



THINK OPERA'S NOT FOR YOU?

OPERA THEATRE
OF SAINT LOUIS
SAYS THINK
AGAIN

A DISCUSSION GUIDE

This guide explores preliminary insights from Opera Theatre of Saint Louis's audience-building efforts as part of The Wallace Foundation's Building Audiences for Sustainability Initiative

ABOUT THIS DISCUSSION GUIDE

As part of The Wallace Foundation's Building Audiences for Sustainability (BAS) initiative, Opera Theatre of Saint Louis sought to attract and retain younger and more diverse audiences, to replace losses within its core audience. In November 2018, the foundation released a written and video story titled *Think Opera's Not for You? Opera Theatre of Saint Louis Says Think Again*, the fourth installment in the foundation's Building Audiences for Sustainability (BAS) Stories series that records early-stage efforts of performing arts organizations to expand their audiences.

The core approach applied in the BAS initiative was the idea of continuous learning. This approach had two formative steps: first, the identification of a target audience to attract and second, the use of research and analysis to learn about the target audience, challenge assumptions, and design and test activities to suit their needs. Once implemented, organizations tracked results, made adjustments based on evidence, and continued to retest and refine. Opera Theatre of Saint Louis (OTSL), along with the other organizations involved in the initiative, have applied this principle throughout their work.

Central to the story is how Opera Theatre of Saint Louis, through market research, decided to approach an underlying problem: newer audiences are not spending enough on tickets to replace the losses from those departing. Based on its findings, OTSL is making greater strides in identifying more precisely the challenges facing the company. Like most U.S. opera companies over the past decade, OSTL has seen its core audience aging and dwindling, earned income dropping, and expenses rising. Audience-building has become OSTL's top strategic priority, with a focus on targeting Gen X-ers and millennials, as well as people of any age in the region's racially and ethnically diverse population.

The purpose of this Discussion Guide is to help arts administrators, board members, and arts practitioners working within varying disciplines and with a range of budget sizes to better understand and apply lessons from another institution's experience to their own. The guide can serve as a teaching aid for small-group discussions, as well as individual study. It is designed to be used in conjunction with the [written and/or video versions](#) of the story.

This Discussion Guide was created in collaboration with OPERA America. Founded in 1970, OPERA America draws on resources and expertise from within and beyond the opera field to advance a mutually beneficial agenda that serves and strengthens the field through creation, presentation, and enjoyment.

DOWNLOAD THE STORY AND VIDEO

Prior to completing this Discussion Guide, read the written story and watch the video that describe Opera Theatre of Saint Louis' use of market research to more effectively target younger and more diverse audiences. The story and video are available at: www.wallacefoundation.org/operatheatre.

QUESTIONS FOR DISCUSSION

A THE AUDIENCE GOAL

- a.1. Consider OTSL's target audience groups and why they were selected. How does your organization identify and prioritize audience groups, and how does this fit in the context of your overall mission and financial goals?
- a.2. How were the OTSL programs designed to address these audience goals?
- a.3. As you actively engage with your audience, how well does your organization understand its audience demographics: *who is attending, how often, and spending patterns over time*? How do these demographics match those in your community? Are you serving all parts of your community or only specific groups?
- a.4. How complete is your organization's audience data? How rigorously do you analyze this data, and how often do you complete this analysis? Do you utilize third-party data sources to complement your own collected data? (*What information would you still need to make better decisions, and how might you obtain that information?*)

B INITIAL ASSUMPTIONS

- b.1. Before this market research, OTSL sensed that older generations were leaving at a faster rate than new, younger audiences were entering. Did that assumption hold true?

- b.2. What barriers did OTSL initially expect were preventing audiences from trying opera? How did those perceived barriers match results from its later market research?
- b.3. How can your organization evaluate assumptions about your current and potential audiences and adjust them based on evidence?
- b.4. How do current audience demographics influence your assumptions of what your potential audience can or should look like?
- b.5. How do industry-wide general audience trends influence your organization's thoughts on audience goals?

C MARKET RESEARCH

- c.1. What perceptions did focus group participants have about opera in general, and how did that differ from what OTSL offers?
- c.2. What kind of assumptions do you have about your audiences, and what steps have (or can) you take to confirm or adjust those assumptions?
- c.3. Outside of their buying patterns at your company, what else do you know about the cultural participation patterns of your potential audiences? How can you learn more about the ways they engage with cultural events, including movies, restaurants and other forms of entertainment?
- c.4. How did OTSL change its tactics based on results from its market research?

- c.5. What indicators do you have that your prospective audiences might be open to attending performances in your discipline? How can you test their receptivity before investing in expensive programs?
- c.6. Are there potential research partners in your community that can assist your company in learning more about your current and prospective audiences? Have you received research reports generated by other cultural institutions in your community? Are any of their findings applicable to your organization?

D THE FINDINGS

- d.1. Through research analysis, OTSL learned that many of its newcomer audiences behaved differently in purchasing tickets than its core audience. Does your organization understand the purchasing behaviors of its different audience groups? How can your organization engage with these groups in an authentic way, respecting their attendance desires, while still trying to engage them in a deeper relationship?
- d.2. In diving deeper into their year-over-year mainstage sales data, OTSL discovered disparate trends in the total number of tickets sold, gross sales revenue, and number of purchasing households. In working towards similar findings, how does your organization go about analyzing its aggregate data streams and what tools might you need to do so?

- d.3. OTSL learned that audiences of all races want to see diverse casting on stage, reflecting the world in which they live, which aligned with OTSL’s mission-driven imperatives. How can your organization make a similar, authentic commitment to increasing diversity onstage, backstage, in the board room, and in the administrative offices?
- d.4. Only 20% of attendees who age-qualified for Young Friends events actually attended, indicating that these events were not a draw for all in this age group. How can you learn what motivates your audience groups and tailor programs and messages accordingly, rather than just by demographics (age or otherwise)?

- e.4. As part of its festival season, OTSL is known for developing new opera talent and for its pre-performance lawn picnics. Both of these elements play a role in its Opera Tastings program. What defining characteristics can your organization build upon in its engagement activities?
- e.5. Does your organization have established relationships with other businesses, organizations, and/or agencies that can help communicate with prospective audiences and on projects? Do you collaborate with their leaders in your planning processes?
- e.6. Your organization’s audience engagement activities likely differ in timing, location or format from your mainstage offerings. How can you design programming that authentically represents your brand while achieving its engagement and financial goals?

E DESIGNING NEW STRATEGIES

- e.1. Does your Board consider new audience recruitment to be an organizational priority? How does your Board learn about trends in the field and practices at other arts organizations? How can you incorporate sustained learning into the culture of your Board?
- e.2. OTSL has a variety of committees and task forces that provide suggestions and advice. Does your company have formal or informal structures that serve as conduits between key constituents and company leaders? How does your company “listen to” prospective audiences?
- e.3. With which OTSL institutional priorities do the activities described in “Think Opera’s Not for You?” align? How can your organization adapt current programs to align with multiple priorities?

F IMPLEMENTATION

- f.1. Consider the kinds of partnerships OTSL engaged in to ensure high attendance at Opera Tastings. What kind of work is needed to make these partnerships successful from both sides?
- f.2. Getting new audiences to try a low-key, introductory program is one thing. What techniques can you employ to encourage those attendees toward a deeper and longer engagement with your organization?
- f.3. By altering the schedule of Tastings events, OTSL was able to reduce the per-event cost with no effect on festival ticket sales, making them more cost-effective. What adjustments to similar programs

can your organization make to achieve cost savings and how can you evaluate the resulting effect on audience behaviors?

- f.4. What factors do you need to consider (budget, mission, etc.) in order to determine whether or not a program is “worth it?”
- f.5. OTSL received grant funding from The Wallace Foundation to launch Opera Tastings and evaluate its impact. At your organization, experimentation may require reallocation of funds from other programs. Have you identified established programs that are no longer effective that can be trimmed or eliminated to make room for new experiments? What other ways might you seek additional funding?

- g.3. When chasing new, potential audience groups, is your organization placing a similar emphasis on retaining current or reacquiring lapsed audiences? How can you determine the right balance of resources to devote to each?
- g.4. How can you make your engagement activities financially sustainable in order to continue moving the audience development needle? At what point does your organization need to make painful decisions about changing the program’s course or discontinuing it altogether? How does this affect your engagement strategies?

G ASSESSMENT

- g.1. Increasing main stage ticket sales was a clear goal for OTSL. Did the company reach its goal? Did the company have success in other dimensions, such as improved community relations? Are there other ways to measure the benefit of an increased community profile?
- g.2. In weighing new initiatives, organizations must assess capacity to successfully carry them out from design to implementation to analysis. How does your organization navigate this process?

ABOUT OPERA THEATRE OF SAINT LOUIS

Opera Theatre of Saint Louis is a spring festival featuring casts of the opera world's most exciting singers accompanied by members of the Grammy Award-winning St. Louis Symphony Orchestra. Each season, OTSL presents four inventive new productions in English during the months of May and June. In addition to presenting innovative interpretations of classics, OTSL is also committed to premiering new and relevant operas by prominent composers; since its inaugural season in 1976, 28 operas have received their world premieres at Opera Theatre. The company's competitive young artist programs foster the next generation of emerging American singers; these programs have been a springboard for countless artists to launch international careers. OTSL is led by General Director Andrew Jorgensen and Artistic Director James Robinson.

ABOUT OPERA AMERICA

OPERA America (operaamerica.org) leads and serves the entire opera community, supporting the creation, presentation, and enjoyment of opera. The organization is committed to:

- Delivering professional development to artists, administrators, and trustees.
- Increasing appreciation of opera through educational and audience development resources.
- Offering technical support and informational services that foster the creation and presentation of new works.
- Fostering equity, diversity, and inclusion across all aspects of the opera industry.
- Undertaking national research and representing the field to policymakers and the media.
- Managing the National Opera Center, a custom-built facility that provides a centralized space for collaboration, rehearsal, and performance.

Founded in 1970, OPERA America fulfills its mission through public programs, an annual conference, regional workshops, consultations, granting programs, publications, and online resources. It is the only organization serving all constituents of opera: artists, administrators, trustees, educators, and audience members. Membership includes 150 professional opera companies; 350 associate, business, and education members; and 1,700 individuals. OPERA America extends its reach to 80,000 annual visitors to its National Opera Center and over 40,000 subscribers and followers on e-communications and social media. Representing over 90 percent of eligible professional companies, OPERA America is empowered to lead field-wide change.



ABOUT BUILDING AUDIENCES FOR SUSTAINABILITY

Opera Theatre of Saint Louis is one of 25 performing arts organizations that participated in The Wallace Foundation's Building Audiences for Sustainability (BAS) effort, a six-year, \$52-million initiative aimed at developing practical insights into how arts organizations can successfully expand their audiences. Building Audiences for Sustainability (BAS) continues the foundation's 25-year history of support for the arts, with a particular emphasis on building audiences.

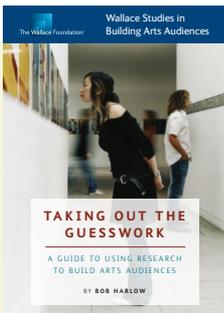
Representing a spectrum of organizations—from dance and opera companies to orchestras, theaters, and multidisciplinary arts institutions—the selected partners receive financial and technical support from the foundation to research and develop their audience-building work. The evidence gathered from these organizations will be documented and analyzed by an independent team of researchers at the University of Texas, Austin, providing valuable insights, ideas, and information for the entire field.

The effort is structured around continuous learning. Each organization's audience-building project is informed by research, implementation, assessment, and revision.



ABOUT THE WALLACE FOUNDATION

Based in New York City, The Wallace Foundation is an independent national philanthropy dedicated to fostering improvements in learning and enrichment for marginalized children and the vitality of the arts for everyone. It seeks to catalyze broad impact by supporting the development, testing, and sharing of new solutions and effective practices. At www.wallacefoundation.org, the foundation maintains an online library about what it has learned, including knowledge from its current efforts aimed at: strengthening education leadership to improve student achievement, helping selected cities make good afterschool programs available to more children, expanding arts learning opportunities for children and teens, providing high-quality summer learning programs to disadvantaged children, enriching and expanding the school day in ways that benefit students, and helping arts organizations build their audiences.



IF YOU ARE INTERESTED IN LEARNING MORE ABOUT USING MARKET RESEARCH to better understand your audiences, [*Taking Out the Guesswork: Using Research to Build Arts Audiences*](#) is a practical guide to conducting market research with low-cost solutions applicable to organizations of all sizes and disciplines. Download the free guide along with other Wallace resources [here](#).

This marks the fifth resource in the Discussion Guide Series. The full series can be accessed at www.wallacefoundation.org/buildingaudiences.