Say that opera is an important part of British tradition

42%

Believe the industry should receive Government support

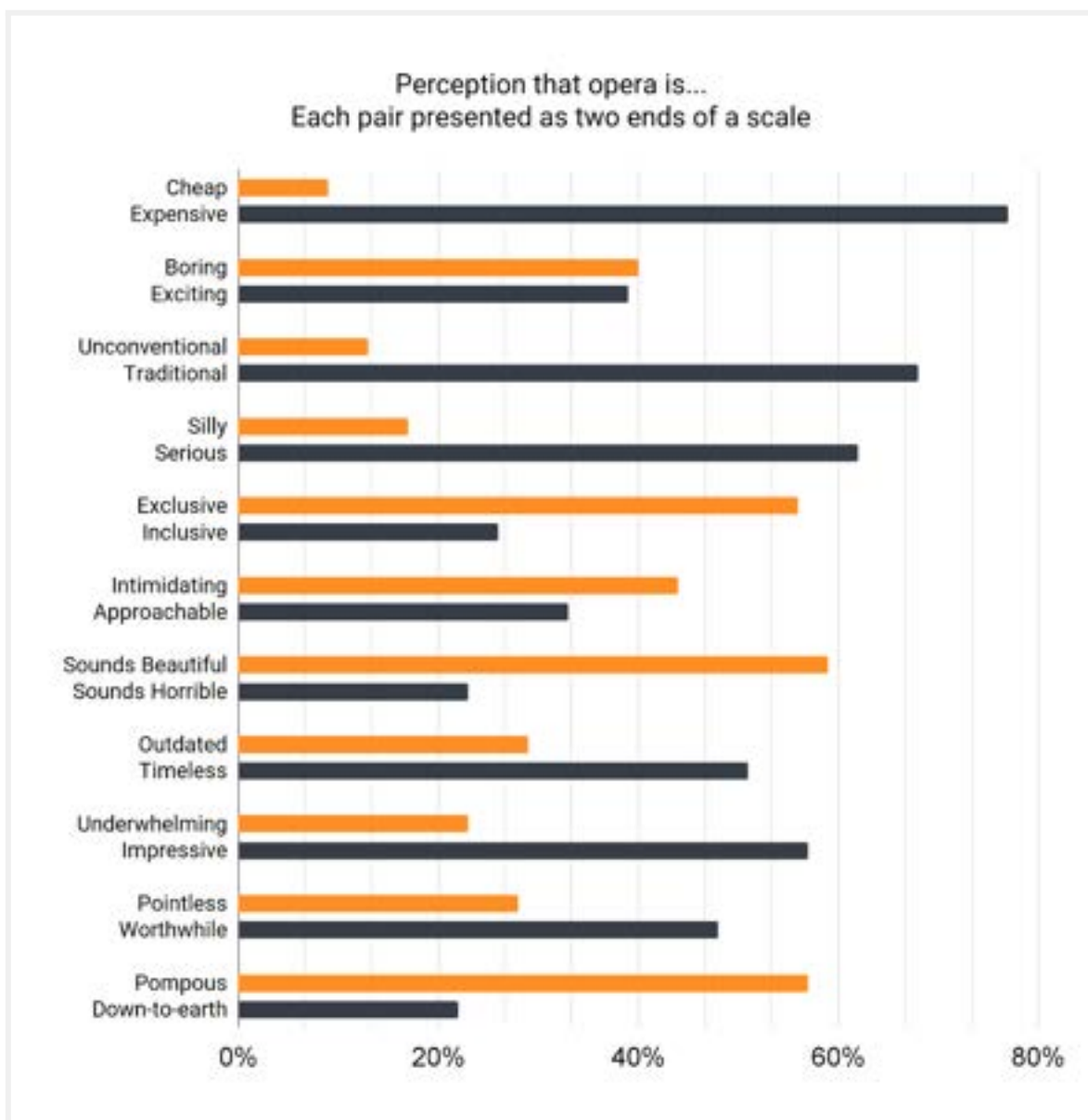
68%

Enjoyed a clip of *Nessun Dorma* when shown it

IMPRESSIVE AND TIMELESS, BUT EXCLUSIVE AND POMPOUS

There are clear strengths and weaknesses in the perception of opera as an art form; it is seen as hard to access (both financially and because it feels exclusionary) but it is regarded as genuinely impressive and unique.

We asked participants to classify opera as an art-form on a number of scales, each between a roughly mutually exclusive set of descriptors such as (“cheap” vs “expensive”). This exercise showed that opera is consistently thought of as expensive, exclusive and pompous. However, it is also thought of as serious, impressive and timeless. Further a majority lean towards saying it sounds beautiful rather than that it sounds horrible. The public is split on whether it is boring or exciting, and whether it is intimidating or approachable.



Participants in our groups had similar perceptions:

“ To me, opera is very serious. It's grown up. It's dark, it's high end. ”

FEMALE, 38, LONDON
Fraud Investigator

“ It reminds me of Italy ... and the reason I say that is just I think of certain opera songs and certain performances. One that comes to mind always is when Leicester City won the league and they brought Andrea, Andrea Bocelli, I think his name is...and stood on the pitch and their manager was crying as he was singing because well, I'm guessing it was so beautiful. But the moment was so big...when I hear it and when I listen to it, it does sound very beautiful. ”

MALE, 30, LONDON
IT Support Worker

A UNIQUE EXPERIENCE



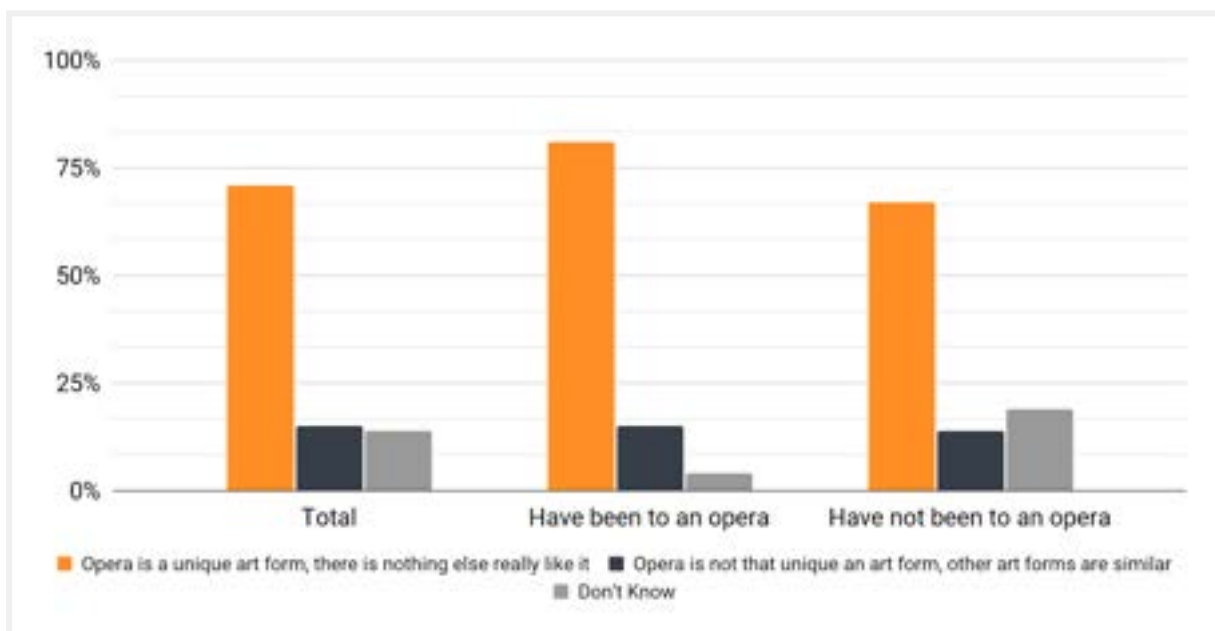
It's melancholy, drama, tragedy .. a really unique kind of music.



MALE, 42, MANCHESTER

Bar Staff

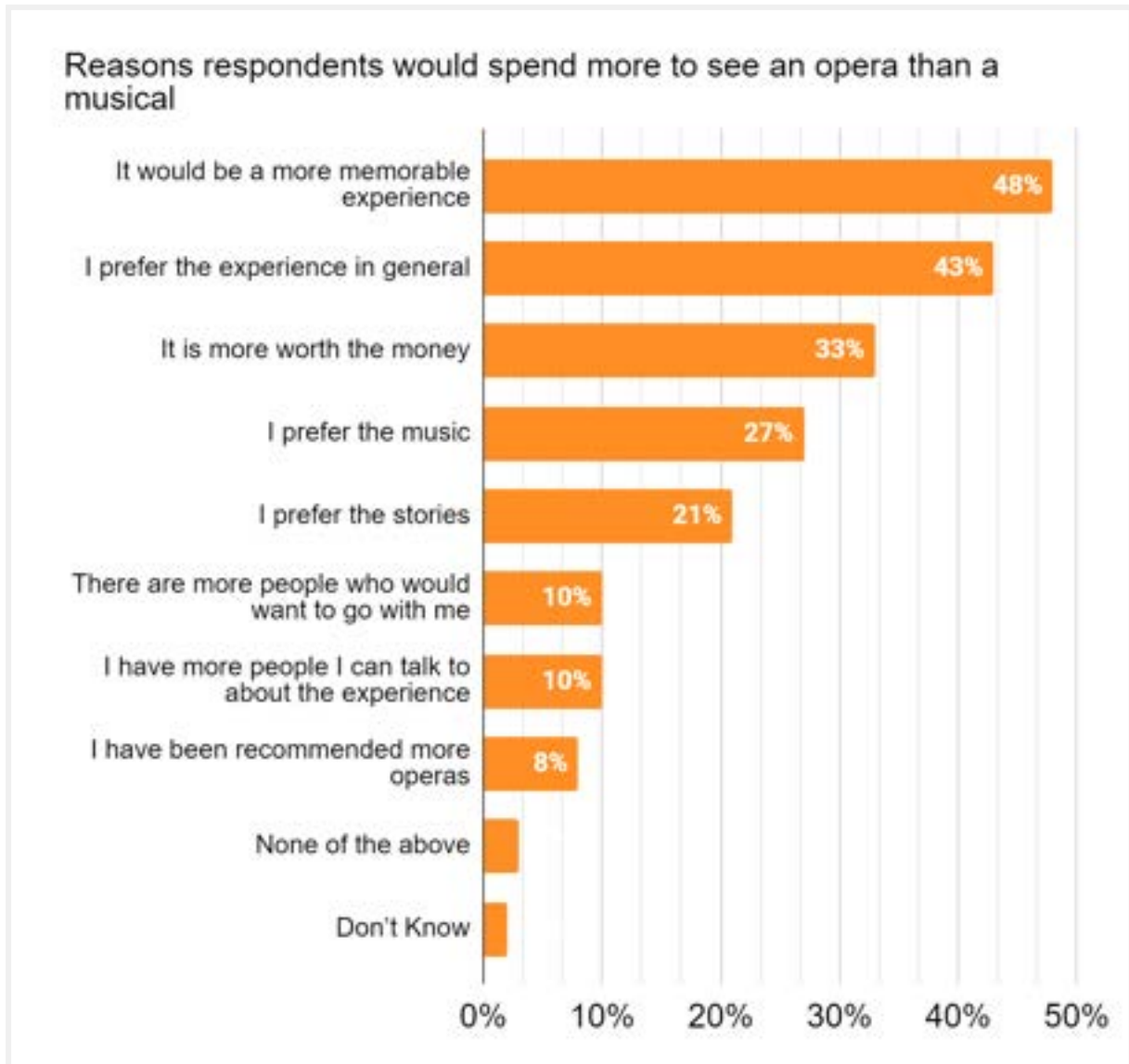
One factor that stood out in the responses to our poll was the perception of opera as unique. Overall, 71% of the public felt that opera was a unique form, rather than similar to other art forms. This rises to 81% of those who have themselves been to an opera, with 67% of those who have never been to an opera also agreeing with this.



When asked what makes an opera unique, respondents were most likely to say that it was the sound of the vocalists. 55% said that this was something which makes opera unique, ahead of “the combination of drama, music and visual art” (44%) and the sound of the orchestra (39%).

This uniqueness comes through in the reasons that people seek to go to an opera. A minority of respondents in the survey indicated that they would spend more to see an opera than a musical, and the main reason that they gave this answer was that it would be a “more memorable experience” (48%). When the whole sample was asked what reasons they might consider going to the opera in the future, the most commonly cited

reason was “to have the experience” (38%). This was also the main reason for those who had not been to an opera before (33%), just above “to see what it is like” (30%).



In our qualitative work, the participants often talked in these terms about their motivations for attending.

“ I like the idea of the experience of it .. the sense that everyone will be really dressed up. But I quite like that. So just like getting all you know dressed up and just making a real night out of it. Like a proper event. ”

FEMALE, 29, LONDON
Project Manager

“ I think it's, you know, it's the experience of it. It's to say that you've done it. It's I think you just can't have enough experiences in life and if it's something that another box ticked, it's kind of if you know you never know whether you're going to like something until you try it. So I think if you're drawn in by it with the music that would be enough to make you want to go. ”

FEMALE, 41, MANCHESTER

Carer

These groups did indicate a potential double-edged sword to the opera's uniqueness as an experience. For some, attending could be an almost tick-box exercise. Equally the intensity of the experience could leave people feeling that it was a big deal to attend; that it required a lot of planning. There is a risk this uniqueness could leave some with a feeling that opera was not for them.

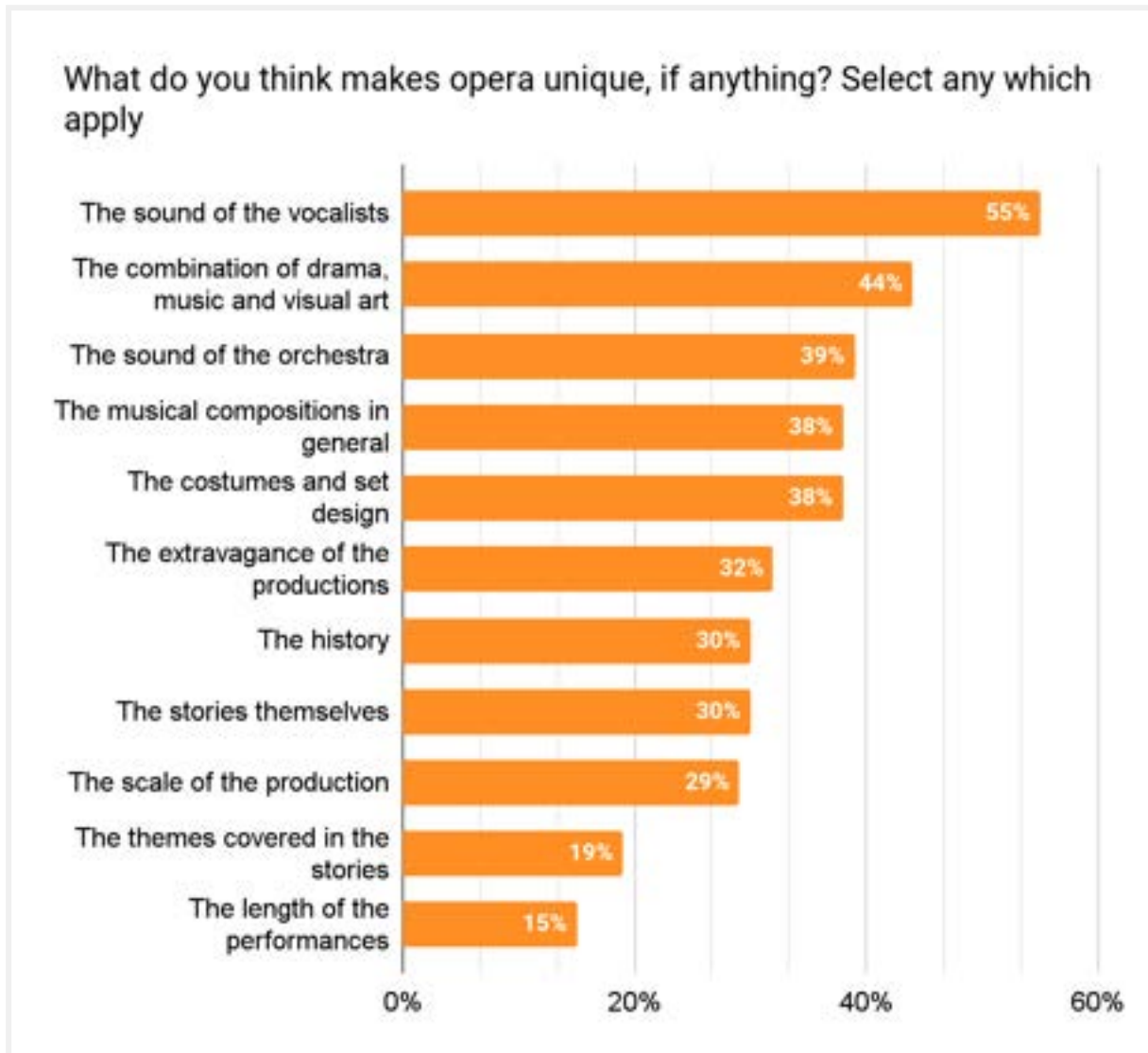
“ I think one of the big problems with the opera is that it's a bit of a niche kind of thing to actually book up and go and see. I think you've really got to want to go and see it. There's got to be some reason, some rationale for it. And there's so many things that opera actually appears on, adverts and other other kinds of media where there are pieces of opera that make you think that's really nice. But could you sit all the way through it?...I think that's one of the problems ... most people perceive opera to be very highbrow and very intense and a lot of singing to sit through is the best way I could describe it. ”

MALE, 70, LONDON

Retired Teacher

POSITIVITY DRIVEN BY THE PERFORMERS

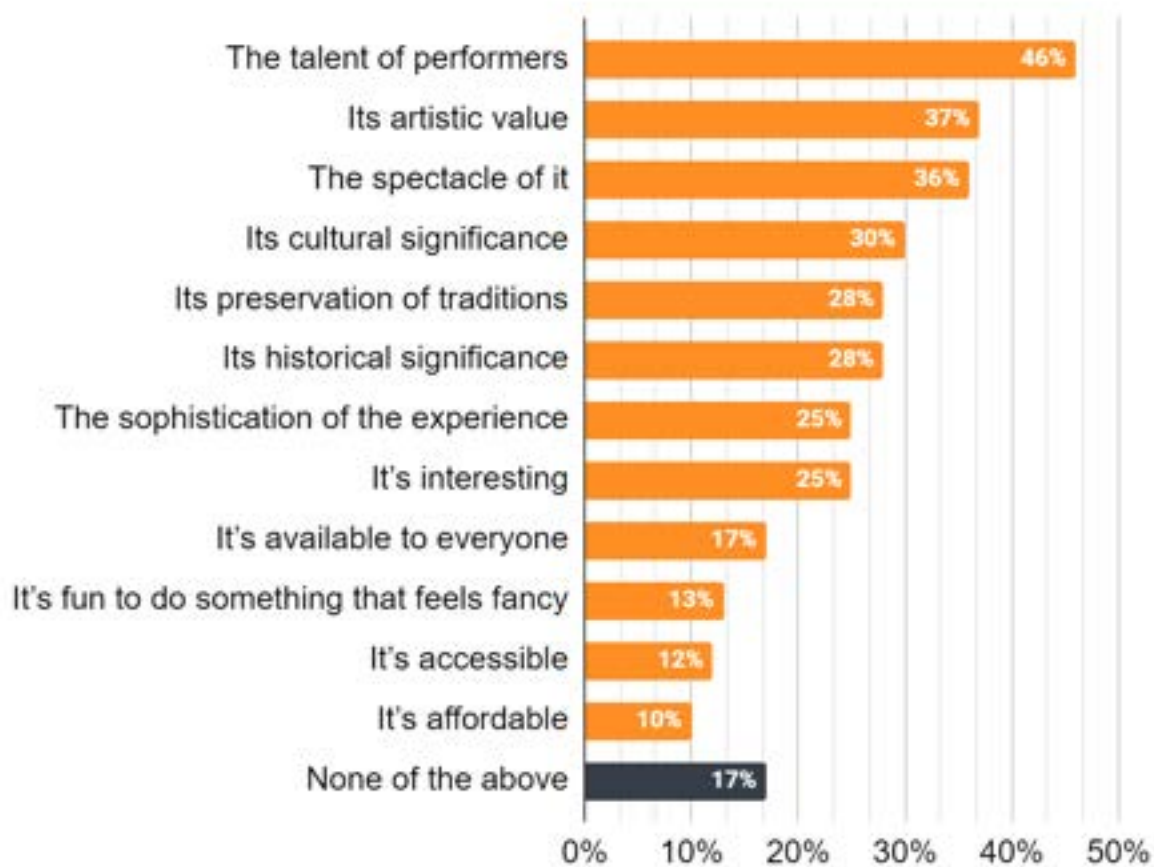
Key to the perception that opera is unique is the sound of the vocalists.



In fact, throughout our research, the performers were often felt to be one of the most important draws of opera. Respondents were most likely to say that the sound of the vocalists (55%) was what made opera unique. Similarly, the vocalists talent was the top thing that positively influencing attitudes to the art form.

When we asked the main reasons that people felt positive towards the opera, the top selected reason was the talent of the vocal performers (46%), ahead of the artistic value (37%), the spectacle (36%), and the cultural significance (30%).

Which of the following positively influence how you think of opera?
Select any which apply

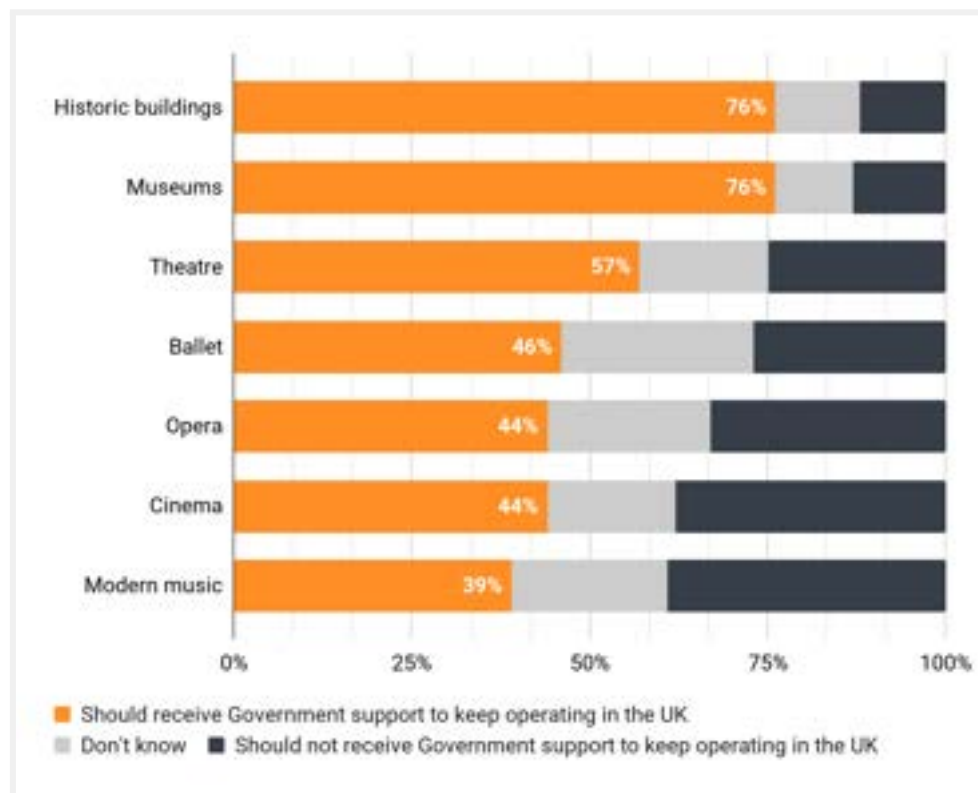


GOVERNMENT SUPPORT FOR THE OPERA

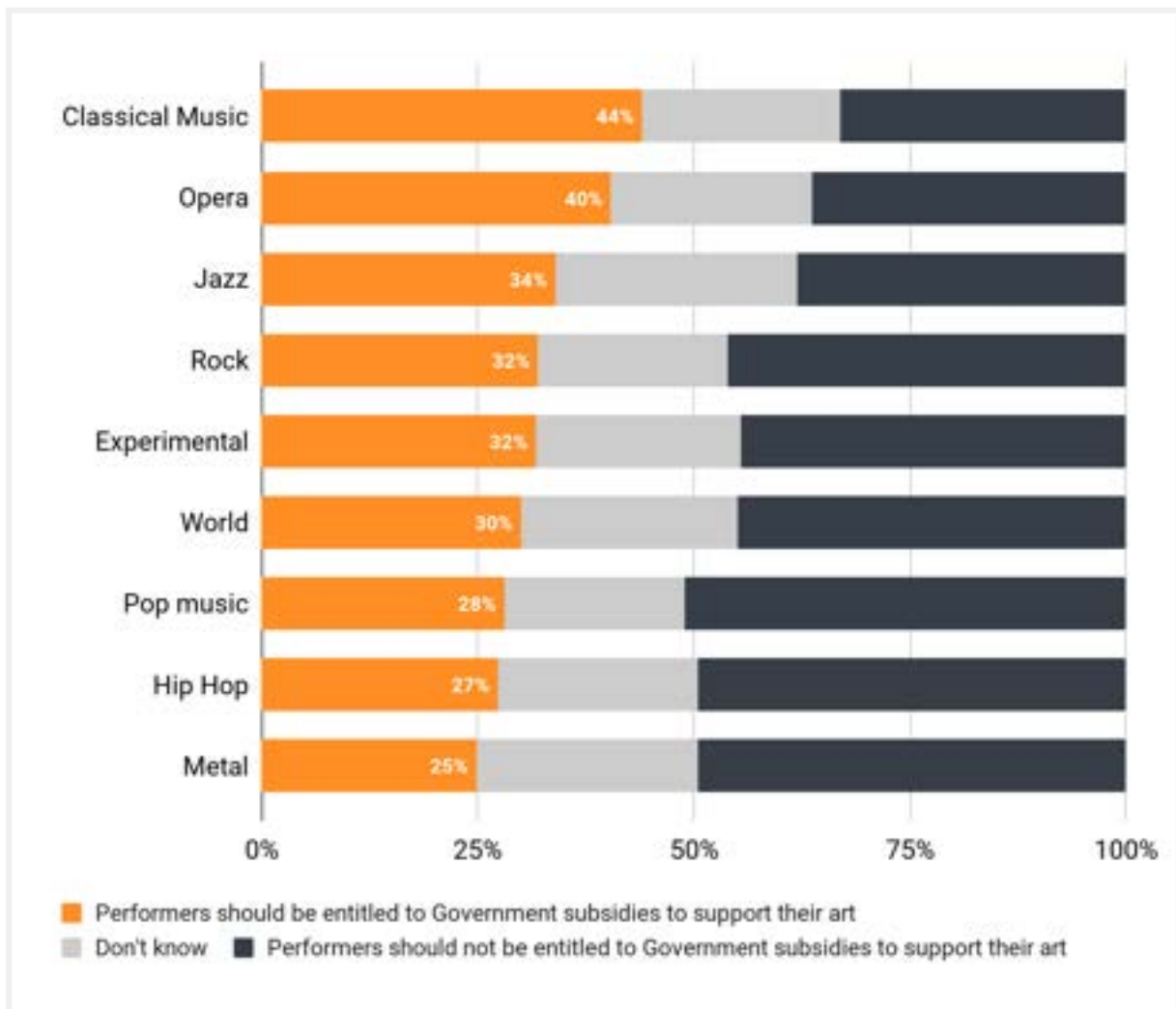
One of the key challenges that our research identifies is that opera tends to be low on the list of areas which people believe contribute to the UK, economically and socially. For example, opera was the least likely option to be seen as an important contributor to the UK economy, behind literature, art and fashion. It was equally less likely to be seen as an important part of British tradition, with just 19% indicating that they felt it was (level with fashion 19%, and behind live music (36%). Generally people believe that opera is a less important part of “British” culture than other cultural activities.

Exploring questions around Government support for opera did show some promising results for the sector. A top-level question about whether the industry should receive Government support showed 42% agreeing that it should, and 22% that it should not. 61% of those who have been to an opera felt it should receive support, compared to just 33% who had not. We cannot infer causality here, but this is at least promising for broadening audiences’ increasing interest in keeping the art alive.

We compared opera both to other music genres, and other cultural entities. In this context, we find that opera tends to receive similar support for Government assistance as ballet, and more than modern music. When we talk about the musicians, opera and classical music performers are the only ones where a plurality believe they should receive Government support. This is likely because the other genres (pop or hip hop, for example) are seen as able to sustain themselves.



These attitudes likely reflect a combination of both attitudes towards Government support in general, and the sector specifically, and we do find some trends on other political attitudes. For example, those who voted Leave in 2016 tended to object more to Government support on the areas we tested - on modern music Leave voters leaned towards opposing Government support (46% to 35%), Remain voters more towards supporting (42% to 36%).



There is a bigger risk for the opera in that people are quite direct on the low awareness that they have of the art form. 46% of the public say that they would not notice if all the opera houses in the UK shut down. This rose to 53% among those who have never been to an opera, although even a third of those who had been at some point in their lives said they would not notice (33%). There is an uphill battle for the sector here; if there was insufficient funding to operate, the risk is less that people would support this, and more that they simply would not notice.

GOVERNMENT SUPPORT FOR THE OPERA

Our research provided a rare opportunity to engage participants, many unfamiliar with opera in general, with clips of opera itself. These were deliberately chosen to encompass a range of different opera styles, stories and settings.

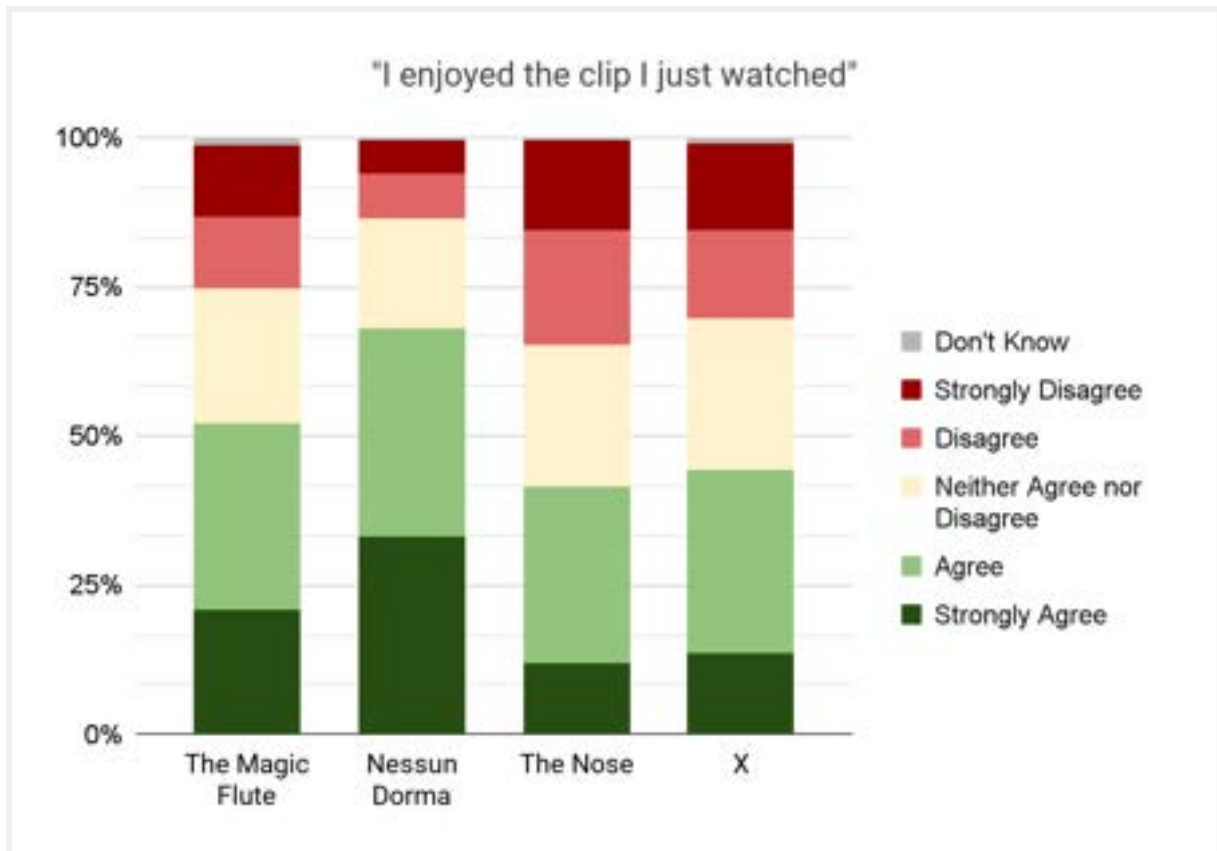
In our quantitative polling work, we split the sample into 4 and showed 4 short clips from different opera performances. These were:

- **Shostakovich's "The Nose"**: A short clip in which a row of people dressed as noses tap-dance, finishing with a collective sneeze
- **Mozart's "The Magic Flute"**: A short clip from the Queen of the Night Aria, performed by Diana Damrau
- **Anthony Davis's "X: The Life and Times of Malcolm X"**: The trailer from the Metropolitan Opera
- **Puccini "Nessun Dorma"**: Performed in concert by Pavarotti in 1994

In our focus groups, we also showed clips to the participants, and then talked through what they liked and did not like about them. This included:

- **Anthony Davis's "X: The Life and Times of Malcolm X"**: The trailer for a Metropolitan Opera production
- **Giacomo Puccini's "La Boheme"**: The trailer for a Royal Opera House production
- **Rogue Opera's "Opera Cabaret in the Garden"**: The trailer for a series of performances in collaboration with Fuller's Pubs

The quantitative sample allowed us to examine minor differences in the response to the clips. For example, when asked directly if they enjoyed the clip they just saw, we can see that the "Nessun Dorma" clip received the most positive feedback, and "The Nose" the least.



Even though in general the more traditional operas performed better here, we find that the “non-traditional” operas do cut-through with some audiences better. “X” for example, saw a large proportion of 18-30 year olds indicating that they would consider seeing it (61%), respondents from ethnic minorities (66%), those who like experimental music (67%).

Among those who have never attended an opera in their life, the Nessun Dorma clip was the most positively received (46% interest) although notably X (31%) and The Magic Flute (32%) were roughly equal. We can also see how these different performances appealed to respondents on the basis of what interests they expressed in opera. For example, we find:

- Those who say that increased cast diversity would encourage them to go to an opera are considerably more likely to express interest in “X” (74%)
- Those who said that operas sticking as close to the source material would encourage them to go preferred Nessun Dorma (80%) and The Magic Flute (73%)

NON-TRADITIONAL OPERA CHANGED PERCEPTIONS MOST

In our group discussions, the non-traditional opera clips had a greater scope to change attitudes, or to generate new interest in the art-form.

“ With the Malcolm X performance that's like a quick easy win, for me anyway, because that's something I am aware of, I know I'll be interested in. So it's not a big risk to get there yet. I know there's a very good likelihood that I will enjoy the show. ”

MALE, 28, LONDON
Care Home Manager

When we discussed the “X” clip with those in the groups, some expressed the view that it seemed more like a musical than an opera, and that it was unexpected as a result. Participants discussed how they felt they would likely be able to understand the story better.

“ I definitely think [X clip] was more interesting than the first clip [La Boheme] because it's more modern. It's not something I would have expected from an opera. I always expect sort of Latin singing ... for me it's more engaging when they're singing and I can understand more of the story rather than just the sounds. ”

FEMALE, 22, LONDON
Teacher

“ It's more like a musical and also because it's in English and I expect an opera to be Italian ... That doesn't look like opera to me, even though they sing amazingly like opera. I would be interested in that story about Malcolm X and probably understand it more because it's in English...but I don't feel like it's opera, it's more just like musical theatre. ”

FEMALE, 43, MANCHESTER
Therapist

And that the story felt more relevant, and possibly more interesting.

“ I think with the first one [La Boheme], if it had just come up as a YouTube ad, I would have just kind of carried on waiting then clicked next. But this one [X] would be more engaging ... I'd be more interested definitely to look further into it because I would never have expected that to be an opera. It's because I'm familiar with the story, but also the actors as well ... seeing black people there is definitely a more relatable factor for me. ”

MALE, 28, LONDON
Care Home Manager

“ I think modern stories can be just as powerful as the older stories that we've got. And to be honest, I think maybe younger people might lose interest in the older stories. So if you can adapt a modern story to be entertaining and then keep people's interests then great. But watching that trailer ... that's definitely something I would go see and probably more likely than the first one we saw [La Boheme]. ”

MALE, 21, LONDON
Student

When watching the more traditional opera clip, group participants felt they were more in line with their expectations of an opera but were divided on their reaction.

“ On one hand, I did think like, 'oh, my God', I bet that [La Boheme] sounds incredible if you're actually there. But on the other side, I did think or I do have a slight sense, that it would be quite long. ”

FEMALE, 29, LONDON
Project Manager

“ I think that [La Boheme] is more or less what I would expect .. ”
very dramatic and atmospheric ... I can imagine if you're
actually sat in the room, you would be feeling a lot of the
emotions and ... I think that it could be almost quite magical to be honest.
I think it's just the whole experience of it and sitting in it and almost
feeling like you're part of it ... sort of like you, you leave the world for a
second.

FEMALE, 19, LONDON
Student

THE MORE PEOPLE SEE OF THE OPERA, THE MORE THEY LIKE IT

Regardless of the clip they saw, more people came away feeling more positive than did more negative. We found this relatively consistently throughout our research; those who experienced opera, tended to enjoy it and come away more positive about it.

Further demonstrating this, there is a vanishingly small number of people who have personally attended an opera and have a negative review of the experience. Those who have attended an opera are positive about the experience overall, with 76% rating the overall experience 4 or more out of 5. Further, they rated the music (79%), the story (75%), the costumes (78%) and the set design positively. 56% of these opera goers say that the experience was better than they expected it to be, and most compare it relatively equally to their most recent trip to a musical theatre performance (69% say it was equally or more enjoyable), and theatre production (68% say it was equally or more enjoyable).



SECTION 2

WHO IS CURRENTLY GOING TO THE OPERA?

Our quantitative and qualitative research provides us with unique insight into current attendance and interest in the art form. Even among those who have never been to an opera, we find relatively high interest in attending. In a binary choice between going at some point, and never going, 56% of the public say they would consider going to an opera performance in the future, including 43% of those who have never been. The UK public do view themselves as open to new experiences, with 72% saying they like to try new things, and 59% that they will try anything once.

30%

Claim to have attended a live opera before

41%

Say they have listened to a piece of opera music in the last year

67%

Believe a typical opera-goer is over 45 years old

18%

Claim to have heard of the opera "The Reverie", which was made up

10%

Say they are willing to pay more than £75 for an opera ticket

WHO ARE THE OPERA VISITORS?

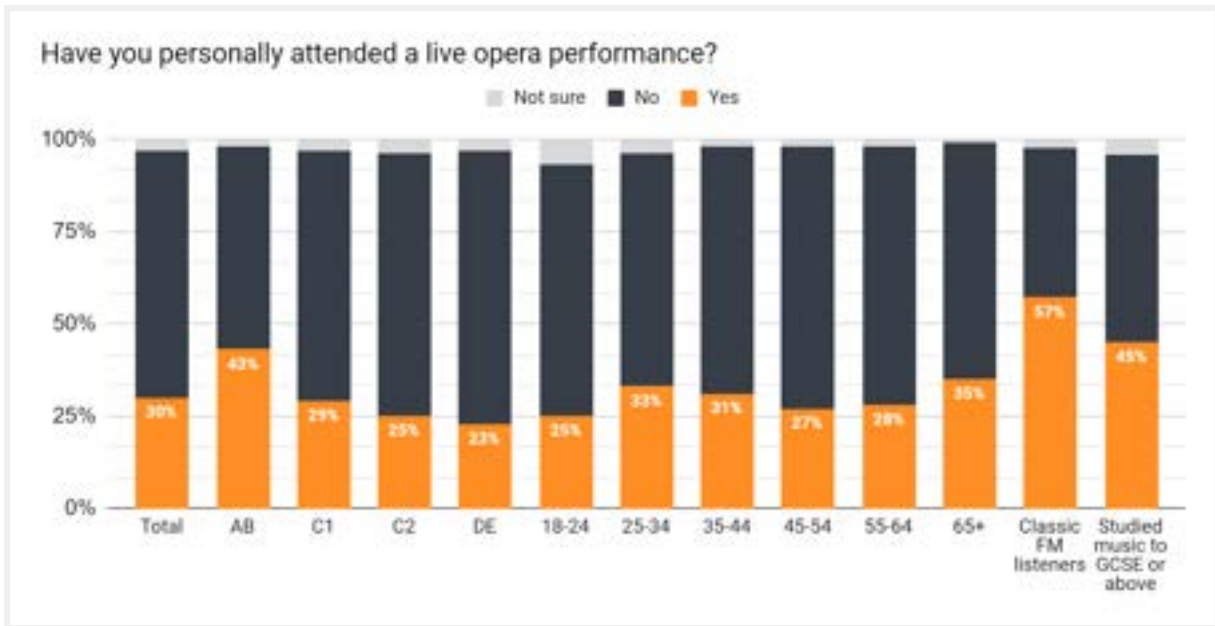
In our quantitative research, 30% of the public said that they had attended a live opera performance before, at some point in their life. This is likely a high-water mark for attendance; those who attended once even at a very young age would be included in this just as much as those who attend frequently. It is also likely to be an overestimate; given some confusion around what defines an “opera”, we expect some people are counting themselves incorrectly. Equally, what constitutes attending an opera may be inflated.

“ *It's passionate ... it's posh, but they have got some bangers. I think probably the first time I was ever exposed to opera in my life was the 1990 World Cup. And I was like, 'oh, this is a tune'. And I was only like 11.* ”

FEMALE, 44, LONDON
Project Manager

Of those who claim to have attended an opera, 31% say they have done so only once in their life, 69% more than once. High frequency visitors, however, are highly concentrated. Just 9% of those who have attended an opera ever, have done so more than 10 times. This puts the proportion of high frequency attendees in the UK at around 3%, though this is still likely overstating it.

Our research shows that those who have attended an opera tend to be those in higher socio-economic groups. 43% of those in the highest AB socio-economic grade had attended an opera, compared to 23% of those in DE socio-economic grades. Similarly, we find a much higher rate of University graduates (42%) have attended than non-graduates (23%), and a trend on income from attendance levels of 23% among those in households earning less than £20k a year to 45% of those earning £80k or more.



We found little regional variation on attendance. London was highest, but only with 44% compared to a low of 23% in the North East. Besides London, the highest regional attendance rates were 31% in the South East, East of England and Scotland. As this is attendance at some point in their life, it is likely that current proximity to the opera would have a lessened impact on the figures.

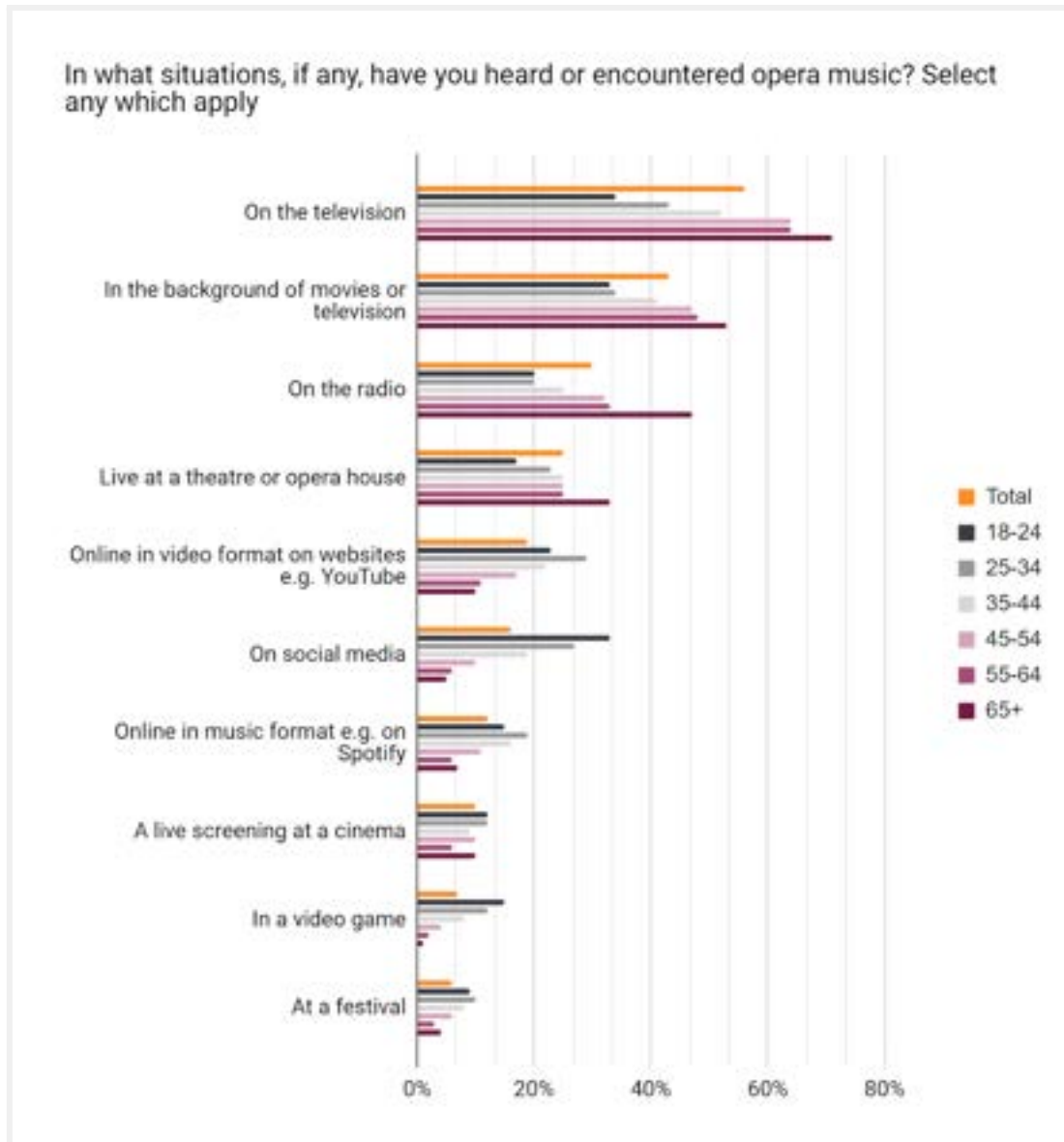
The trends were largely the same when it came to the frequency of attendance too. Notably, older opera-goers were more likely to have attended more than once. 41% of those aged 18-24 who had attended an opera had done so only once, compared to 28% of those aged 65 and over. Naturally this will in part reflect that older people have simply had longer to attend an opera more than once.

In general, demographic trends were less notable than other trends, such as interest in music. Over half of Classic FM listeners (57%) for example have attended a live opera at least once. 45% of those who had studied music to GCSE level or above, 48% of those who play one or more musical instruments themselves, and 45% who sing. Interestingly, distance from an opera house did not seem to relate to likelihood to have been to an opera; 34% of those who live within 15 minutes of their nearest opera house or theatre have attended an opera, 31% of those who live over an hour from one.

When we asked what sort of opera performance people had attended, we found that the most common answer was a performance in a smaller opera house or theatre in the UK. 36% of those who have attended an opera say that the last time they did so was at a smaller theatre. This rises to 44% of those over the age of 65, from 26% of those aged 18-24. This could be driven by some ambiguity on the definition of "smaller theatre", which some may take to mean any theatre besides the ROH. In London, it was more common to have seen an opera in a "big national opera house".

OTHER WAYS PEOPLE ENGAGE WITH OPERA

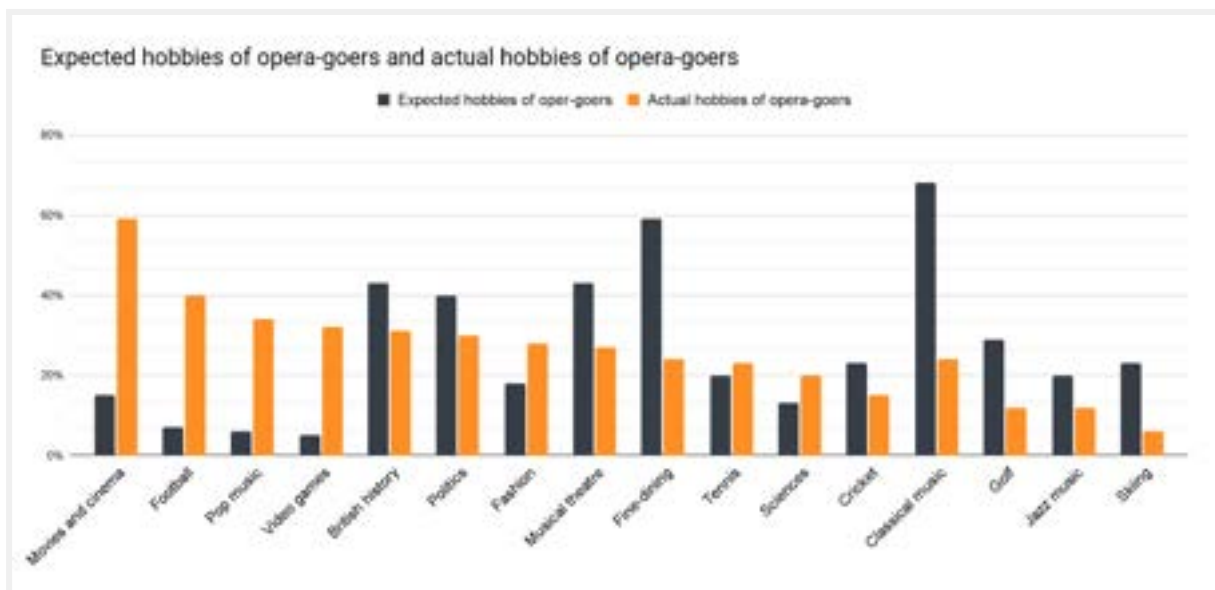
Of course, attending an opera live is not the only way people engage. 56% of adults say they have encountered opera music on the television, 43% in the background of movies or television, 30% on the radio. Many younger people have encountered opera music on social media; 33% of 18-24s have done so, which is roughly the same proportion as have encountered it on television and in movies.



41% of the public recall listening to a piece of opera music in the last year, rising to 75% of those who have been to an opera at some point in their life. 25% of those who have never attended an opera have listened to a piece of opera music in the last year, and 37% report never having listened to one.

WHO PEOPLE *THINK* ATTENDS THE OPERA

The group who have attended opera in their life is relatively diverse, covering people of all ages. However the general perception of an opera-goer is relatively stereotypical. 33% believe that the typical operagoer is upper class, 40% that they are upper middle class. 67% believe that they are over 45 years old. The public expected the main hobbies and interests of a typical operagoer to be classical music, fine-dining, British history, politics and musical theatre. In reality, the most common hobbies and interests of those who have attended an opera are movies and cinema, football and pop music.



Regular opera goers are sophisticated, educated and rich generally .. and of the older generation.



FEMALE, 38, LONDON

Fraud Investigator

One reason why these stereotypes prevail may be that many people in the UK are disconnected from those who attend opera. We find that 42% of the public has never met an opera fan, including 50% of those in the DE socio-economic grades, and 56% of those who have never personally attended an opera. Interestingly, the number was slightly lower among the youngest respondents (36% among 18-24 year olds), where more cited having fans among their colleagues (14%) and relatives (22%). Among Londoners, only 30% had never met an Opera fan, compared to a high of 50% in Yorkshire.

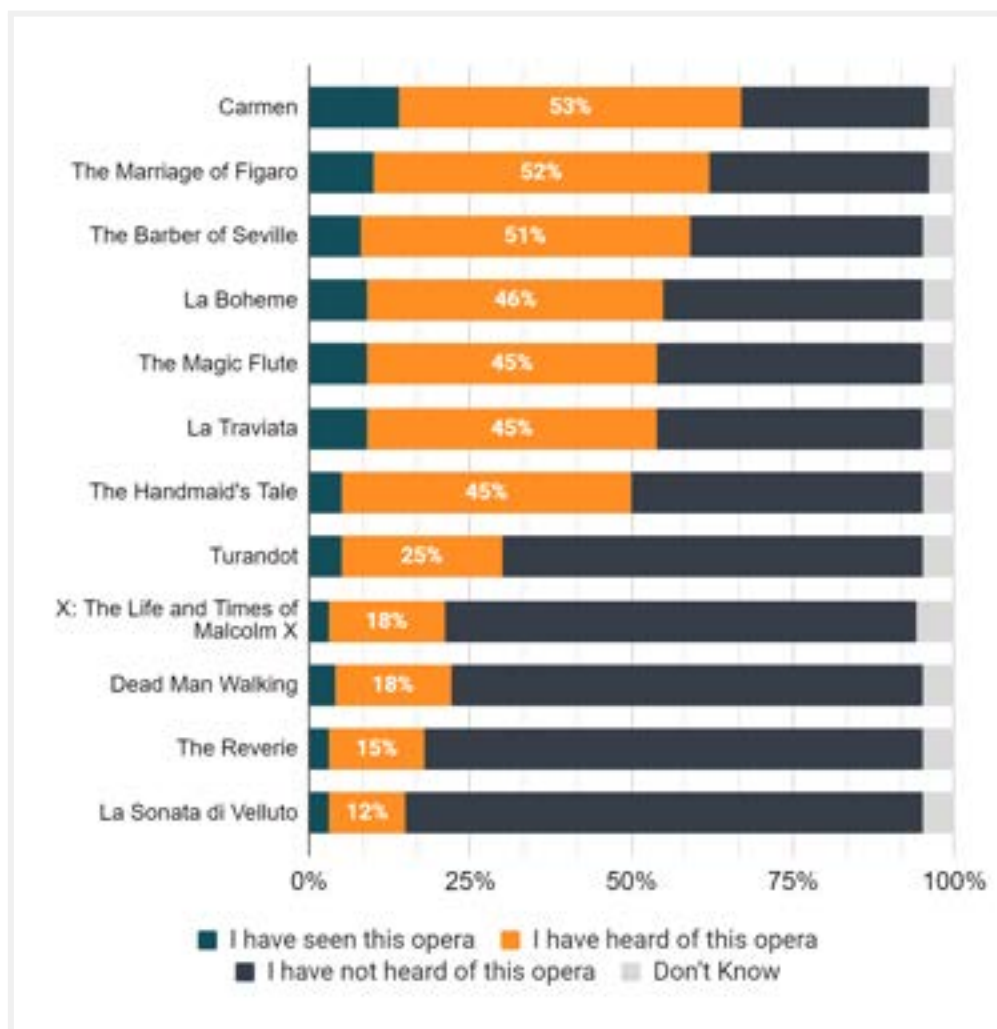
There is therefore a substantial chunk of the public who have no connection to the Opera at all. This is despite our research indicating relatively high levels of perceived attendance, and even higher levels of mild interest. Our research indicates that attendance of opera is more common than people expect, and that audiences are more diverse than they think.

CURRENT AWARENESS OF OPERAS

In our research we were able to test the awareness of a number of opera titles. We find high levels of awareness for traditional opera names, including Carmen (67%), The Marriage of Figaro (62%), The Barber of Seville (60%), La Boheme (56%) and the Magic Flute (55%). More modern operas such as Dead Man Walking (22%) and X: The Life and Times of Malcolm X (22%) were less well recognised among the public.

However, often in research we find a tendency to over-claim or misremember, so we also included in our survey a number of entirely fake opera titles. Awareness of these - for example, The Reverie (18%) and La Sonata Di Velluto (14%) - was roughly level with some of the less well known real life operas we tested.

Awareness was much lower among younger audiences. Carmen, for example, was familiar to 95% of those over the age of 65, and just 34% of those under 24. Furthermore, younger audiences are if anything overestimating, as they are more likely to have expressed awareness for our fake opera examples than older respondents.

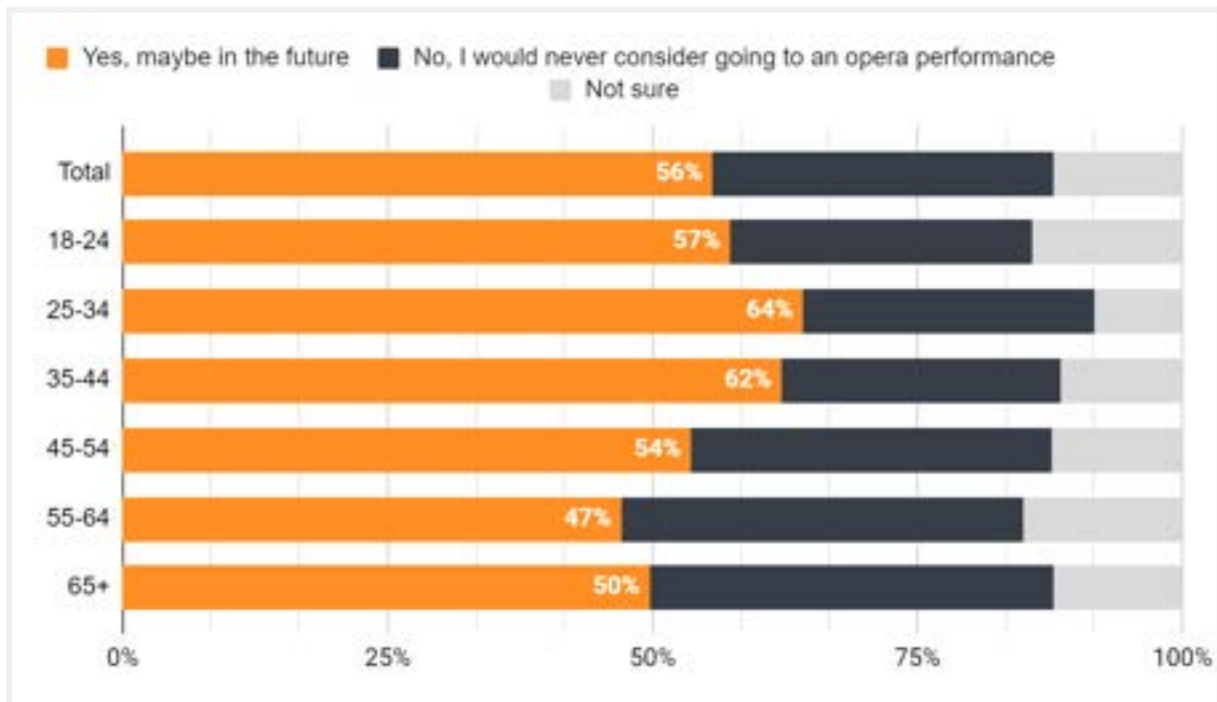


Alongside this general awareness level, we set out to understand what defines an opera to the public. We find that the public believes that an opera has to have music, to have singing, and has to tell a story. It is not widely believed that an opera has to be a tragedy, or that it has to be from before the 1900s. The public is more divided on whether it is necessary for an opera to have vibrato singing, which 38% believe is necessary for something to be an opera.

INTEREST VERSUS ATTENDANCE

Our estimate of the number of people who have been to an opera is considerably lower than those who say they would consider doing so. Naturally “consideration” is much easier to assert, and could mean anything from “considering and quickly disregarding” to “definitely attending”. Nevertheless, in our survey we find in a binary choice that 56% of the public says that they would consider going to an opera performance in the future, and only 32% that they never would. Again, this is a high watermark for consideration, but it gives an indication of the real number of people who completely rule it out.

Perhaps counter-intuitively, given the expectation among the public that opera is predominantly of interest to older audiences, we find that consideration of an opera peaks around the 25-34 year old age group.



Among those who have never attended an opera, 43% would consider doing so, compared to 83% among those who have attended at some point in their lives. This means that 29% of the public have never attended an opera and never intend to. A further 29% fall into the category of never having been but considering themselves open to going. Throughout this research, however, we found that interest was very flexible; for example, when we later asked about interest in attending a hypothetical opera based on a modern work of fiction, 26% of this “never been, never consider” group expressed at least moderate interest in attending.

Having a social network interested in the art form also appears to drive up how likely people are to consider attendance. Among those with no personal connection to an opera-goer, interest in attending is only 35%. Among those who know at least someone who goes to the opera it rises to 74%, including a rise to 82% for those with friends who are opera fans. We cannot assume the direction of this relationship (those who consider going to operas, may well make more friends with opera fans), but it is notable that only a minority would even consider attending among those with no social connection to the art form.

Our qualitative work showed the importance of this social network too; often people's stories of how they went to an opera revolved around recommendations from friends and family.

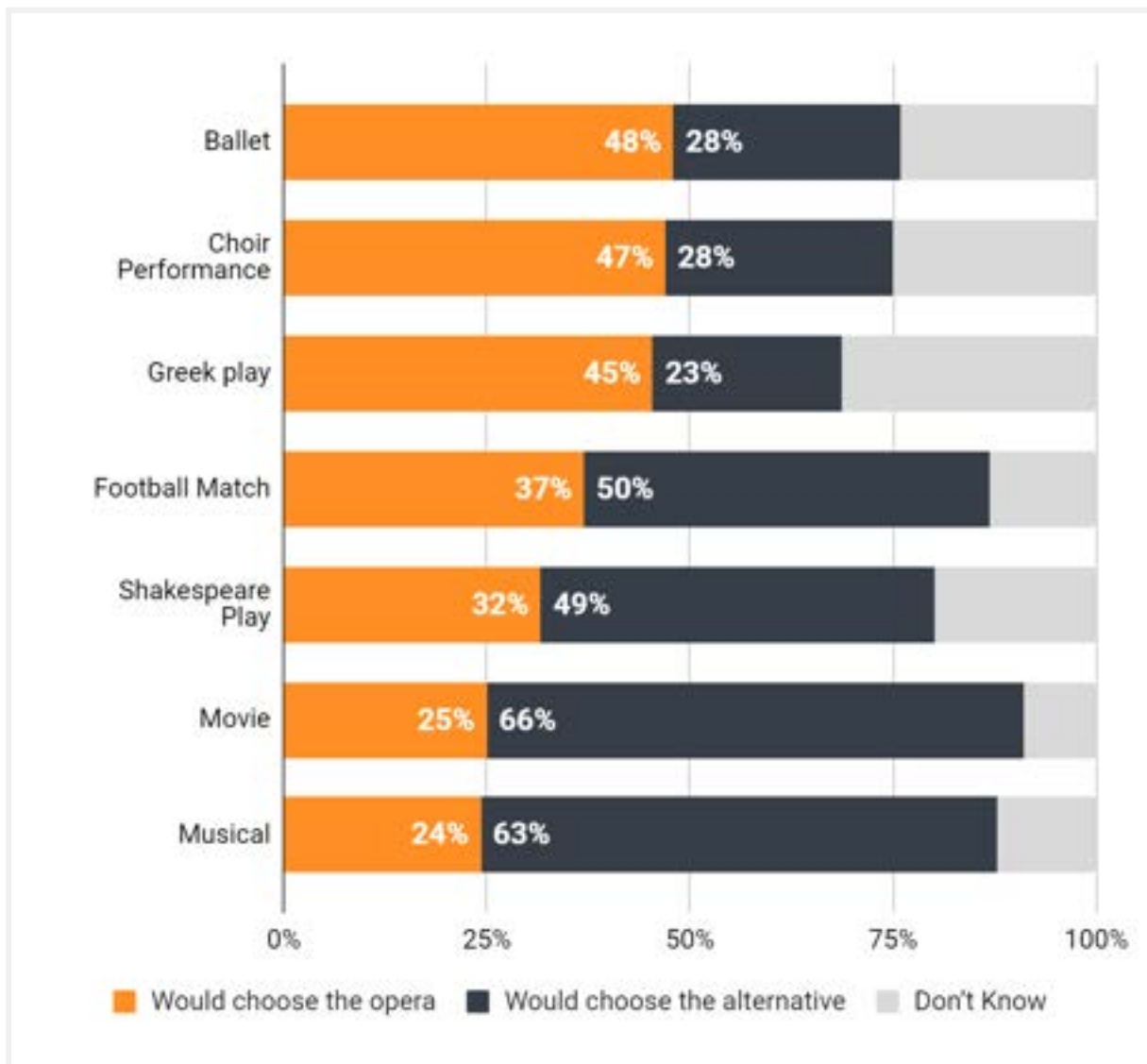
“ *Social media piqued my interest on a particular theatre production that's been going around ... and one friend went to see it with a group. They said it was incredible. Then another friend went too and eventually it got round to me. And I kept seeing it on Instagram, kept seeing it on Instagram .. so much that I had to go and watch it myself.* ”

MALE, 30, LONDON
IT Support Worker

COMPARISON WITH OTHER ENTERTAINMENT OPTIONS

To better understand attitudes to opera, we compared it to other forms of entertainment. We asked whether people would choose to go to the opera or an alternative event, assuming the tickets were free. Opera compared favourably to ballets, to choir performances, and to Greek plays. However, it compared poorly to musicals, movies and Shakespeare plays.

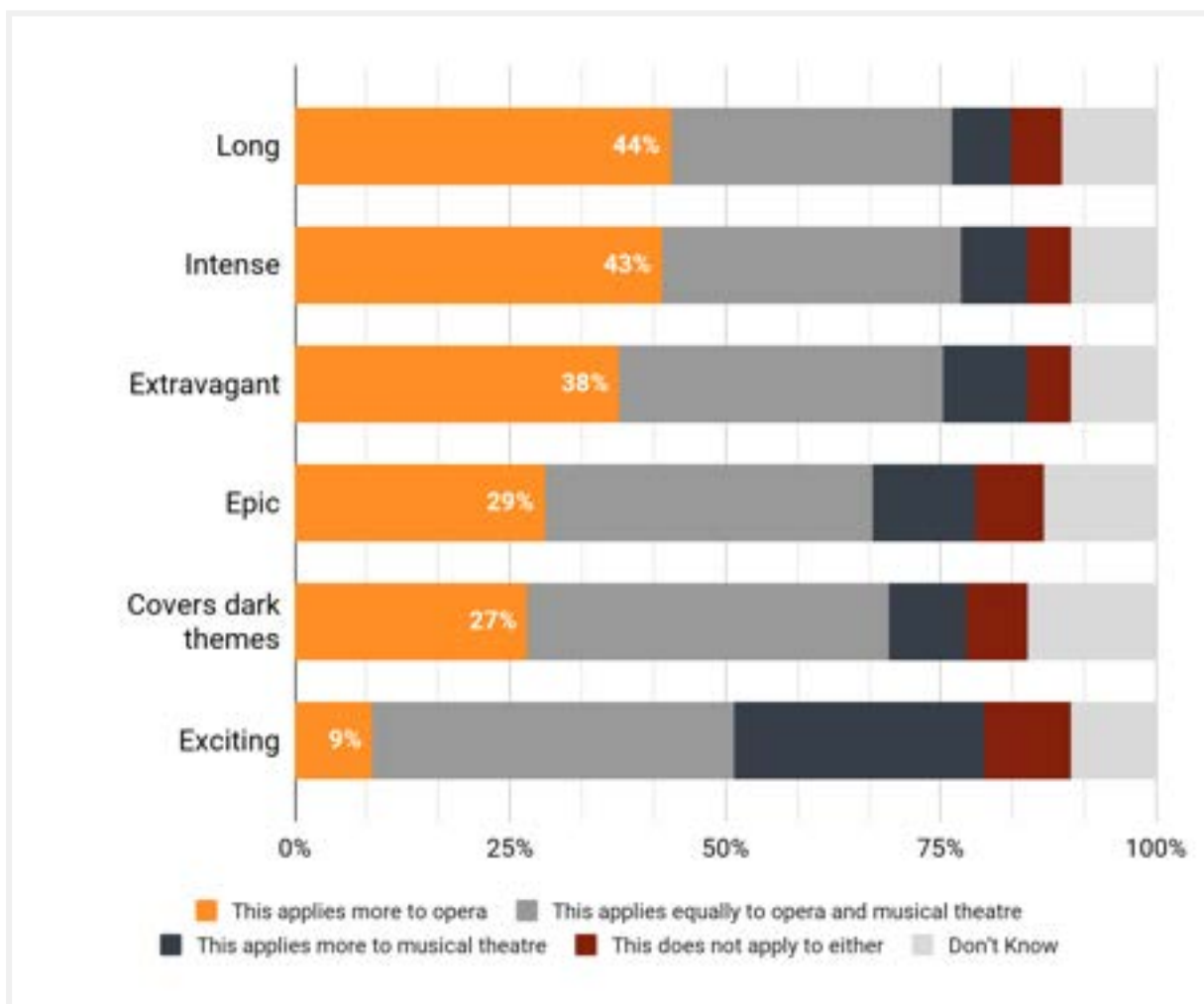
There was some variation in the responses of different groups. Our poll found that women would prefer to attend an opera (47%) than a football match (38%), while men were the opposite (63%-27% in favour of football). Men told us they would rather attend the opera (56%) than a ballet (16%), while for women it was evenly split (40%-39%).



We also carried out a more in-depth comparison of opera and musicals. We first asked respondents which they would pay more for, and found that significantly more would pay more for a musical (39%) than would for an opera (13%). This was even true among those who had been to an opera at some point in their life, although it was closer (31% musical, 25% opera).

When we asked why this was, we found that those who said they would pay more to attend a musical tend to do so because they prefer the music (65%). Those who instead opted for the opera did so because it would be a more memorable experience (48%).

Compared to musicals, operas were perceived to be more intense, extravagant, and epic. They were also more likely to be perceived to cover dark themes. They were also less likely to be considered exciting, and more likely to be considered “long”.



In our groups, many participants made comparisons to musical theatre when discussing opera. There was a perception that musicals were just more well known, more likely to be seen around and advertised. Some, however, made favourable comparisons between opera and musicals drawing on the experience of the opera.

“ I'd probably say if it's something I haven't known about before then I'd probably spend like £30-40. I'd spend more on a musical ticket, especially if you get good seats as well ... maybe like £100- £120. But only if it's a well known musical or something that's got really good reviews and that I want to go see. ”

MALE, 21, LONDON
Student

“ I went to go and see La Boheme and you know the majority of the time, I'd lost the storyline. But it was so poetic. I really like my musicals but you know a lot of that is acting as well as singing. Whereas with the opera, it's a case of you're so drawn in just by the singing alone that you can tell what emotions are being put forward and everything purely by their voices. ”

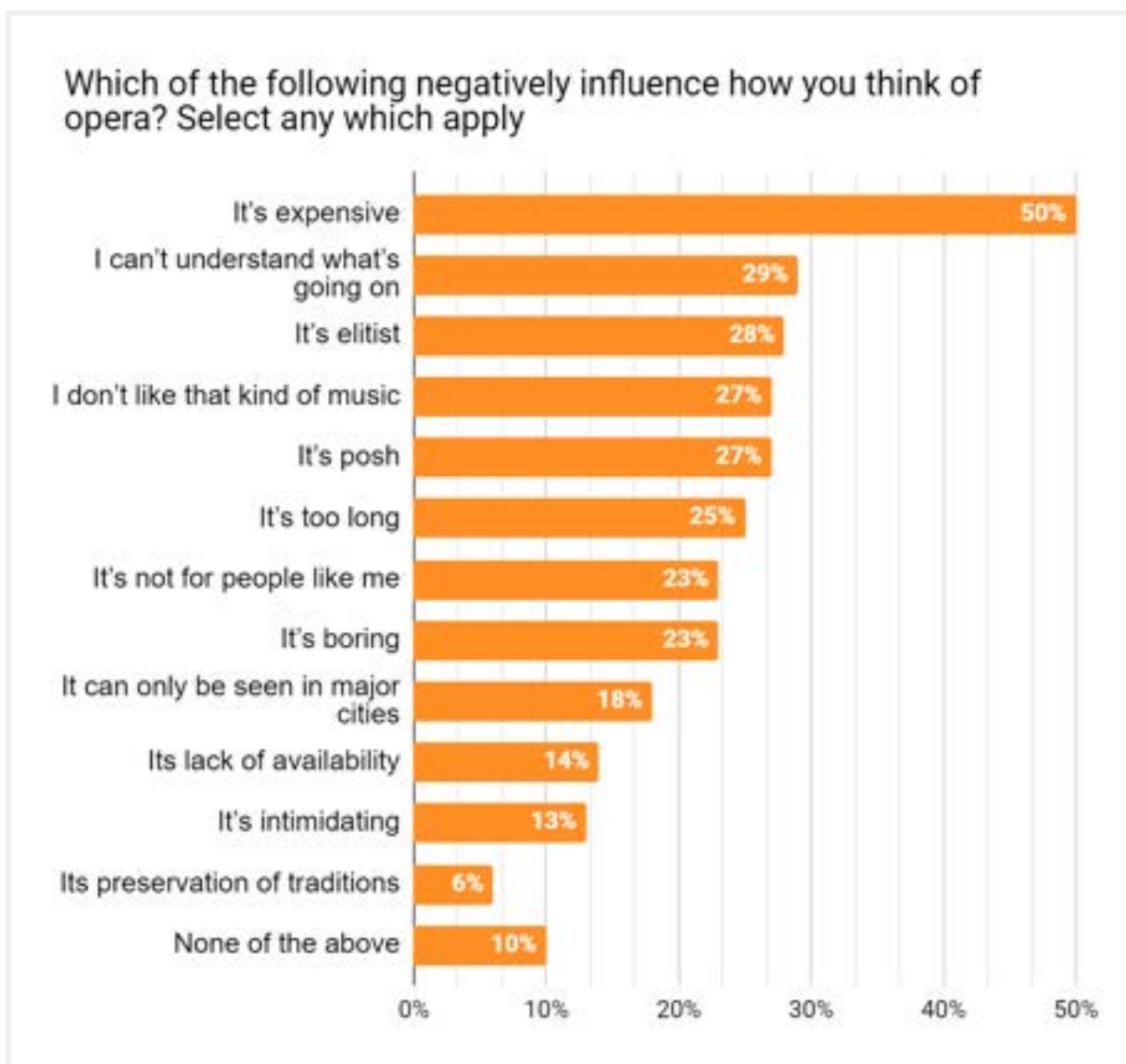
FEMALE, 25, CARDIFF
Civil Servant

While opera may not be top of the list for many people, our results indicate that the unique experience it is perceived to offer is a significant part of its appeal for some people.

BARRIERS TO ATTENDANCE

Our research allowed us to examine the barriers to people attending the opera. In both the qualitative and quantitative work, we found clear patterns in some of the barriers which were talked about.

Cost was by far the strongest barrier (which we explore in a separate section, below) but other commonly cited barriers included the length, the inability to tell what was going on, a feeling that opera was exclusive or unwelcoming, and a simple issue with opera being out of sight for most people.



Among the key barriers to people attending the opera was the length of the performances. It is possible to overstate this (only 25% of the public cited the length as something that made them think negatively of the genre), but it is undeniably

something which is thought of negatively and it often came up in our qualitative work. Asked to compare opera to musical theatre on a number of measures, a near-majority (44%) said that the word “long” applies better to opera than musical theatre, only 7% said the opposite. 43% say they would be more likely to attend an opera performance if the performances were made shorter.

“ *When opera comes to mind you think of like an older audience and really long hours watching a show that you might not be too interested in. But I've watched like opera movies, and they can be great, though they can also be quite long.* ”

MALE, 21, LONDON
Student

“ *Some of them [operas attended] have been hours and hours and hours long. And sometimes I find that they're quite hard to follow if you don't really know the full story, so then you're kind of almost trying to read the notes. And obviously in a dark theatre, you don't want to be ruffling around with paper, so it just feels like you have to just be really into the story ... almost kind of be educated about it, so that then you can really be in the moment and understand what's going on....If you can get on that level and you really are sat there and you're invested, then it can be a really positive experience... I don't know if in this day and age we've all got ants in our pants and find it hard just to sit down for that amount of time.* ”

FEMALE, 32, LONDON
HR Worker

Another key barrier was being unable to tell exactly what was going on in the performance. 29% said that the fact they can't understand what is going on is a negative influence on the way they feel about opera.

“ That first time I went [to the opera] ... it felt like a lot of money for something that I wasn't quite following. It was very, very pretty, but I would rather spend my money on going to see like a musical instead. ”

FEMALE, 25, CARDIFF
Civil Servant

Another barrier was the feeling that opera was for “other people”. Respondents in our survey did indicate that they believed opera to be more exclusive than inclusive, and more intimidating than approachable. 28% cited opera being “elitist” as something which negatively affected how they think about it, 27% that it is posh, and 23% that it is “not for people like me”. This sentiment came through more strongly in the groups, where some participants expressed explicit concerns about the art not feeling welcoming to them.

“ But sometimes I'll hear something, I'll even Shazam it, and then I'll be like, oh, look at me. I'm so cerebral. It's opera....But I just immediately think posh or not for me...not for people like me. That's kind of what I always think. ”

FEMALE, 44, LONDON
Project Manager

“ I've been [to opera] a lot and I guess there's a sense of elitism around it, which can be a negative thing. I suppose that's why they were trying to get £5 and £10 tickets because it can be intimidating and maybe a bit unwelcoming for people, especially if you're not upper class or even middle class to some extent. You think about the difference between going to see a musical and going to see the opera ... of course it's different styles, but there's also almost like a class element around it and sort of a cultural hierarchy around it as well. ”

FEMALE, 33, CARDIFF
University Lecturer

“ I picture it in my head as a lot of upper class people. And I'd worry that I'd be ordering a drink at the bar and they'd be thinking 'did you hear his accent? Common as muck!' ”

MALE, 47, MANCHESTER
HR Officer

In our groups, participants also spoke about the fact that opera was out of sight in a way that other forms of entertainment were not. Participants discussed how you never see advertising for opera in the way you do for other forms of entertainment.

Our survey also indicated that younger people were more likely to encounter opera marketing. 57% of 18-24s, for example, say they have encountered promotional material for an opera, compared to just 36% of those aged 65 and over. While social media and the internet were some of these adverts, even among younger people the TV (36%), billboards (25%) and posters (26%) were the main places these marketing materials were seen.

“ I think it's probably because I've never seen it advertised anywhere, so it doesn't really spring to mind. Even with word of mouth, it's never really come up. Seeing musicals has come up and I've even had a conversation about going to watch the ballet ... but never opera. ”

FEMALE, 29, LONDON
Project Manager

“ I think they need to advertise it more. You hear of all these different shows that are going on and these different events and what not but you hardly ever hear of anything going on with opera. I can't say that I've ever been handed a leaflet walking round or seen a poster, whereas you do for a lot of other events. ”

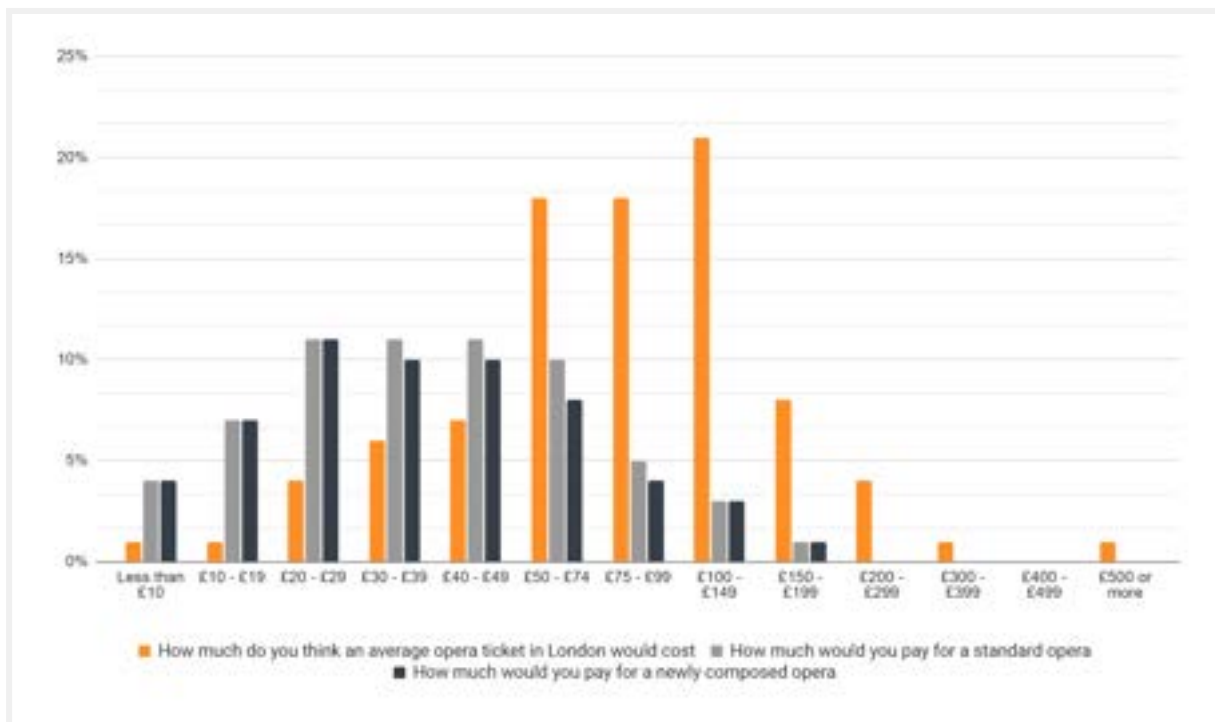
FEMALE, 41, MANCHESTER
Carer

“ It needs more advertising because you hardly get any. The only time I know that there's an opera or something is when you pass the Opera House and they have something on the front of it. But apart from that I've never seen anything about it. ”

FEMALE, 38, MANCHESTER
Finance Administrator

THE IMPORTANCE OF COST

Cost was a consistent barrier throughout our research. Cost is a complex barrier to understand since it is in part the way that people express the extent of other barriers; if an opera is too long, maybe people are less willing to pay more to go and see it. Nevertheless, when asked what changes to UK opera would make people more likely to go, 49% selected lowering costs, far ahead of the second most selected of closer performances (29%).



Only 10% of the public indicated a willingness to pay over £75 for an opera, but 54% expect tickets to a London opera to exceed that price. The positive side of this is that only a third (31%) completely ruled out paying anything for an opera, and a majority (50%) of the public said that they would be willing to pay between £10 and £75 for an opera. The cost barrier is therefore chiefly one of perceptions of cost, rather than total reluctance.

In our groups, the discussion of cost highlighted that this barrier is by no means unique to the opera sector. People broadly are concerned about the cost requirements of evening entertainment (and everything else). In the context of the financial pressures people are facing, committing to an opera show is somewhat of a major commitment.

“ *It's not the cost ... it's the atmosphere. I paid 180 pounds to see Beyonce and we were quite far back. I didn't really enjoy the concert, but the atmosphere was just incredible and so it doesn't even matter if she's no good on stage, it's the people that are around you in that setting.* ”

FEMALE, 40, CARDIFF
Homemaker

“ *What isn't expensive these days? You know just going to the theatre ... isn't cheap. So yeah, cost is a negative, but no different to anything else ... going to festivals, going to big gigs. I think if anything, probably everything else has caught up with opera in terms of pricing. But you can get cheap tickets. Matinee shows and so on.* ”

MALE, 44, LONDON
Client Manager

Participants in our focus groups were also clear that they were willing to spend substantially on the right performance and experience. However, cost pressures meant they were more likely to think about their choices in terms of risk or 'value for money', which made them less likely to pay for performances where they weren't certain they would enjoy it. This poses a challenge for opera, given the large number of people who have not attended a performance before and who are unsure about what it involves or whether they would like it.

“ *If it's a massive gig, I'll probably invest in an artist because I know I'm going to enjoy it .. kind of almost like getting value for money. If it's my favourite artist performing then I'm willing to spend that bit more. Whereas if we're exploring something a bit unique or we're not really sure where it's going then you want it to be a bit more affordable so that it's worth the risk of seeing what it's like. And then when you kind of get a taste for it I could then consider maybe paying a bit more.* ”

MALE, 28, LONDON
Care Home Manager

“ I think everyone would say that actually if you were gonna go to the opera, a bit like going to the ballet, or even to the theatre in London, it's an extremely expensive outing. It's not something you do lightly and something and it's something you plan way ahead of time. ”

MALE, 70, LONDON

Retired Teacher

Cost is clearly part of the equation when it comes to increasing opera attendance, but just as important is shifting the perceptions of cost and reassuring new audiences about what their experience will be like.

SECTION 3

WHO COULD OPERA APPEAL TO?

With this research, we set out both to understand the current status of opera in the UK, but also how the sector could unlock new audiences, or encourage further attendance among those who have only visited infrequently.

It is important to note, when looking at hypothetical interest like this, stated preference can diverge from revealed preference. Someone may say that they want to see an opera of a specific variety, but in reality when that is offered to them they choose not to. Equally, we can only present a snapshot of information to a respondent.



33%

Would be very interested in an opera designed to be close to a traditional performance

57%

Say they are more likely to attend if tickets were made cheaper

29%

Of the UK has never attended an opera, and expresses interest in doing so

Our **segmentation** of future audiences shows the divide between those who seek traditional performances, and those who seek new approaches from the sector.

UNDERSTANDING THE AUDIENCE OF THE FUTURE

“ I think diversity is important. I didn't know opera actually offered a wider range of shows. I just thought it was Victorian era kind of performances that they put on. ”

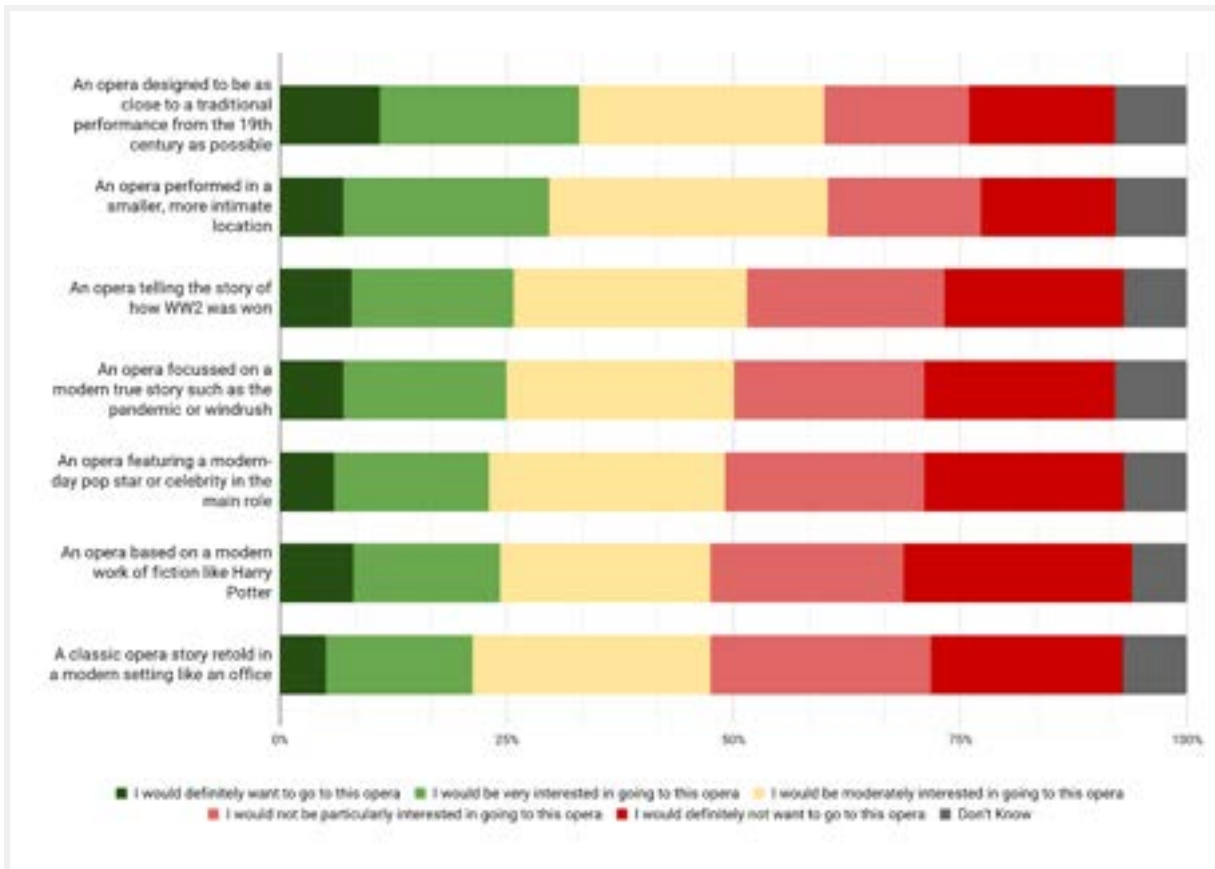
MALE, 28, LONDON
Care Home Manager

We asked three main questions on the ways that the sector could evolve. These were:

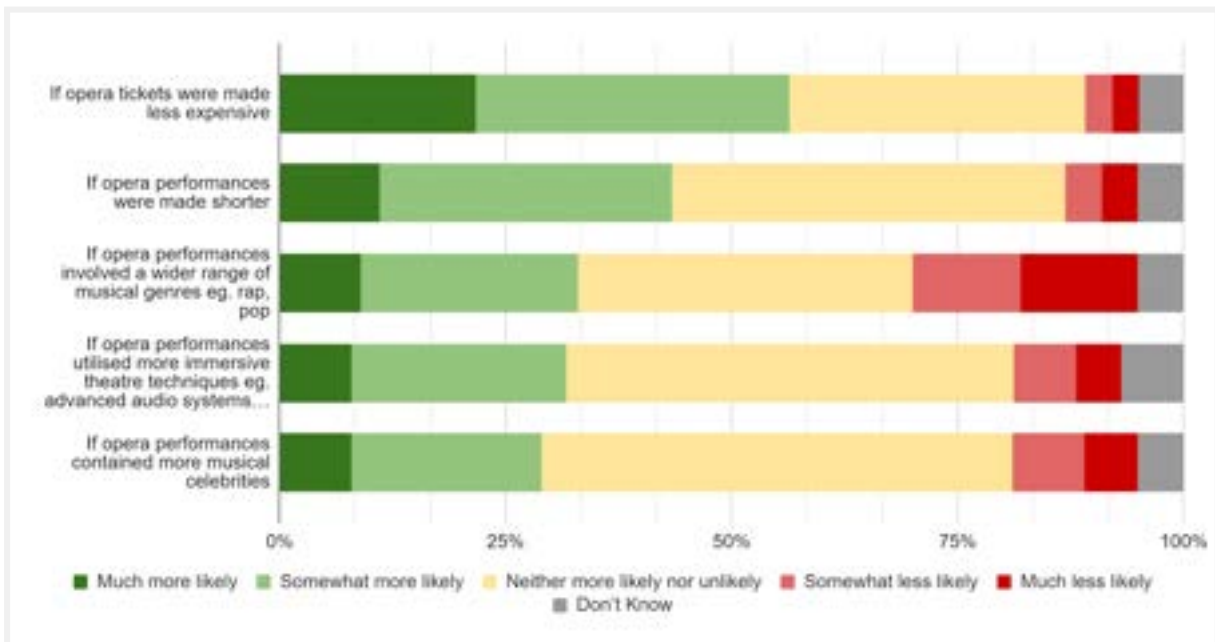
- What potential changes to the opera format would make people more likely to attend
- What hypothetical performances would people be interested in attending
- What changes would improve or worsen the experience if they did attend an opera

We presented a range of different options in each of these categories. It would of course be impossible to test every possible angle for the sector, and we are limited in this instance by being able to present only short descriptions of the operas.

Nevertheless, at the national level we find a slight preference overall for operas designed to be as close to traditional performances as possible, and operas performed in smaller and more intimate locations.



When it came to sector changes, the interests were relatively straightforward focussing on reduced costs and shorter performances.

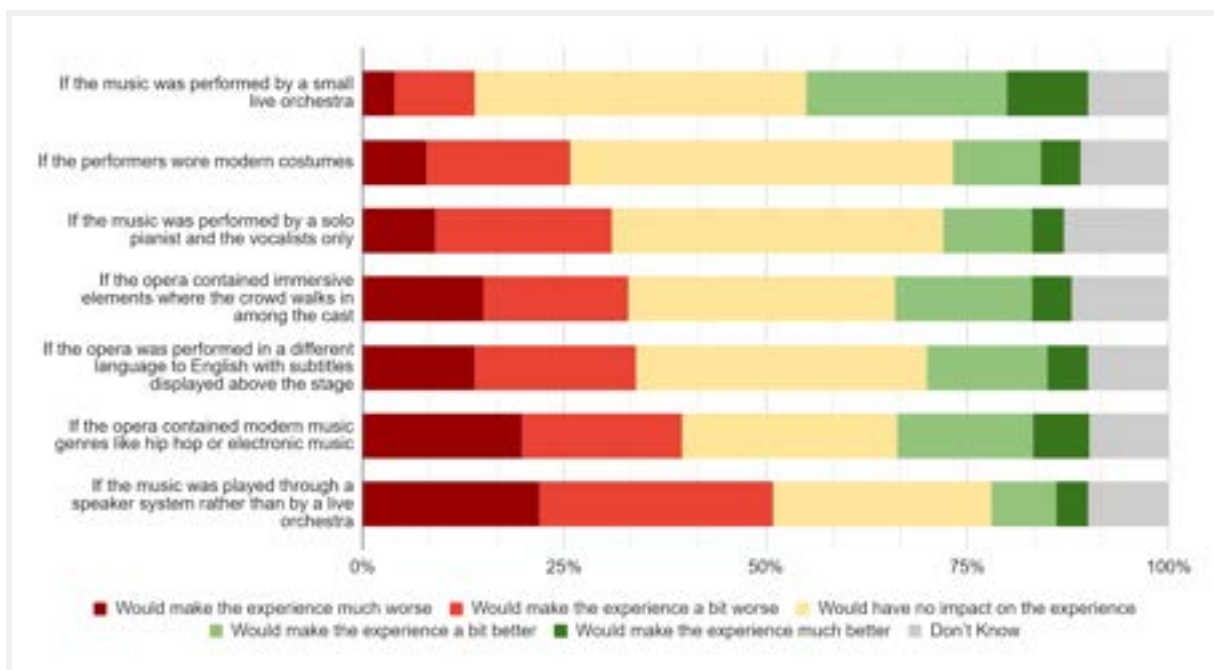


“ We kinda need the 2020 cricket version of the opera. They've taken a Test cricket match and they've squeezed it to make it a bit more fast-paced. ”

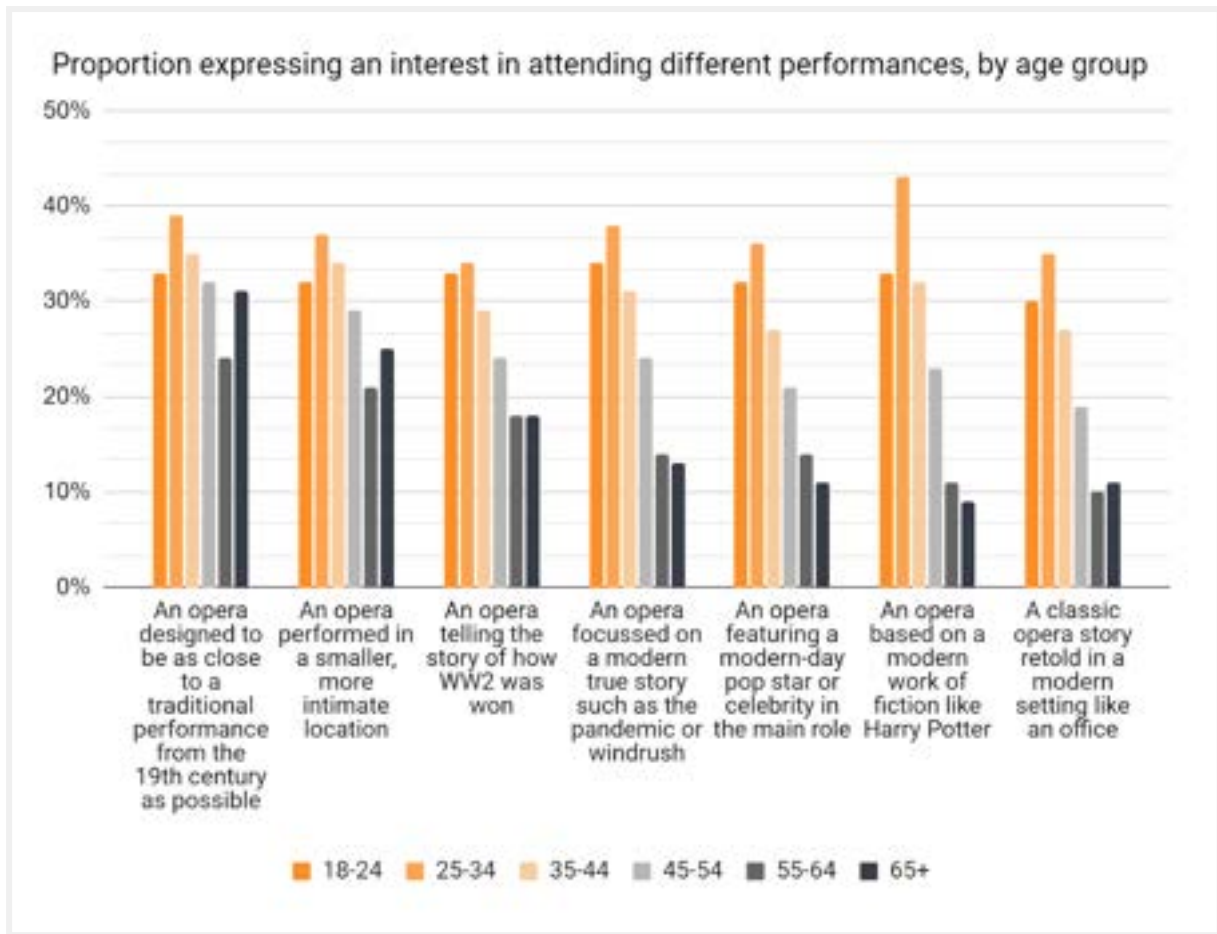
FEMALE, 44, LONDON
Project Manager

When it came to specifics about the way which operas could be presented differently, many of the changes were relatively poorly received, with the exception of having the music performed by a small live orchestra.

Involving modern costumes had a slightly negative impact, as did solo pianist and vocalist performances. The most negative responses were to music being played through a speaker system rather than a live orchestra, again speaking to the importance of the performers.



An important trend in these findings was that of age, where younger respondents were considerably more likely to display interest in some of the more substantial changes to the opera format. Among younger people, interest tended to be roughly level across all the examples we gave (albeit slightly higher for a modern work of fiction). This meant older individuals were the main reason for the higher overall appeal of traditional and more intimate opera performances.



The groups provided some insight into the nuance in people’s attitudes in this area. When presented with information on “Opera in the garden”, participants were able to go into further detail on what we were finding around intimate performances. Their views showed that there is a limit to the extent to which opera can receive the same level of interest in a smaller venue. For some, an unconventional setting can undermine the grandeur of opera, and the feeling that it is a special event or occasion, which is an important part of opera’s appeal.

“ I think it loses its kind of credibility if it's in the back of a pub to be completely honest. I wouldn't go if it was in that scenario. It just doesn't fit very well for me personally because I just imagine in my head that opera is this grand thing ... an event, a special occasion. ”

FEMALE, 29, LONDON
Project Manager

“ It just looked cheap ... like a Poundland version. I like the music and, you know, I've even got some of my iPod. But if I'm going to go, I want to put a really nice dress on and then I want the full experience. ”

FEMALE, 44, LONDON
Project Manager

“ I think it's the experience and the atmosphere. You wouldn't get the same experience or atmosphere from a beer garden as what you would in Opera House ... I would definitely rather save up and go to something there, even if it was more expensive because it's an experience and ... I don't think you would get the atmosphere in a garden as what you would get from being in a theatre and the sound of the music hitting the walls. ”

FEMALE, 41, MANCHESTER
Carer

But equally, for some the groups indicated how this approach could make the art form more approachable, and the environment would feel more relaxed.

“ Yeah I think that it's relatable ... you know, the whole summer vibe ... everyone's kind of in a jovial mood. It kind of reminds me, especially with the Euros coming this summer, of football ... everyone crowding into one place to watch something. So you can almost, you know, watch a game one night, then go to the opera in the evening after. ”

MALE, 30, LONDON
IT Support Worker

“ I think it looks much more light-hearted than the traditional opera. A lot more fun, relaxed. To me, opera is very serious. It's grown up. It's dark, it's high end. This looks more far, more lighthearted. I definitely would be up for that and ... it might potentially get more younger people interested in it, that would normally be like that would turn their nose up at the opera. ”

FEMALE, 38, LONDON
Fraud Investigator

Focus group participants also helped to put into context why it is that people value traditional performances, while also making it clear there was an appetite for change and new takes on the genre.

“ I think in all honesty, there's some aspect that if I was to go to the opera, I think I would want the old style experience because that's kind of what you relate to the opera about. But then on the other hand, I do think it would be more relatable in a more modern presentation. ”

FEMALE, 41, MANCHESTER
Carer

The challenge facing the sector then is to navigate these complex attitudes, providing performances which both address the interest in more light-hearted and accessible forms of opera, and ensuring that access is encouraged to the more traditional performances without cheapening them or reducing the feeling that these are a “special occasion”. The research demonstrates this tension; there is no one-size-fits-all solution.

It is also important here to acknowledge that different groups can be motivated by different aspects of opera performances - underlining the importance of ensuring the sector includes a diverse range of stories, styles and performances to appeal to them and target these appropriately.

TURNING INTEREST INTO ATTENDANCE

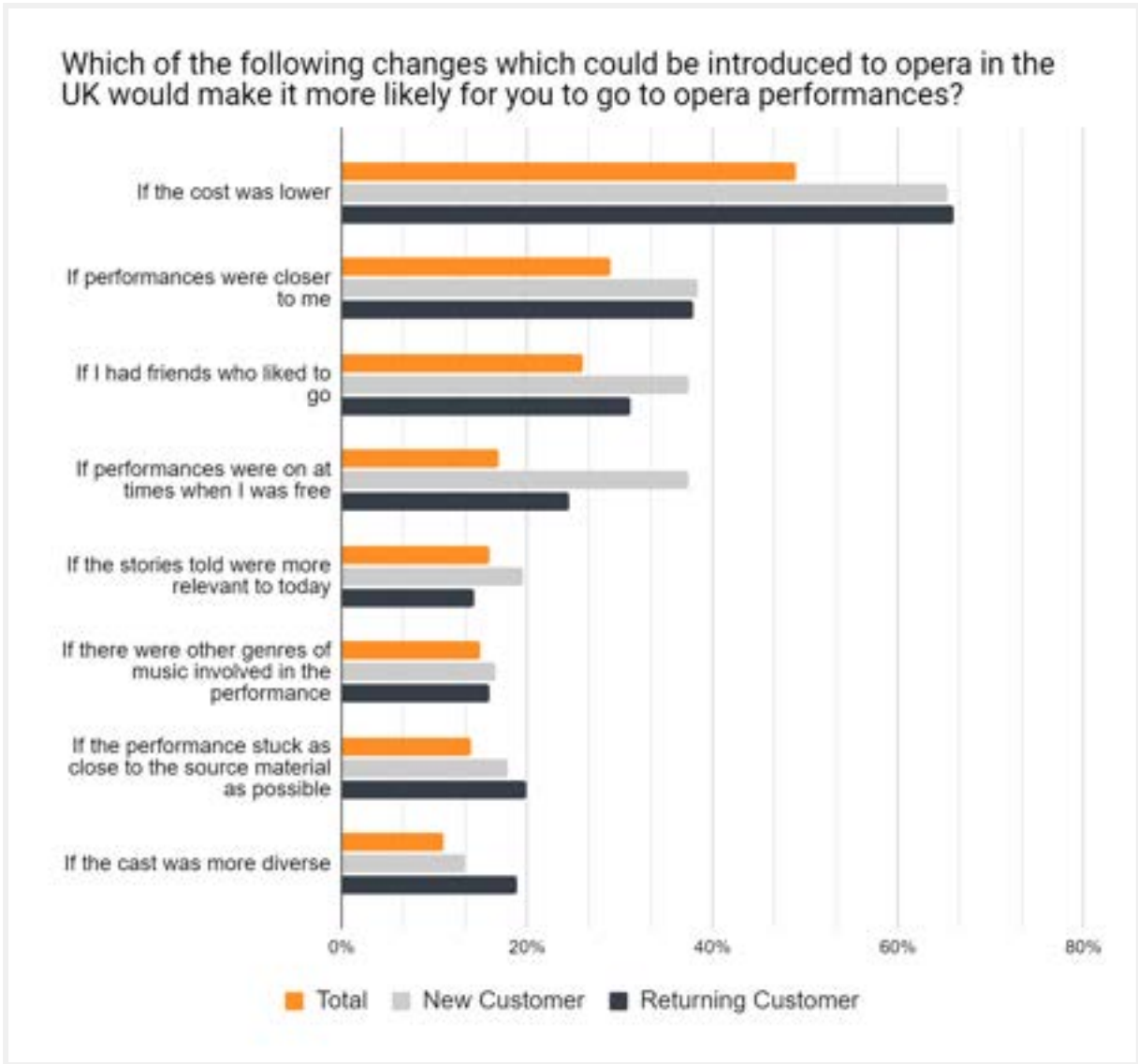
We have a range of questions in this research where people, even those who are quite disengaged with opera as an art form, are expressing higher than expected levels of interest in attending. The challenge for the opera sector is to translate this interest into real attendance.

Our research identifies a key group for the sector: those who say they would consider going to an opera, who have never been before. This group would be essential to any sector effort to expand audiences. These are people who have never attended the opera before, but express a general interest in doing so at some point in their lives (29% of the UK). The “New Customers”.

Separately to increasing attendance among those who have never attended, there is the task of encouraging those who have attended in the past to return. In our sample, we find around 7% of people fit the category of having attended in the past but only once, and expressing an interest in returning. The “Returning Customers”.

The New Customers tended to be slightly younger (37% under 35) than the general sample (31%). Interestingly, New Customers were less likely to report ever seeing promotional material for an opera (47% said they had at some point) than Returning Customers (70% had seen promotional material at some point). Equally, while 41% of New Customers had never met an opera fan, this was true of just 19% of Returning Customers. Our research indicates that this Returning group, even though they had only attended once, still had many more touch points with the sector than those who expressed an interest but had never been.

Both these groups tended to guess, like the rest of the public, that opera tickets were quite expensive (56% of New Customers guessed over £75, 49% of Returning). As we might expect, the key barrier for both groups was cost, and a majority said that the cost being lower would encourage them to attend.



A challenge we find is that with this analysis, the steps to increase opera attendance look relatively simple. People want cheaper performances, closer to them, at times they can make it to the show and ideally in a way that means they can bring a friend. Interest in hypothetical operas did not differ that substantially from the national average; operas designed to be traditional performed best with these groups.

PRICE REDUCTIONS

The main barrier to opera attendance uncovered by this research was cost, and it is a key challenge for growing audiences, so it is unsurprising that cost reductions proved popular when we discussed them with focus group participants. In the poll, reducing the cost of tickets was the main thing people said they would look for to encourage them to go, and there was a shared sentiment that this was important in the qualitative discussions.

“ *The world is just getting more and more expensive every bloody year and it's like rent and bills have just absolutely rocketed since COVID. I'm payback to paycheck and it difficult. So I think anytime something is more affordable, I just think that's great. And like for my sort of age group who are just trying to stay afloat and on top of rent and things ... any time that things are discounted that makes a big difference.* ”

MALE, 31, MANCHESTER
Admin Assistant

Interestingly though, there were some concerns expressed, especially by participants from lower social grades, that cost reductions could cheapen the experience or create an audience that would not be as engaged with the event.

“ *Cheap tickets doesn't feel very opera ... I don't know, it just feels like Harrod's having a bargain basket ... I just think that seeing that associated with opera almost takes away some of the mystique.* ”

MALE, 42, MANCHESTER
Bar Staff

“ I mean, there's the danger from my point of view in offering free tickets because you might sometimes get the wrong people there ... people going just 'cause it's free and not actually coming there because they've got a great deal of interest in the actual show itself and essentially talking all the way through it. ”

MALE, 47, MANCHESTER
HR Officer

“ Cheaper tickets would probably entice people, but would it be the right people? ”
And I think ... it would probably make more people want to go, but then will it still be that experience that you've kind of built it up to be?

FEMALE, 41, MANCHESTER
Carer

Given the importance of the experience in motivating people to attend the opera, it is important that cost reductions are not seen as undermining its exclusivity and grandeur, which is a key appeal for some. Given our research demonstrates that many are willing to pay in the mid-range for tickets, there is likely a sweet-spot for tickets that avoids seeming too cheap to provide the full opera experience for first-time attendees, while getting people through the doors.

A NOVEL SEGMENTATION OF THE FUTURE OPERA AUDIENCE

Building on the challenges this research has identified in encouraging people to attend opera, our research also sought to understand different potential directions for the sector and various audiences that could be reached. The decisions which writers, directors and performers take can change the likely audience to the performance, and we set out to understand how this could vary based on the hypothetical performances people were most positive and negative about.










In order to understand this, we ran a segmentation based on the quantitative dataset, focussed heavily on the questions about hypothetical opera performances and possible changes to opera, in order to identify which groups different types of opera could appeal to and why.

WHAT IS A SEGMENTATION?

A segmentation is a data-driven approach to understanding patterns in opinion data. By data-driven, we mean that a statistical process identifies the patterns within the data, and it is then the job of the researcher to interpret these patterns. Sometimes a segmentation can paint a very clear picture of an individual, whereas other times it can be a bit more blurry and the interpretation a bit harder to draw out.

The segmentation analysis produced nine segments across the whole population. We focused our analysis on six key segments who were more inclined towards the opera than the other groups.

The segments are presented overleaf.

HIGH INTEREST		
	Traditionalists	This group reflects those currently most engaged with the opera, with nearly all of them expressing interest in attending. They most enjoy performances which are as close to traditional as possible, and they were positive about operas in non-English languages.
	Experimentalists	This segment expresses moderate interest in opera, and their interest piques most when the style of storytelling is different (e.g. using modern costumes, modern music genres, modern settings).
	Story Retellers	This segment expresses moderate interest in opera, but also holds strong views on the value of retelling old stories and embracing modern art forms.
MEDIUM INTEREST		
	History Buffs	Opera is low down the list for this segment, who prefer museums and historic buildings. Nevertheless, traditional performances appeal most to them, and bringing down cost and length could mean more of them attending in the future.
	Light Entertainment Seekers	This segment expresses high interest in musicals, theatre shows and restaurants, but not opera. Making an opera an immersive experience, or involving modern day pop stars drove interest higher for them.
	Music Enthusiasts	This segment expresses high interest in going to gigs and music festivals, but very low interest in attending an opera. Generally, this group could make up a small portion of opera attendees going forward, and the performance styles do not tend to shift this proportion by that much.
LOW INTEREST		
	Non-Considerers	Did not express outright dislike for opera, but said they know what they like and were unlikely to say they would come along to any of the operas we tested.
	Opera Haters	There was one group which was defined more by the way that they disliked opera than anything else. For every example of an opera performance they said they were not interested, even if tickets were made cheaper.
	Disinterested	For this group, opera was not of any particular interest, and this showed in the way they tended to respond to the questions about it.

At the core of this segmentation are three groups with highly opposed views of what the opera sector should prioritise when it comes to future performances. Broadly these represent the people who are motivated by highly traditional performances (**Traditionalists**), by modern adaptations which make use of more experimental approaches to telling the stories such as using modern costumes and settings (**Experimentalists**), or by those which tell new modern fictional and true stories with the medium (**Story Retellers**).

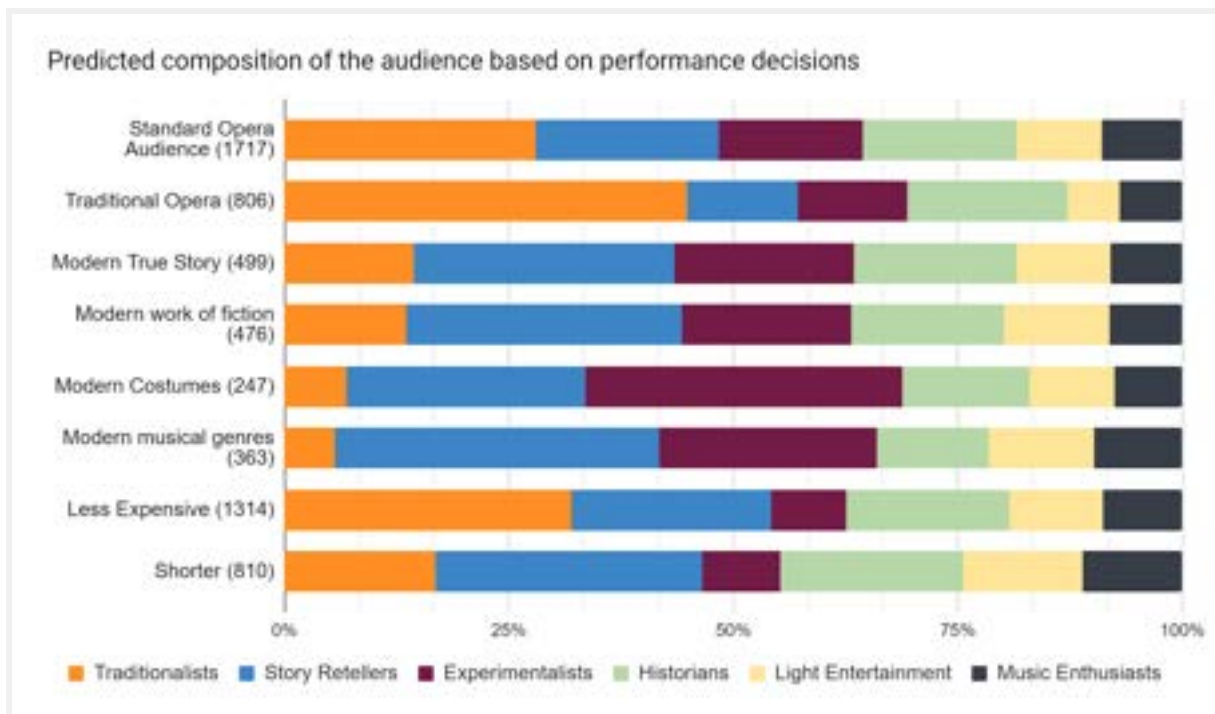
We find that, compared to one another:

- **Traditionalists** are older (54% over 55 years old), more female (58%), and tend to have slightly more disposable income (48% have £200 or more left over after expenditures at the end of the month).
- **Experimentalists** are younger (58% under 34 years old), and tend to have slightly less disposable income (32% have £200 or more left over after expenditures at the end of the month). They are more likely to live in London (20%) and urban areas in general (33%). They are also less likely to be White British (59%).
- **Story Retellers** are well distributed on age, and tend to have slightly more disposable income (48% have £200 or more left over after expenditures at the end of the month)

The segments reveal an opportunity for a number of different audiences which could be unlocked by taking different approaches to future performances.

At the moment, the larger portion of those who would consider attending opera in the future are the **Traditionalists**. As so many of this group indicate that they would like to attend an opera at some point (93%) this is unsurprising. A performance designed to be as close to a traditional performance increases the proportion of this group attending, as does reducing the cost.

However, the composition of the audience changes quite dramatically for different changes to the opera format. For example, if the opera focuses on a modern true story or modern fiction, then the potential audience becomes more dominated by **Story Retellers** and **Experimentalists**, similarly (more extremely) for modern costumes and modern musical genres.



The chart above indicates how the composition of opera audiences could change based on the direction a performance takes. To produce these estimates, we look only at the segments which expressed generally high enough levels of consideration for opera in general, and within those took only those who said they would be interested in attending an opera at some point in their lives. Numbers in brackets indicate the raw number of respondents who expressed interest in opera in general, and then in this specific type of opera described.

While samples were small, we could see this in our research when we presented the clips to participants too.

- Among the **Traditionalists**, 91% said they would consider seeing the *Nessun Dorma* performance, 76% *The Magic Flute*. Only 44% of those would consider *X*, and just 22% *The Nose*.
- When we look at the combination of **Experimentalists** and **Story Retellers**, interest in *X* (49%) is roughly level with *The Magic Flute* (48%), and *The Nose* sees considerably higher interest at 42%.

What this segmentation indicates is that new takes on opera do genuinely unlock a new and interested audience. It also demonstrates the breadth and variety of the potential future audience for opera. In doing so, it reveals a key challenge for the sector. Opera needs to strike a balance between performances which appeal to the typical returning customers of today, many of whom fall into the **Traditionalist** category, and performances which grow entirely new audiences. In some places, these different approaches present a mild conflict; novel takes on the genre can put off some of the safest customers in the **Traditionalists**, for example. Nevertheless, the segmentation shows that the maximum audience for the sector requires steps in both directions.

SECTION 4

CHALLENGES AND OPPORTUNITIES FOR THE SECTOR

Our research reveals **5** key challenges facing the opera sector.

- 1.** The substantial number of people who have no touch-point with opera performances at all.
- 2.** The perception that opera is expensive.
- 3.** The different and sometimes actively conflicting views of potential audiences.
- 4.** Opera attendance is surrounded by stereotypes.
- 5.** The pros and cons of being a “once in a lifetime experience”.

- 1. The substantial number of people who have no touch-point with opera performances at all.** A majority of people say they are open to attending an opera performance. Though it is less popular than musicals, opera compares favourably to other art forms such as ballet or choir performances, and even football matches for some groups. However, many members of the public are disconnected from the art form. This lack of touch-points with opera compounds barriers to attendance, since it makes it less likely that people will see or hear about it, or have friends who might suggest attending it with them.
- 2. The perception that opera is expensive.** We avoid saying that the cost itself is a challenge, as efforts to reduce ticket prices have been noticed and appreciated. The challenge is that as so many people face rising costs, the need for them to feel they will have a good 'return on investment' when choosing a source of entertainment has become more pressing. In our groups, participants expressed specific concern that they might be taking a "risk" on an opera performance rather than something they know for sure they will enjoy, and saw this as a significant barrier .
- 3. The different and sometimes actively conflicting views of potential audiences.** As many opera companies will be aware, different audiences want to take the sector in different directions and this is hard to accommodate. This was true both in terms of content (where people had conflicting views on modern and traditional performances), on medium (where small intimate performances were well received, but some felt it reduced the quality of the experience) and on experience (where some are attracted by opera's perceived spectacle and exclusivity but others see this as a barrier).
- 4. Opera attendance is surrounded by stereotypes.** Our research shows that the stereotypes people hold of opera attendees often do not match the reality. However, these stereotypes certainly loom large in the public mind. The art form is still thought of as being attended by an audience which is older, richer and less diverse than the general population. This leads some to feel that they would not belong in the audience but it also puts others off because they do not see themselves as enjoying the same type of entertainment as this group
- 5. The pros and cons of being a "once in a lifetime experience".** Opera has a strong reputation for uniqueness, and for being a special and epic event. Many people express an interest in experiencing it at some point as a result. The

challenge is the extent to which opera being a “bucket list” experience limits how many people are open to attending it more regularly. While many in the survey expressed an interest in attending at least once, only a small proportion of those who had attended an opera just once said they wanted to do so again. Our focus groups suggested this was because the intensity and perceived cost of going to the opera made people less likely to see themselves as potential returning customers or regular attendees.

The research also suggests a number of opportunities for how the opera sector can overcome these challenges and grow its audience

- 1. Focus on growing the pool of people who are aware of opera performances** - a majority of the public are open to going to an opera performance but too few of them are aware of opportunities to attend. Our research suggests opera is less effective in raising awareness of performances than other art forms. To create more potential attendees, opera needs to be more visible to more people and grow the pool of those who would consider going or returning. This emphasises the importance of putting more resources into marketing, where some of our focus group participants felt opera was behind other art forms. Alongside this, the sector could also find other ways to grow opera's visibility, for example by using longer runs of performances to allow for word of mouth to build up around them or transferring shows to different venues, especially via tours in the regions, rather than allowing hits to fade away. Finally, it also suggests there could be value in campaigns or initiatives which collectively promote opera as a whole, rather than just individual shows or companies.
- 2. Look beyond cost as a barrier to attendance** - cost is a fundamentally important factor in people's decision to attend opera but attempts to address this also need to be linked to other barriers which may discourage new or returning audiences. In particular, the way in which people make decisions around what events to attend and uncertainty around what an opera performance is like means it is important to link costs to potential social barriers. This could point to, for example, schemes that encourage existing opera-goers to 'bring a friend', performances designed for 'first-timers' or discounted group tickets.
- 3. Lean into the unique experience of opera** - the experience of attending an opera performance and the talent of the performers stand out in the public's views about what makes opera unique and explain much of its appeal. It is important to celebrate these things when communicating with audiences, including new ones. The sector should seek to find ways to allow more people to access the full 'opera experience', rather than assuming that this in itself is a barrier. This includes younger audiences and those attending more modern operas, who may want to see different content but enjoy many of the same things about opera as more traditional audiences. The sector could potentially learn from the way that others, such as horse racing, have sought to maintain

the experience of attending a luxury event whilst attempting to attract a larger and more diverse audience.

- 4. Deliver a balance of different types of performances and tailor marketing appropriately** - Our research demonstrated the importance of both traditional and more modern opera performances. While traditional ones were slightly more popular, and appealed to the returning audience, modern operas had a greater potential to change attitudes and bring in new audiences. As those in the sector recognise, it is important to strike a balance between these two approaches, maintaining traditional opera to appeal to the more certain audience, while exploring adaptations to classic stories or developing new ones which could expand the audience. Recognising that different audiences seek different things from an opera performance, it is then crucial to use specific messaging and marketing that is targeted at the appropriate group and which highlights those things which will appeal to them. Our segmentation provides one set of insights with which to do this. For example, since a more modern version of a traditional opera is likely to be appealing to the “Experimentalist” group, which is much younger, the marketing for this should focus on the channels where they are more likely to see it and emphasise the features of the performance, such as modern costumes and its relevance to the present day, which are more likely to appeal to them. Marketing for “Traditionalists” could be used within performance venues themselves, given that this is a group who have often visited in the past. Opera producers could also consider using insights on the financial backgrounds or sensitivity to price when determining how they price or market tickets for different performances.

- 5. Move beyond opera as a ‘one-off’ experience** - converting a proportion of those who are open to attending an opera into semi-regular attendees could give a major boost to the sector. Whilst our research suggests it is important to emphasise the unique experience of opera, there is also a need to encourage them to consider it as something they could come to more than once. This emphasises the importance of ensuring new attendees feel welcome and that opera is for them. It also suggests there is a crucial period after people attend an opera for the first time when the sector needs to maintain their interest and find ways to consider getting them to return. This could mean, for example, providing a significant discount on another attendance or multi-buy packages, as some opera companies now offer.



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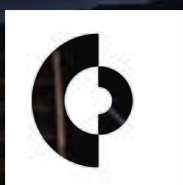
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