UNDERSTANDING
OPERA'S NEW AUDIENCES

PUBLISHED NOVEMBER 2024

OPERA AMERICA | sloverlinett at NORC | NORC at the University of Chicago

FOREWORD

Amid the disruption of the COVID pandemic, millions of people thought about the new experiences they wanted to explore when social proximity replaced social distancing. Happily, one of those experiences was opera! Surveys of opera companies of all sizes documented record-breaking levels of first-time attendance. Since full houses are central to the artistic and financial health of opera companies, retaining these newcomers and involving them as fully as possible in the life of our opera companies emerged as a prime imperative.

With deeply appreciated support from the National Endowment for the Arts and other generous donors, OPERA America undertook a national research project in partnership with Slover Linett at NORC, based at the University of Chicago. The key findings and detailed analyses offered in this report are derived from over 11,000 survey responses across 36 opera companies of all budget sizes, geographies, and formats.

The report does not offer a universal solution for attracting and retaining new audiences, but it points to numerous avenues for additional analysis and experimentation. The study invites opera companies to think creatively about confronting the barriers and seizing the opportunities revealed by respondents — in ways that can advance our collective understanding of new-to-opera audiences and their experiences.

Marc A. Scorca
PRESIDENT/CEO

This project was supported in part by an award from the Research Grants in the Arts program at the National Endowment for the Arts (Grant# 1925739-38-24), with additional leadership support by Bob Ellis, John Nesholm, and The Heinz Endowments.

The opinions expressed in this paper are those of the author(s) and do not represent the views of the Office of Research & Analysis or the National Endowment for the Arts. The National Endowment for the Arts does not guarantee the accuracy or completeness of the information included in this paper and is not responsible for any consequence of its use.

On the cover (clockwise from top left): Pacific Opera Project's *Hansel and Gretel*; A San Francisco Opera performance; A Tri-Cities Opera education program; The Metropolitan Opera's Summer HD Festival. This page: Heartbeat Opera's *Messy Messiah*

COVER PHOTOS: MARTHA BENEDICT (POP), CORY WEAVER (SFO), COURTESY OF TRI-CITIES OPERA (TCO), RICHARD TERMINE (MET), THIS PAGE: ANNE HOSKINS

Lyric Opera of Chicago's "Sunday in the Park with Lyric" concert

KYLE FLUBACKER

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2

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Cincinnati Opera's Opera Goes to Church program

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Ticket cost prevents audiences from returning — especially those who are New to Opera.

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New-to-Opera attenders **differ notably from Ongoing audiences** — both demographically and behaviorally.

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Newcomers to an opera company include those who are new to opera (New-to-Opera attenders) and new to only that company (New-to-Company attenders).

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New-to-Opera attenders **have positive experiences** and are eager to recommend opera to others.

Pacific Opera Project's *Elixir of Love*

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New-to-Opera **attenders who return tend to be more engaged** with the performing arts generally.

7

Different types of **opera companies play different but crucial roles** in sustaining local audiences.

In recent seasons, opera companies across North America have reported record levels of first-time attenders. Since full houses are central to the artistic and financial health of opera companies, and since retention of newcomers is fundamental to audience growth, OPERA America set out to learn more. Our research seeks to inform opera companies as they devise and test strategies to encourage first-time attenders to return and develop ongoing relationships with opera.

RESEARCH GOALS

1. Identify key **motivations and pathways** that lead to first-time attendance.
2. Explore what **perceptions** first-time attenders have of their experiences, the opera company, and opera generally.
3. Uncover **barriers** that may prevent first-time attenders from returning.
4. Understand how newly attending audiences compare **demographically and behaviorally** to ongoing audiences.

A performance at Portland Opera

COURTESY OF PORTLAND OPERA

PROJECT GOALS

We partnered with 36 U.S.-based opera companies to survey patrons who had attended between 2020 and 2024.

192,064	11,242	5.9%
SURVEYS SENT	RESPONSES RECEIVED	RESPONSE RATE

The participating opera companies represent the breadth of the American opera industry in terms of geography, budget size, and programmatic offerings. Companies were asked to oversample their new audiences, yet longer-term patrons still replied at higher rates than newcomers. Responses were weighted to reflect the actual opera attendance ratios reported by the opera companies.

The survey was informed by initial Zoom-based interviews with 12 new audience members at four opera companies: Minnesota Opera, Nashville Opera, Pittsburgh Opera, and San Francisco Opera.

FOR MORE INFORMATION ON DISTRIBUTION METHODOLOGY AND WEIGHTING, SEE APPENDIX (PP 62–63).

PARTICIPATING OPERA COMPANIES

Austin Opera *Austin, TX*
Central City Opera *Central City, CO*
Chicago Opera Theater *Chicago, IL*
Cincinnati Opera *Cincinnati, OH*
The Dallas Opera *Dallas, TX*
The Florentine Opera *Milwaukee, WI*
Fort Worth Opera *Fort Worth, TX*
Heartbeat Opera *New York, NY*
Houston Grand Opera *Houston, TX*
Kentucky Opera *Louisville, KY*
LA Opera *Los Angeles, CA*
Long Beach Opera *Long Beach, CA*
Lyric Opera of Chicago *Chicago, IL*
Marble City Opera *Knoxville, TN*
Maryland Opera *Baltimore, MD*
The Metropolitan Opera *New York, NY*
Minnesota Opera *Saint Paul, MN*
Nashville Opera *Nashville, TN*
Opera Birmingham *Birmingham, AL*
Opera Colorado *Denver, CO*
Opera Columbus *Columbus, OH*
Opera Idaho *Boise, ID*
Opera Memphis *Memphis, TN*
Opera Omaha *Omaha, NE*
Opera San José *San Jose, CA*
Opera Tampa *Tampa, FL*
Pacific Opera Project *Los Angeles, CA*
Pensacola Opera *Pensacola, FL*
Pittsburgh Festival Opera *Pittsburgh, PA*
Pittsburgh Opera *Pittsburgh, PA*
Portland Opera *Portland, OR*
Resonance Works *Pittsburgh, PA*
San Diego Opera *San Diego, CA*
San Francisco Opera *San Francisco, CA*
Seattle Opera *Seattle, WA*
Tri-Cities Opera *Binghamton, NY*

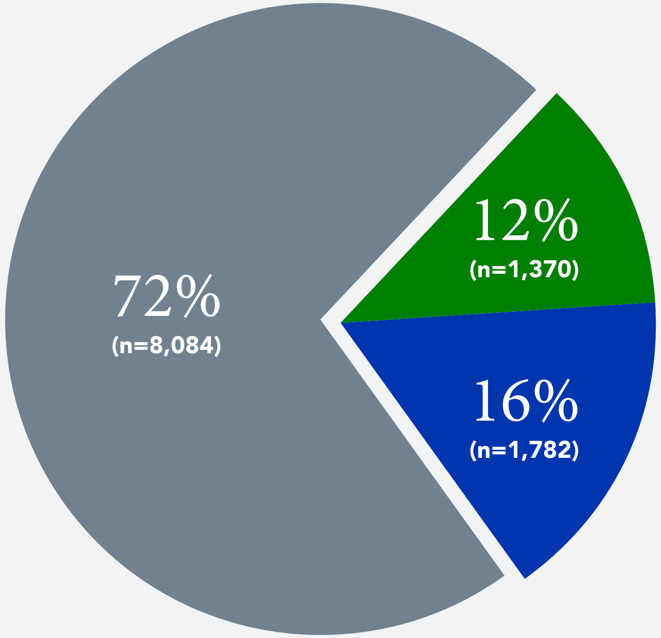
WHO PARTICIPATED

The study sought to compare Newcomers to a company between 2020 and 2024 to the Ongoing audiences who had been attending previously. But not all Newcomers are the same.

Pacific Opera Project's *Ercole su'l Termodonte*

MARTHA BENEDITCT

ONGOING ATTENDERS
Those who reported buying at least one ticket prior to 2020 and returned during 2020–2024.



NEWCOMERS

Those who reported buying their first ticket to the company between 2020 and 2024.

NEW-TO-OPERA ATTENDERS
For these Newcomers, it was their first-ever time at an in-person opera performance.

NEW-TO-COMPANY ATTENDERS
These Newcomers had attended opera in person elsewhere prior to 2020, perhaps in another city or at another company in their community.

DEFINITIONS: TYPES OF NEWCOMERS

Not all opera companies are the same either. In our analysis, we considered the role that each opera company plays within its local ecosystem.

Lohengrin at the Metropolitan Opera

ANCHOR COMPANY

Companies that exist as the largest opera company in a city or metropolitan area that houses multiple companies (e.g., Lyric Opera of Chicago, Pittsburgh Opera)

14 Companies in the Study | 7,016 Responses | 61% of Responses

SOLITARY COMPANY

Companies that are the sole opera company in their city or metropolitan area (e.g., Austin Opera, Opera Birmingham)

11 Companies in the Study | 2,346 Responses | 20% of Responses

ALTERNATIVE COMPANY

Companies that exist in the same metropolitan area as an anchor (e.g., Chicago Opera Theater, Pittsburgh Festival Opera)

11 Companies in the Study | 2,084 Responses | 18% of Responses

DOES COMPANY SIZE MATTER? We also explored differences between companies by budget sizes, but budget size and ecosystem roles often overlapped. In other words, companies with larger budgets tended to be Anchor companies, while those with smaller budgets tended to be Alternative companies. Ultimately, we found ecosystem role to be a more meaningful lens than budget size for interpreting the data.

FOR PARTICIPATION AND RESPONSE RATES BY BUDGET GROUP AND GEOGRAPHIC REGION, SEE APPENDIX (PP 66–67).

DEFINITIONS:
TYPES OF OPERA COMPANIES

We did the research, but we invite you to come up with ideas that turn it into action. You'll notice that this report stays away from making suggestions for strategies to attract and retain new audiences — though the findings point to numerous avenues for further inquiry and strategic experimentation.

Minnesota Opera participates in the "Ordway Inside Out" concert

COURTESY OF MINNESOTA OPERA

- How do the findings resonate with what you know about your audience, your company, and your community?
- How do the broad findings align with your company-identified goals for audience retention and diversification?
- What areas could you investigate with greater granularity by surveying your audiences?
- How can the takeaways of the report help refine what you have already tried to retain newcomers?
- What aspects of your *modus operandi* could you try upending in response to a takeaway of the report?
- What local assets might your company use when responding to a takeaway of the report?

Bring this study to your next staff, board, or community meeting. No one is more creative than you at devising initiatives and programs to inspire your audiences. We hope this report provides you with an informed starting point for building loyal opera audiences into the future.

FROM RESEARCH TO ACTION

Opera San José's *The Magic Flute*

DAVID ALLEN

KEY FINDINGS

FINDING
1

A NEW EXPERIENCE

Most New-to-Opera attenders initially come for a new "experience," and they tend to stick to the classics.

For their first performance, a majority of New-to-Opera attenders choose traditional operas, with traditional staging, in traditional venues. They have an interest in contemporary works and novel formats, but it's the traditional works that get them in the door.

Across all opera audiences, most are motivated to attend opera for the experience of a great show and great music — although New-to-Opera attenders are more drawn by the theatrical side of opera, while Ongoing attenders favor the music.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTION "WHAT BROUGHT THEM?" ON PAGE 31.

LA Opera's *Omar*

CORY WEAVER

FINDING

2

LISTENING AND WATCHING

Many New-to-Opera attenders listen to and watch opera recordings before they attend in person.

Both Newcomers and Ongoing audiences report being introduced to opera first through audio and video recordings — primarily as children. But over a quarter of those who are New to Opera begin listening to and watching opera as adults.

Some New-to-Opera attenders engaged with digital programming during the pandemic, but far fewer than Ongoing audiences. Those New to Opera who did tune in appreciated those experiences as quality entertainment that was free and easy to access.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTION "WHO ARE THE NEWCOMERS?" ON PAGE 18 AND "WHAT BROUGHT THEM?" ON PAGE 31.

El Niño **at the Metropolitan Opera**

EVAN ZIMMERMAN

KEY FINDINGS

FINDING 3

POSITIVE EXPERIENCES

New-to-Opera attenders have positive experiences and are eager to recommend opera to others.

New-to-Opera attenders were highly impressed by the quality of their first performances. They are ready to recommend their companies just as passionately as Ongoing attenders.

New-to-Opera attenders generally feel welcome and that they fit in at performances. But they are also more likely than Ongoing attenders to feel disoriented or distanced during the performance.

Newcomers want to learn more about opera, and they are taking time to educate themselves about opera beyond just attending a performance.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTION "WHAT WAS THEIR EXPERIENCE LIKE?" ON PAGE 41.

Seattle Opera's *Barber of Seville*

SUNNY MARTINI

KEY FINDINGS

FINDING

4

BARRIER OF PRICE

Ticket cost prevents audiences from returning more frequently — especially those who are New to Opera.

New-to-Opera attenders feel the performances they saw were worth the cost, and over three-quarters say they are likely to return. But ticket price still ranks among their biggest perceived barriers to returning. While a majority paid full price for their tickets, they were more likely than Ongoing attenders to have used a ticket discount.

While not a main barrier, New-to-Opera attenders who have not returned after their initial performance are more likely than other audience members to cite feeling disoriented at the opera.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTION "WHAT WOULD BRING THEM BACK?" ON PAGE 52.

Everest at
The Dallas Opera

KAREN ALMOND

KEY FINDINGS

FINDING

5

DEMOGRAPHICS & BEHAVIOR

New-to-Opera attenders differ notably from Ongoing audiences — both demographically and behaviorally.

New-to-Opera attenders are younger and more racially and ethnically diverse, have a broader range of income, and have fewer advanced degrees.

New-to-Opera attenders also have different tastes in music and entertainment, and they attend performing arts events less frequently than Ongoing attenders.

Both New-to-Opera and New-to-Company attenders spend more time generally in the area of the opera company, often because they recently moved to the region or changed their habits after the pandemic.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTION "WHAT WOULD BRING THEM BACK?" ON PAGE 52.

Minnesota Opera's *La bohème*

KEY FINDINGS

FINDING 6

THOSE WHO RETURN

New-to-Opera attenders who return tend to be more engaged with the performing arts generally.

Some New-to-Opera audiences who took the survey had already returned at least once beyond their first visit. But time is a factor in coming back: More recent New-to-Opera attenders are less likely to have returned (yet).

New-to-Opera audiences who have already returned attend the performing arts and listen to classical music or opera more frequently than New-to-Opera audiences who have not. They are also more likely to call themselves opera lovers. Demographically, we see no differences between those who have returned and those who have not.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTION "WHAT WOULD BRING THEM BACK?" ON PAGE 52.

***Florencia en el Amazonas* at Nashville Opera**

COURTESY OF NASHVILLE OPERA

FINDING
7

DIFFERENT ROLES FOR COMPANIES

Different types of opera companies — Anchor, Solitary, and Alternative — play different but crucial roles in sustaining opera audiences.

Anchor and Solitary companies introduce people to opera. They draw greater numbers of New-to-Opera attenders who seek the new experience of going to an opera.

At the same time, Alternative companies attract people to more novel venues and formats. They draw greater numbers of New-to-Company attenders who want to experience the variety within opera.

While the main barrier for most Anchor and Solitary attenders is the cost of tickets, Alternative companies also face perceived barriers of location, programming tastes, and advertising reach.

TO EXPLORE MORE, SEE THE DETAILED FINDINGS SECTIONS "WHAT WAS THEIR EXPERIENCE LIKE?" ON PAGE 40 AND "WHAT WOULD BRING THEM BACK?" ON PAGE 52.

Tri-Cities Opera's *H.M.S. Pinafore*

RANDY CUMMINGS/BUNN HILL PHOTO

Maryland Opera's "Ritorna Vincitor!" presentation

MADELEINE GRAY

DETAILED FINDINGS

Lyric Opera of Chicago's "Sunday in the Park with Lyric" concert

KYLE FLUBACKER

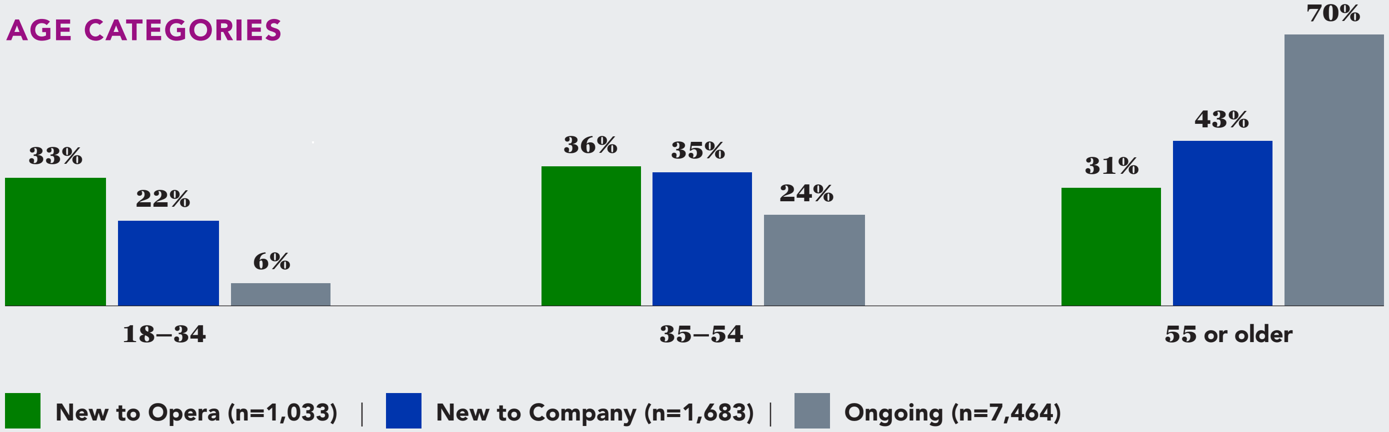
DETAILED FINDINGS SECTION 1: WHO ARE THE NEWCOMERS?

Newcomers to opera companies are more diverse than Ongoing audiences in age and in racial/ethnic identity. All age groups are more evenly balanced among New-to-Opera and New-to-Company attenders, while Ongoing attenders skew older. While still a majority White audience, New-to-Opera attenders do include more audiences of Color. They are more likely to identify as Asian American or Pacific Islander, Black or African American, and Hispanic or Latino/a/x/e than Ongoing attenders.

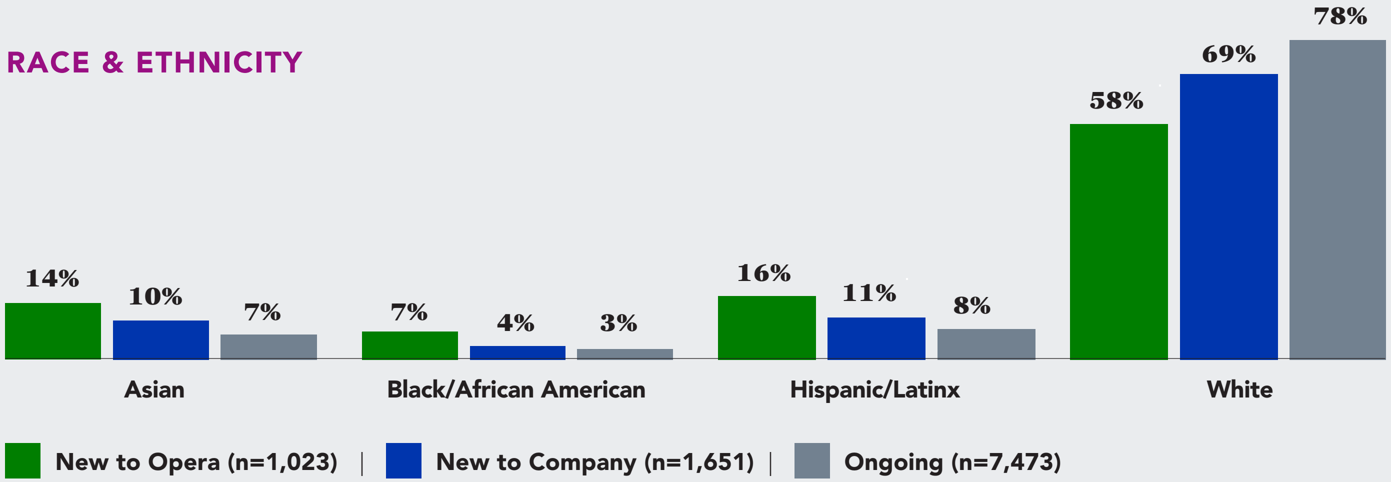
***The Passion of Mary Cardwell Dawson* at Pittsburgh Opera**

DETAILED FINDINGS SECTION 1:
WHO ARE THE NEWCOMERS?

AGE CATEGORIES



RACE & ETHNICITY



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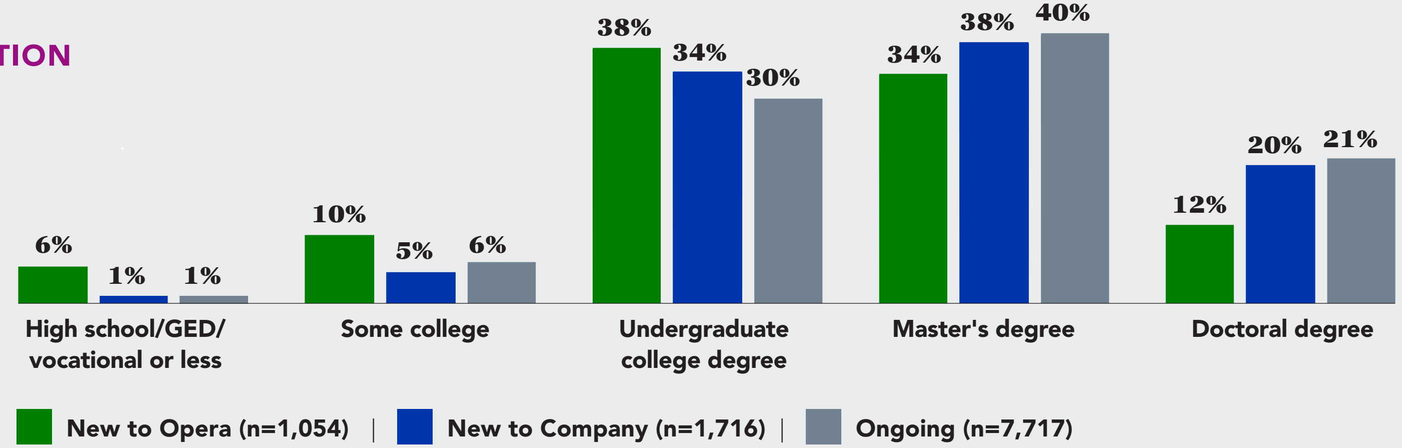
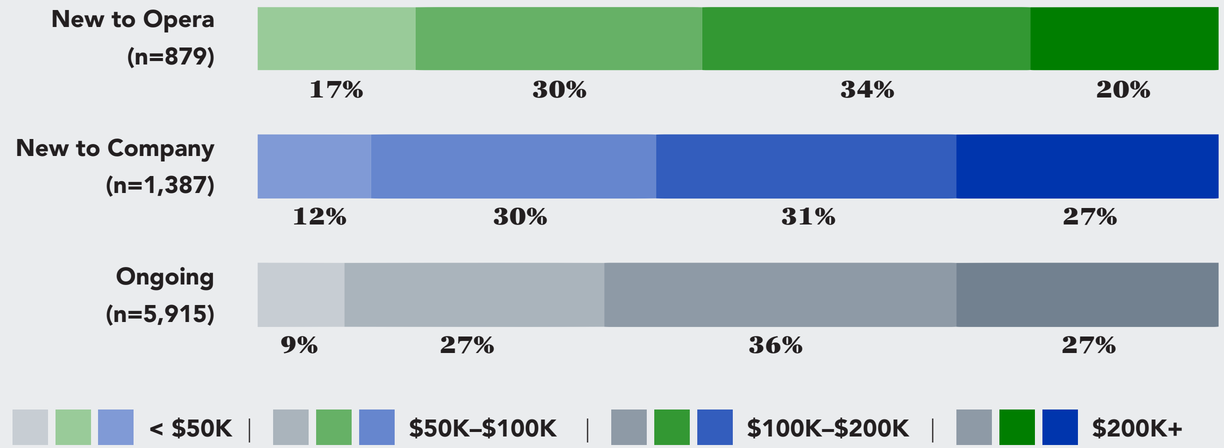
New-to-Opera attenders are more evenly distributed across a broader range of incomes and levels of education. Most opera attenders, across both Newcomers and Ongoing audiences, have undergraduate college degrees or additional degrees, but more New-to-Opera attenders don't.

Portland Opera's Opera a la Carte program

EDUCATION

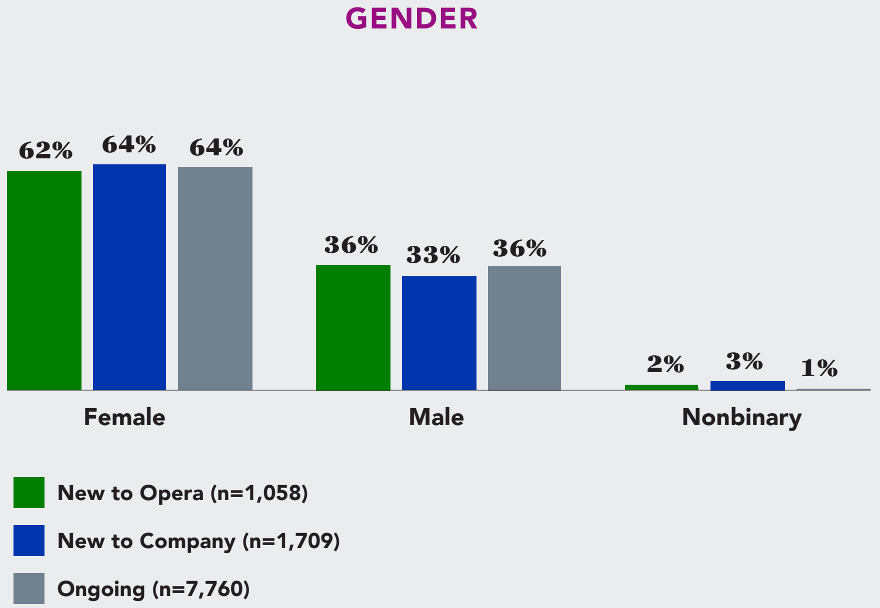


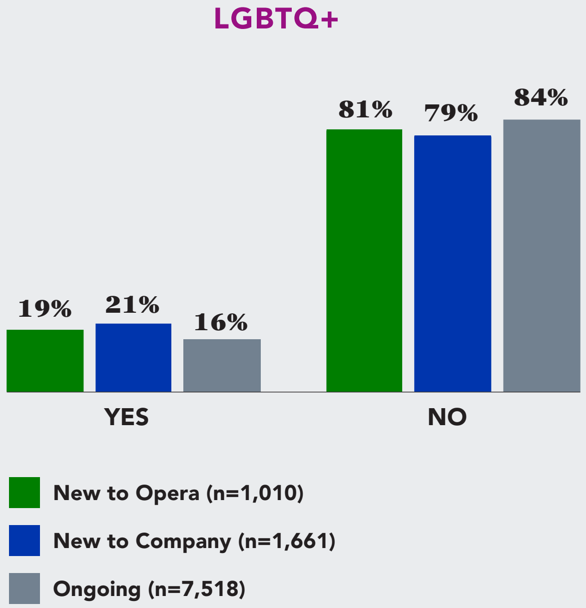
INCOME

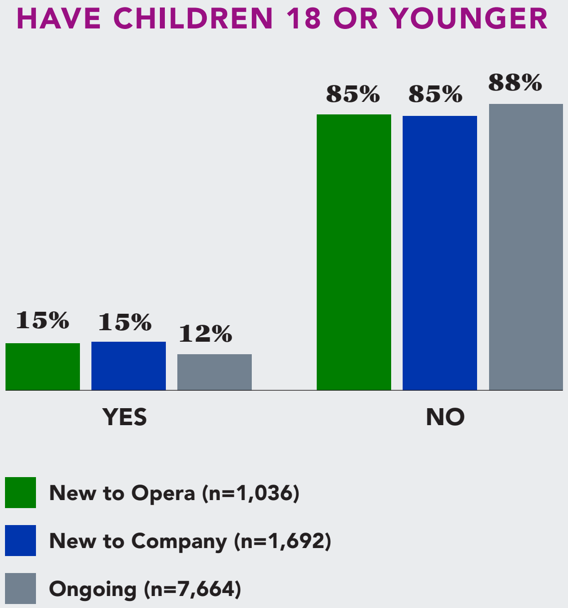


DETAILED FINDINGS SECTION 1:
WHO ARE THE NEWCOMERS?

Opera attenders at all affiliation levels look relatively similar in terms of gender, LGBTQ+ orientation, and family status. Similar to what we've seen across a variety of other studies in the arts and culture sector, a majority of survey respondents are women.







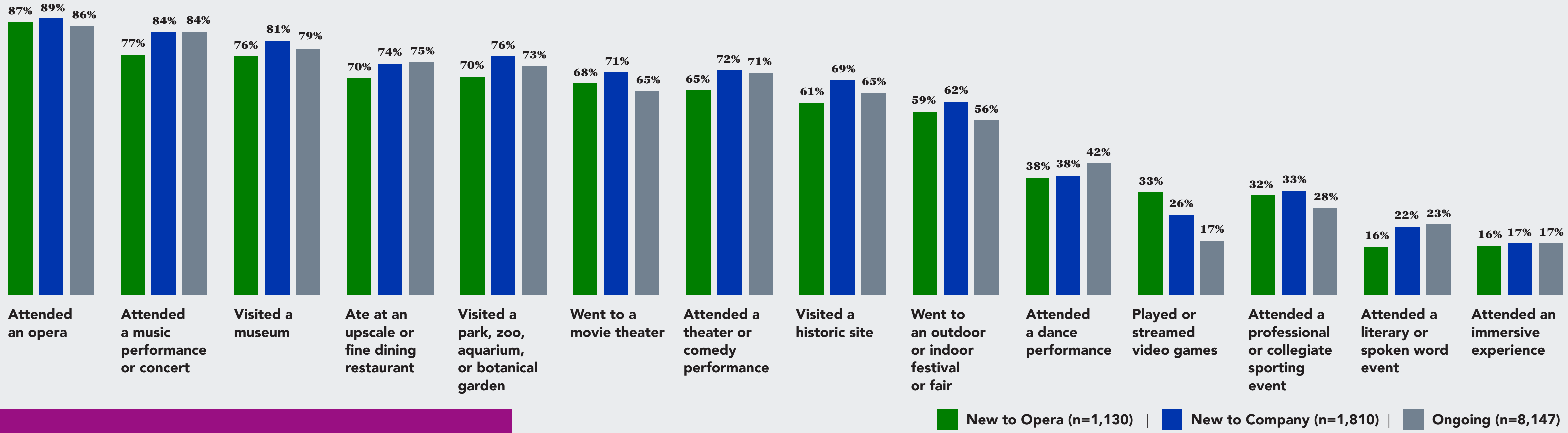
Opera company Newcomers are just as culturally active as Ongoing audiences, attending a wide variety of activities. New-to-Company attenders are even more prolific in their attendance at a variety of activities than Ongoing attenders.

AVERAGE NUMBER OF CULTURAL ACTIVITIES IN THE PAST 12 MONTHS

New to Opera	New to Company	Ongoing
7.94	8.15	7.8

CULTURAL ACTIVITIES IN THE PAST YEAR

Q1: Which of the following activities have you done in the past 12 months? Please select all that apply.



DETAILED FINDINGS SECTION 1:
WHO ARE THE NEWCOMERS?

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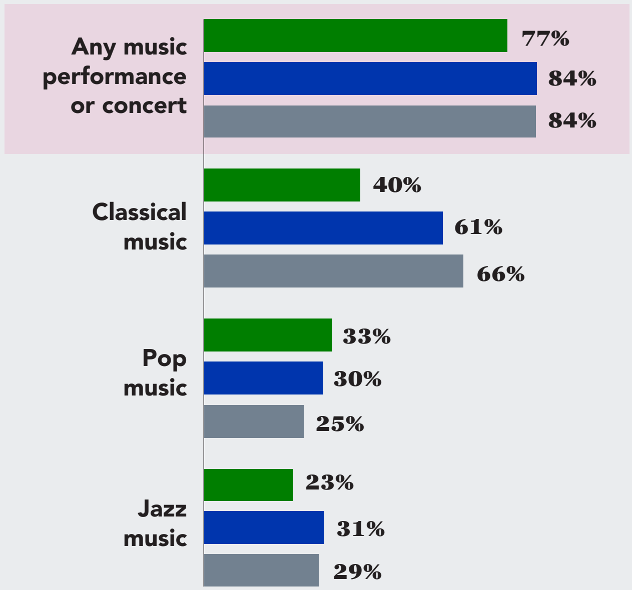
New-to-Opera audiences attend a different range of performing arts activities than Ongoing attenders. They are less likely to go to classical music concerts, plays, and contemporary dance than Ongoing audiences. They are just as likely to attend musicals and ballet, but they are more likely to attend pop music concerts and comedy performances.

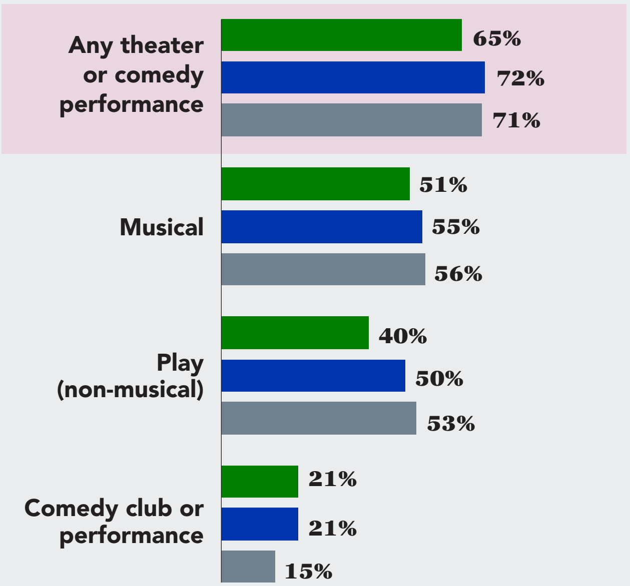
MUSIC PERFORMANCES OR CONCERTS ATTENDED

Q1A: *Did you attend a music performance or concert in the past 12 months? What kind(s) were they? Please select all that apply.*



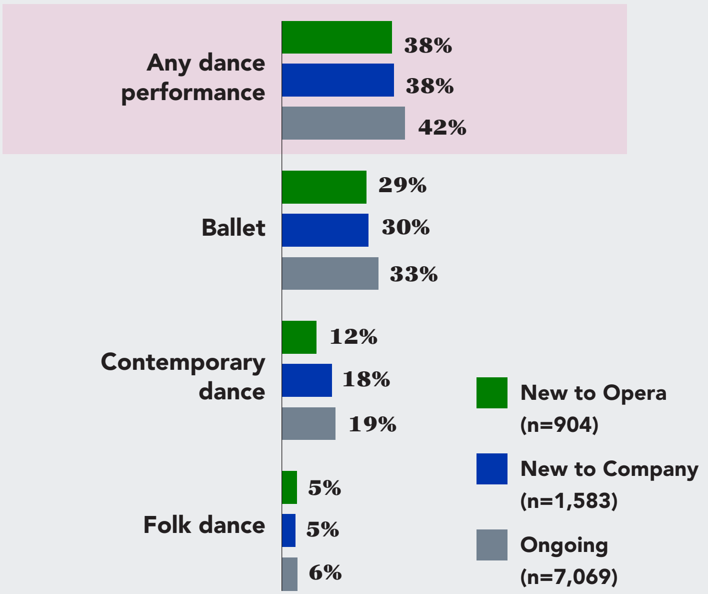
THEATER OR COMEDY PERFORMANCES ATTENDED

Q1B: *Did you attend a theater or comedy performance in the past 12 months? What kind(s) were they? Please select all that apply.*



DANCE PERFORMANCES ATTENDED

Q1C: *Did you attend a dance performance in the past 12 months? What kind(s) were they? Please select all that apply.*



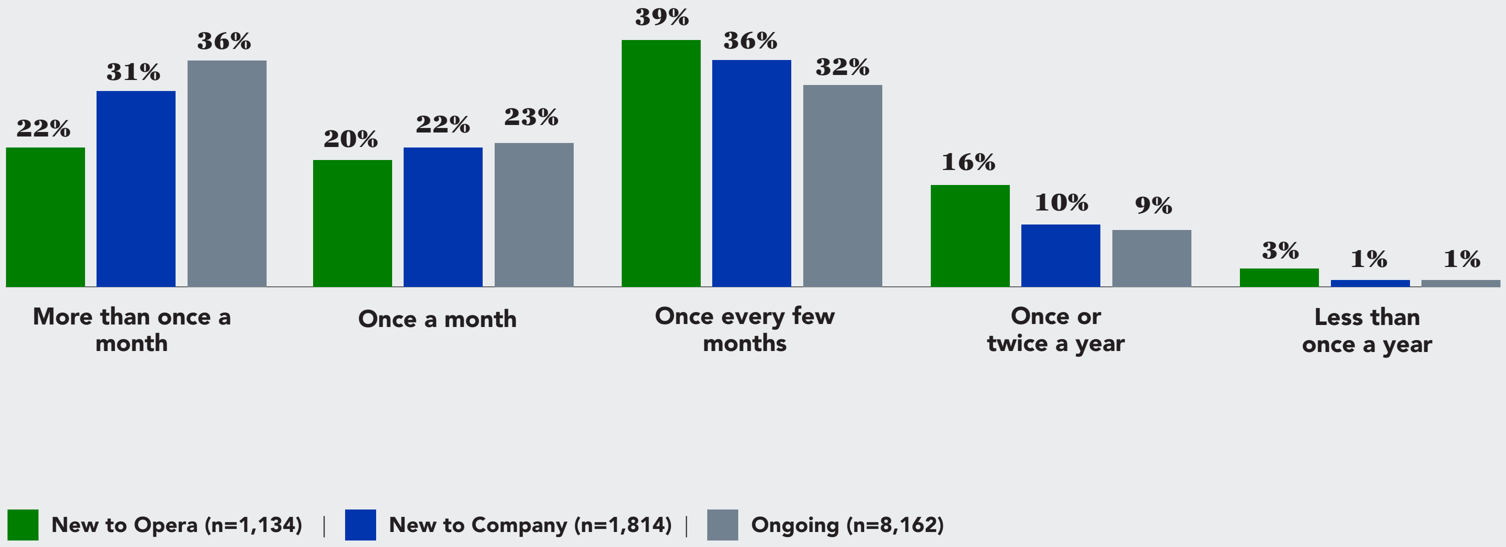
Although New-to-Opera attenders seek out performing arts activities, they attend with less frequency than Ongoing audiences. New-to-Opera attenders are less likely to attend more than once a month.

Long Beach Opera's *ISOLA*

DETAILED FINDINGS SECTION 1:
WHO ARE THE NEWCOMERS?

FREQUENCY OF PERFORMING ARTS SHOW ATTENDANCE

Q3: *In a typical year, how frequently do you attend performing arts shows (not including student productions)?*



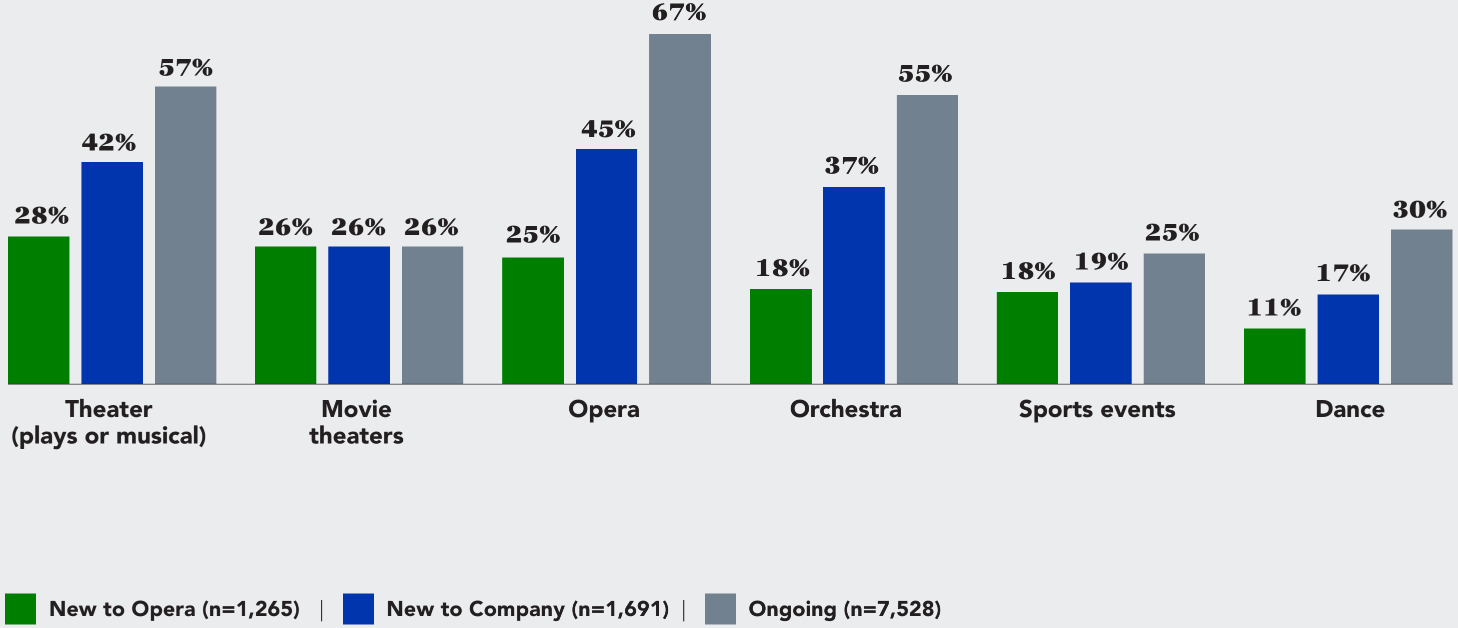
Newcomers are less likely than Ongoing audiences to have held any kind of performing arts subscription in the past. New-to-Company attenders are more likely than New-to-Opera attenders to have had a subscription to a performing arts organization — although still not as likely as Ongoing audiences.

Nashville Opera's *Das Rheingold*

DETAILED FINDINGS SECTION 1:
WHO ARE THE NEWCOMERS?

SUBSCRIPTIONS OR SEASON TICKETS

Q4: *Have you ever purchased a subscription or season tickets to any of the following?*



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While both Newcomer and Ongoing audiences are frequent music listeners, Newcomers have a broader listening palette. Nearly 60% or more of New-to-Opera and New-to-Company attenders listen to pop, rock, and classical music on a weekly basis. Ongoing attenders listen primarily only to classical music at that level.


Opera San José's digital recording studio

COURTESY OF OPERA SAN JOSÉ

FREQUENCY OF LISTENING TO MUSIC GENRES

Q2: *How frequently do you listen to each of the following types of music?*

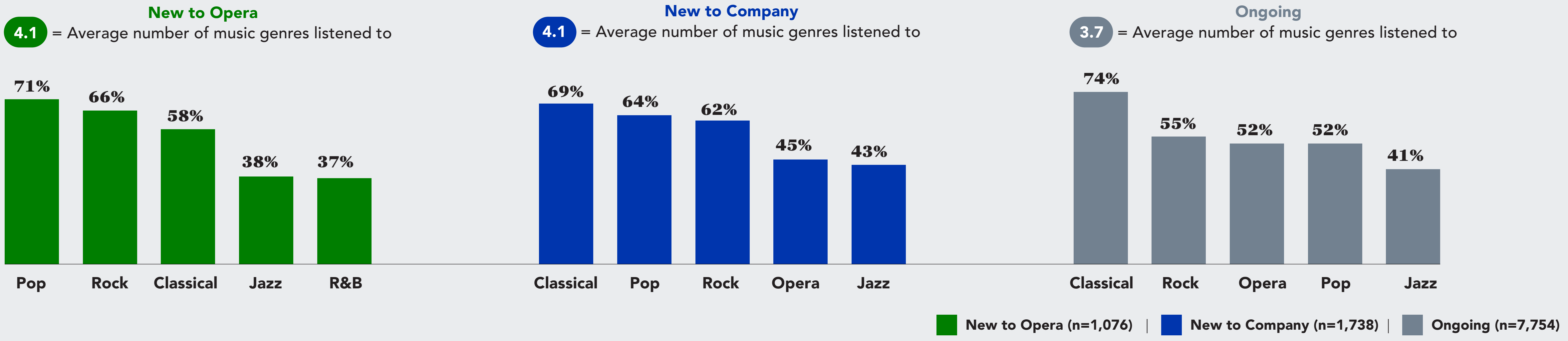


Chart presents those who selected "once a week" or more frequently.

DETAILED FINDINGS SECTION 1:
WHO ARE THE NEWCOMERS?

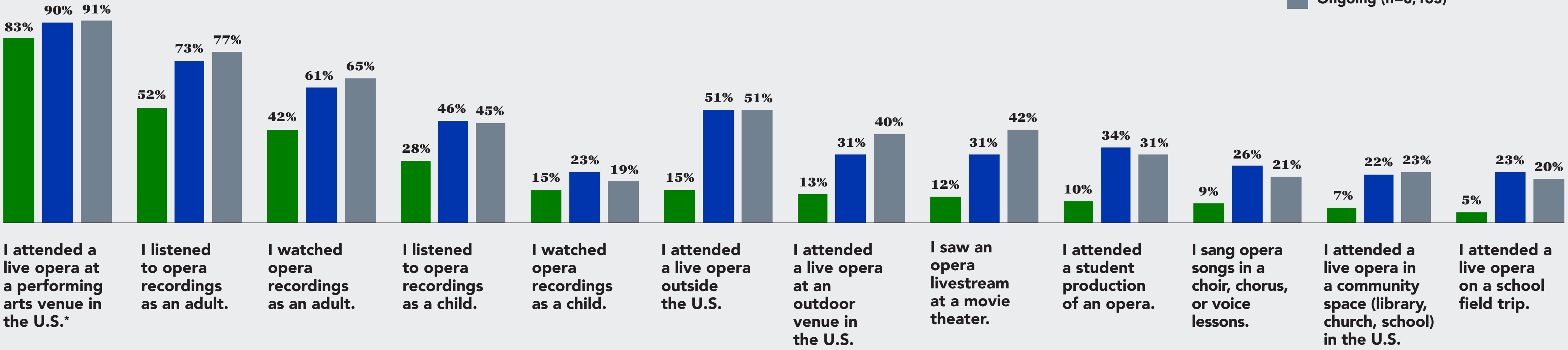
Most New-to-Opera attenders have experienced opera in just a few ways, primarily through live performances in the U.S. or through recordings. New-to-Company and Ongoing attenders have a wider variety of opera experiences, including interactions as a child, performances outside the U.S., and performances in other venues.

The Dallas Opera's *Flight*

OPERA EXPERIENCES

Q5: *Please tell us if you have ever had any of the following opera experiences. Please select all that apply.*

New to Opera (n=1,132)
New to Company (n=1,811)
Ongoing (n=8,163)



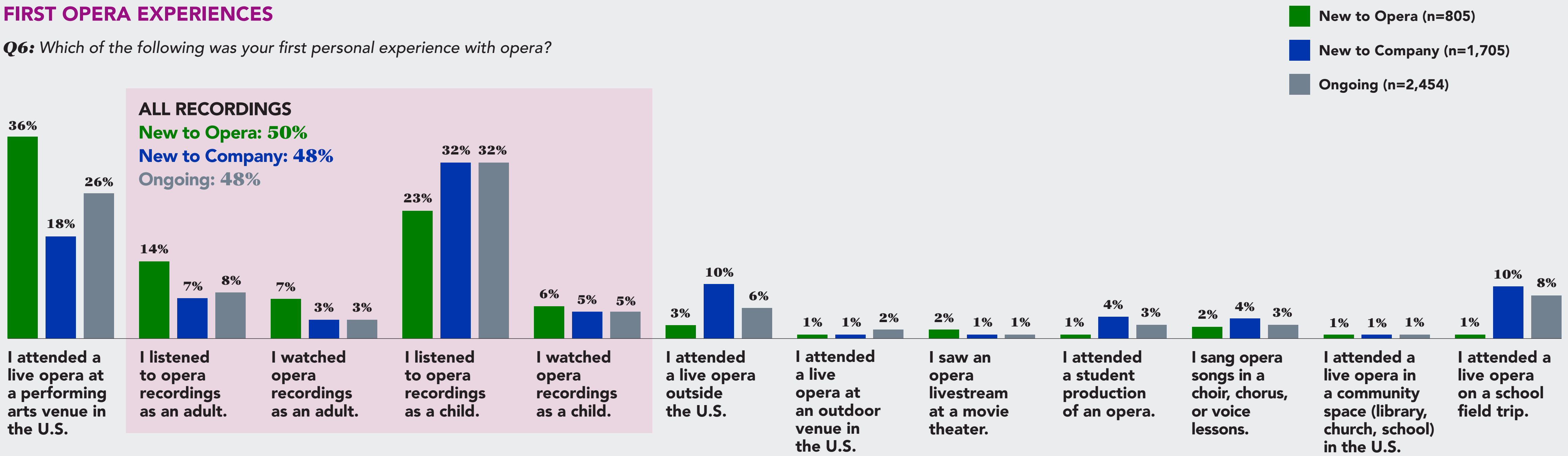
*Surveys were sent to anyone who attended a performance or other ticketed event between 2020 and 2024. Not all respondents had attended a live opera performance.

Half of all opera audiences, including Newcomers, first engage with opera by listening to or watching recordings — often as a child. New-to-Opera attenders, though, are more likely than others to start engaging with recordings for the first time as adults.

El Último Sueño de Frida y Diego at LA Opera

FIRST OPERA EXPERIENCES

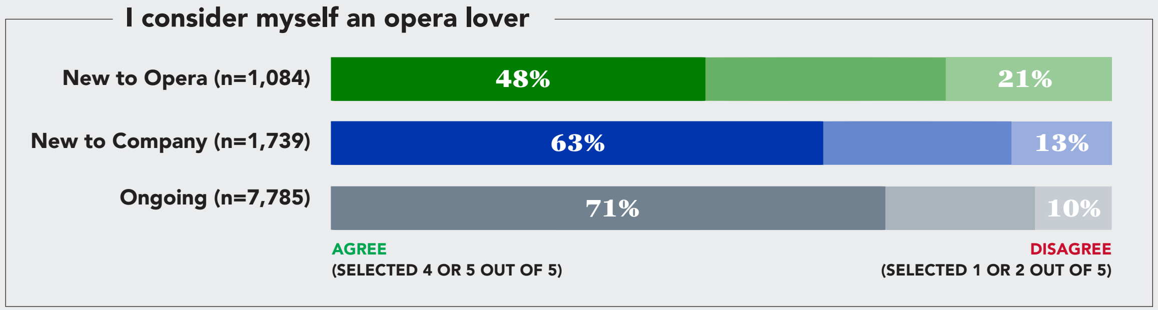
Q6: *Which of the following was your first personal experience with opera?*

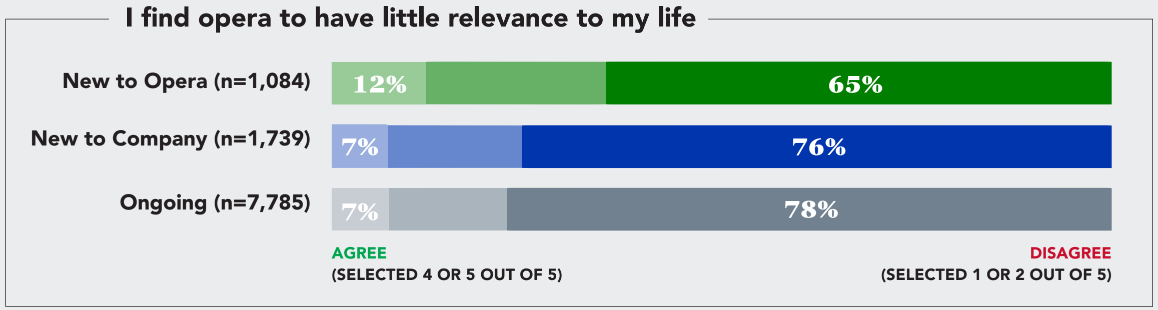


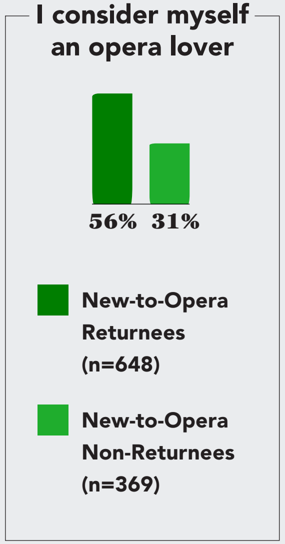
Nearly half of New-to-Opera attenders considered themselves opera lovers at the time they completed the survey. Two-thirds believed opera was relevant to their lives. Yet by both measures, New-to-Opera attenders are less impassioned than Ongoing or New-to-Company attenders who have longer relationships to opera. Repeat engagement matters: Among those New to Opera who returned after their first visit, nearly twice as many consider themselves opera lovers.

AFFINITY FOR OPERA

Q11: *To what extent do you disagree or agree or with the following statements about opera?*







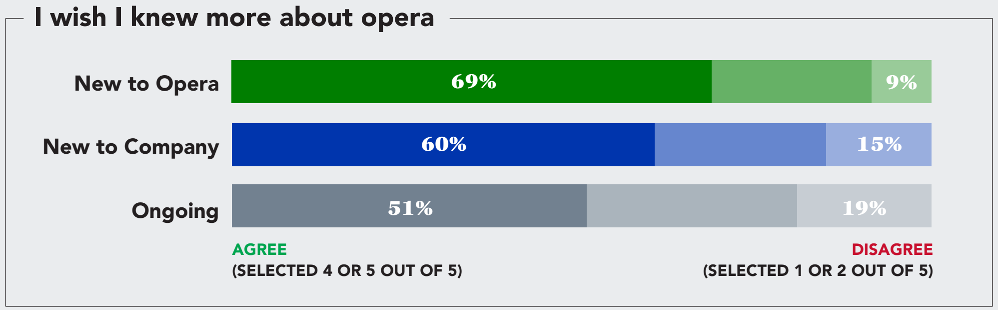
All audiences are eager to learn more about opera, with New-to-Opera attenders most interested. Ongoing attenders are most engaged in the art form. New-to-Opera attenders are not quite as comfortable, but they're not far behind.

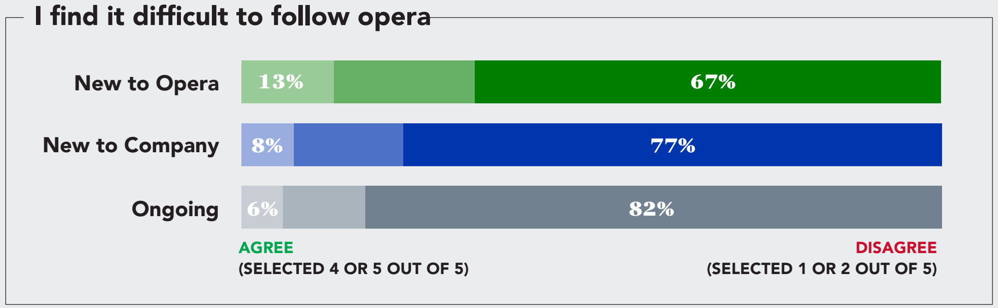
Portland Opera at the Newmark Theatre

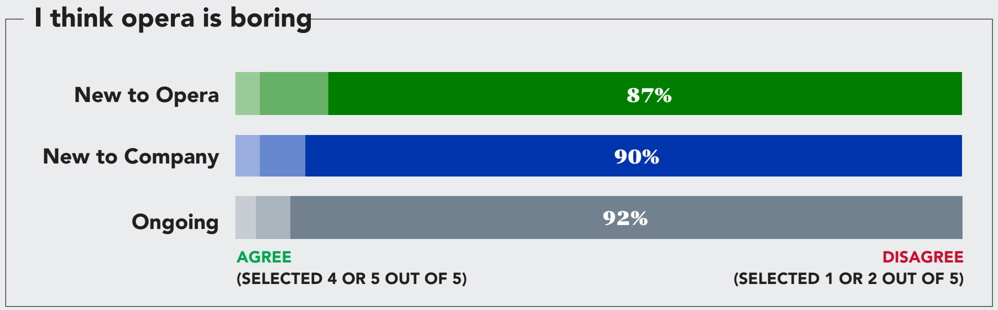
DETAILED FINDINGS SECTION 1: WHO ARE THE NEWCOMERS?

ENTHUSIASM FOR OPERA

Q11: *To what extent do you disagree or agree with the following statements about opera?*







- New to Opera (n=1,084)
- New to Company (n=1,739)
- Ongoing (n=7,785)

Moby-Dick at Pittsburgh Opera

DAVID BACHMAN PHOTOGRAPHY

DETAILED FINDINGS SECTION 2: WHAT BROUGHT THEM?

The majority of New-to-Opera and New-to-Company attenders started coming in 2022 or after. The high levels of Newcomers in subsequent years suggest sustained interest since the pandemic.

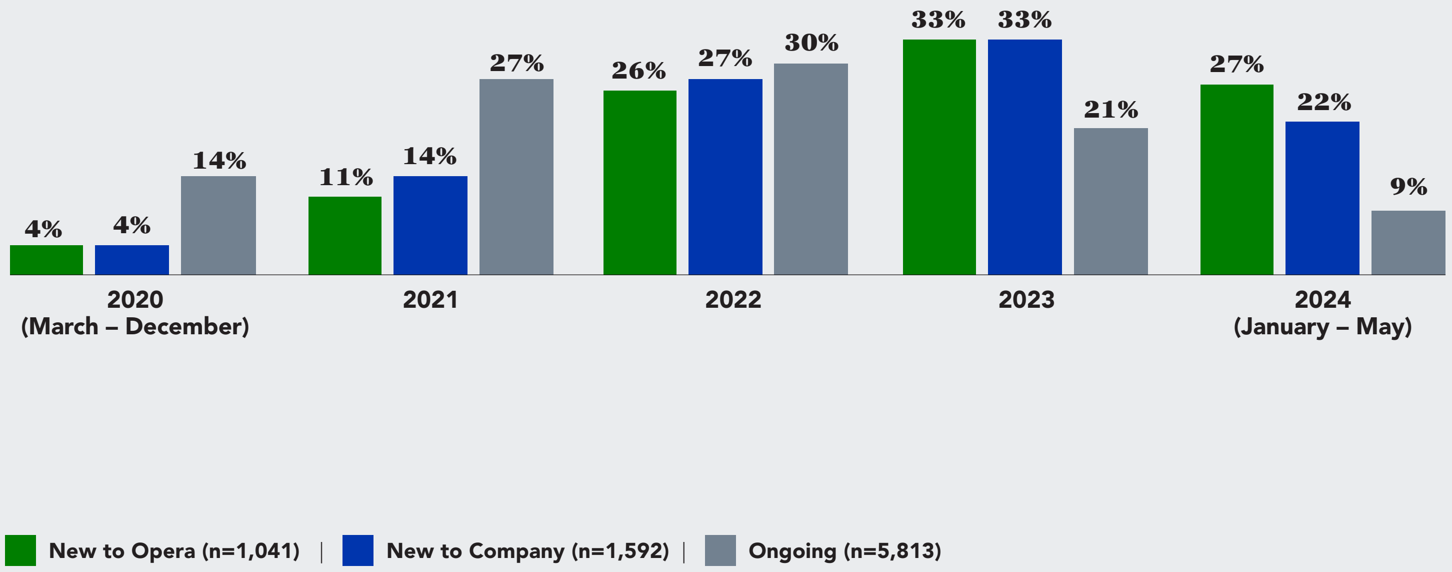
Pittsburgh Opera's *Tosca*

DAVID BACHMAN PHOTOGRAPHY

DETAILED FINDINGS SECTION 2: WHAT BROUGHT THEM?

DISTRIBUTION OF AUDIENCES BY FIRST YEAR OF LIVE ATTENDANCE

Q22: *What year was that first live performance or event that you attended with this opera company since COVID-19?*



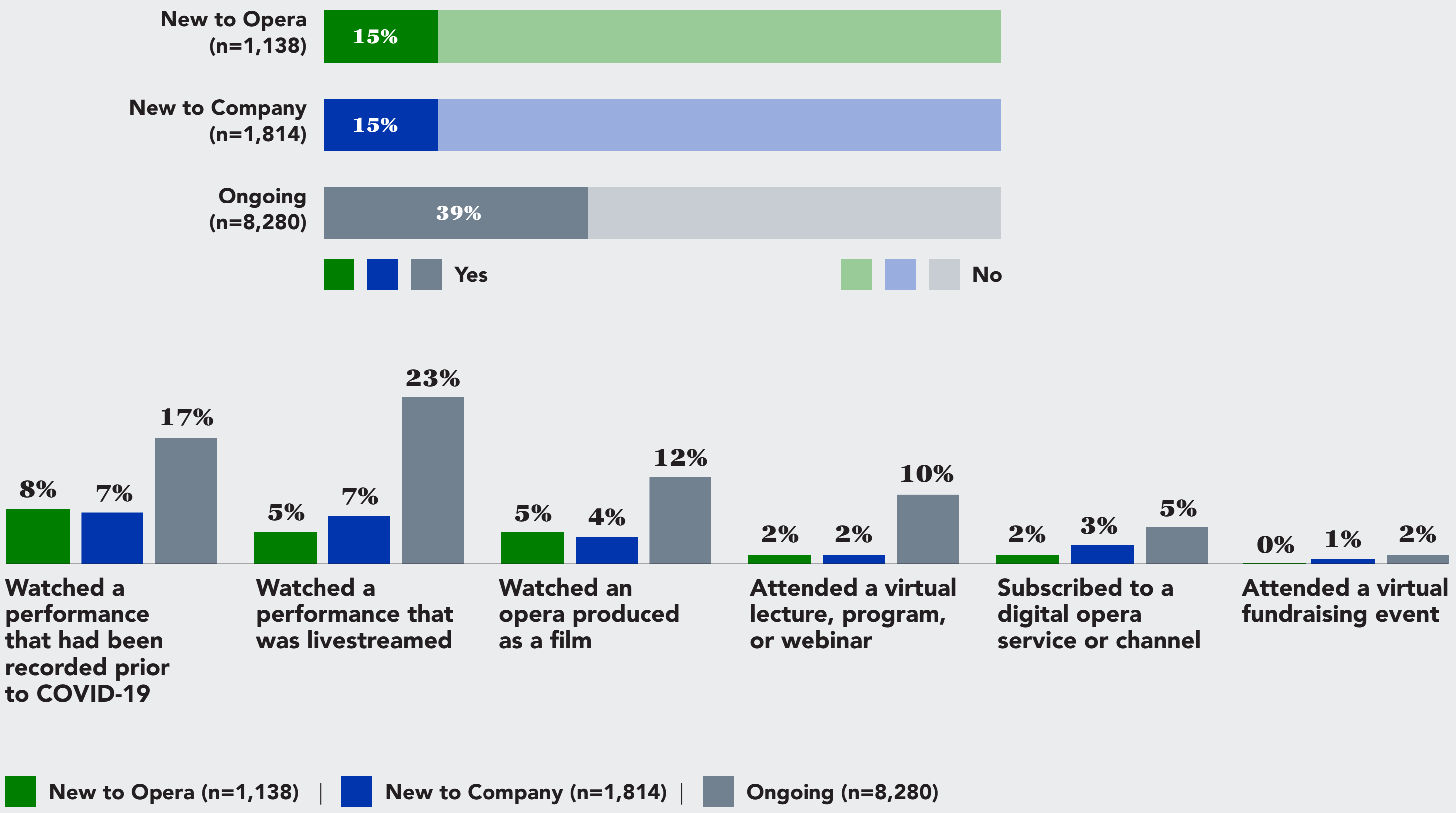
Digital engagement during the pandemic was highest for Ongoing attenders who had come to live performances before COVID-19. Only a small number of Newcomers had tuned in digitally during the pandemic.

Opera San José's digital recording studio

DETAILED FINDINGS SECTION 2:
WHAT BROUGHT THEM?

DIGITAL ENGAGEMENT DURING COVID

Q17: *Did you interact with your opera company digitally in any of the following ways during COVID-19?*



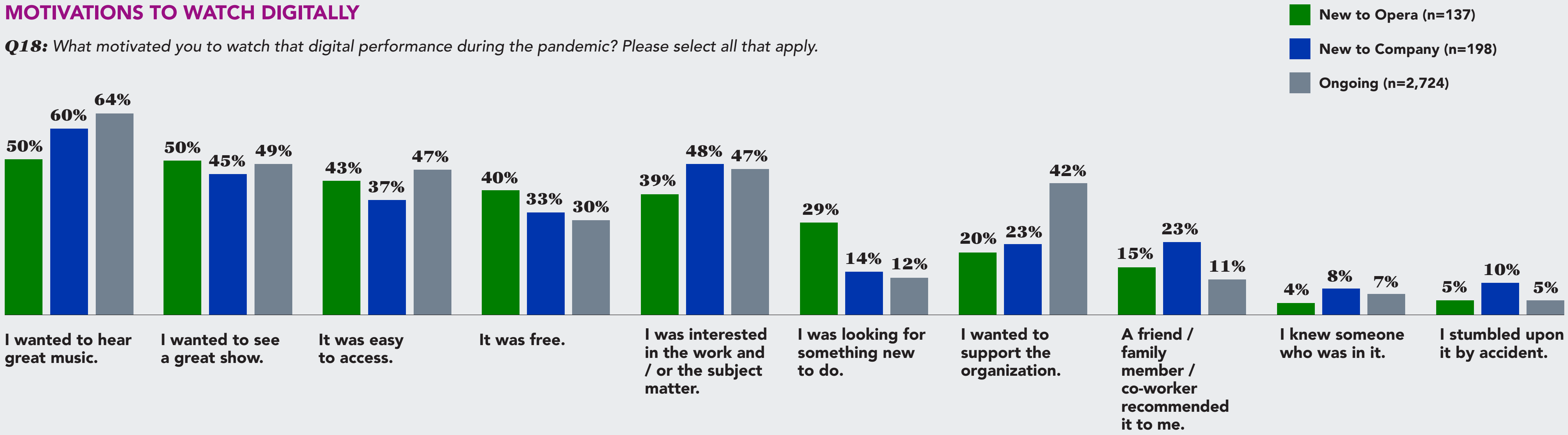
OPERA AMERICA | sloverlinett at NORC | NORC at the University of Chicago

New-to-Opera attenders who engaged digitally during the pandemic were motivated by artistic reasons around the quality or content of the performance — but free and easy access was also important. These motivations were similar for New-to-Company and Ongoing attenders, but many Ongoing attenders also wanted to support their companies during this time.

An outdoor concert by Pittsburgh Opera

MOTIVATIONS TO WATCH DIGITALLY

Q18: *What motivated you to watch that digital performance during the pandemic? Please select all that apply.*



DETAILED FINDINGS SECTION 2:
WHAT BROUGHT THEM?

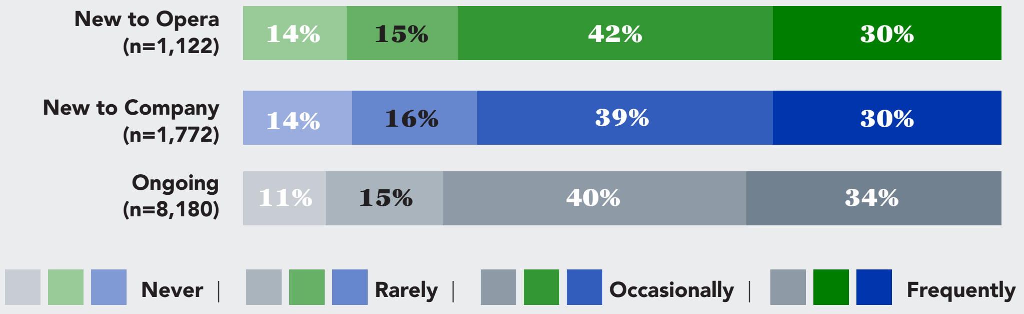
Newcomers are spending more time in the area of their opera companies. While Newcomers and Ongoing audiences visit the areas of their opera companies at comparable rates, their routines have changed since the pandemic: Newcomers are more likely to visit the area while Ongoing audiences come by less frequently.

Maryland Opera's "Bravissimo Bel Canto" presentation

DETAILED FINDINGS SECTION 2: WHAT BROUGHT THEM?

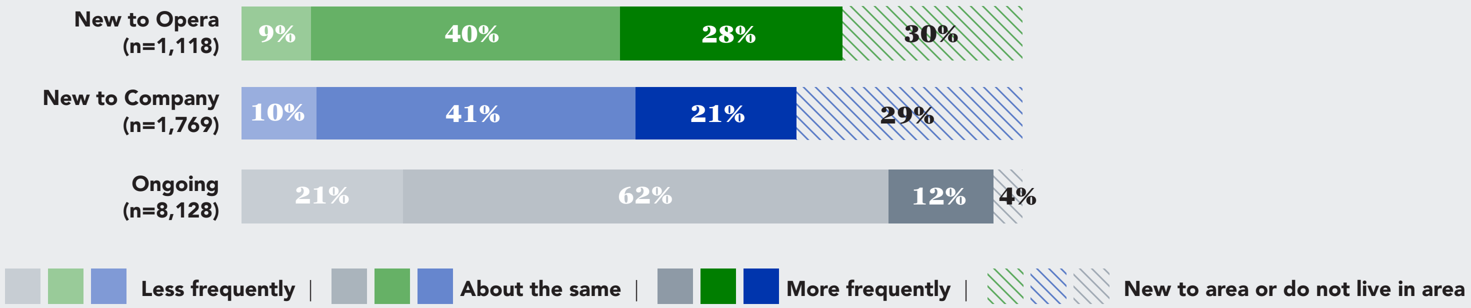
FREQUENCY OF VISITING THE AREA OF THE OPERA COMPANY

Q14: *Thinking of where the main venue of your opera company is located (or the most recent venue you attended), how frequently do you visit the area for any reason (shopping, dining, work, etc.) other than attending opera?*



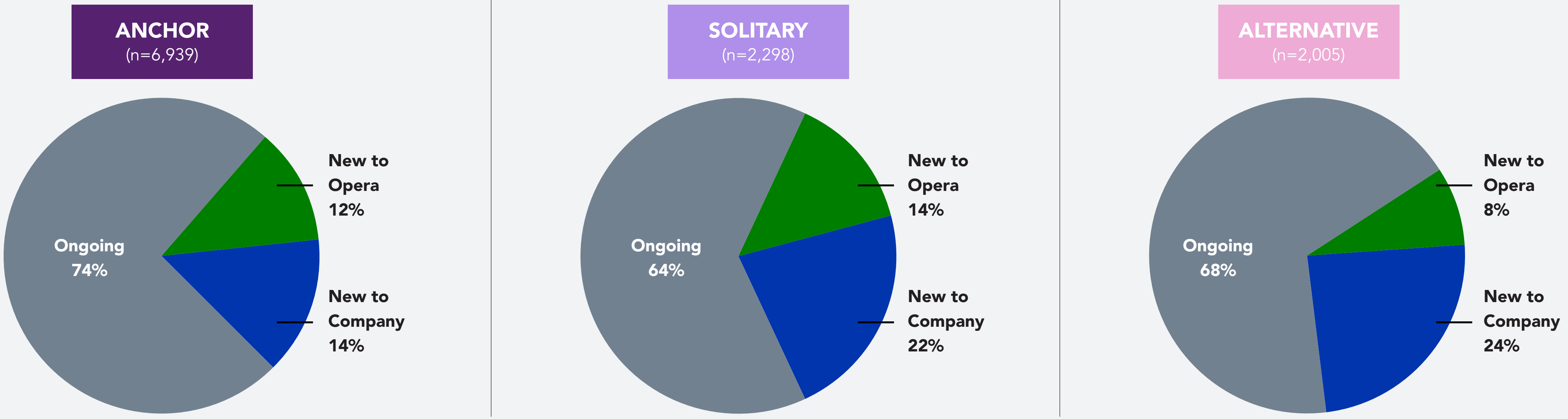
CHANGE IN FREQUENCY OF VISITING SINCE COVID-19

Q15: *How frequently do you feel like you visit that area now compared to prior to the COVID-19 pandemic?*



Anchor and Solitary companies see greater shares of New-to-Opera audiences than Alternative companies. Alternative and Solitary companies draw a greater proportion of New-to-Company audiences than Anchor companies do.

PROPORTIONS OF NEW ATTENDERS BY ECOSYSTEM ROLE

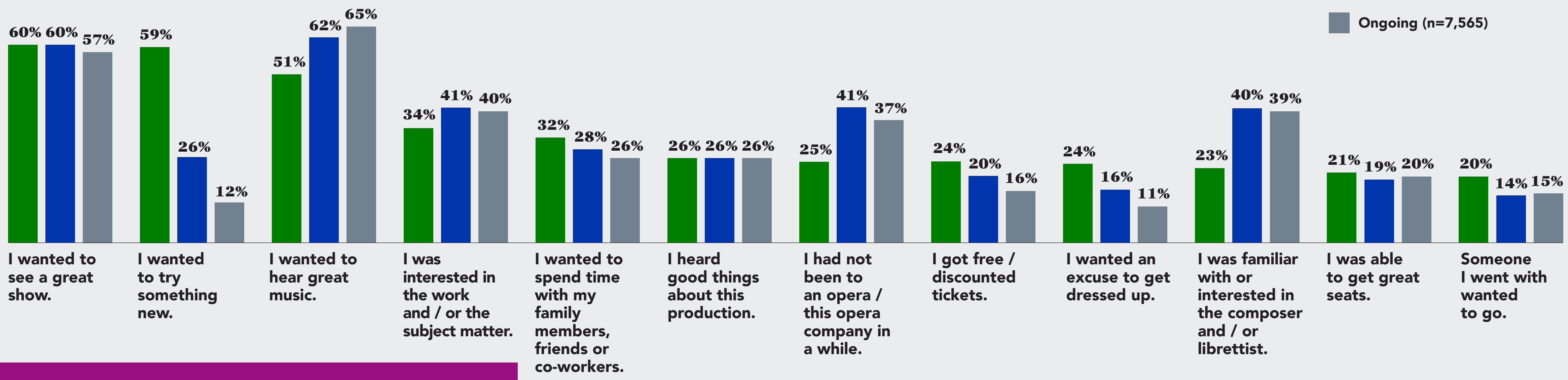


New-to-Opera attenders are motivated by the overall "experience" of seeing a great show and trying something new off their bucket list. Hearing great music also matters, but it is less important to New-to-Opera attenders than it is to New-to-Company and Ongoing audiences, for whom the specific work and its creators matter more.

Heartbeat Opera's
Drag Extravaganza

MOTIVATIONS TO ATTEND THE FIRST LIVE OPERA SINCE MARCH 2020

Q25: *What motivated you to attend your first live performance since March 2020? Please select all that apply.*



DETAILED FINDINGS SECTION 2:
WHAT BROUGHT THEM?

Newcomers and Ongoing audiences are primarily interested in famous and well-known operas, but Newcomers are just as open as Ongoing audiences to other approaches to programming. Around one-third of Newcomers are interested in novel formats, world premieres, and works that deal with contemporary issues. Over a quarter are interested in opera written by women, people of Color, or LGBTQ+ composers and librettists.

MOTIVATIONS TO ATTEND AN OPERA GENERALLY

Q12: *When deciding to attend an opera, how do each of the following impact your interest in attending?*

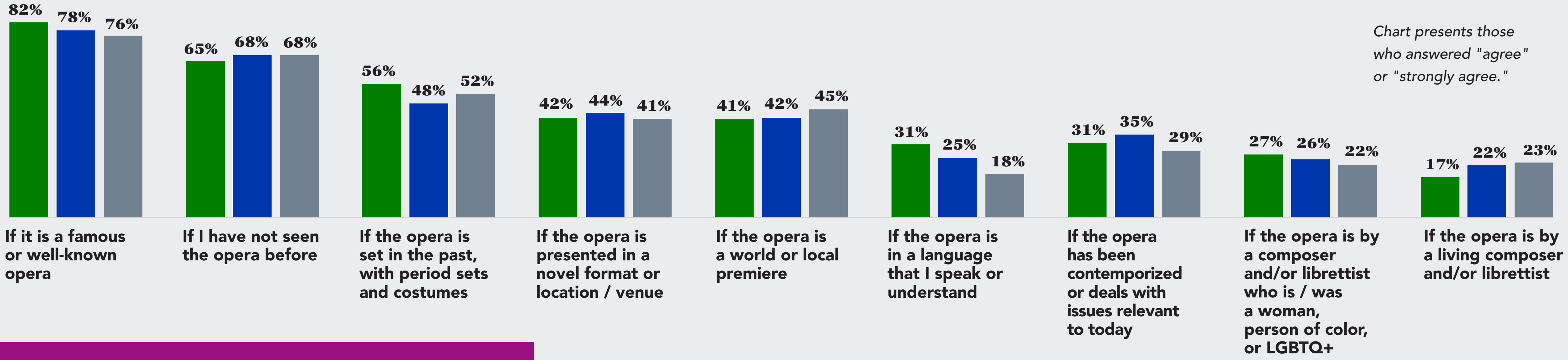


Chart presents those who answered "agree" or "strongly agree."

DETAILED FINDINGS SECTION 2:
WHAT BROUGHT THEM?

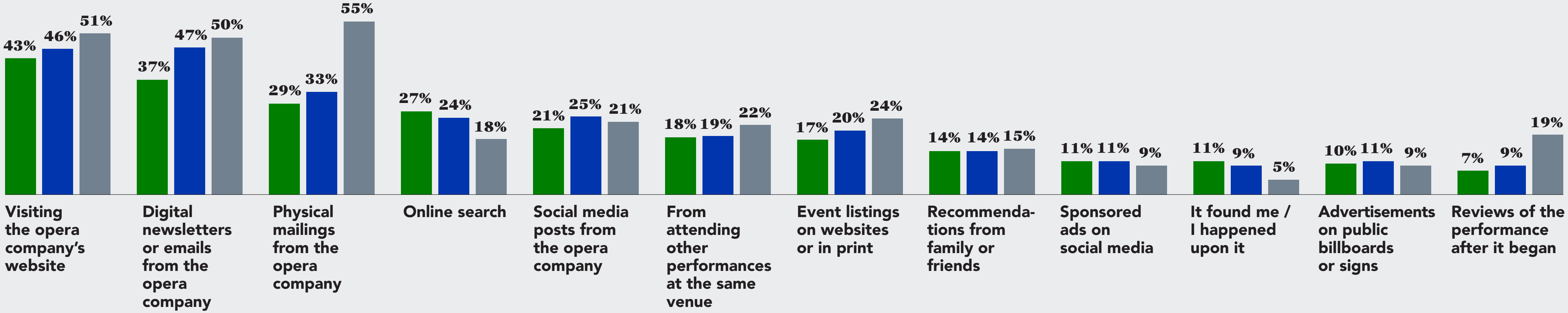
Opera company websites, emails, and physical mailings are the most effective channels for reaching Ongoing audiences and Newcomers. Ongoing attenders are attuned to wider variety of information sources about opera generally, especially direct communications from opera companies. Newcomers are more likely to discover opera opportunities through an online search.

Minnesota Opera 's *Trouble in Tahiti*

FINDING OUT ABOUT THE OPERA OFFERINGS

Q27: *Generally, how do you find out about the offerings at your opera company? Please select all that apply.*

New to Opera (n=1,084)
New to Company (n=1,739)
Ongoing (n=7,563)



Options with fewer than 10% selecting not shown.

DETAILED FINDINGS SECTION 2:
WHAT BROUGHT THEM?

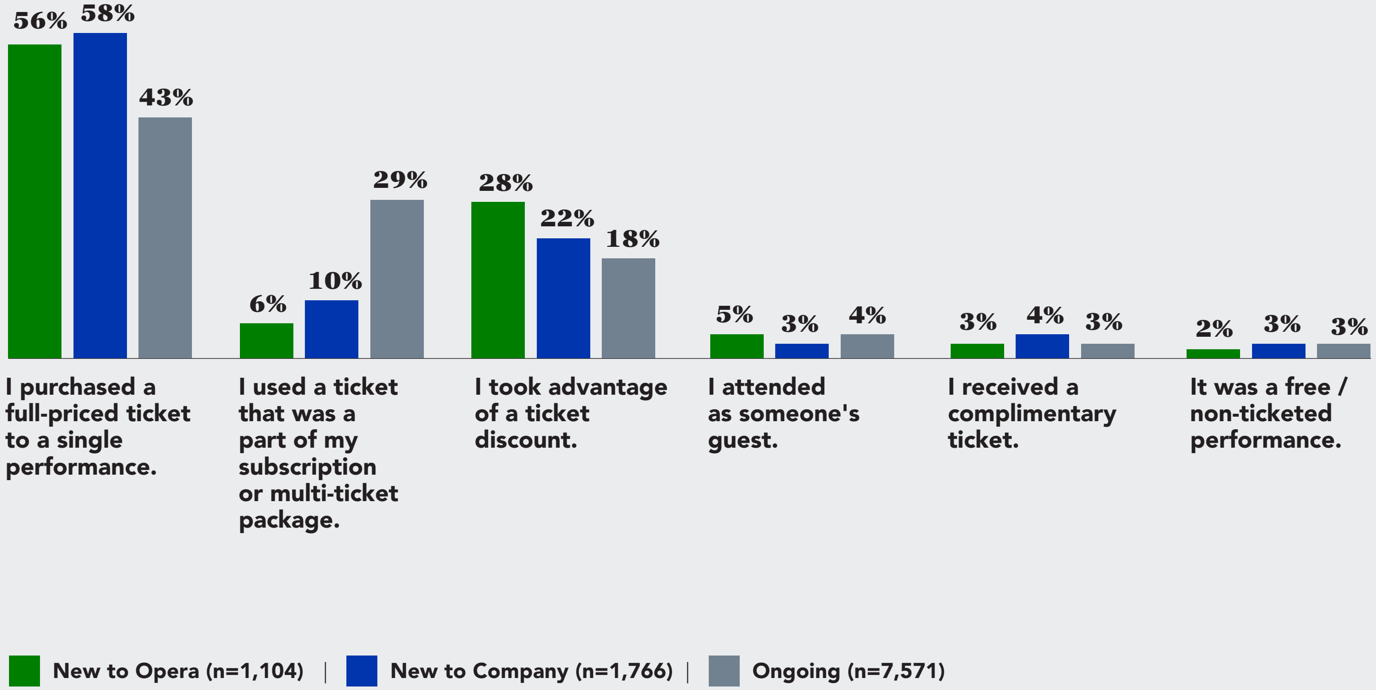
For their first performance, a majority of New-to-Opera attenders purchase a single ticket at full price, but many are influenced by a ticket discount. Ongoing audiences are most likely to have subscriptions, but some Newcomers do too.

El Último Sueño de Frida y Diego at LA Opera

ORY WEAVER

TYPE OF TICKET TO THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020

Q21: *Which of the following best describes your ticket to attend that performance or event at your opera company?*



DETAILED FINDINGS SECTION 2:
WHAT BROUGHT THEM?

Long Beach Opera's
Romance of the Rose

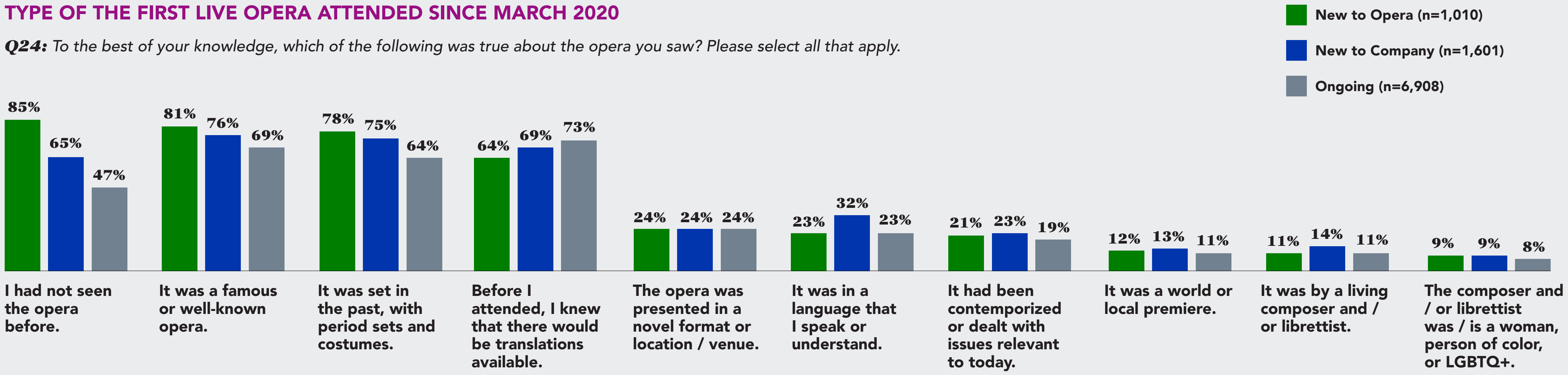
JJ GEIGER

DETAILED FINDINGS SECTION 3: WHAT WAS THEIR EXPERIENCE LIKE?

Most Newcomers described the opera they first saw as famous or well-known, set in the past, and with period sets and costumes. During exploratory interviews held prior to the survey, some Newcomers spoke about how they were attracted to more well-known operas because they had some familiarity with them — if only with the title — which gave them the sense that it would be a good place to start.

TYPE OF THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020

Q24: *To the best of your knowledge, which of the following was true about the opera you saw? Please select all that apply.*



Alternative companies are less likely to draw audiences to well-known works than Anchor or Solitary companies. Alternative companies, though, are more likely than others to attract audiences for premieres, works by living composers, and other productions that are presented in a novel format or venue, performed in a language spoken by the audience, or contemporized to deal with issues relevant to today.

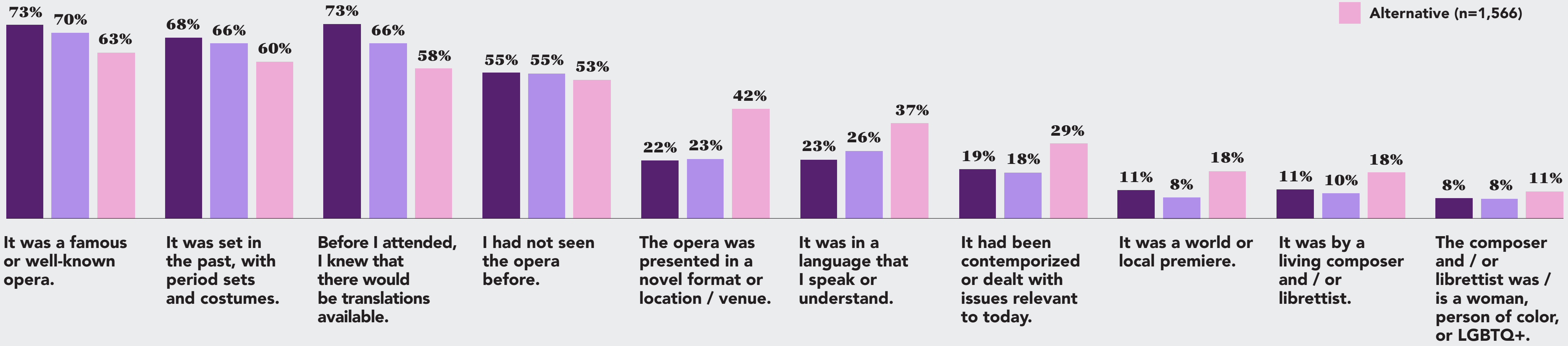
TYPE OF THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020

Q24: *To the best of your knowledge, which of the following was true about the opera you saw? Please select all that apply.*

Anchor (n=6,054)

Solitary (n=1,929)

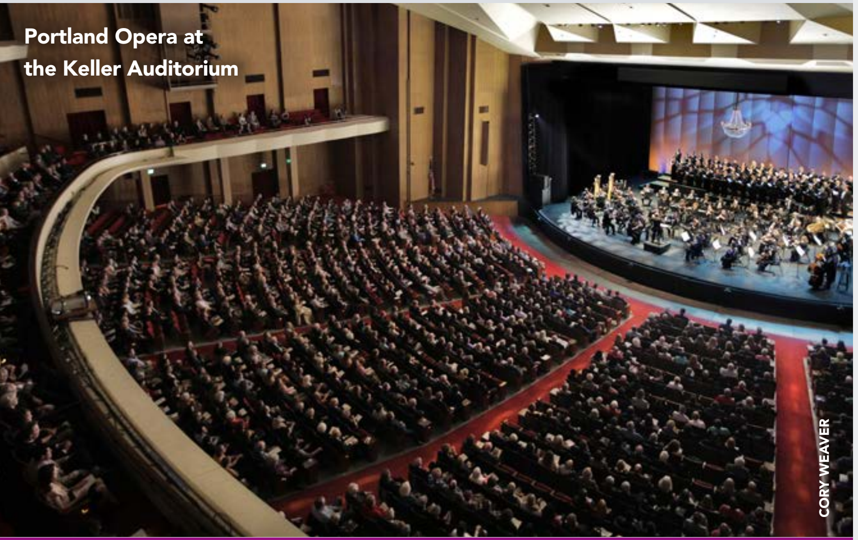
Alternative (n=1,566)



DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

OPERA AMERICA | sloverlinett at NORC | NORC at the University of Chicago

Most audiences saw their first post-pandemic opera at the company's main venue. But a small number of Ongoing attenders (who were more likely to have attended in 2020 and 2021) went to an opera at an outdoor venue, likely because this was the only way that opera was being offered at the time.

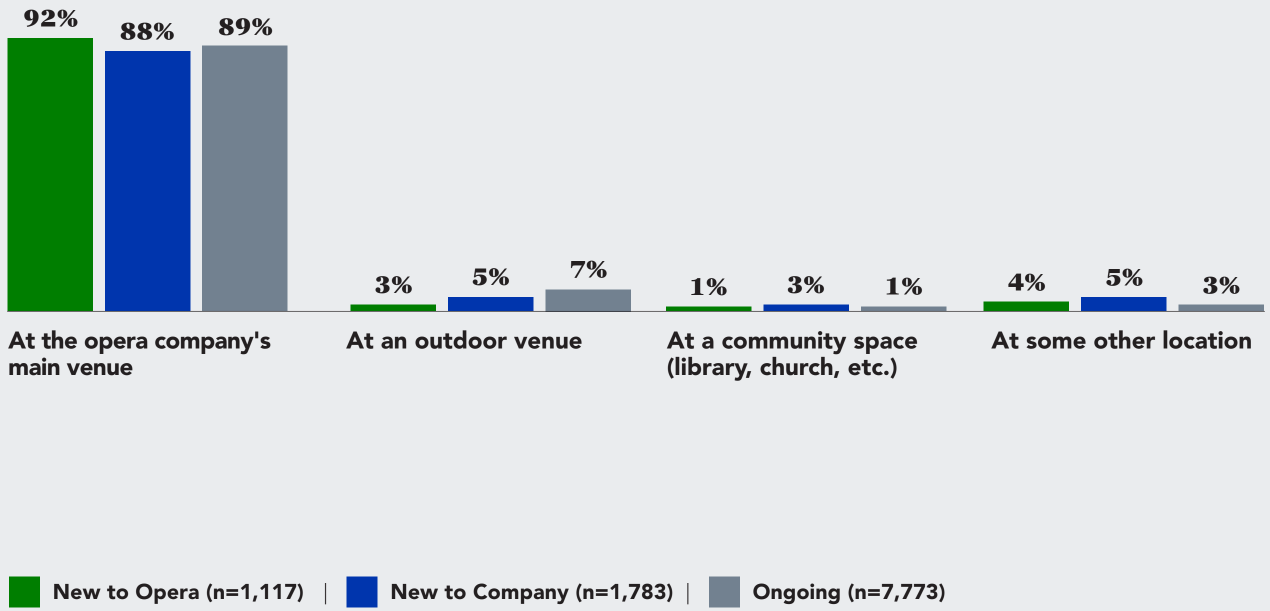


Portland Opera at the Keller Auditorium

DETAILED FINDINGS SECTION 3: WHAT WAS THEIR EXPERIENCE LIKE?

VENUE OF THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020

Q19: *Thinking about the first live performance or event you attended in person put on by your opera company since March 2020, which of the following best describes where you saw the performance?*



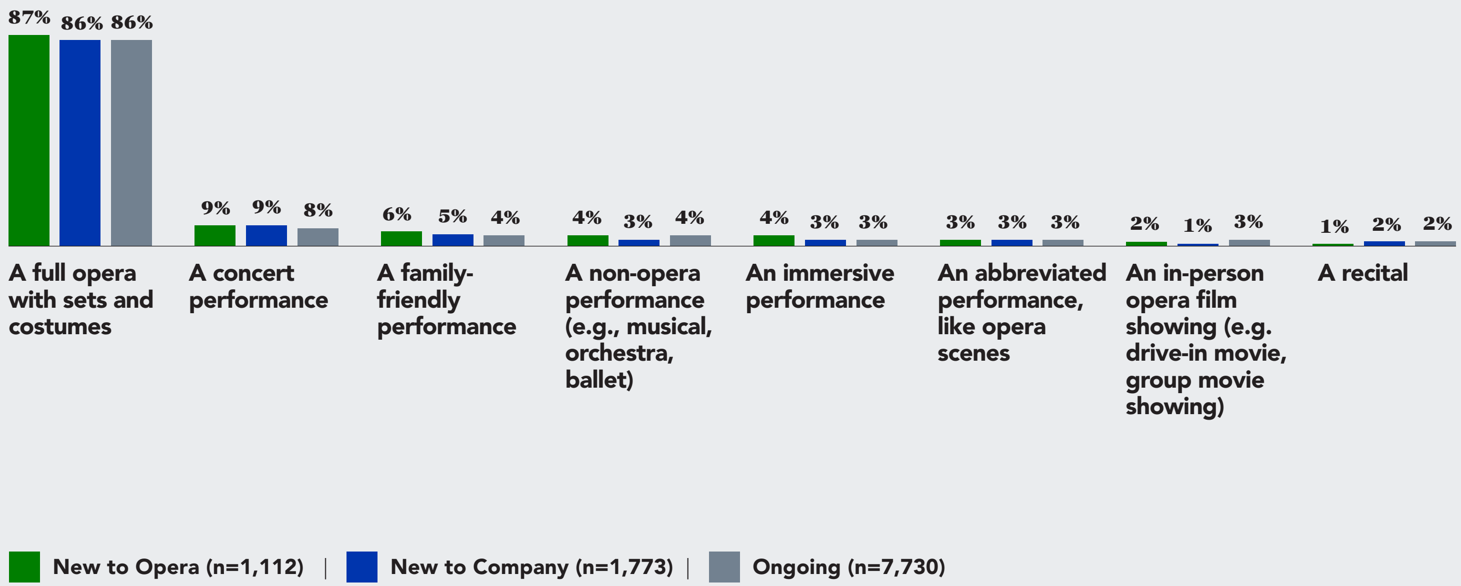
In terms of format, nearly all opera audiences attended a fully staged opera with sets and costumes. Concert performances ranked in a far second place.

Proximity at Lyric Opera of Chicago

TODD ROSENBERG

FORMAT OF THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020

Q20: *Which best describes the format of that performance? Please select all that apply.*

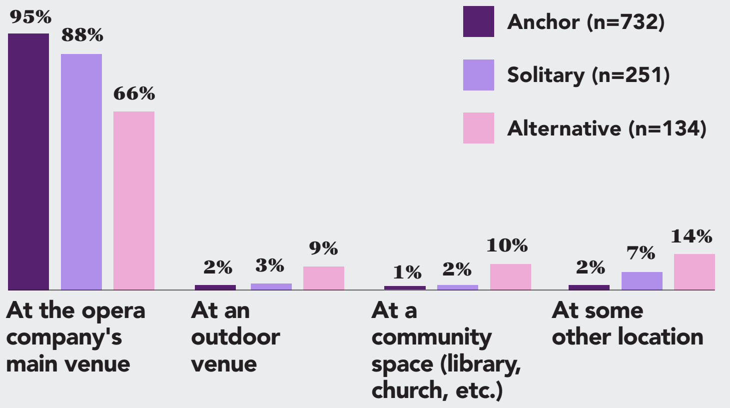


DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

Anchor companies and Alternative companies drive New-to-Opera attenders with different offerings. Anchor companies attract those who are New to Opera to their main venue for full operas with sets and costumes. Alternative companies engage them in a broader array of programming, at a variety of venues. Solitary companies offer a variety of programming, predominantly at their main venue.

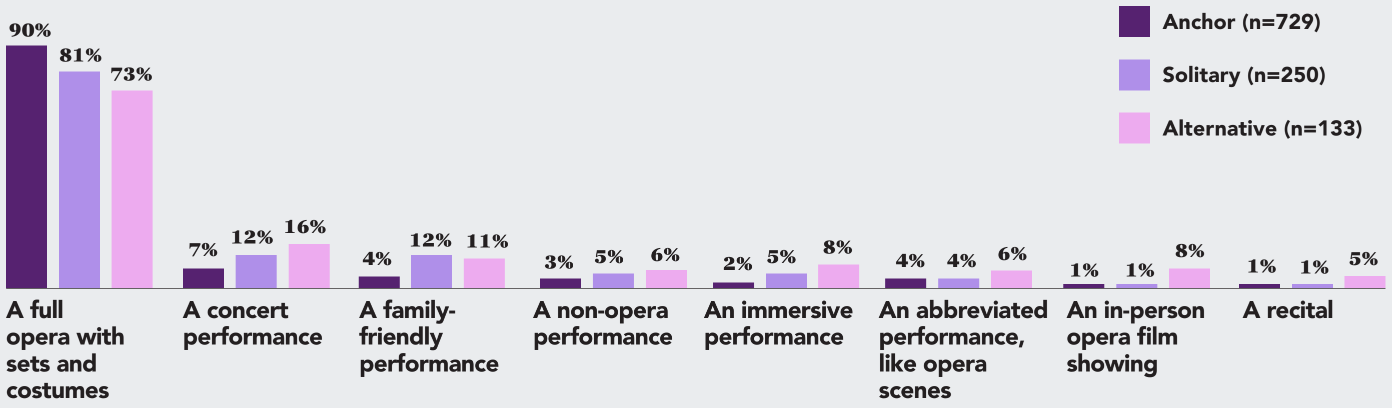
VENUE OF THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020 — FOR NEW-TO-OPERA ATTENDERS

Q19: *Which of the following best describes where you saw the performance?*



FORMAT OF THE FIRST LIVE OPERA ATTENDED SINCE MARCH 2020 — FOR NEW-TO-OPERA ATTENDERS

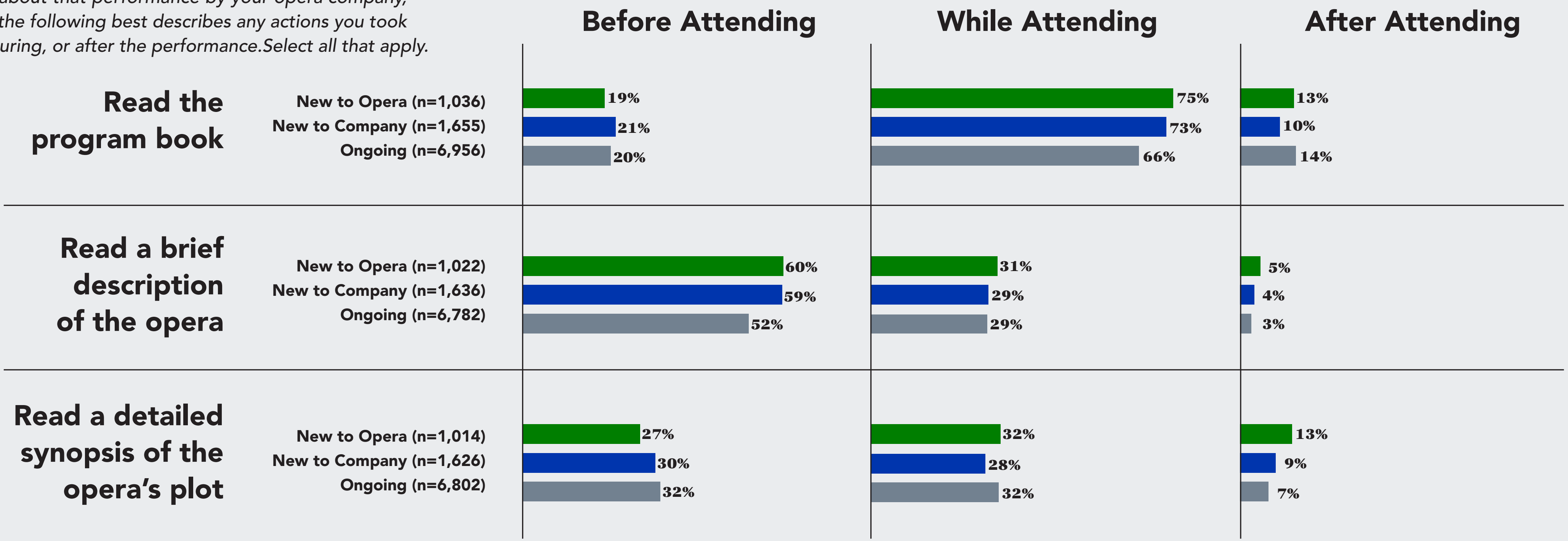
Q20: *Which best describes the format of that performance? Please select all that apply.*



DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

Newcomers are taking the time to educate themselves about opera, beyond just attending the performance. They are just as likely as Ongoing attenders — and sometimes more likely — to read descriptions, synopses, and program books. Interestingly, all audiences are more likely to read something brief than something detailed.

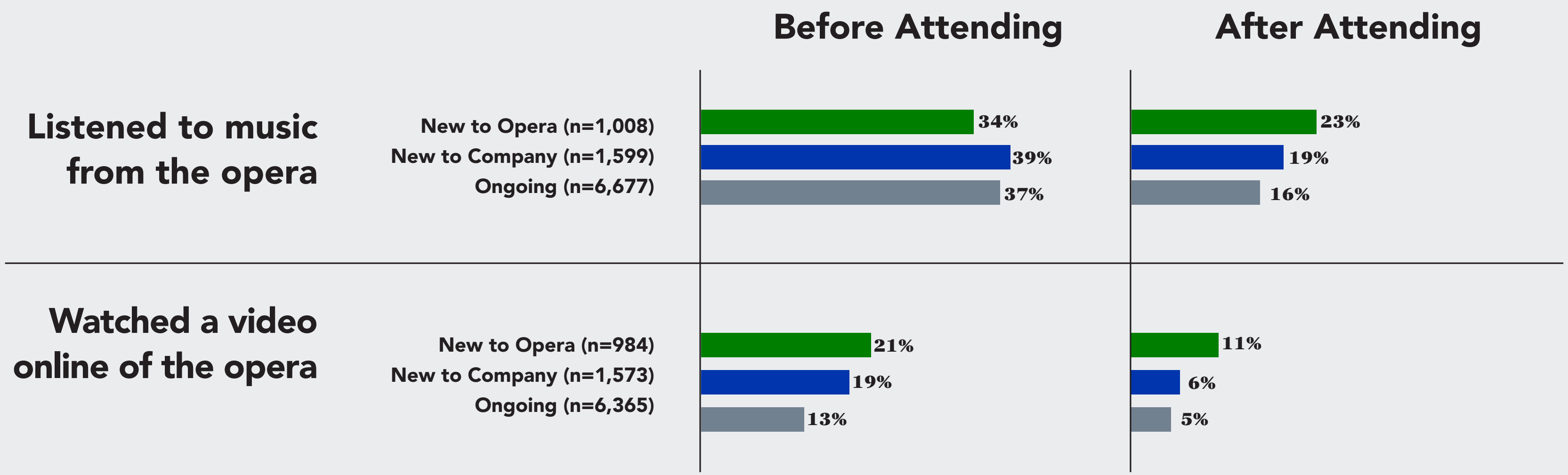
Q29: *Thinking about that performance by your opera company, which of the following best describes any actions you took before, during, or after the performance.Select all that apply.*



DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

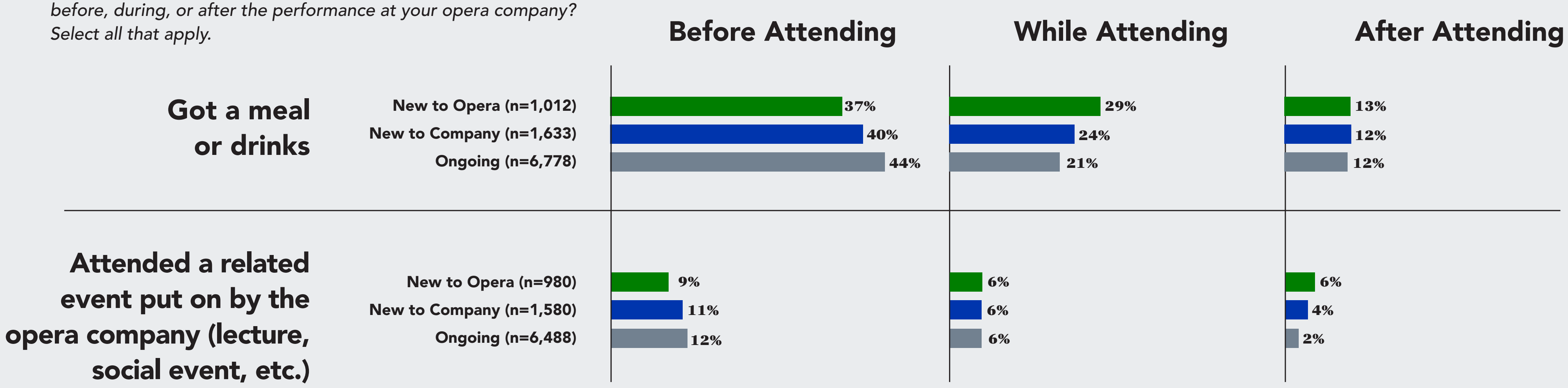
All audiences listen to the opera they are planning to see at similar rates before attending, but New-to-Opera audiences are more likely to re-listen afterward. Newcomers are more likely than Ongoing attenders also to have watched a video of the opera before attending — and New-to-Opera audiences again are more likely to re-watch afterward.

Q29: *Thinking about that performance by your opera company, which of the following best describes any actions you took before, during, or after the performance. Select all that apply.*



Having a meal or getting drinks is a common part of the operagoing experience. Two-fifths of all audiences have a meal or drinks before the performance. New-to-Opera attenders are more likely than others to partake in refreshments during the event. When it comes to ancillary activities around a performance, only a small percentage of audiences — and even fewer New-to-Opera attenders — participate.

Q29: *Which of the following best describes any actions you took before, during, or after the performance at your opera company? Select all that apply.*



DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

Newcomers have positive impressions of their recent performance experiences. In fact, their reviews of the musicality, theatricality, and production design are slightly more enthusiastic than Ongoing audiences. Although not a majority, more New-to-Opera attenders than Ongoing audiences express difficulty following the story and reservations about the length.

IMPRESSION OF MOST RECENT PERFORMANCE

Q30: *To what extent do you agree or disagree with the following statements about your most recent experience at your opera company?*

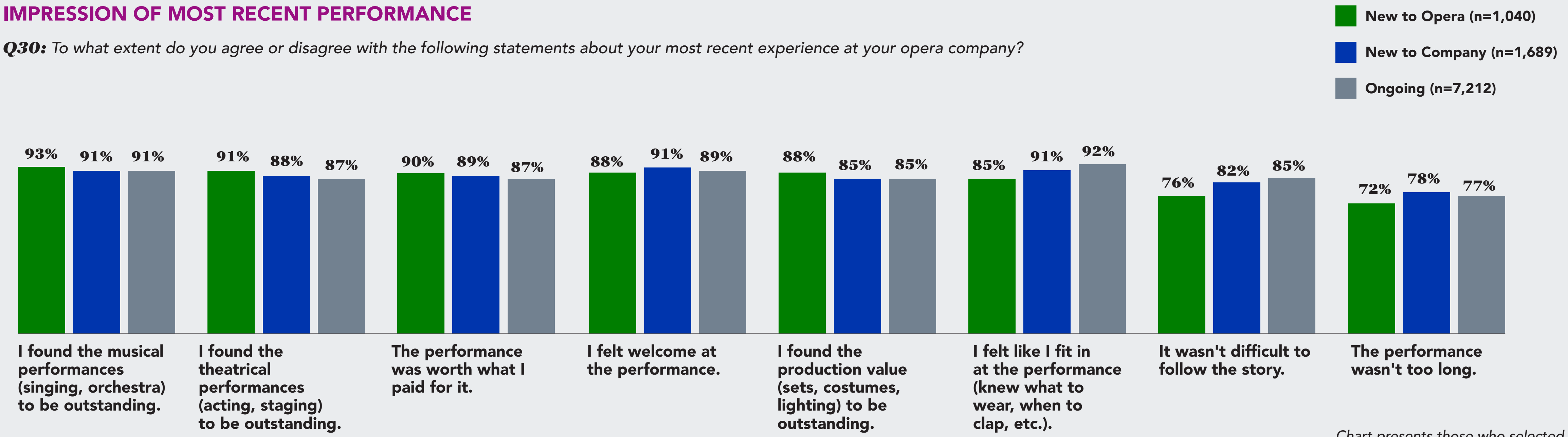


Chart presents those who selected "agree" or "strongly agree."

DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

Both Newcomers and Ongoing audiences are likely to be opera promoters for the opera company they attended, suggesting that Newcomers already consider themselves advocates. Generally, we expect established audiences to have a higher net promoter score than less affiliated groups, but in this case, New-to-Opera, New-to-Company, and Ongoing attenders have almost equal ratings.

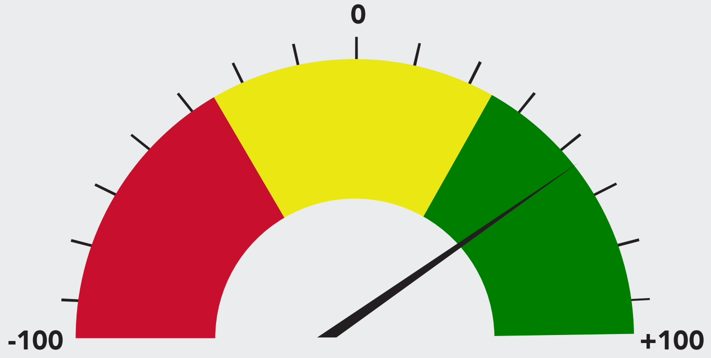
NET PROMOTER SCORE

A net promoter score (NPS) is a measure of audience loyalty. Survey respondents were asked how likely they were to recommend their companies to others on a scale from 0 to 10.

The NPS is calculated by subtracting the percentage of those least likely to recommend their companies (0–6) from the percentage of those most likely to recommend their companies (9–10).

An NPS of zero would mean that there are an equal number of promoters and detractors. A good NPS score is one greater than zero, meaning more people are more willing to promote than to detract.

Q13: *First, how likely are you to recommend your opera company to a friend or colleague?*



NEW TO OPERA
+67

NEW TO COMPANY
+65

ONGOING
+66

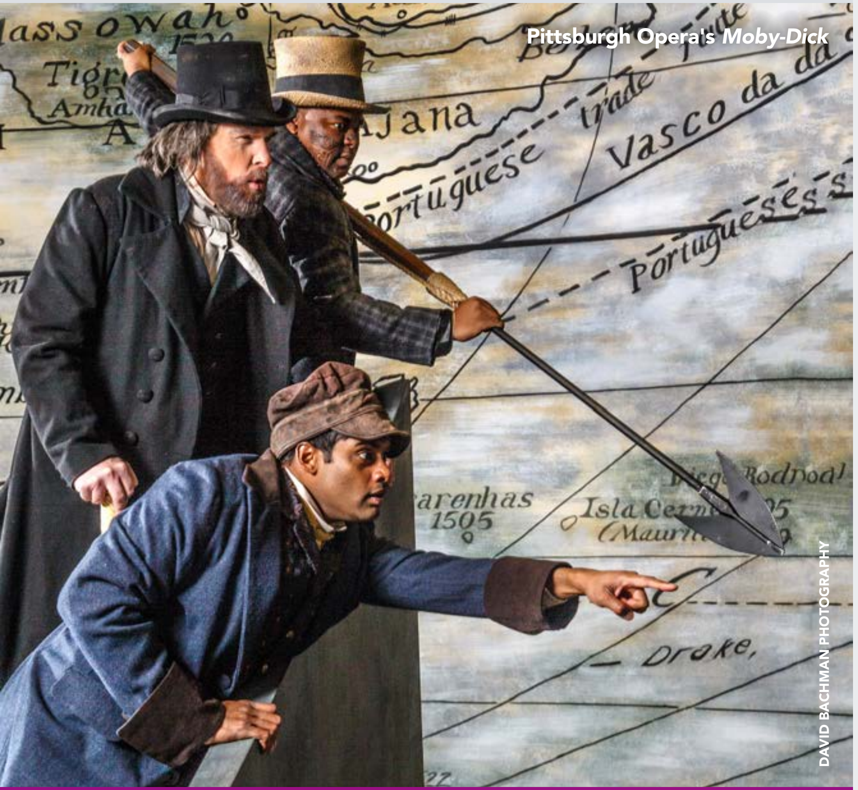
DETAILED FINDINGS SECTION 3:
WHAT WAS THEIR EXPERIENCE LIKE?

The Marriage of Figaro
at Tri-Cities Opera

RANDY CUMMINGS

DETAILED FINDINGS SECTION 4: WHAT WOULD BRING THEM BACK?

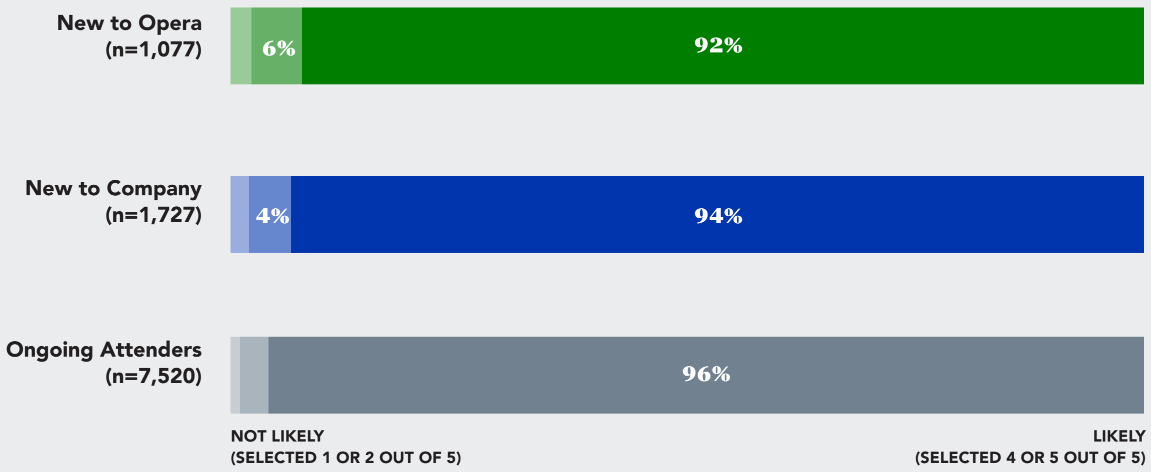
Most attenders who responded to the survey indicate they are likely to come back at some point in the future.



DETAILED FINDINGS SECTION 4:
WHAT WOULD BRING THEM BACK?

LIKELIHOOD TO ATTEND ANOTHER PERFORMANCE AT THE OPERA COMPANY

Q31: *How likely are you to attend another opera performance at your opera company in the future?*

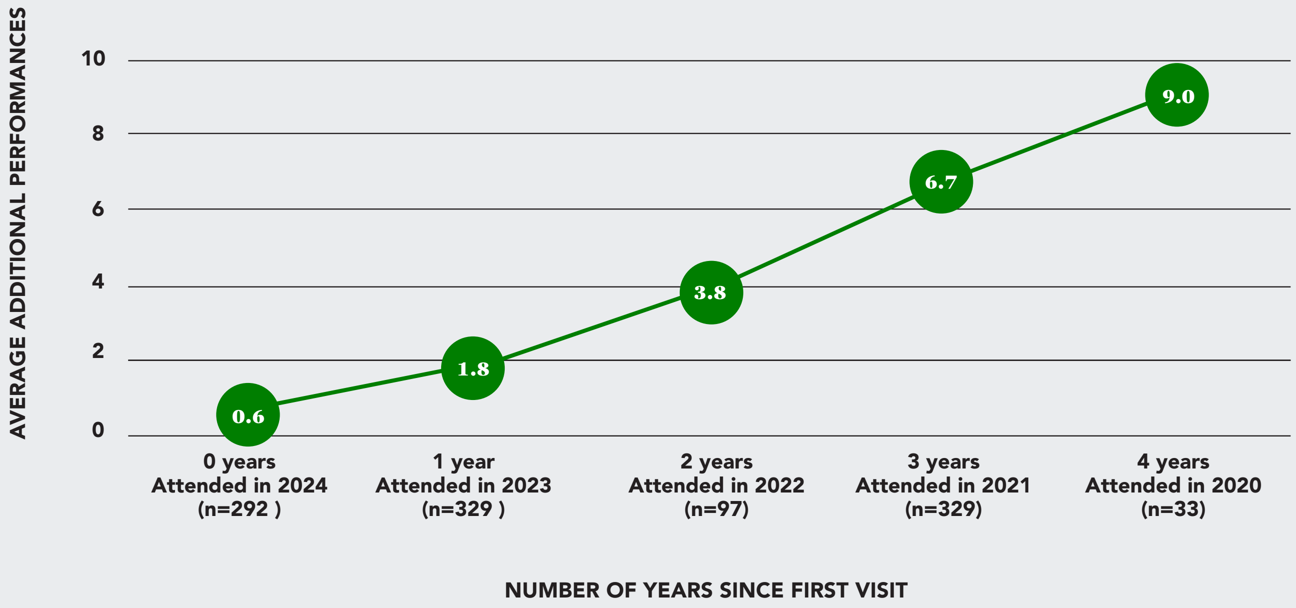


Many attendees are gradually fitting opera into their lives as an ongoing habit — but this takes time. Many New-to-Opera attenders who took the survey have already returned at least once beyond their first visit. Nearly a third of Newcomers in 2024 have already returned. With each year that passes, the number of performances attended by those New-to-Opera attenders increases.

Pacific Opera Project's *Madama Butterfly*

DETAILED FINDINGS SECTION 4:
WHAT WOULD BRING THEM BACK?

AVERAGE NUMBER OF ADDITIONAL PERFORMANCES BY NUMBER OF YEARS SINCE FIRST VISIT



New-to-Opera attenders who have returned show stronger affinity for classical music and the performing arts than those who haven't. They are more likely to listen weekly to classical music or opera, or to attend performances each month.

Listen to classical music at least once a week

Returned New to Opera (n=651)
60%

Not Returned New to Opera (n=369)
52%

Listen to opera at least once a week

Returned New to Opera (n=651)
37%

Not Returned New to Opera (n=369)
24%

Attend performing arts at least once a month

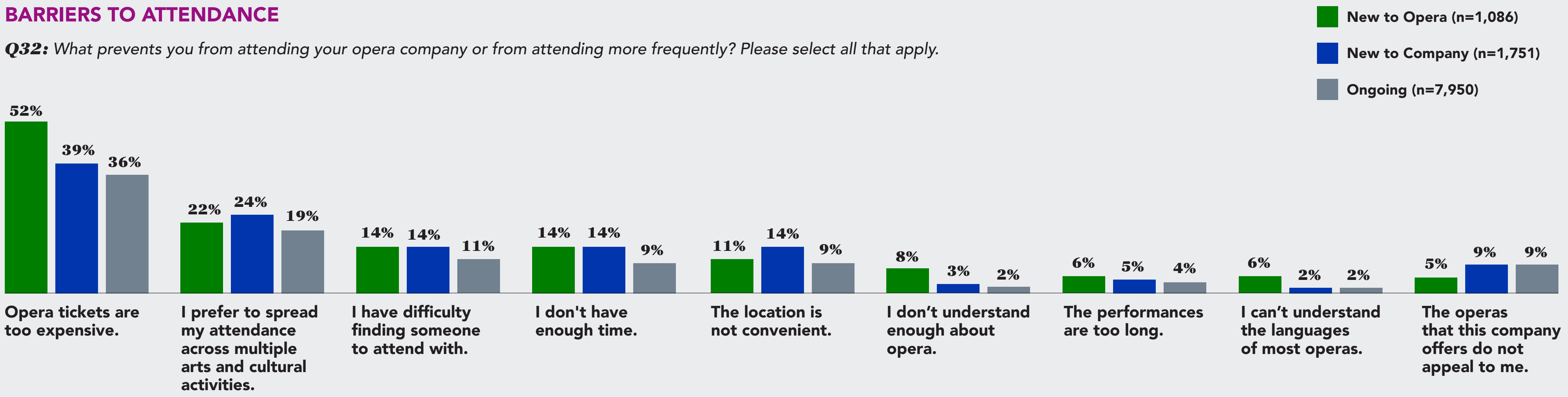
Returned New to Opera (n=668)
48%

Not Returned New to Opera (n=378)
30%

The expense of tickets is the main barrier to attendance across all audiences. Many attenders are held back also by a desire to spread their arts attendance across multiple organizations. Although other barriers rank lower, the differences between New-to-Opera and Ongoing attenders in several categories reveal other factors that opera companies should consider addressing.

BARRIERS TO ATTENDANCE

Q32: *What prevents you from attending your opera company or from attending more frequently? Please select all that apply.*



DETAILED FINDINGS SECTION 4:
WHAT WOULD BRING THEM BACK?

New-to-Opera attenders who have not returned are more likely to cite barriers related to feeling disoriented at performances. They are more likely to say that they don't understand enough about opera, can't understand the language, or that it feels too foreign to them.


LA Opera's *Moses*

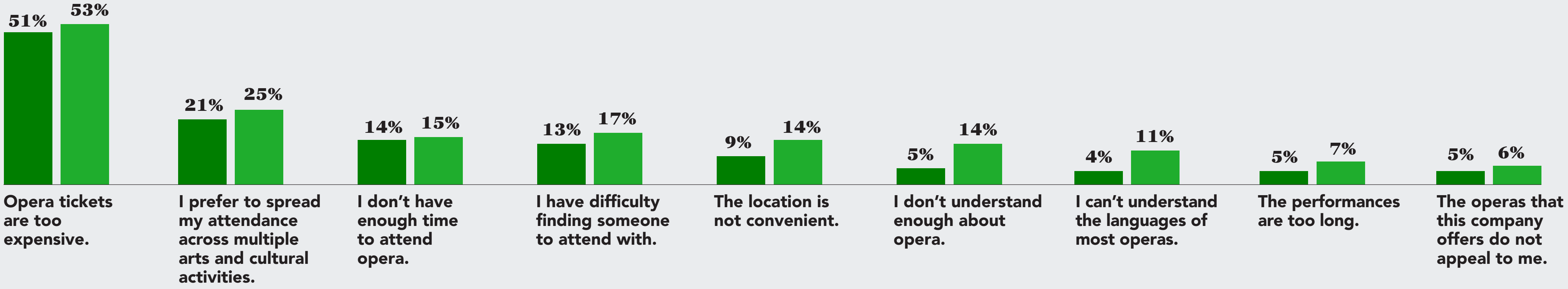
TASO PAPADAKIS

BARRIERS TO ATTENDANCE FOR NEW-TO-OPERA ATTENDERS WHO HAVE/HAVE NOT RETURNED

Q32: *What prevents you from attending your opera company or from attending more frequently? Please select all that apply.*

New-to-Opera Returnees (n=658)

New-to-Opera Non-Returnees (n=373)

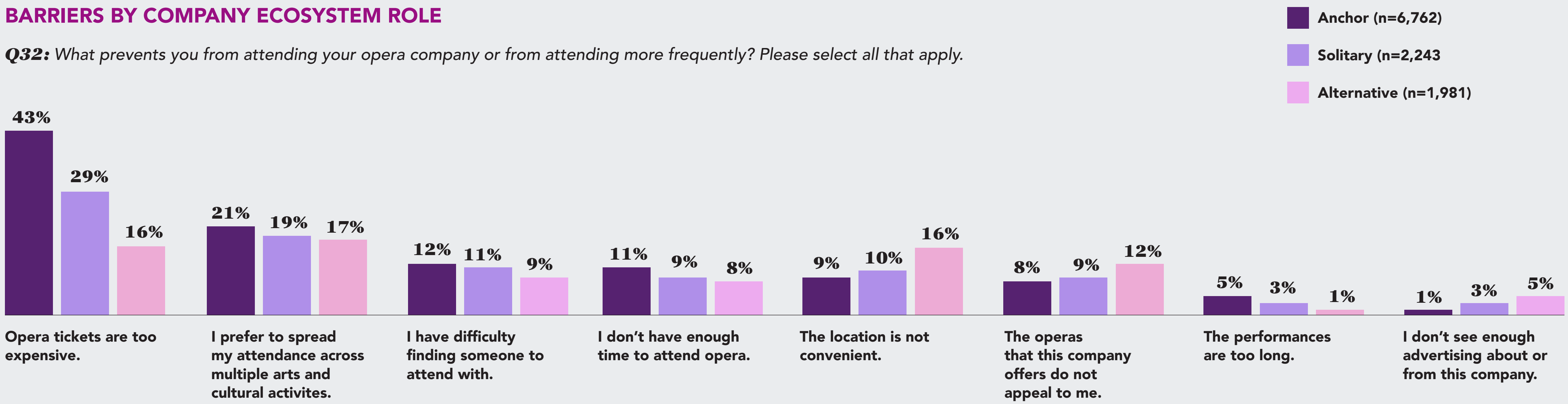


DETAILED FINDINGS SECTION 4:
WHAT WOULD BRING THEM BACK?

When viewed through the lens of opera company type, there are more nuances to what prevents audiences from attending. Price sensitivity is more acute for Anchor and Solitary companies, while Alternative companies struggle with perceived issues of location, programming choices, and advertising reach.

BARRIERS BY COMPANY ECOSYSTEM ROLE

Q32: *What prevents you from attending your opera company or from attending more frequently? Please select all that apply.*



Cincinnati Opera's Opera in the Park

PHILIP GROSHONG

REFLECTIONS & NEXT STEPS

TYING INTO BROADER DIALOGUE

PANDEMIC PROGRAMMING

The performing arts field across disciplines still is trying to understand the impact of digital programming during the pandemic. This research offers a window into its impact on audiences who subsequently came for live performances.

NEW STORYTELLING

Producers continue to define opera as an American art form by commissioning new works by new voices. This research demonstrates the simultaneous importance of staging engaging productions of inherited repertoire to win new audiences.

INCREASING DIVERSITY

The goal to diversify audiences is a priority at opera companies across the country. This research suggests that it is happening: The new, opera-curious individuals who are filling theaters are more diverse in terms of race, age, and education level than ongoing attenders.

Proximity at Lyric Opera of Chicago

DAVID BACHMAN PHOTOGRAPHY

APPENDIX

DISTRIBUTION METHODS

Each participating opera company was instructed to send surveys to a randomized selection of up to 10,000 recent audience members who had bought or reserved a ticket to any digital or in-person production or event between March 15, 2020, and May 15, 2024.

Each company was asked to divide their recent patrons into two groups:

- Newcomers whose first engagement came in the 2020–21, 2021–22, 2022–23, or 2023–24 seasons; and
- Ongoing attenders, whose first engagement came prior to COVID-19.

Companies with more than 10,000 first-time audience members during that period were asked to send emails to up to 5,000 additional Newcomers. This was intended to offset anticipated response bias from longer-term audiences.

The Passion of Mary Cardwell Dawson **at Pittsburgh Opera**

DAVID BACHMAN PHOTOGRAPHY

WEIGHTING METHODOLOGY

Participating opera companies were asked to report the total number of Newcomers and Ongoing audiences in their databases from 2020 to 2024 and the number of surveys sent to each group. Responses were weighted to keep responses proportional to the total numbers for each opera company and within the combined sample.

The survey offered questions to determine which respondents were Newcomers and which were Ongoing audiences apart from how their opera company categorized them. This allowed survey respondents to self-identify as new or returning.

Some responses were missing data necessary to weighting. To compensate for this, the research team employed a hot-deck imputation statistical technique to replace missing values with randomized estimates based on other, similar variables. In these instances, the team calculated the values based on when respondents indicated they first attended the opera company, compared to answers given by respondents from the inviting opera company or respondents from companies of a similar budget size. The hot-deck imputation allowed the team to keep n=818 responses with missing data in the combined sample.

Research teams interested in performing their own analysis of the data collected for this report may request access.

TOTAL		Attenders	% of Total	Respondents	% Actual Responses
	NEWCOMERS	280,016	62%	5,743	50%
	ONGOING	170,178	38%	5,703	50%

Those you think are Newcomers may not actually be! While opera companies believed that nearly two-thirds of their lists were Newcomers, more than half of those weren't. Some of these individuals may have recently purchased tickets themselves for the first time, but they had already been coming as guests and partners of other purchasers.

El último sueño de Frida y Diego at San Diego Opera

DAVID BACHMAN PHOTOGRAPHY

APPENDIX

A CAUTION FOR OPERA COMPANIES

COMPANY-IDENTIFIED ATTENDERS

62% NEW

Database-identified Newcomers
Those tagged in company databases as having bought a ticket for the first time between 2020 and 2024

38% ONGOING

Database-identified Ongoing Attenders
Those tagged in company databases as having bought at least one ticket prior to 2020, as well as between 2020 and 2024

(Unweighted data)

ACTUAL SURVEY RESPONDENTS

28% NEW

Self-identified Newcomers
Those who reported that they had bought a ticket for the first time between 2020 and 2024

72% ONGOING

Self-identified Ongoing Attenders
Those who reported that they had bought at least one ticket prior to 2020, as well as between 2020 and 2024

(Weighted data)

STUDY LIMITATIONS

Any survey methodology comes with tradeoffs, and while distributing surveys via email was chosen for this study for its many positive benefits, we do want to acknowledge some of the limitations that come with this distribution method that may affect our data.

This is a survey only of ticket buyers (paid and complimentary). Those who came to performances as a guest, or those who attended a free performance where emails were not collected, are not included.

Email surveys tend to have higher response rates among more affiliated members. To combat non-response bias, incentives were offered to survey takers in the forms of Visa gift cards, OPERA America memberships, and, in some cases, incentives from the inviting opera company.

Ultimately, we are still more likely to have captured those new-to-file respondents who are already more highly affiliated — those who open emails and take time to respond to surveys.

Maryland Opera's *Tosca*

MADELEINE GRAY

PARTICIPANT COMPANY DATA — BUDGET GROUPS

	Companies	Responses (unweighted)	% of Responses (unweighted)
BUDGET 1 — OVER $15,000,000	7	4,847	42%
BUDGET 2 — BETWEEN $3,000,000 AND $15,000,000	11	4,102	36%
BUDGET 3 — BETWEEN $1,000,000 AND $3,000,000	10	1,645	14%
BUDGET 4 — BETWEEN $250,000 AND $1,000,000	5	714	6%
BUDGET 5 — UNDER $250,000	3	138	1%

PARTICIPANT COMPANY DATA — REGION

	Companies	Responses (unweighted)	% of Responses (unweighted)
CALIFORNIA	6	2,609	23%
MID-ATLANTIC	4	344	3%
MIDWEST	7	2,281	20%
NEW YORK	3	1,650	14%
NORTHWEST	2	1,034	9%
SOUTHEAST	7	1,088	10%
SOUTHWEST	4	1,373	12%
WEST	3	1,067	9%

OPERA AMERICA

Project Lead: Jenny Fornoff
Project Oversight: Dan Cooperman
Data Collection: Irene Fitzgerald-Cherry, Kevin Sobczyk
Design & Layout: Alisha Neumaier, Nick Wise, Sarah K. Ivins

SLOVER LINETT AT NORC

Matthew Jenetopulos, Research Scientist
Bayaz Zeynalova, Research Director
Tanya Treptow, Senior Research Scientist, Co-Director
Research Associates: Gustavo Arruda-Franco, Heather Welty

PARTNERS

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San Francisco Opera

DREW ALITZER

CREDITS & THANKS

FOR QUESTIONS ABOUT THE REPORT, CONTACT US AT MARKETING@OPERAAMERICA.ORG. RESEARCH TEAMS INTERESTED IN PERFORMING THEIR OWN ANALYSIS OF THE DATA COLLECTED FOR THIS REPORT MAY REQUEST ACCESS.