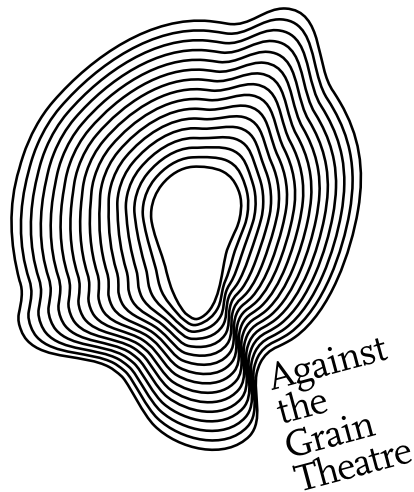


# Digital Opera Research and Intelligence Study



A WHITE PAPER  
BY AtG ON  
LIVESTREAMING  
PERFORMANCES

# ATG'S MISSION

To create and  
introduce  
communities  
to outside-the-  
box opera  
experiences.

For more information, please visit AtG online at [www.atgtheatre.com](http://www.atgtheatre.com), on Twitter, Snapchat and Instagram @AtGTheatre and on Facebook at [www.facebook.com/AtGTheatre](http://www.facebook.com/AtGTheatre).



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# Technology is shaping the future. How will it change the future of opera?

Technology has affected nearly all aspects of our lives. We are more connected and have access to more information than ever before. It is the solution to many of our problems, and the cause of many others. The question we keep asking ourselves is: how does an opera company adjust to this current reality and use technology to serve our audiences better?

At Against the Grain Theatre (AtG), we believe that technology is key to reaching new audiences and enriching the experience for existing audiences. Our company was formed on the idea that opera can be produced anywhere, including a dimly-lit pub, a remote grotto and shiny TV studio. Presenting opera online is our next challenge.

Over the past several months, we've been serious about exploring livestreamed performances. We've been speaking with experts from around the world and, more importantly, asking opera audiences for their opinions on livestreams. With the generous support of the Canada Council for the Arts, we've engaged digital consultant Michael Morreale to lead a comprehensive research project. The project is called the Digital Opera Research and Intelligence Study. We like to call it DORIS for short.

This free White Paper is what we've learned. In the coming pages, you will find the results of our audience survey and insight from international livestream experts.



**Joel Ivany**  
Founder and Artistic Director  
Against the Grain Theatre

**WE ARE GRATEFUL TO  
THE FOLLOWING  
ORGANISATIONS FOR  
THEIR PARTNERSHIP  
ON THIS PROJECT:**

Banff Centre for Arts and Creativity  
Canadian Music Centre  
Canadian Opera Company  
Cowtown Opera  
Edmonton Opera  
Ottawa Chamberfest  
Lyric Opera of Chicago  
Pacific Opera  
Vancouver Opera



We acknowledge the support of the  
Canada Council for the Arts.

Nous remercions le Conseil des arts  
du Canada de son soutien.



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# Hello, DORIS.

A key component of DORIS is an online audience survey sent out to tens of thousands of opera-lovers in March and April 2019. The survey, distributed together with our partner organisations listed on the previous page, was designed to help us better understand the online habits of opera fans, and their attitudes towards livestreaming. The results give a clearer picture of how existing audiences behave online. Further study is required to better understand the preferences of potential audiences.

**Over 1,500 opera fans participated in the survey. 99% of the respondents were from Canada or the United States, with the majority between the ages of 55–74.**

They came from a variety of backgrounds and regions, and shared a wide range of opinions. Opera fans know what they like, and will seek out great performances wherever they can find them, whether it's live or online. But one thing united them all: a love of great performances and an appreciation for the power of opera.

**This is what they told us.**

# Executive summary

The goal of our survey was to better understand the opera fan's online behaviours and attitudes toward livestreaming.<sup>1</sup> Fortunately, opera audiences aren't known for holding back their opinions.

Of course, it is impossible to generalise the views of all opera-goers. Some expressed complete disinterest toward experiencing opera in this way. It is clear that livestreaming isn't for everyone. But others see livestreaming as the best way to get their opera fix between the performances they are able to attend in person. Time and money are the top barriers stopping opera fans from attending more performances, and free or cheap livestreaming is one solution to this problem. But neither group sees watching a livestream as a replacement for the live experience.

## BIG TAKEAWAYS

**35.7%** of respondents have watched a livestreamed performance; however, **72.8%** say they are at least somewhat interested in doing so.

The majority of respondents say they would pay to watch a livestream. In fact, almost a quarter of respondents would pay **\$10** or more.

**31.9%** of respondents say they are more likely to donate to an opera company after it has streamed an opera.

Only **55.2%** of respondents report watching online video at least once per week. This is significantly lower than the Canadian video consumption rate of **85%** across all demographics.<sup>2</sup>

1. For the purposes of this survey, we chose to use the term "livestreaming" to denote any performance disseminated online either live or on demand.

2. IAB Canadian Media Usage Trends Study 2018

In the pages below we go deeper into how opera fans across North America interact with social media, online video, streaming subscription services, and livestreamed performances. AtG is pleased to share these valuable insights with full transparency so that opera companies around the world can use technology to better serve audiences.

**Michael Morreale**  
DORIS Digital Consultant & Project Lead

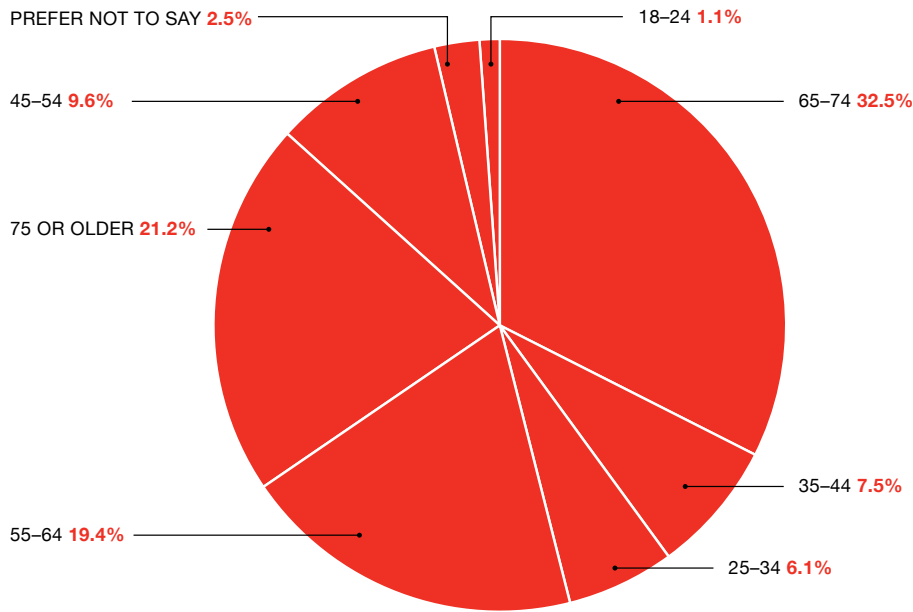
# Survey Findings





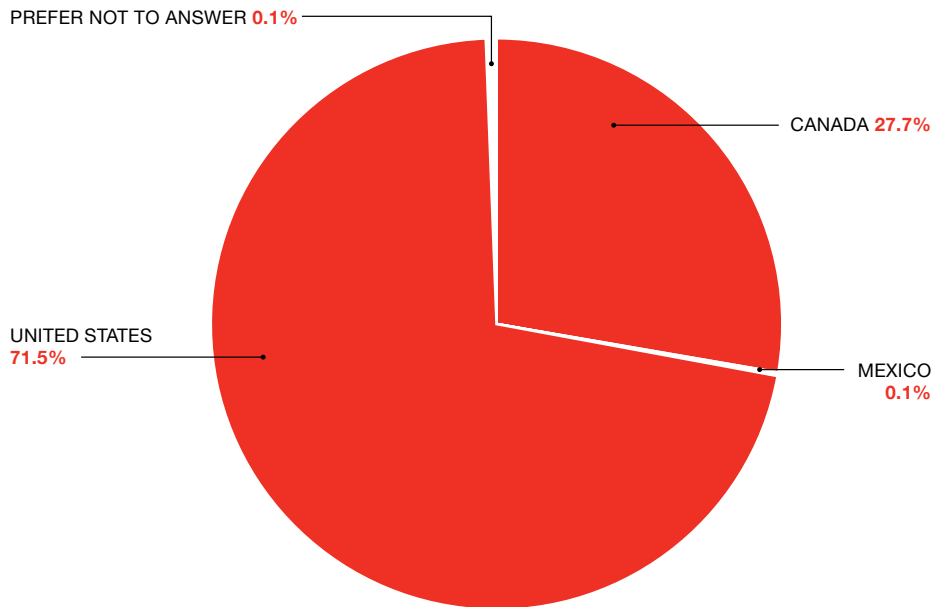
# Who participated in this survey?

How old are you?



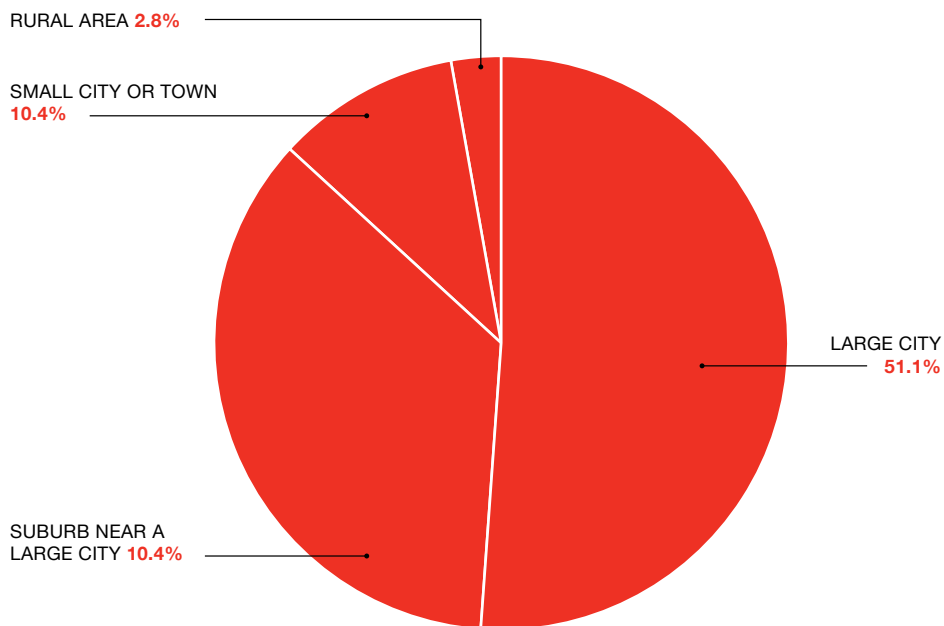
AtG partnered with eight opera companies and arts organisation to disseminate the 24-question survey to audiences across North America.

Where do you live?



The results reflect the views of opera-goers from Canada (27.7%) and the United States (71.5%) with access to a computer.

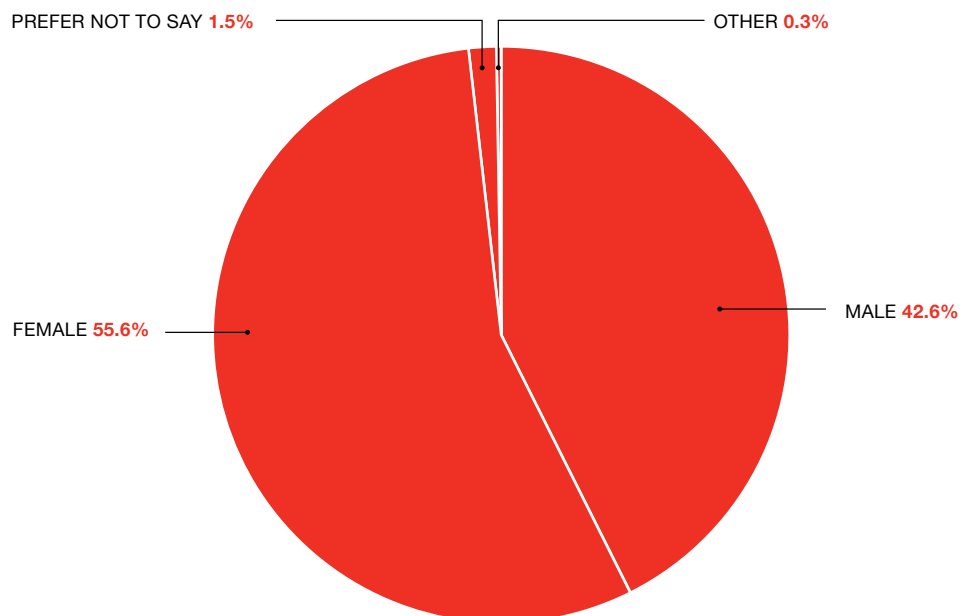
Which of following best describes where you reside?



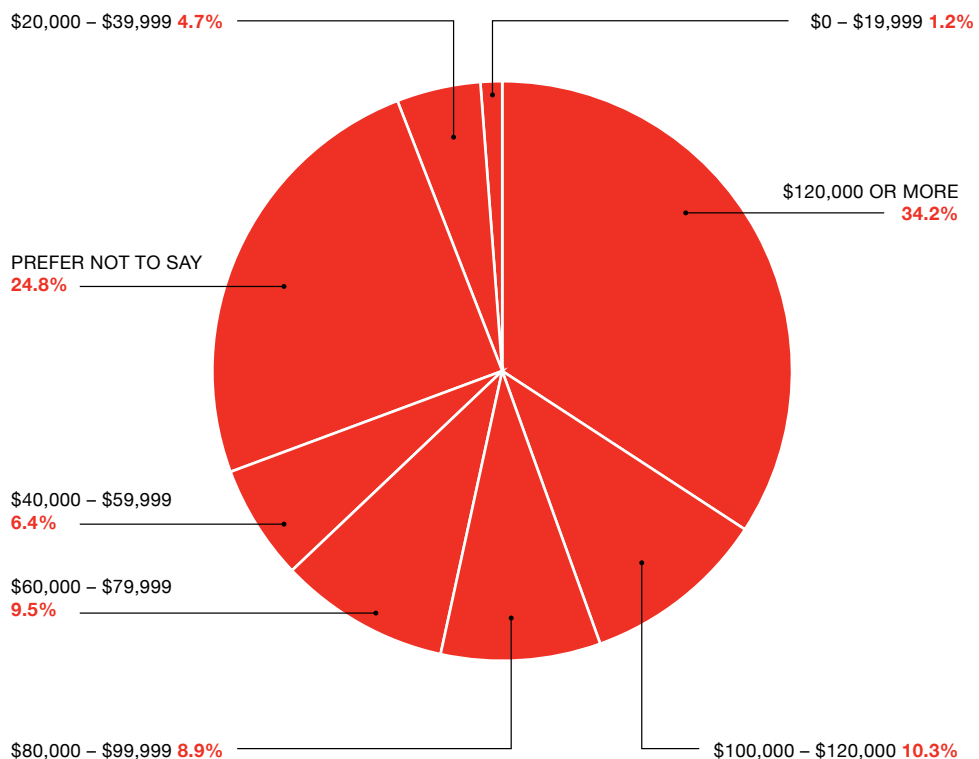
Of those respondents, **86.8%** live in or near a large city.

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What is your gender?



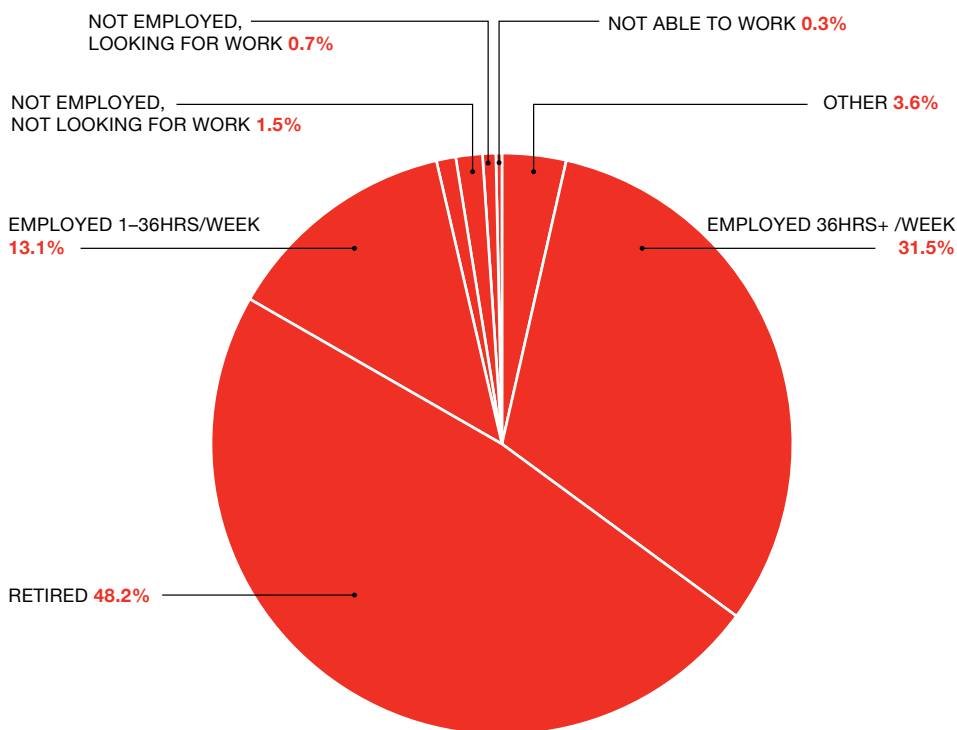
What is your combined total household income in 2018?



Nearly half reported a household income of over **\$100,000** in 2018.

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Which of the following best describes your employment status?



Approximately half of respondents are retired.

“It is essential to develop the public of tomorrow. Your future ticket-buyers are already online but not yet in your concert halls and operas.”

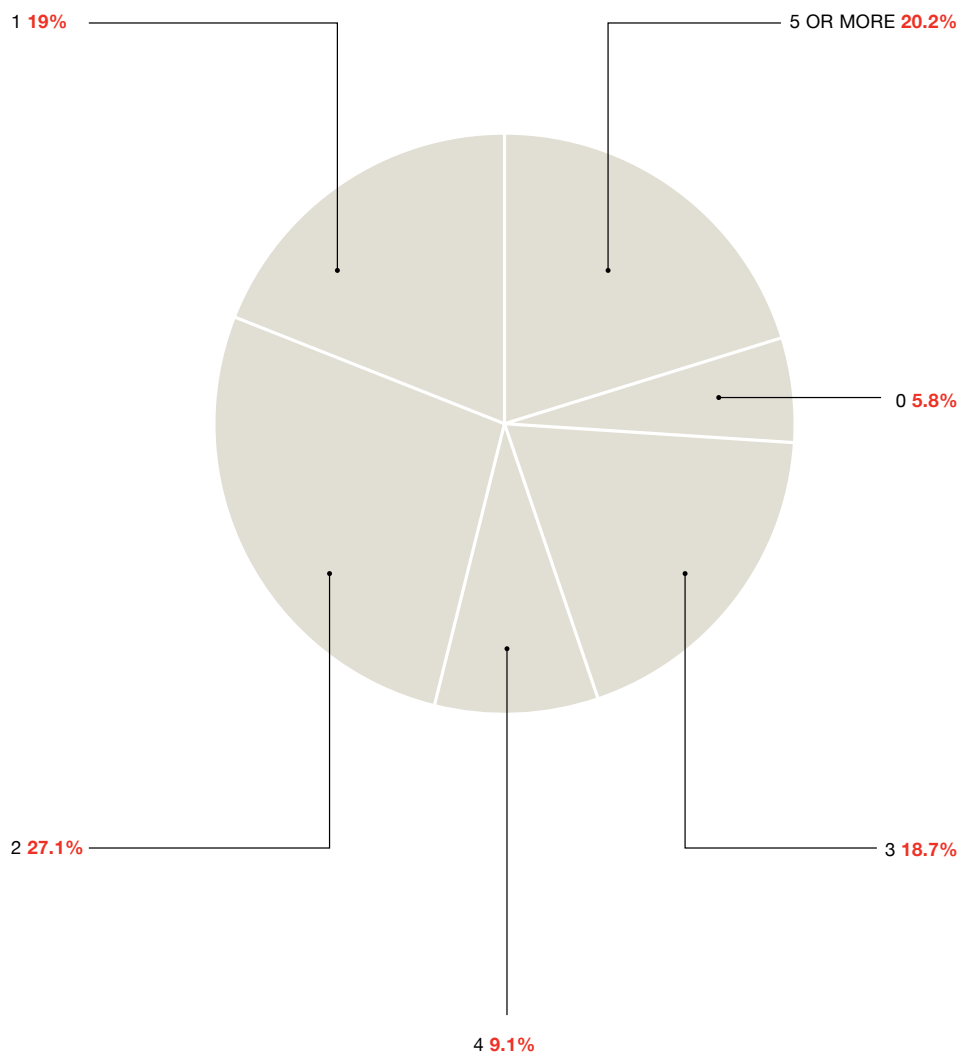
– HERVÉ BOISSIÈRE,  
FOUNDER AND MANAGING  
DIRECTOR OF MEDICI.TV

Read the full Q&A at [atgtheatre.com/blog](https://atgtheatre.com/blog)

# Level of arts participation

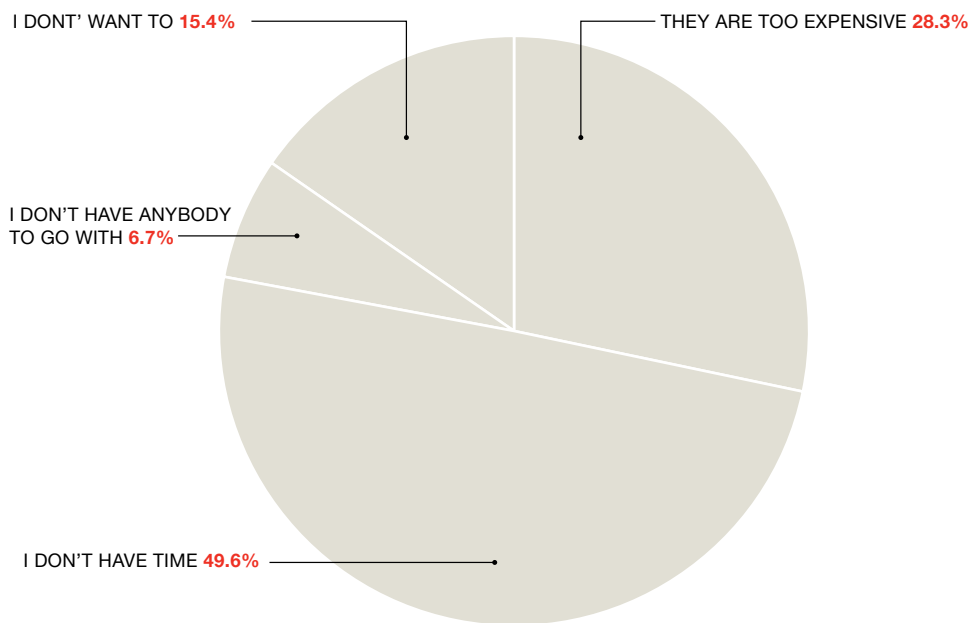
13

How many performances (concerts, operas, ballets, etc.) have you attended in the past 30 days?



**94.2%** of respondents have been to at least one live opera, symphony, or ballet performance in the past 30 days with over **20%** attending five or more performances.

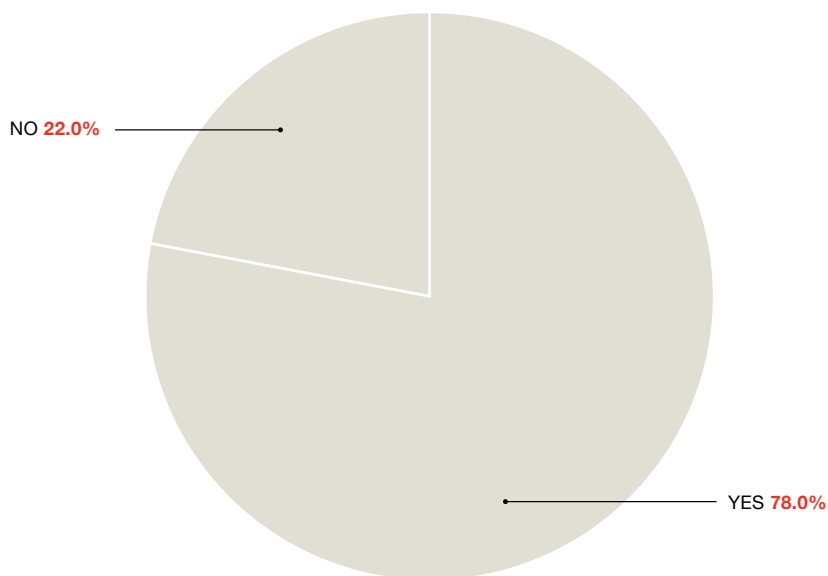
### What is your reason for not attending more performances?



Half say that lack of time is what prevents them from attending more performances.

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### Have you made a financial donation to an arts organisation in the past 12 months?



78% of respondents have made a financial donation to an arts organisation in the past year.

# What prevents you from attending more performances?

“Travel time too long, public transit schedules are too infrequent”

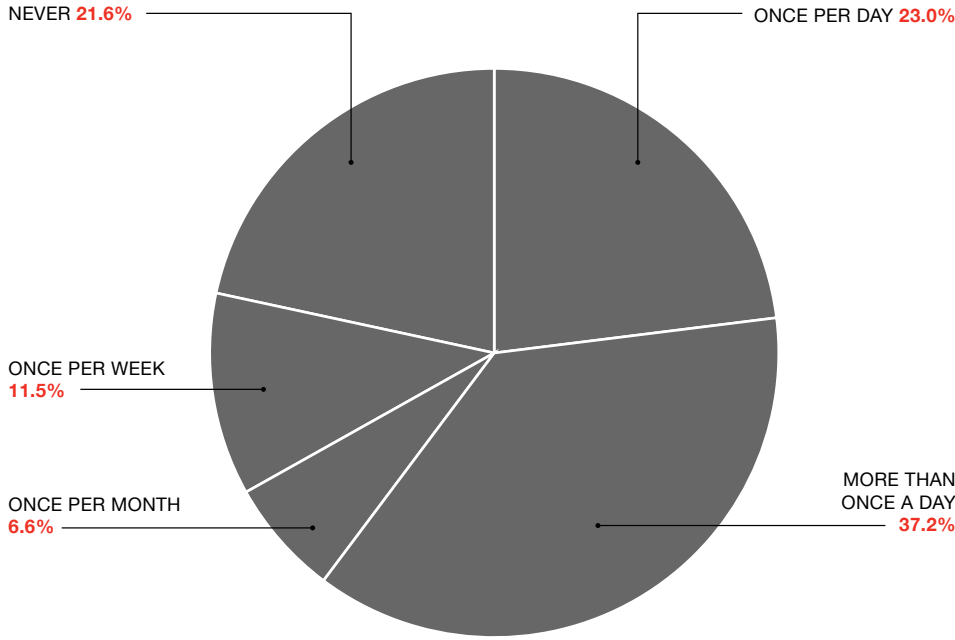
“The seats are not comfortable. I don’t want to dress up. People that go are condescending assholes.”

“I attend a great deal of theatre, films, lectures and family events. I couldn’t manage any more.”

“Retirement income doesn’t allow entertainment events.”

# Social media activity of opera fans

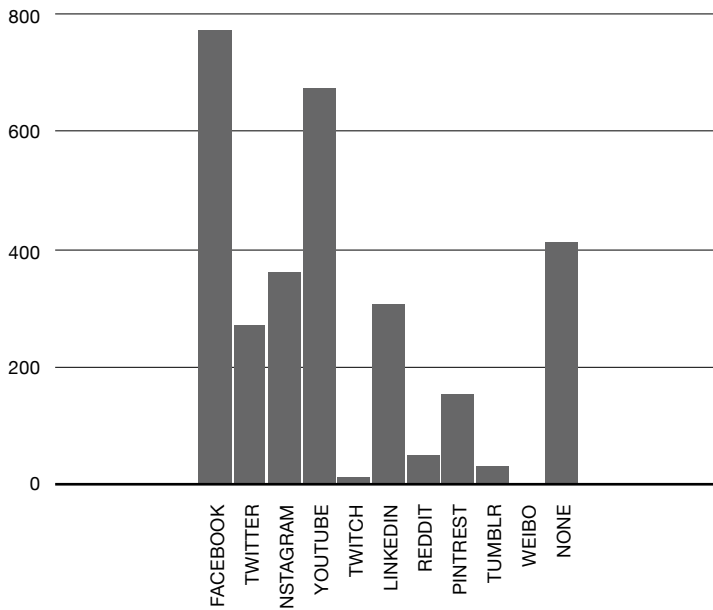
How often do you visit at least one social media site?



Over **60%** of respondents say they visit a social media site once a day or more.

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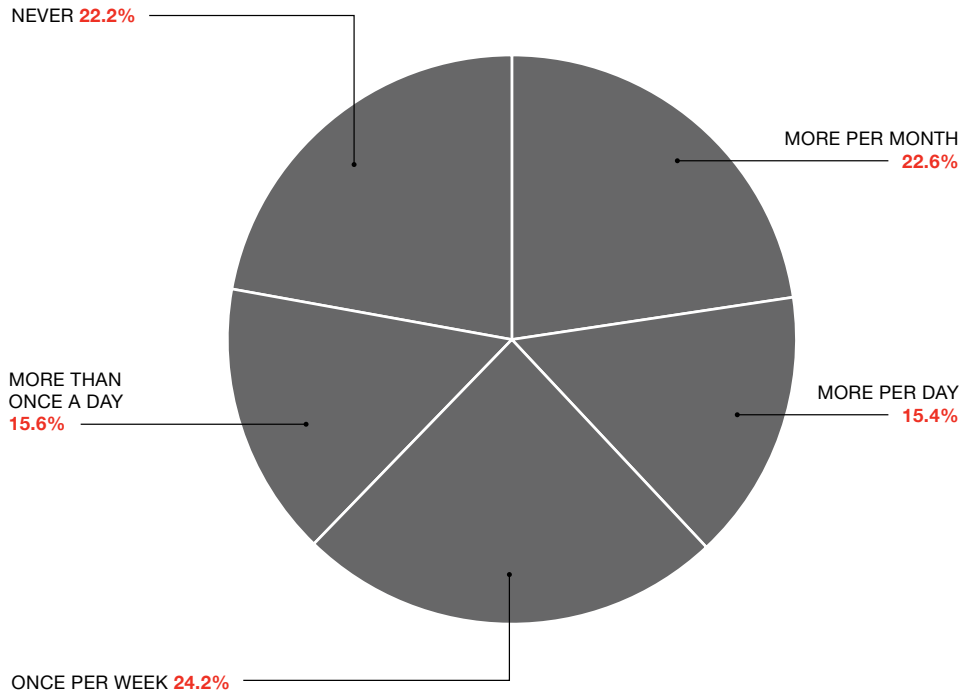
Which of the following social media sites do you visit regularly? (Select all that apply)



The most popular platforms are **Facebook, YouTube, Instagram and LinkedIn.**



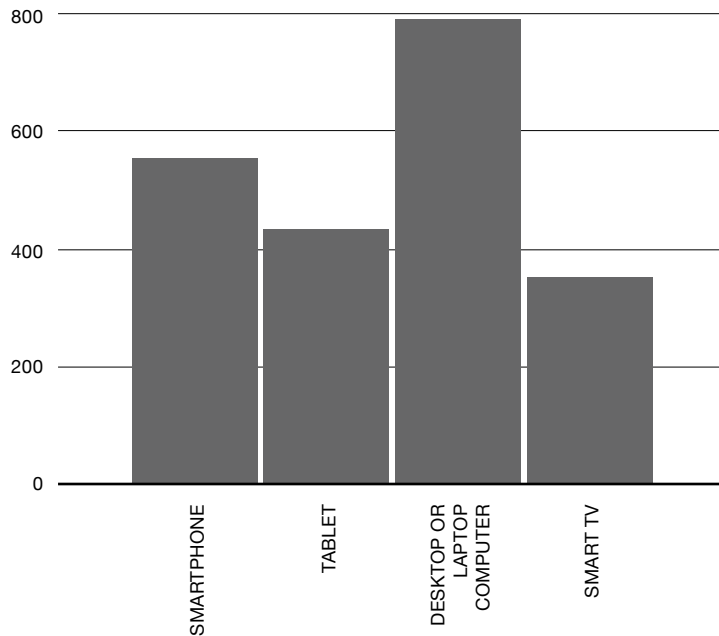
How often do you watch videos online?



Only **31%** of respondents report watching at least one online video per day.

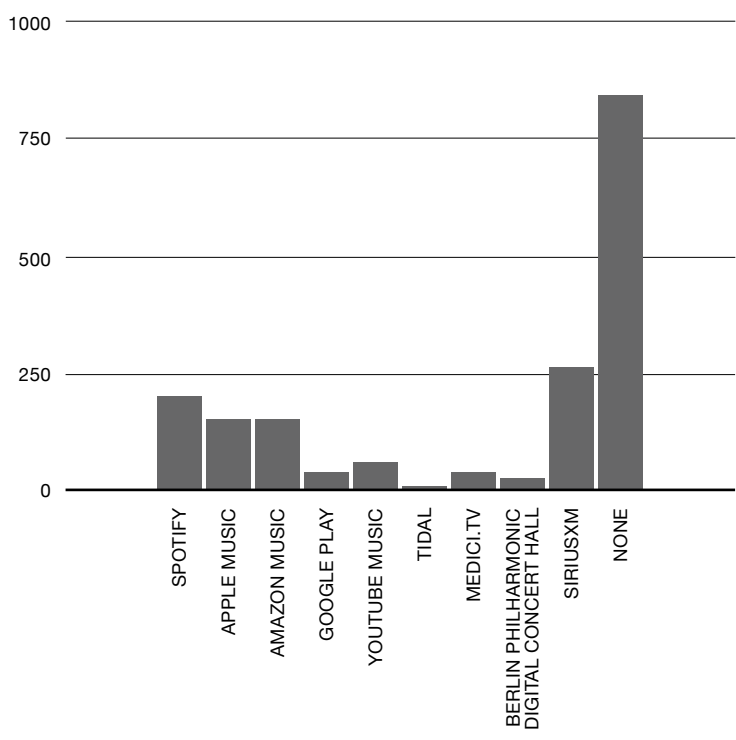
17

On which devices do you regularly stream online video content? (Select all that apply.)



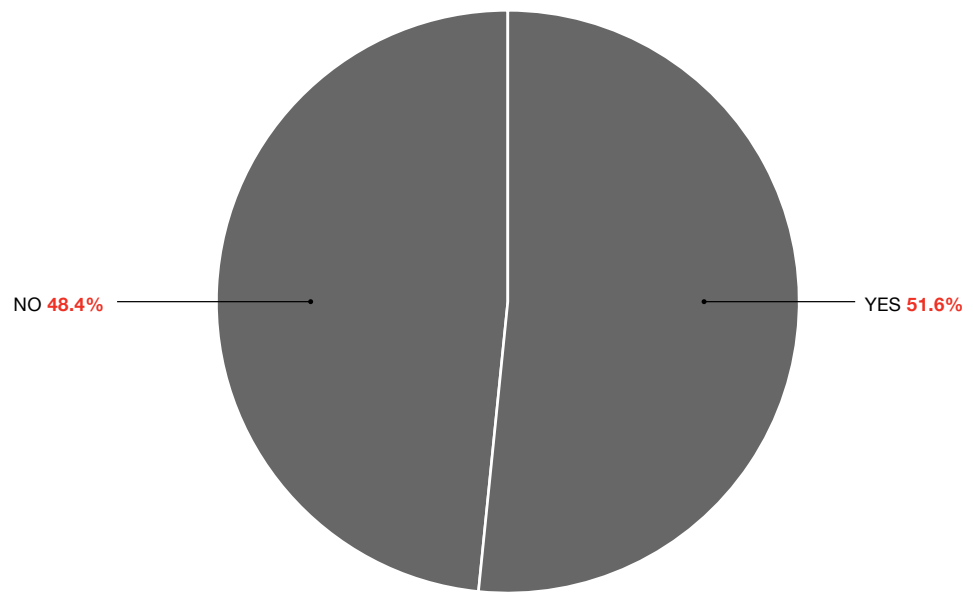
For this audience, online viewing is most common on a **desktop** or laptop computer, but the prevalence of mobile and tablet cannot be ignored.

Which if the following online music streaming services do you pay to subscribe to? (Select all that apply.)



The majority of respondents **do not pay** to subscribe to a music streaming service. Of those who do, the most popular are: SiriusXM, Spotify, Apple Music and Amazon Music.

Have you ever attended a Met Live in HD broadcast at a movie theatre?



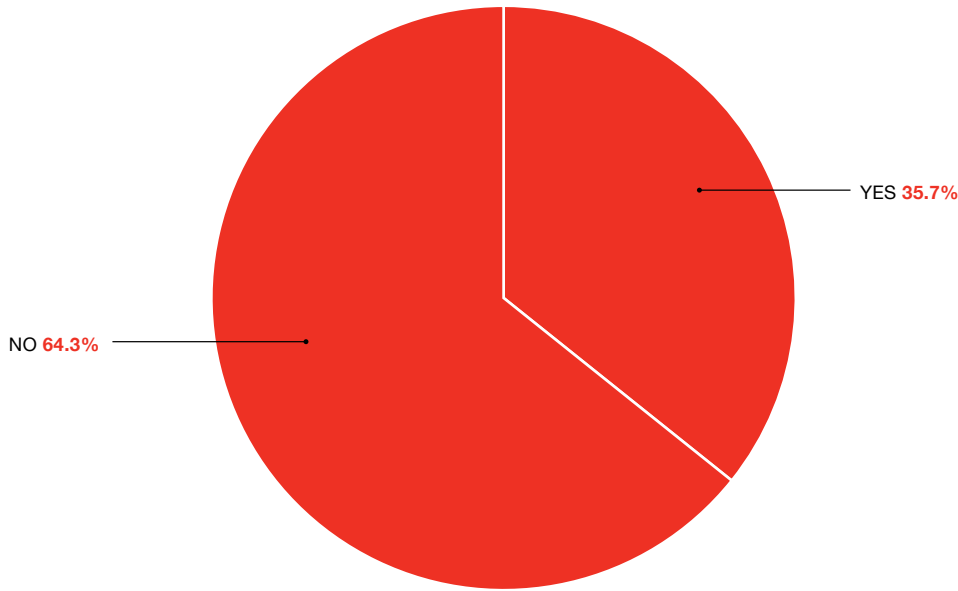
About half of respondents have attended a **Met Live in HD** cinema broadcast.

# I stream, you stream

## LIVESTREAM OPINIONS

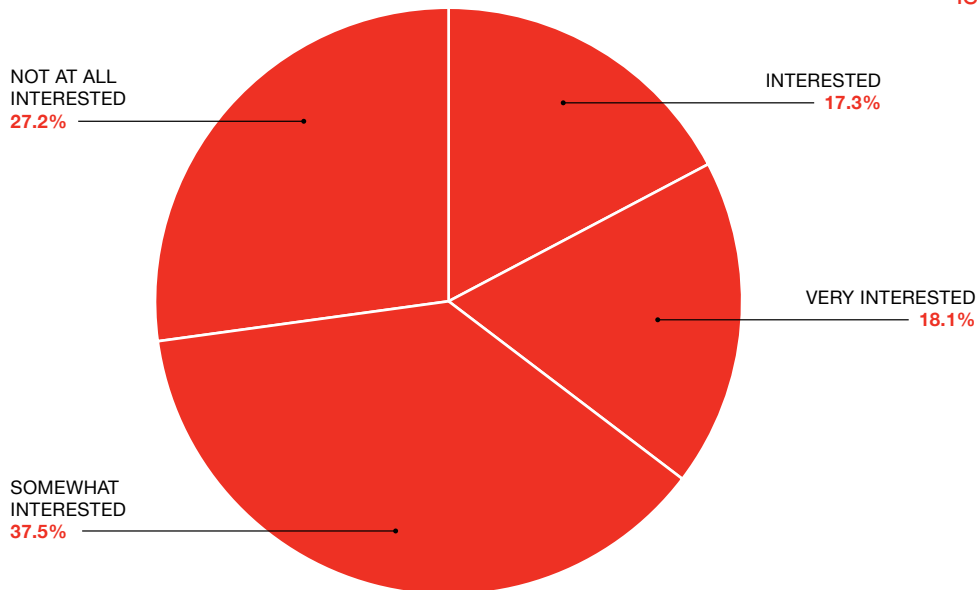
19

Have you ever watched a livestream performance online?



**35.7%** of respondents have watched a livestreamed performance; however, **72.8%** say they are at least somewhat interested in doing so.

How interested are you in watching a livestream of an arts performance (opera, concert, ballet, etc.)?



“If I find the cost of attending a performance prohibitive, I would be happy to watch a livestream of the performance.”

“Sometimes it is more convenient for my schedule. It allows me to have access to companies and performances I could not otherwise see (distance or expense).”

“I am an advocate for widening access to the arts and livestreaming addresses many barriers (ex. disability, mental health, low income, generational, rural vs urban).”

“As it is getting harder to travel, watching online livestreams is looking more attractive.”

“I love livestreams! Nothing beats a live performance, but I can’t see them all in person. Too expensive!”

“While livestreamed performances can be interesting, they often cannot compare to the experience of seeing something live. This is especially true of opera, which often evokes a physical reaction to the vibrations in singers’ voices.”

“The experience of being in the opera house or theater is all part of the enjoyment of the arts performance.”

# Stream come true

## AUDIENCE FACTORS FOR SELECTING LIVE AND LIVESTREAMED PERFORMANCES

When it comes to purchasing tickets or selecting a livestreamed opera, rank the following from most (1) to least (5) important to you.



- 1** Composer/  
repertoire
- 2** Singers
- 3** Opera company
- 4** Conductor
- 5** Director

When choosing a performance to livestream, rank the following from most (1) to least (5) important to you.



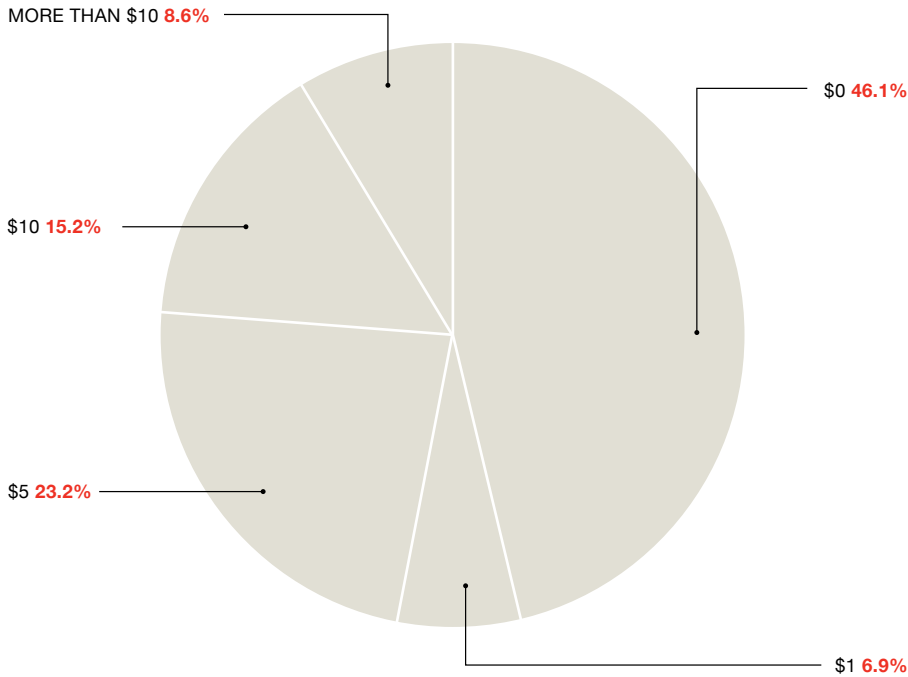
- 1** Sound quality
- 2** Repertoire/  
Content
- 3** Singers/  
Conductor/  
Director/Opera  
company
- 4** Video quality
- 5** Interviews and  
behind the  
scenes content

# Revenue streams

## MONETIZATION POSSIBILITIES OF LIVESTREAMING

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How much would you pay to livestream a complete performance online



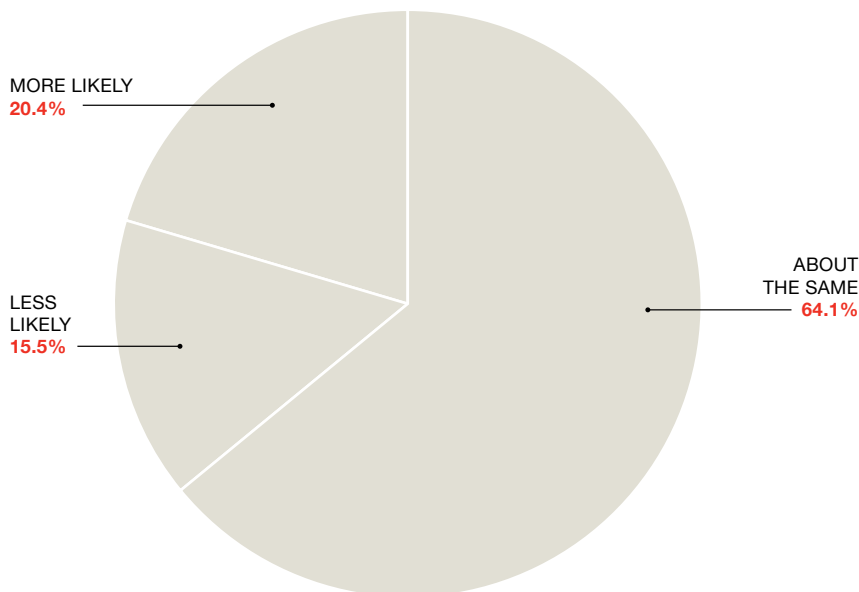
The majority of respondents say they would pay to watch a livestream.

Almost a quarter of respondents would pay **\$10** or more.

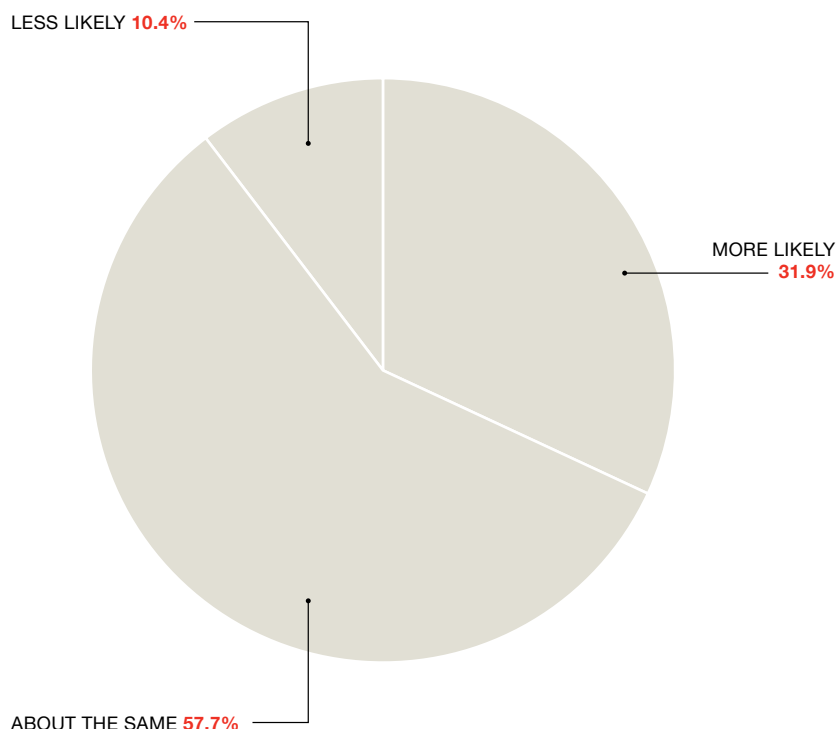
Only **15.5%** of respondents say they are less likely to purchase tickets to a live performance if it is being livestreamed;

**20.4%** report being more likely to purchase if there is a stream.

If a performance is being livestreamed online, how much more or less likely are you to buy tickets to attend in person?



If a performing arts company livestreams performances online for free, how likely are you to make a financial contribution to the company?



**31.9%** of respondents are more likely to donate to a performing arts company after it has streamed a performance.

“In our experience, the best model is direct sponsorship with non-traditional advertisers that can benefit from exposure to your audience.”

– ALEX OLEGNOWICZ, CEO OF SYMMETRICA

Read the full Q&A at [atgtheatre.com/blog](http://atgtheatre.com/blog)

# Environment scan





# Stream on

## WHERE TO STREAM PERFORMANCES NOW

There are thousands of hours of high-quality performances to stream online now. This material ranges from free, to by donation, to monthly or yearly paid memberships. Many offer free trials with limited access.

	FREE TRIAL	SUBSCRIPTION (\$CAD)	WEBSITE	APP	SMART TV	ESTABLISHED	WE RECOMMEND
MEDICI.TV	PARTIAL ACCESS	\$125/YEAR	YES	YES	YES	2008	<a href="#">PLÁCIDO DOMINGO'S OPERALIA CROWNS RISING STARS (2018)</a>
DSO LIVE (DETROIT SYMPHONY ORCHESTRA)	LIVE ONLY WITH LIMITED PREVIEWS ON YOUTUBE	DSO REPLAY ACCESS AVAILABLE WITH \$50 DONATION	YES	NO	YES	2011	<a href="#">BEETHOVEN: CONCERTO FOR VIOLIN AND ORCHESTRA (HILARY HAHN, VIOLIN: 2017)</a>
BERLIN PHILHARMONIC DIGITAL CONCERT HALL	NO	\$224.92/YEAR	YES	YES	YES	2009	<a href="#">BARBARA HANNIGAN AND SIMON RATTLE WITH "FAÇADE" BY WILLIAM WALTON (2015)</a>
MET OPERA ON DEMAND	7 DAYS	\$200/YEAR	YES	YES	YES	2007	<a href="#">JOHN ADAMS' DOCTOR ATOMIC (2008)</a>
STAATSOPER.TV (BAYERISCHE STAATSOPER)	YES	FREE FOR 24 HOURS AFTER STREAM	YES	NO	YES	2017	N/A
OPERAVISION	YES	FREE	YES	NO	NO	2017	<a href="#">JUHANI KOIVISTO'S ICE (2019)</a>
WIENER STAATSOPER LIVE	NO	\$240/YEAR	YES	YES	YES	2013	<a href="#">MOZART'S COSÌ FAN TUTTE (1996)</a>

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Toronto's Against the Grain Theatre (AtG) has invigorated opera audiences since its first sold-out production to an audience of fifty guests in December of 2010. AtG revitalizes the operatic art form by presenting an eclectic array of musical works in unconventional spaces and innovative ways. Since its first season, AtG has consistently performed to standing room-only crowds, to both critical and public acclaim, and continues to introduce hundreds of new opera-goers to the art form. Founded by an adventurous collective of friends and artists, the company endeavours to be serious in intent and execution, yet fun and irreverent in spirit.

**Media Contact:**  
**media@againstthegraintheatre.com**  
**647-367-8943**

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This White Paper was written by [Michael Morreale](#).

## ATG: THE COMPANY

### **Founder & Artistic Director**

Joel Ivany

### **General Manager**

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### **Editorial & Creative Manager**

Amanda Hadi

### **Artistic Associate & Opera Pub Host**

David Eliakis

### **Resident Lighting Designer**

Jason Hand

### **Founding Member & Artistic Advisor**

Miriam Khalil

### **Administration & Projects Consultant**

Michaela Dickey

### **Orchestra Manager**

Brenna Hardy-Kavanagh

### **Digital Consultant**

Michael Morreale

### **Media Attaché**

Michael Zarathus-Cook

### **Manager of Guest Engagement**

Madison Angus

### **Photography**

Darryl Block

## ALUMNI

Cait Coull, *Founding Member*

Topher Mokrzewski, *Founding Member*

Joanna Barrotta

Allison Bent

Cecily Carver

Brad Cherwin

Holly Coish

Nina Draganic

Nancy Hitzig

Nikki Tremblay

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**JOIN THE ATG GANG:** [atgtheatre.com/support](http://atgtheatre.com/support)

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## ATG: BOARD OF DIRECTORS

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Matthew Bernstein

Simion Candrea, *Treasurer*

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Barrie Chercover

Kim Finkelstein

Marzena Gersho

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Jonathan MacArthur, *ex-officio*

Topher Mokrzewski, *ex-officio*

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Shirley Neuman

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Andrea Bellefeuille, *Past Chair*

Cecily Carver

Caitlin Coull

Nina Draganic

---

Design by [Anastasiya Milova](#).

Translation by Services linguistiques TACT inc.

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## WE GRATEFULLY ACKNOWLEDGE THE SUPPORT OF:



Against the Grain Theatre is proud to be the inaugural participant in the Canadian Opera Company's Company-in-Residence program.



“Against the Grain is one of Toronto’s – if not the country’s – most innovative opera/theatre companies.”

– THE GLOBE AND MAIL

