
CAPTURING LONDON'S AUDIENCES

English Touring Opera – ‘Opera in Cinemas’ Report

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English Touring Opera – ‘Opera in Cinemas’ Report

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This document reports on a research project undertaken by English Touring Opera and the Guildhall School of Music & Drama, in partnership with the Barbican Cinema, and funded by CreativeWorks London. It incorporates the analysis completed for English Touring Opera as presented to its management in February 2104. As such, it was written for the purposes of informing their business plan and is shared here in the interests of knowledge exchange.

Aims of the project

The project aimed to understand the appeal and audience experience of live cinema broadcasts of opera, in order to see whether lessons may be learned for live opera companies. It sought to answer such questions as:

- Who are the audience at cinema broadcasts? Are they the same as those attending live performances?
- What do audiences value about their experience of opera in cinema and theatre settings?
- How are their experiences of cinema and live opera similar or different?
- What are the discourses around opera and opera-going and what insight can this give into audiences’ expectations and perceptions of the art form?
- What are the motivations for attending cinema broadcasts and are these different to those for attending live performance?
- What factors are considered important in people’s decision to attend?
- Can a live company learn from the cinema in order to improve or develop its own offering to audiences?

Method

Two means of data gathering were employed:

1. A **questionnaire** circulated to cinema audiences attending live screenings between October and December 2013. This contained a mixture of closed and open-ended questions. Participants were offered entry into a prize draw to win tickets to an English Touring Opera production.
2. Two **Focus Group discussions** with participants recruited from among questionnaire respondents. These were convened by Karen Wise and John Sloboda and held at the Guildhall School of Music & Drama. Participants were offered entry to an English Touring Opera dress rehearsal as a thank you.

These methods were chosen to gather both quantitative and qualitative data, allowing broad statistical characterisation alongside rich and detailed in-depth insights into the nature and quality of people's experiences.

The questionnaire addressed the following:

- Demographics
- Audience members' attendance at cinema and theatre opera
- Audience experiences
 - at the screening attended, and of opera in cinemas and theatres generally (open ended)
 - What do you value in an opera performance? (Tick box)
- Deciding to attend
 - What attracted you to this event? (Tick box)
 - Rating of the importance of different factors in deciding to attend that particular screening (e.g. accessibility, price)
 - Change in motivation to attend future opera performances in cinema & theatre

The Focus Group discussions, one with 5 participants and the other with 7, centred on participants' experiences of cinema broadcasts and live opera, in order to supplement the questionnaire responses with more detailed accounts.

The research project was reviewed and approved by the Guildhall School of Music & Drama's Research Ethics Committee.

Analysis

The analysis is in the following sections:

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1. Background information

i. Participants

There were 234 participants; 138 female, 92 male, 4 unspecified. The distribution of age groups is shown in Fig 1 (mode: 60-69). The majority of respondents (145) were attending with one other person, 39 were alone and 49 with a group.

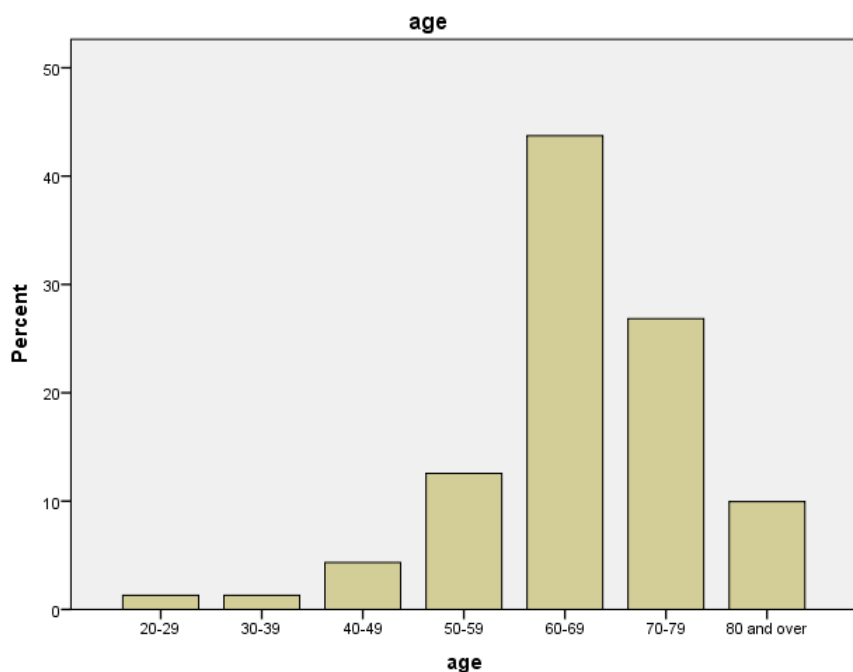


Figure 1: Age distribution of participants

ii. Venues and productions

Participants came from 13 different cinemas (4 outside London), with the majority (46%) drawn from the Barbican as partner (see Fig. 2). Participants from outside London only numbered 13 (5.5%). Most (160; 68.4%) were subscribers or part of a loyalty scheme at the venue, and 79.1% were repeat attenders to the venue for opera screenings. In addition, 64.5% reported having attended a live opera relay elsewhere.

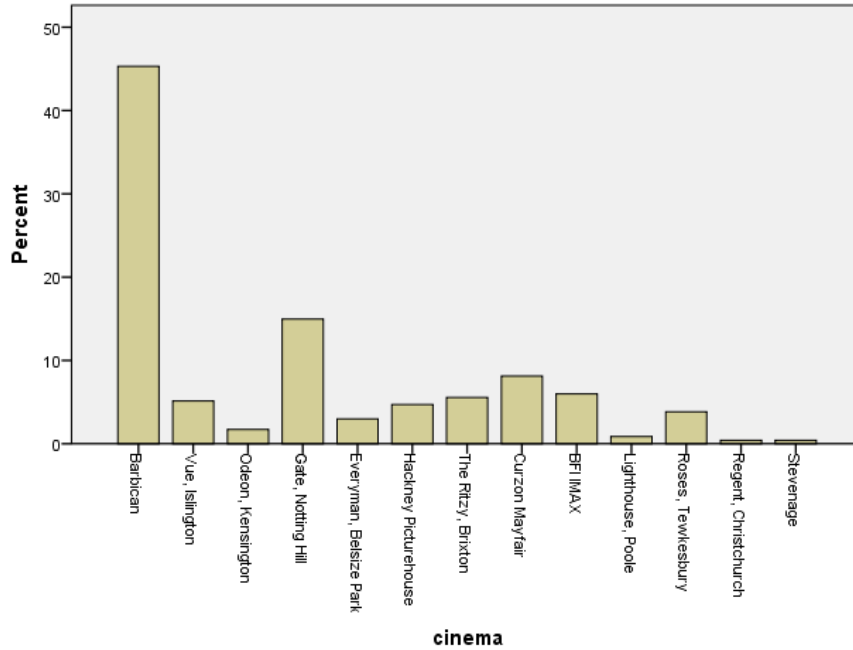


Figure 2: Percentage of participants by cinema

The percentage of responses from the five different opera screenings is shown in Fig 3.

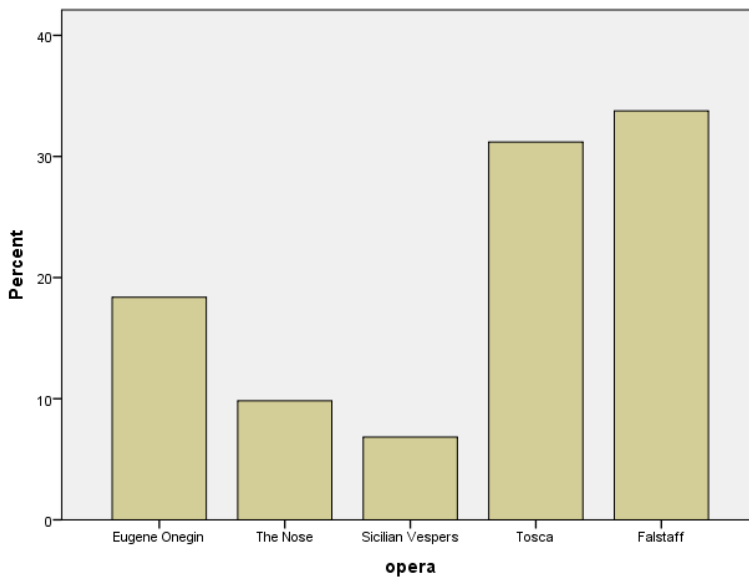


Figure 3. Responses by opera.

iii. Opera attendance and viewing

Combining the 'no' responses for previous attendance at cinema live screenings at the venue and at other venues, with responses to the question about cinema opera attendance in the last two years, it is evident that 28 participants were cinema opera first-timers.

Participants' reported attendance at opera performances shows they range from infrequent to frequent attendees across both cinema and theatre (Figs 4 & 5). A sizeable proportion of cinema attendees (41.1%) attended more than 10 times in the last 2 years. Across the whole sample, attendance correlates moderately across the two types of presentation ($R = .31, p < .001$) – that is, frequent attendees tend to be attending both and there is not an overall trade-off of theatre against cinema. However, 13.7% report no attendance at the theatre in the last 2 years.

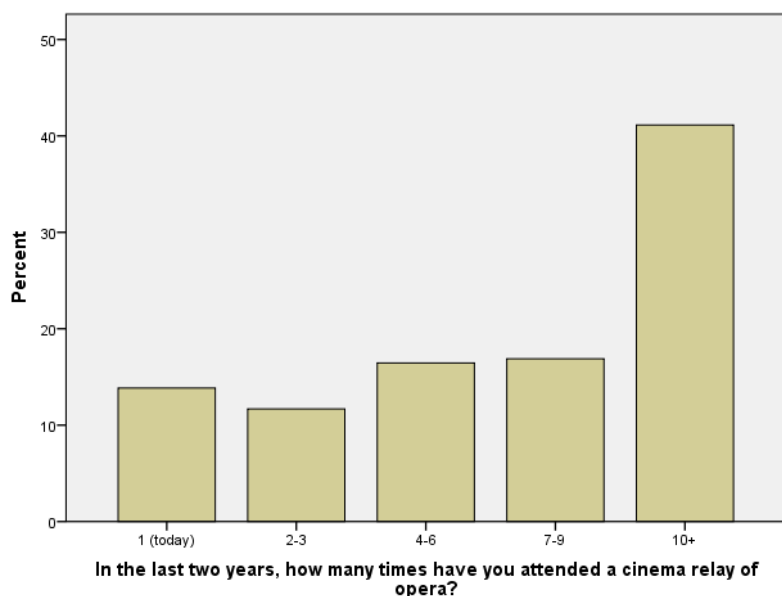


Figure 4: Attendance at cinema opera in the last 2 years

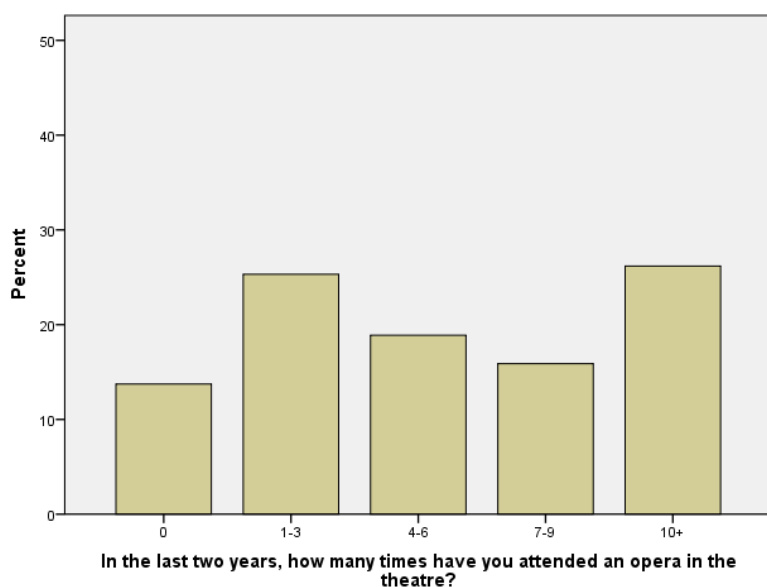


Figure 5: Attendance at theatre opera in the last two years

Figure 6 shows the differences between reported theatre and cinema attendance in the last 2 years. People who reported the same attendance at both cinema and theatre are represented in the bar marked 0 (no difference). Those attending more cinema than theatre are to the right of 0 (positive numbers) and those attending less cinema than theatre are to the left (negative numbers).

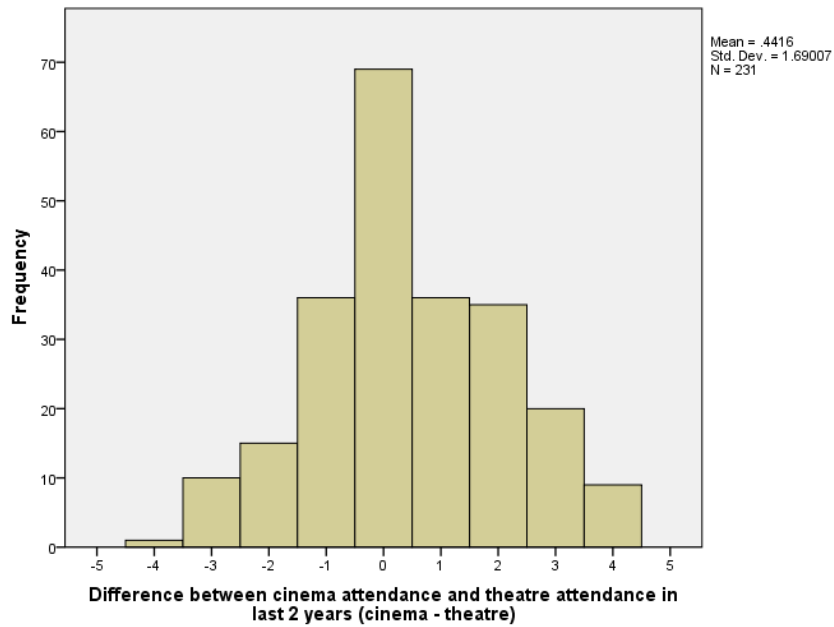


Figure 6: Differences between reported cinema and theatre attendance (numbers of participants)

2. Thematic analysis of qualitative data – (Focus groups and Open-ended Questionnaire Questions)

The open-ended questions were phrased as follows:

In the next two questions we would like you to tell us about your response to the screening you have just seen. You might want to think about aspects of the performance itself (e.g. the musical and dramatic impact) as well as aspects of the cinema relay (e.g. choice of camera shots and backstage footage).

1. What were your favourite things about the screening today and why?
2. What were your **least** favourite things about the screening today and why?
3. What was the most positive aspect of your **overall experience** here today? (Including aspects such as the venue and the atmosphere)
4. What was the most negative aspect of your **overall experience** here today?

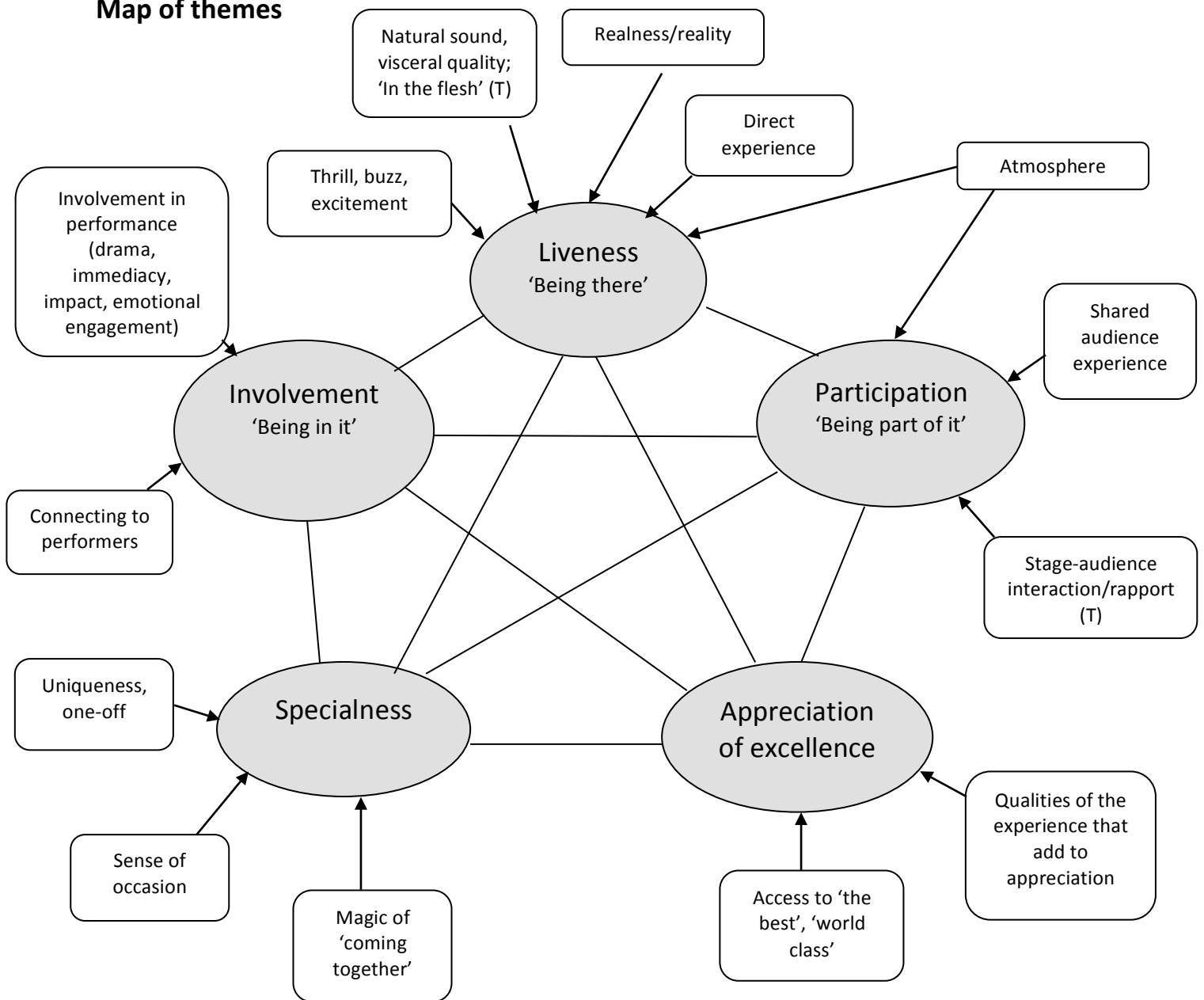
Thinking about your experiences of opera **in general**, please complete the following:

5. The thing I like **most** about opera **in the cinema** is...
6. The thing I like **least** about opera in the cinema is...
7. The thing I like **most** about opera **in the theatre** is...
8. The thing I like **least** about opera in the theatre is...

i. Values and the quality of the experience

Qualitative thematic analysis of the focus group material combined with questionnaire open-ended responses reveals some major themes around what is valued by audience members. These are represented in the Map of Themes, with the five major themes shown in ovals and the subthemes within them shown in rectangles. These themes are for the large part present in relation to both cinema and theatre, but are fostered or hindered in different ways that appear to be mediated by the individual's response to certain features. For example, the value of 'Involvement' is for some people enhanced by close-up views of performers, while others find the film medium distancing. Thus the overall message is that people can find valued experiences in either medium, but through different routes, and not everyone will react the same way. However, the aspect of Liveness is largely particular to the theatre experience, where 'being there' means physically being in the same space while the event is taking place. For cinema, it becomes 'like being there', and the aspect of 'Liveness' more associated with having a shared experience with other audience members, either within the cinema or in the opera house being viewed. 'Specialness' is also primarily, though not exclusively, associated with the theatre. (T) denotes subthemes *only* occurring in relation to theatre.

Map of themes



ii. Cinema meets theatre

Four themes emerged expressing attitudes towards cinema opera, in the context of its relationship with theatre. The first three are about the extent to which it is valued as an experience of opera:

1. There is nothing like live opera in the theatre – cinema can only ever be second best to this.

It's easier to get tickets. It is cheaper but I would pay the full prices if it was easier for me to get there. It's a second best, going to the cinema it's very much a second best. (Claire, Focus Group 1)

2. Cinema is a good alternative to live theatre for those who cannot afford or access the opera house – some aspects don't translate but it gives a fairly good approximation of the experience of being there (brilliant, but not the same as live)

Although a cinema screening of opera can never be as thrilling as a good production in the Opera House, it is an excellent second best. I am too old to travel abroad for opera and also opera house tickets have now risen to a price outside my budget. Have given up my membership to the ROH and the ENO and am very grateful that I can still hear some excellent productions from the MET (Barbican, Eugene Onegin, E79¹)

3. Cinema opera is a new art form, a genre in itself. It offers something different, but equally valuable or even better.

There was nothing to fault in what was coming from New York. Perhaps one of the best opera experiences I've ever had. And the proximity to the action provided by the HD relay I think makes this format a very real rival to being in the opera house (certainly it ranks above being anywhere but in the stalls I think – i.e. I would prefer an HD relay to cheaper in house seats). Great value, and sold my opera skeptic friend on the opera too (Barbican, Eugene Onegin, E16)

I'm very anti- TV opera because the sound in the TV is hopeless. And I just thought it would be like TV opera on a big scale, and was eventually persuaded to go with an elderly friend of mine who'd stopped travelling up from Croydon to the Opera House. She'd discovered the Gate. She goes to the Monday lunchtime one because it means she can get back home earlier. So I said, I'll come along with you. And I was completely knocked out by it. I came out saying things like 'this is a new art form'. And it definitely is, for all the reasons that various people have given. [...] it's just like being... in there amongst the singers. I mean I had no idea there would be these close-ups and the sort of cinema angles that you get in classy film. They've got all of that going haven't they? So it's a real experience. Slightly different from the real one, because if you are in a theatre, there is a kind of hairs on the back of your neck thing with really great singers, which I don't think you quite get in any recorded form. But apart from that... you obviously see so little don't you, when you go to a theatre opera performance... the effort and what these performers are putting into the performance is 50% wasted in the theatre, you know, because you can't get that, but these close-ups, it's miraculous I thought, I'm very very impressed with it really. (Paul, Focus Group 2)

One's position with respect to these three seems related to one's experience, in everything from the film quality to aspects of etiquette in the house. For example, some people focus on the inability of cinema to replicate the theatre experience and see this as a big negative. Others embrace the new possibilities cinema gives.

The fourth theme that emerged about the relationship between theatre opera and cinema expresses:

4. The potential of cinema to be good for newcomers, overcoming stereotypical perceptions of opera, and break down barriers to attending.

Most of the focus group participants, and a handful of the questionnaire respondents, reported bringing others to their first experience of opera through the cinema – and that these people were resistant initially and then surprised by the reality. Cinema was felt to offer a way in to opera because of its familiarity as a medium, its democratising nature, and its more relaxed atmosphere. However, there was acknowledgement that this alone was not enough for people to just 'walk in off the street'. There was also a subtle perception among participants that opera is something one needs to be educated about, and initiated into. Newcomers are referred to as 'novices' or 'beginners', and they themselves report using cinema to increase their knowledge and 'feel more confident'.

¹ Participant identifier code. P codes refer to paper questionnaires; E codes refer to electronic questionnaires

3. Content analysis (open-ended questionnaire questions)

A content analysis of the open-ended questions from the questionnaire was carried out (without the focus group data). This analysis is less interpretative than the thematic analysis, and simply categorises participants' responses, or subsections of their responses, and counts them up. Categories have been decided on the basis of what participants chose to mention, rather than being predetermined. Table 1 shows the most frequently mentioned categories, divided into subcategories across positive and negative comments. Instances referring to theatre are marked **T**; all other instances refer to Cinema. The number of occurrences of each category/subcategory appears in parentheses. Thus, for example, close-ups were mentioned as something participants liked about cinema opera 66 times without further information. A further 31 times people mentioned liking close-ups in connection with having a close-up view of singers' faces or emotions, and 11 times in connection with being able to see more detail. Note that the relatively fewer numbers referring to theatre reflect the nature of the questions (only 2 out of 8 asked specifically about theatre experiences).

Categories appearing in Table 1 are those with 50 or more instances (main categories) and subcategories that are theoretically interesting. Subcategories that appear very infrequently and/or do not fit into a main category have been excluded from the table, on the grounds that they may be idiosyncratic to a particular person and less representative. A strong caveat in interpreting the table, though, is that the number of occurrences is not necessarily informative of the relative importance of each category. For example, many frequently occurring categories are the result of participants writing a single word (e.g. 'Cost'). This is easy for participants to do, but doesn't tell us any more information – e.g. what aspect of cost, how exactly it affects people, and how important that is in the scheme of things. The instances where participants expand a little to give us more information are fewer in number, but often intrinsically more meaningful. The numbers therefore should not be used to ascribe a hierarchy of importance or significance to the data. Note also that this way of categorising does not bring out the same deeper issues emphasised in the thematic analysis above. Further explanation appears below the table.

Table 1: Content analysis categories
(T) = theatre. (n) = number of mentions

| | Main category | Subcategories: Positive | Subcategories: Negative |
|---|---|---|--|
| a | Aspects of the performance itself (375) | Performers/performance (147) Production (94) Music or piece (57) | Performers/performance (19) Music or piece (14) Production (28) |
| b | Film and camera work (248) | Close-ups (non-specific) (66) - Singers' faces & emotions (31) - Details (11) - Increasing drama/involvement (6) Quality of filming (28) Camera work in general (16) | Close-ups (non-specific) (6) - Losing whole stage/designer's view (24) - Too many (13) - Losing other action (8) - Too close/overwhelming (7) - Exposing negatives (7) Camera work in general (11) |
| c | Extra footage (226) | Interviews (non-specific) (64) - Interviewer/host (6) Backstage/behind the scenes (56) | Interviews (non-specific) (31) - Interviews/ interval material spoiling dramatic flow/magic (12) - Interviewer/host (11) Backstage/behind the scenes (9) |

| | | | |
|---|---|--|---|
| | | Background information (15) | Advertising/future productions/sponsorship (13) Background information (3) |
| d | Cost (226) | Cost (non-specific) (36) - Accessibility to high quality experience (23) - Affordability (21) - Cheaper than theatre (15) - Value for money (14) - Allows frequent attending (9) | Cost (non-specific) (85) T - For good seats (11) T |
| e | Liveness (170) | Live (cinema) (21) Live (theatre) (23) T The live experience (20) T - Live voice (10) T - Excitement/thrill/buzz (33) T (+3 C) - Physically being there (14) T - Unique/one-off (9) T - Nothing beats live (8) T | Loss of live experience (11) Not physically being there (7) |
| f | Sound (147) | Sound - clarity, audibility (61) Quality of live, natural (16) T | Sound too loud (27) Sound quality (general) (24) - Poor balance, distortion (9) |
| g | Physical comfort (128) | Comfort (seats/temperature) (90) | Discomfort (seats) (27) T Discomfort (temperature) (10) |
| h | Audience (112) | Etiquette (15) Like minded, opera lovers (11) (+ 2 T) Audience engagement (3) (+7 T) Audience (general) (6) T (+2 C) | Etiquette (23) (+15 T) Lack of interaction/applause (9) Audience (general) (6) T |
| i | Transmission breakdown (95) | N/A | Transmission breakdown (80) Breakdown interrupting flow/music (9) Fear of breakdown (6) |
| j | Accessibility (94) | Location, transport (36) Accessibility (non-specific) (14) Availability, booking (8) | Location, transport (20) Availability, booking (4) (+9 T) |
| k | Atmosphere (90) | Atmosphere (Non-specific) 42 T (+11 C) Live atmosphere (14) T | Lack of/loss of atmosphere (20) |
| l | Involvement (90) | Proximity, nearness to action (27) Being 'in it' (11) Connection, rapport (10) T | Sitting a long way from the stage (21) T Feeling removed, distanced (12) Lack of connection, rapport (4) |
| m | View/visibility (81) | View/visibility (50) | View/visibility (24) T (+3 C) |
| n | Seeing things I wouldn't otherwise (53) | Place (e.g. New York) (23) Productions, pieces, artists, particular performances (16) Things not visible/available in the theatre (11) | |
| p | Excellence – the best (51) | Excellence – the best (world-class) | Excellence – the best (risk of not |

| | | |
|--|------|---------------|
| | (42) | seeing) (9) T |
|--|------|---------------|

Elaboration of Table 1 with examples

a. Aspects of the performance itself (375)

These are comments given in response to the questions about people's experiences of the screening they saw, and their overall experience. They are comments that specifically reference the categories shown. Although interesting, they are largely not directly relevant to our research questions and hence I haven't divided them into smaller categories. However, I did notice a number of very critical comments about singers' physical aspects and appearance for one of the operas (*Falstaff*) and it is tempting to speculate that this is in part exacerbated by close-up footage - some people mentioned that cinema's hyperrealism can be unflattering to singers and makes it harder to suspend disbelief (Close-ups: Exposing negatives [7]).

b. Film and camera work (248)

By far the most frequently commented on aspect of camera work was the use of close-ups. They were liked because they allowed participants to see singers' facial expressions and details not usually visible; people mentioned being able to appreciate the acting. Close-ups were associated for some people with a sense of immediacy and 'realness'.

Wonderful close-ups of performers, individually & in ensemble, clearly demonstrating their superb acting talents as well as vocal. Much better than front row stalls seats at the Met, ROH & ENO (Everyman, Falstaff, P77)

Seeing the facial expression and acting of the singers so close – much better than in real life when I'm so high up in the theatre. (Ritzy, Falstaff, P84)

really felt involved in the performance and we could see the actors faces so clearly. It made the performance very 'real'. (Barbican, Tosca, E62)

Negative responses to close-ups included feeling they were too close, unflattering to singers, and too frequent at the expense of the whole stage or other action.

Although close-ups can be v. effective, I miss the experience of seeing the whole stage picture, rather than details. I would also like to see more of the orchestra, not just during the overture. Close-ups can be cruel to singers who may not have the looks to match their beautiful voices (Gate, Falstaff, P122)

Positive comments about camera work in general include liking the variety of shots, and liking an approach that is not 'too busy'. Negative comments include inappropriate shot choices at dramatic moments. Overall, close-ups and camera work seem to either help people feel involved/engaged with the action, or (if they responded negatively) distanced, overwhelmed, or frustrated.

c. Extra footage (226)

Comments about footage beyond the stage production were for the large part positive. People especially enjoyed interviews and shots of backstage. On the few occasions where people expanded a little on their answers, they mentioned finding interviews and backstage footage interesting, liking having access to something extra that they couldn't get in the theatre, or having an insight into the 'real people' connected with the show.

Negative comments were more specific. Interviews were disliked for their content (banal or overly 'gushy'), and some people found they interrupted the flow or spoiled their involvement in the production, i.e. they wanted to suspend disbelief. The same applied to negative comments about backstage footage. The style of American hosts was annoying to some.

d. Cost (226)

Cinema was viewed as affordable, and something that because of its low price allowed people access to high quality opera, the implication being that to see the same productions in the theatre was prohibitively expensive. Cost was frequently mentioned as a negative aspect of the theatre in non-specific terms (85); answers giving more information mentioned the cost of good seats or the price one has to pay for a good view (11).

The following quotation illustrates a typical attitude (where more information was given), including the implication that what is not liked about the theatre is the price one pays for a good view, and that not all seats have an equal experience.

Opera in the cinema is affordable. One can purchase tickets for a fraction of the price of opera in the theatre; one can obtain excellent seats with a superb view anywhere in the cinema at a reasonable price (Barbican, Eugene Onegin, E17).

An important underlying aspect of the comments is people's awareness of having their view dictated by someone else, to the extent that some people specifically commented positively about theatre allowing them to 'choose where I look' (6).

e. Liveness (170)

Out of all the references in this category, only 24 refer positively to cinema. However, 'Liveness' is valued both for cinema transmissions (in the sense of simultaneity) and for theatre (in the sense of the experience of actually being there). There are thus slightly different connotations to 'live' in the two settings. Cinema references are about sharing an experience with a live audience:

The live transmission. Sharing a live experience with a world-wide audience. (Barbican, Tosca, P25)

The sense of being at a live performance:

- shots of audience settling down

- sound of audience response at appropriate points, capturing the acoustic of the venue

The backstage coverage was very interesting and well filmed (informative sense of live production) (Hackney, Tosca, P48)

Theatre references comment on aspects such as the interaction with performers, the visceral experience, and the impact of 'in the flesh' singing. The theatre – but not the cinema – is also linked with excitement/thrill/buzz (31), the uniqueness of a one-off event (9), and there being 'nothing like' the live experience (8).

Being part of a live performance is an amazing experience. I go to live opera in many different venues & many different types of productions. The interaction between the stage (performers/orchestra) and audience is a very special one (Gate, Tosca, P50)

Nothing beats the live opera experience – the thrill of being there (Gate, Falstaff, P121)

Unique excitement of being involved in live performance – one off (Gate, Tosca, P56)

f. Sound (147)

The main message here is that cinema sound is considered clear, but often overly loud, or otherwise unnatural, distorted, or amplified in favour of singers. People miss the quality of live, natural sound.

g. Physical comfort (128)

Nothing profound here. Cinemas have comfortable seats in general, which people contrast with the discomfort and lack of leg room in many theatres. The average seniority of the demographic and the length of many opera performances perhaps explain the frequency of this category.

h. Audience (112)

Etiquette issues here are around behaviour of other audience members, and people's judgements of whether those surrounding them are like-minded (i.e. genuine opera lovers). Behaviour that disturbs includes talking or eating during the performance, and this is associated more with the cinema. But there were also positive comments about like-minded audience members in the cinema.

Studio One is like a mini opera house where every performance is full of genuine opera lovers who are quiet and attentive!!! (Barbican, Eugene Onegin, E79)

Annoying audience members who can't stop eating their sandwiches throughout - extensive rustling and slurping tends to break the spell of what's happening on the screen. (Barbican, Eugene Onegin, E20)

There seems to be a tension between the expectation among some audience members of opera house etiquette, and the more relaxed atmosphere of the cinema, which many people like; this is reflected in positive comments elsewhere about being able to take drinks and food into the auditorium. A few people commented on being annoyed by theatre goers who 'dress down'.

People commented positively on the experience of being in an engaged audience (more commonly in theatre), and negatively on audiences where engagement or involvement was lacking. Whether or not the audience applauded (in the cinema) was one aspect of this.

i. Transmission breakdown (95)

A unique (negative) aspect of the cinema experience, most of the occurrences of this in the data were non-specific. But some people referred to experiencing an interruption to the flow of the music/drama, and others to feeling apprehension during broadcasts that they might experience a breakdown.

j. Accessibility (94)

The most frequent sub-category here is location and transport, with people finding the cinema near and easy to get to, and theatre more difficult. Ticket availability, easier booking systems and the ability to decide to go at the last minute were mentioned as advantages of cinema. The exception to this was the Barbican (4 comments about lack of availability).

Minor categories in accessibility (related to cinema) mentioned by only a few people included disabled access, and cinema being 'for everyone'.

k. Atmosphere (90)

Atmosphere is partly related to audience and the live experience, but is mentioned so many times in non-specific terms that it warrants a separate category. Although atmosphere was mentioned positively in relation to the cinema, it is mostly associated with the theatre and felt to be missing in cinema broadcasts, or at least, not quite translating through the screen.

l. Involvement (90)

Sitting a long way from the stage was mentioned as a disadvantage of the theatre. Cinema, with its close-ups, was felt to offer proximity to the action and a feeling of closeness. However, cinema was also associated with feelings of being removed and distanced, while for theatre people reported feeling close to performers and a rapport or connection with the stage. Thus proximity in visual terms does not necessarily mean greater involvement; people may differ in their ability to become involved through the film medium.

Vividness of close relationship with stage action (unlike amphitheatre seats at ROH) & therefore feeling of greater involvement (Gate, Falstaff, P115)

The feeling of a direct connection between performers and audience [Theatre] (Lighthouse Poole, the Nose, E83)

m. View/visibility (81)

Cinema is considered to offer advantages over the theatre in terms of the visibility of the action, especially when compared to cheaper seats. The theatre is much more risky since one may be a long way from the stage, and may have a restricted view because of poor sightlines or someone sitting in front. The view in the cinema is not only guaranteed, but also the same for everyone regardless of how much you can afford.

n. Seeing thing I wouldn't otherwise (53)

A frequently mentioned advantage of cinema, this covers access to experiences that would not otherwise be available to participants, either because they are happening in a place people can't easily get to themselves, or because they are otherwise inaccessible (because of cost or availability). Participants valued being able to see 'world class' opera, and appreciated the added extras that cinema gave beyond the theatre experience (the close-up view and the extra footage).

Opportunity to see operas that I would not otherwise see – e.g. live from the NY Met or the ROH when tickets sold out (Vue Islington, Sicilian Vespers, P39)

Chance to see things on and behind stage which I could never see in a live performance (Barbican, Eugene Onegin, E11)

p. Excellence – the best (51)

This is a category in itself because it seems important to people that the opera they are being given access to in the cinema is 'world class'. A small number of people (9) mentioned the risk of disappointment in live theatre when a production or performance fails to live up to expectations, especially when one has paid a lot of money. It therefore seems that cinema broadcasts, especially from the Met, are perceived as guaranteeing a certain level because they show 'the best' productions and artists in the world.

4. Quantitative Analysis of Closed Questions

i. Importance of factors affecting decision to attend

Participants' mean ratings out of 5 are shown in Table 2. The most highly rated practical consideration in attending the particular screening was value for money, and the least important the time of the performance. At the extremes, these ratings are statistically significantly different (i.e. value for money is more important than time of the performance), but not for items that are close together in scores (i.e. you can't say that value for money is significantly more important than accessibility). Overall, the ratings are so close that this doesn't really tell us much.

However, I compared the ratings of people who said they haven't been to the theatre in the last 2 years to those who reported attending more than 10 times (Table 3). Non-theatre goers rated the importance of all except availability of tickets and one's own availability as significantly more important than those who attended theatre the most frequently.

Table 2. Mean ratings of the importance of factors involved in the decision to attend (scale 1- not at all important; 5 - crucial)

| Item | Mean rating |
|---|-------------|
| Value for money | 3.70 |
| Accessibility of the venue (location, transport links) | 3.58 |
| Affordability of the ticket | 3.56 |
| Characteristics of the venue (facilities, atmosphere, attractiveness etc) | 3.34 |
| Availability of seats at time of booking (i.e. other choices sold out) | 3.30 |
| Your own availability (having limited days/times you could come) | 3.05 |
| Time of the performance | 2.90 |

Table 3. Comparison of ratings of lowest and highest theatre attendees on the importance of factors in decision to attend

| Item | 0 theatre visits (n=25) | 10+ theatre visits (n=50) |
|---|-------------------------|---------------------------|
| Value for money | 4.20* | 3.36 |
| Accessibility of the venue (location, transport links) | 3.84* | 3.30 |
| Affordability of the ticket | 3.96* | 3.24 |
| Characteristics of the venue (facilities, atmosphere, attractiveness etc) | 3.79* | 3.24 |
| Availability of seats at time of booking (i.e. other choices sold out) | 3.16 | 3.06 |
| Your own availability (having limited days/times you could come) | 3.04 | 2.90 |
| Time of the performance | 3.24* | 2.66 |

*significantly different, $p < .05$

The implications of this analysis are borne out by a correlation analysis showing that each of the starred items in the table above correlates significantly and negatively with reported level of theatre attendance across the whole sample, but *not* with reported level of cinema attendance (even though cinema and theatre attendance are significantly positively correlated with each other). Thus people's perceptions of the importance of value for money, affordability, accessibility, venue and time are systematically related to their level of theatre attendance: the higher the level of importance they attach to these, the less frequently they attend the theatre. But the importance of these factors is *not* related to how frequently they attend the cinema (even though we asked the question in specific relation to their decision to attend a cinema performance). Although we cannot establish a causal link, the implication is that people's judgements of these aspects are a factor in their attendance at the theatre. But some people's judgements may not be based on accurate opera-going experience, since they don't attend. Therefore an opportunity exists for ETO to replace judgements based on little information with targeted messages.

ii. Attraction to event

Table 4 shows percentages of participants selecting each item in response to the question 'What attracted you to this event?' Participants could select as many items as they wished. The percentage across all participants (Overall) is shown against percentages in people who are low and high in each of theatre and cinema attendance. Bold highlighted numbers are more than 10 percentage points different from the overall percentage (light shading for lower; dark for higher)

Table 4: Percentages of participants selecting items in response to the questions ‘What attracted you to this event?’

| Item | Overall | Theatre 0 (n=32) | Theatre 10+ (n=61) | Cinema first- timers (n=28) | Cinema 10+ (n=95) |
|---|---------|---------------------|-----------------------|--------------------------------|----------------------|
| I wanted to see this particular opera | 69.2 | 68.8 | 73.8 | 64.3 | 71.6 |
| I enjoy/am attracted to the experience of opera in a cinema | 68.8 | 71.9 | 67.2 | 25.0 | 77.9 |
| I wanted to see this particular opera company (Met/ROH) | 54.7 | 43.8 | 57.4 | 35.7 | 63.2 |
| I am interested in the music of this particular composer | 47.4 | 50.0 | 55.7 | 28.6 | 52.6 |
| I enjoy/am attracted to the experience of opera in a theatre | 42.3 | 28.1 | 50.8 | 25.0 | 54.7 |
| I wanted to see a particular singer or conductor | 20.9 | 18.8 | 29.5 | 14.3 | 30.5 |
| Someone else recommended it or invited me | 12.0 | 25.0 | 9.8 | 35.7 | 2.1 |
| I was curious/wanted to find out what it would be like | 11.1 | 15.6 | 8.2 | 60.7 | 2.1 |
| I was looking for a new experience | 9.0 | 18.8 | 4.9 | 39.3 | 5.3 |
| I wanted to experience opera in a different setting than an opera house | 9.0 | 12.5 | 6.6 | 42.9 | 2.1 |
| I wanted to experience this particular venue | 7.3 | 12.5 | 4.9 | 21.4 | 6.3 |
| Other | 22.2 | 28.1 | 18.0 | 17.9 | 27.4 |

There are 9 participants in common between the ‘Theatre 0’ and ‘Cinema first-timers’ groups, and 36 in common between the two ‘10+’ groups, which makes formal statistical analysis tricky. However, cinema first-timers appear more likely than anyone else to have attended on someone else’s recommendation, because they were curious or looking for a new experience, or wanted to experience opera somewhere other than an opera house. They are less likely to report being attracted by the cinema or theatre experience of opera, by the composer, or the opera company. Reassuringly, a relatively high number of cinema regulars report enjoying the theatre experience of opera, and across all types of participants the particular opera was the most highly endorsed item. (The data also show that the majority of first-timers attended *Tosca*.) Aspects such as the opera company and particular artists seem more likely to be selected by devotees.

iii. Values

Table 5 shows percentages of participants selecting each of the items in response to the question ‘What do you value in an opera performance?’ The data are divided in the same way as the previous table, and participants could select as many items as they wished.

Table 5: Percentage of participants selecting each item ‘valued’ in an opera performance

| Item | Overall | Theatre 0 (n=32) | Theatre 10+ (n=61) | Cinema first timers (n=28) | Cinema 10+ (n=95) |
|--|---------|------------------|--------------------|----------------------------|-------------------|
| The combination of the visual, musical and theatrical | 90.6 | 84.4 | 93.4 | 78.6 | 92.6 |
| Beautiful singing | 88.9 | 81.3 | 86.9 | 85.7 | 91.6 |
| A strong musical experience | 84.6 | 84.4 | 88.5 | 78.6 | 88.4 |
| A strong visual and theatrical experience | 78.2 | 71.9 | 85.2 | 75.0 | 81.1 |
| An intense or profound emotional experience | 62.4 | 40.6 | 78.7 | 42.9 | 68.4 |
| A feeling of connection with the characters and story | 44.9 | 40.6 | 54.1 | 32.1 | 47.4 |
| An interest in star performers | 39.3 | 21.9 | 45.9 | 17.9 | 51.6 |
| An opportunity to consider the human condition | 29.9 | 34.4 | 31.1 | 28.6 | 26.3 |
| An opportunity to socialise with friends | 23.5 | 28.1 | 24.6 | 17.9 | 26.3 |
| Period costume | 21.8 | 12.5 | 19.7 | 17.9 | 21.1 |
| An opportunity to socialise with colleagues or clients | 1.7 | 0 | 3.3 | 0 | 2.1 |
| Other | 7.7 | 6.2 | 8.2 | 18.9 | 13.6 |

The most striking thing about this table compared to the previous one is the relative similarity of endorsements across the participants. Differences show that infrequent attendees may be less emotionally invested in the experience of opera, and frequent cinema attendees are more interested than other participants in star performers (though only marginally more than frequent theatre attendees).

iv. Changes in motivation to attend future cinema and theatre opera performances

Participants were asked whether their motivation to attend cinema and theatre performances of opera had changed as a result of attending the cinema screening. The majority of responses for each were ‘about the same’, but there were slightly more reports of increased motivation to attend future performances in cinema than in theatre (Figs 7 & 8). First time cinema attendees, however, showed a different pattern, with 67.8% reporting increased motivation to attend cinema screenings in the future (46.4% being a ‘lot more’ motivated) (Figs 9 & 10). Their motivation for attending future theatre performances remained largely unchanged, though a slightly larger percentage reported an increase in comparison to the participants as a whole. (Note that we did not take a baseline rating of motivation – but some participants noted themselves to be highly motivated to begin with.)

In sum, the implication is that attending cinema relay is more likely to inspire further attendance at a cinema rather than encourage people to transition to a theatre experience. In line with this, a sizeable minority (25.1%) of participants who hadn’t attended a theatre performance in the last 2 years reported feeling less motivated (18.8% ‘a lot less’) to attend future theatre performances, with only 12.5% feeling

'more' or 'a lot more' motivated. But we do not know how many of those were in fact complete first timers (as opposed to just not having been to the theatre in a while). A further caveat is that many of the first-time cinema goers in our sample are already familiar with the theatre experience. Therefore we can't identify a group of complete first-timers (and they would probably be very few anyway) in order to draw any conclusions about the possible impact of cinema on a totally new audience.



Figure 7: Changes in motivation to attend cinema

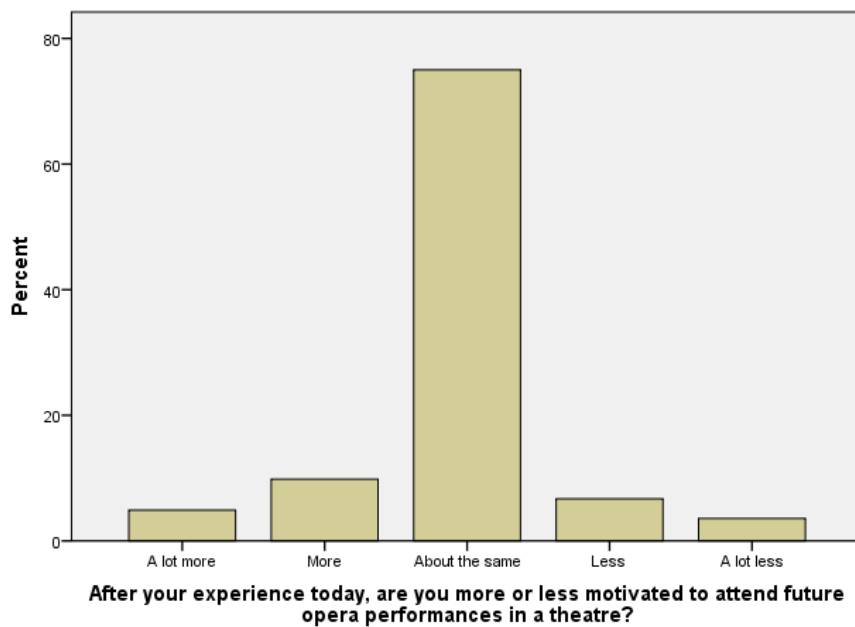


Figure 8: Changes in motivation to attend theatre

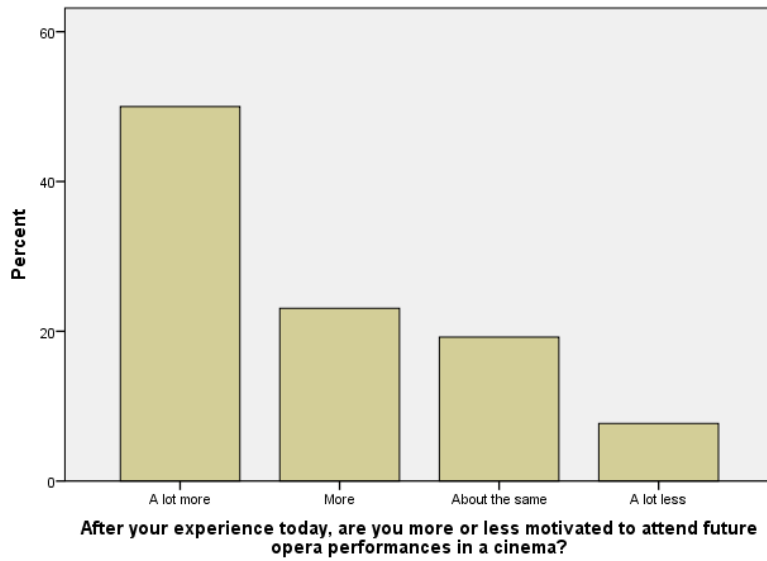


Figure 9: First time cinema attendees' change in motivation to attend future cinema relays

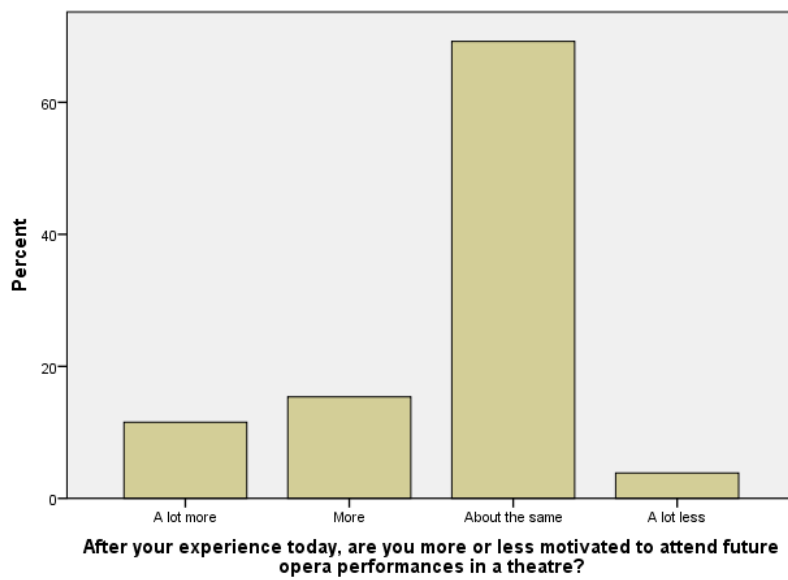


Figure 10: First time cinema attendees' change in motivation to attend future theatre performances