



Transforming Arts Organizations Worldwide

Opera Patrons ABA Audience Survey Data

Fielded February-April 2020, N=367

GENRE REPORT

Summary of This Report

This report contains distribution data for the survey fielded by the Advisory Board for our members.

About the Survey

The survey was conducted from February 7 to April 21, 2020. It had 45 questions total, mostly about a notable performance attended by the respondent. The primary intent of the survey was to identify audience members' motivations to attend arts performances as well as the drivers behind loyalty in the arts. There were 367 responses from people who attended an opera performance.

About the Results

The survey was deployed to 9 ABA member organizations and was sent directly from each organization to its distribution list. Each recipient received a customized link to allow ABA to identify the survey-taker. Through a partnership with HaystaqDNA, the list of survey takers was then matched to a consumer database owned by L2, enabling ABA to import additional demographic information. As part of this initiative, the 9 participating members will also get access to a Web-based tool to explore a broader set of demographic and purchase history information for its full audience list.

About the Report

We have divided this report into 6 sections, each representing a thematic set of survey questions. It is accompanied by an excel report with information that can be sorted, as well as full text for the write-in responses.

Each section begins on the following pages:

1. Overall Loyalty Statistics (p3)
2. Performance Questions (p12)
3. Organizational Questions (p29)
4. Motivation Questions (p37)
5. Preference Questions (p42)
6. Background + Demographics Questions (p47)

If you have any questions about this report, please contact the Advisory Board for the Arts at memberservices@advisoryarts.com.

Overall Loyalty Statistics

The Eight Motivational Segments in the Arts

Amiable Followers

Willing Companions

Motivation: Support friends and family

Values: Excellence

9% of audiences

Culture Surfers

Motivation: See Popular, Famous Works

Values: Humor, enthusiasm

9% of Audiences

Community Appreciators

Civic Stewards

Motivation: Create vibrant community. Fulfill duty toward the arts

Values: Being liked, making a difference, involvement in community, family

11% of Audiences

Social Samplers

Motivation: Try something new (not pursue a passion)

Values: Independence, patience, learning

12% of Audiences

Personal Developers

Mastery Builders

Motivation: gain expertise

Values: Personal growth

13% of audiences

Conversational Challengers

Motivations: conversations, challenge preconceptions (not art at the highest quality)

Values: Compassion, friendship, competence, ethics

14% of audiences

Arts Lovers

Arts Passionates

Motivation: Pursue a passion (not a special occasion or shared memory)

Values: Compassion, enthusiasm, creativity

14% of audiences

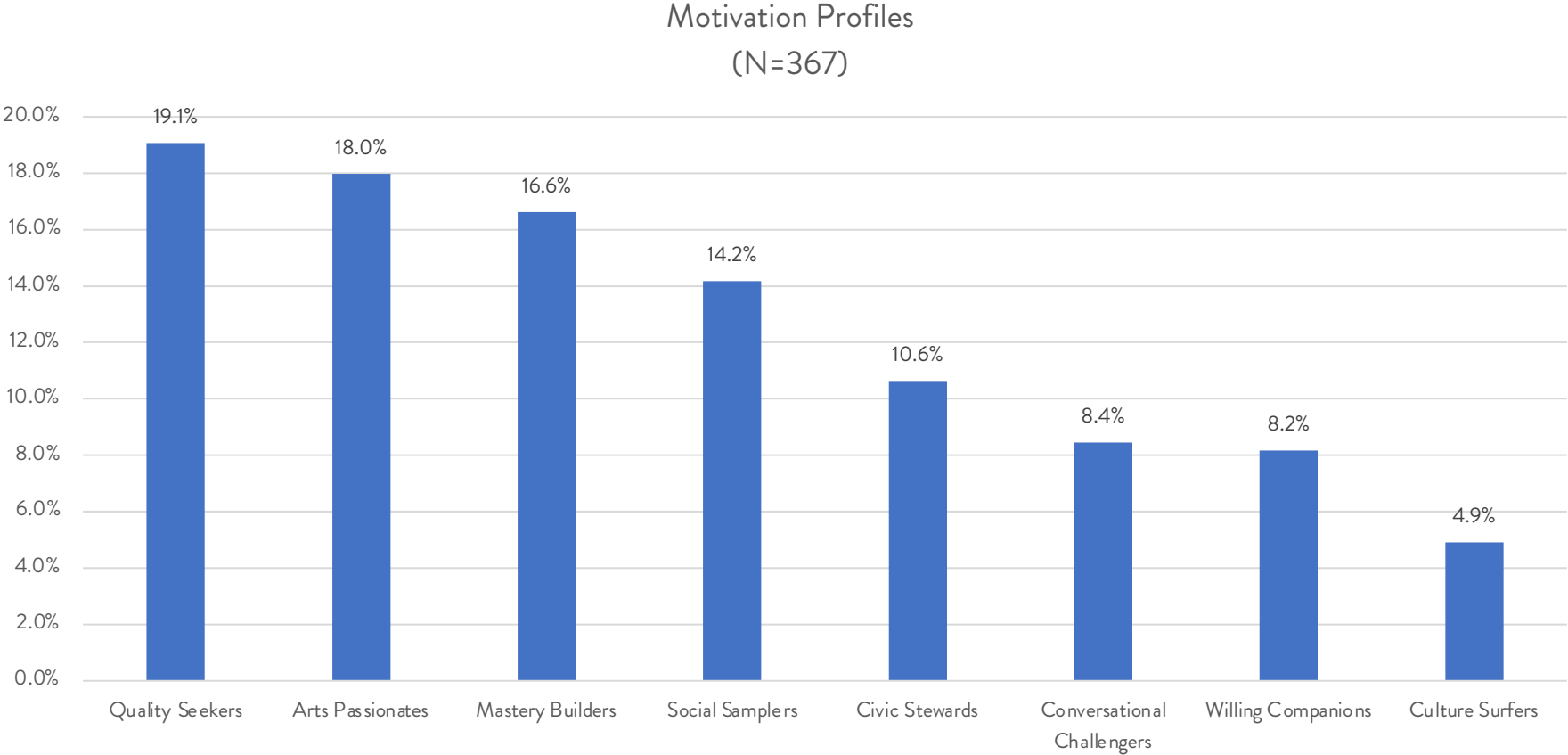
Quality Seekers

Motivations: see art at the highest quality (not to show others or create a shared memory)

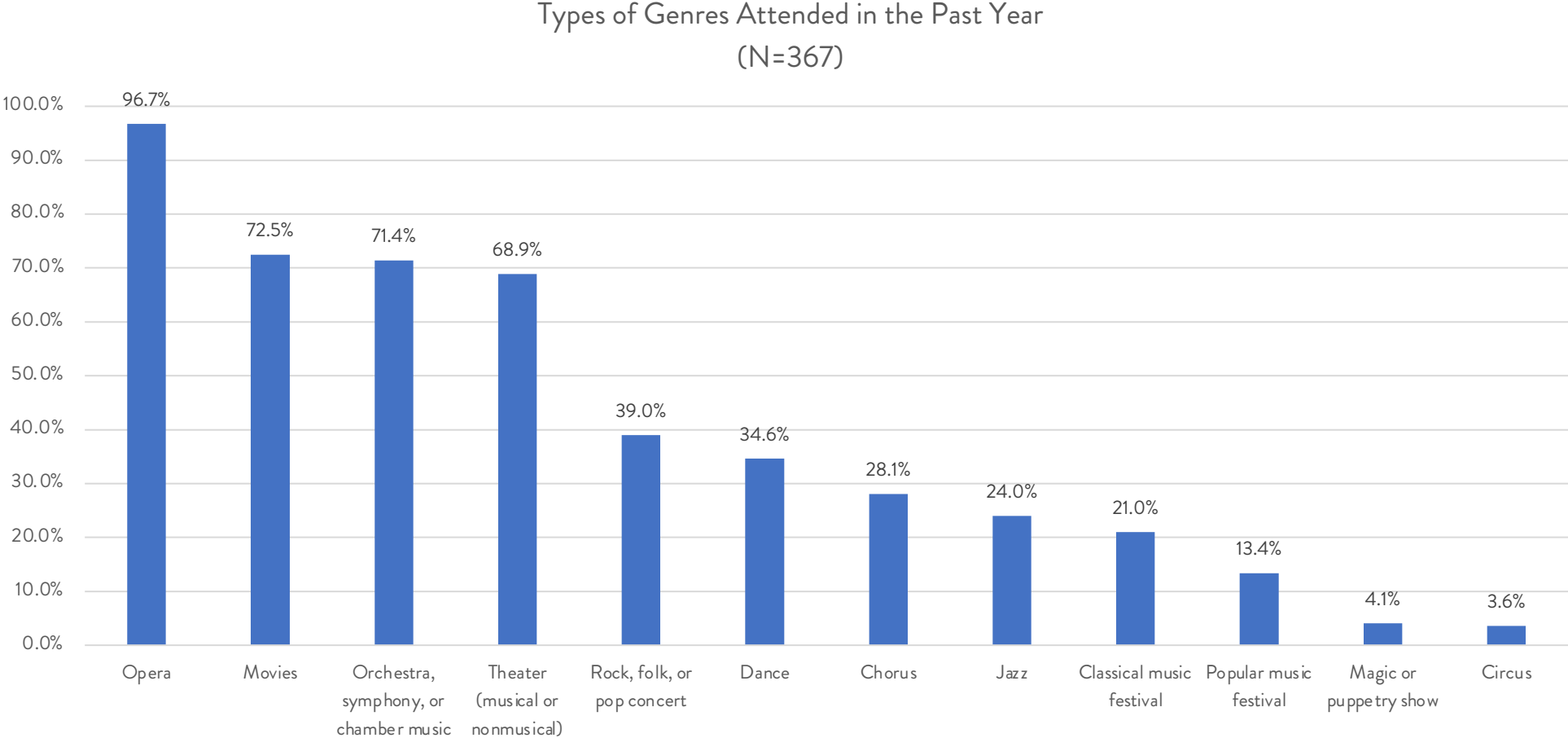
Values: Excellence, balance

19% of audiences

Opera Audience Motivational Segment Distribution



Q1*: Which of the following types of performances did you attend in the past year?



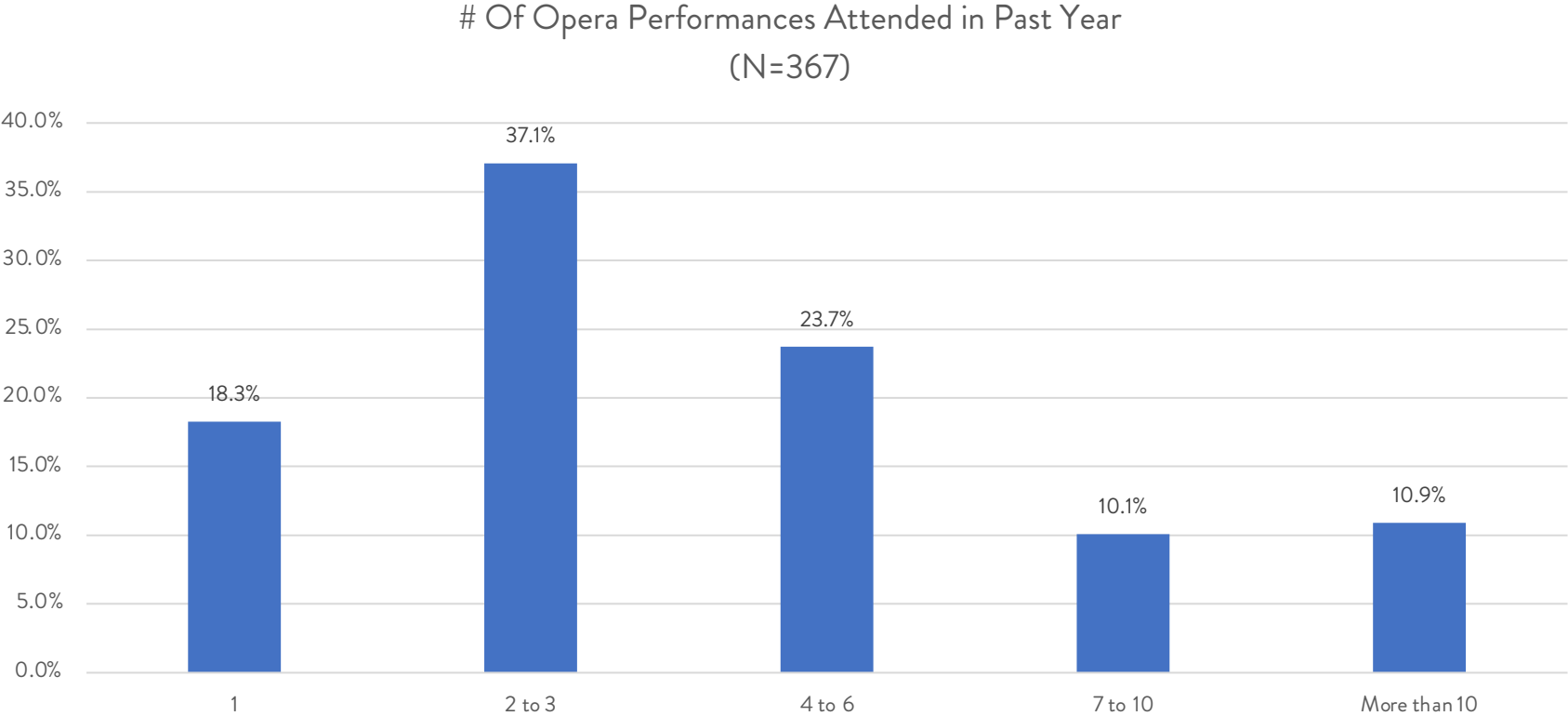
ABA asked about non-arts performances in addition to the classical arts. When individuals indicated that they had not been to an arts performance in the past year, the survey ended. For those who did participate, they were asked to take the rest of the survey about an **opera performance.*

Q2: Now we'd like you to answer the remaining questions about a single performance in the past year that you deliberated most about attending. Please write the name and venue of the performance you attended and be as specific as possible.

See the full responses in 'Write-in Qs' in the Excel report. All responses refer to an opera performance.

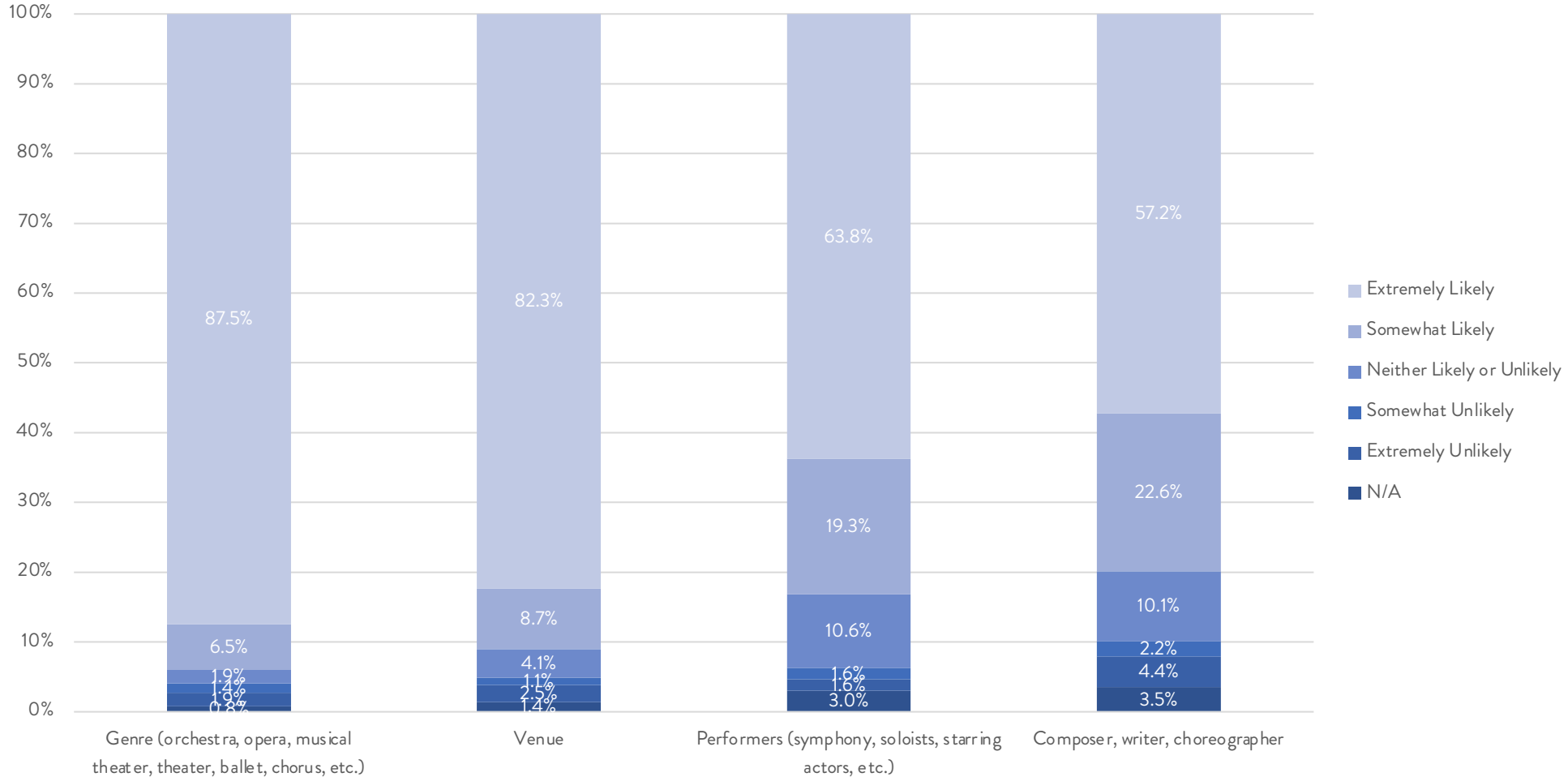
Questions 3-33 refer directly to the performance the survey participant wrote down in Q2.

Q3: Including [the performance from Q2], how many classical music festival performances have you been to in the past year?

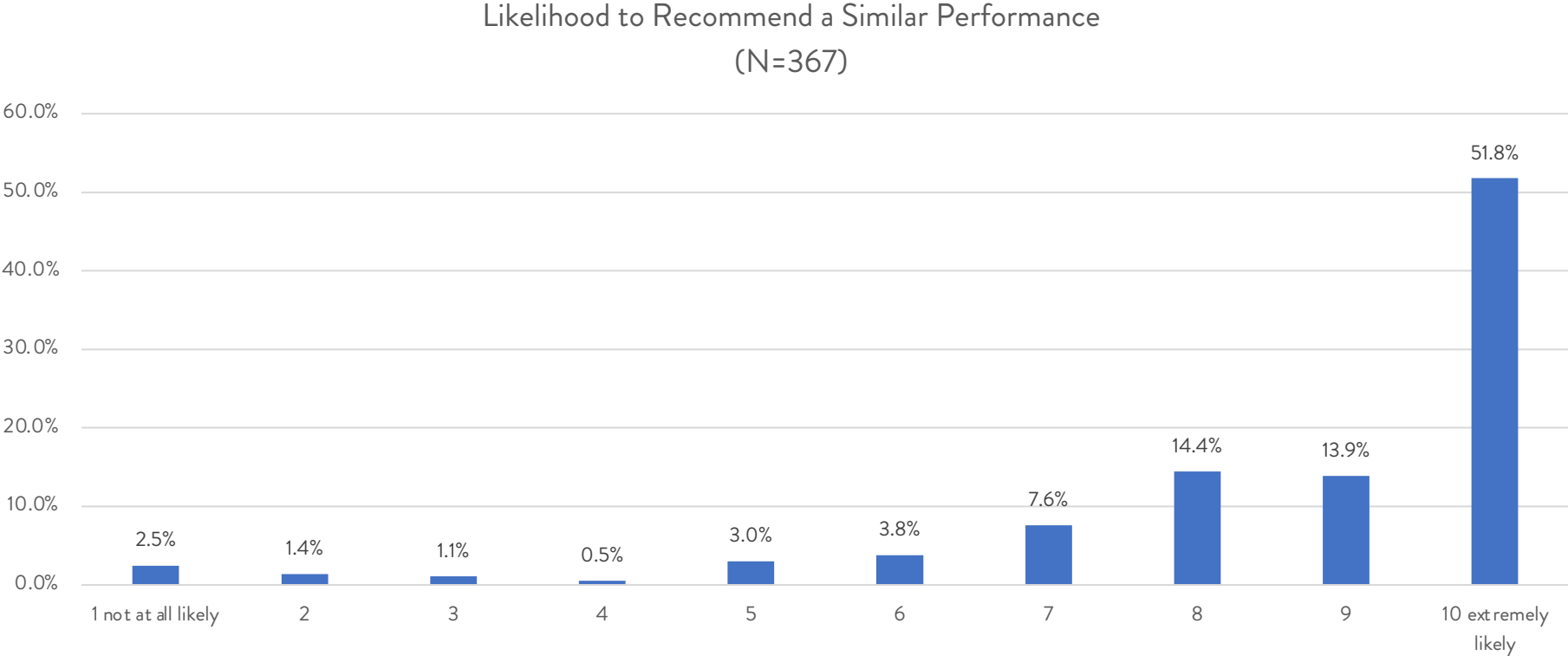


Q10: How likely or unlikely are you to purchase tickets to another performance (a) by these performers (symphony, soloists, starring actors, etc.); (b) by this composer/writer/choreographer; (c) of this genre (orchestra, opera, musical theater, theater, ballet, chorus etc.); and (d) at this venue?

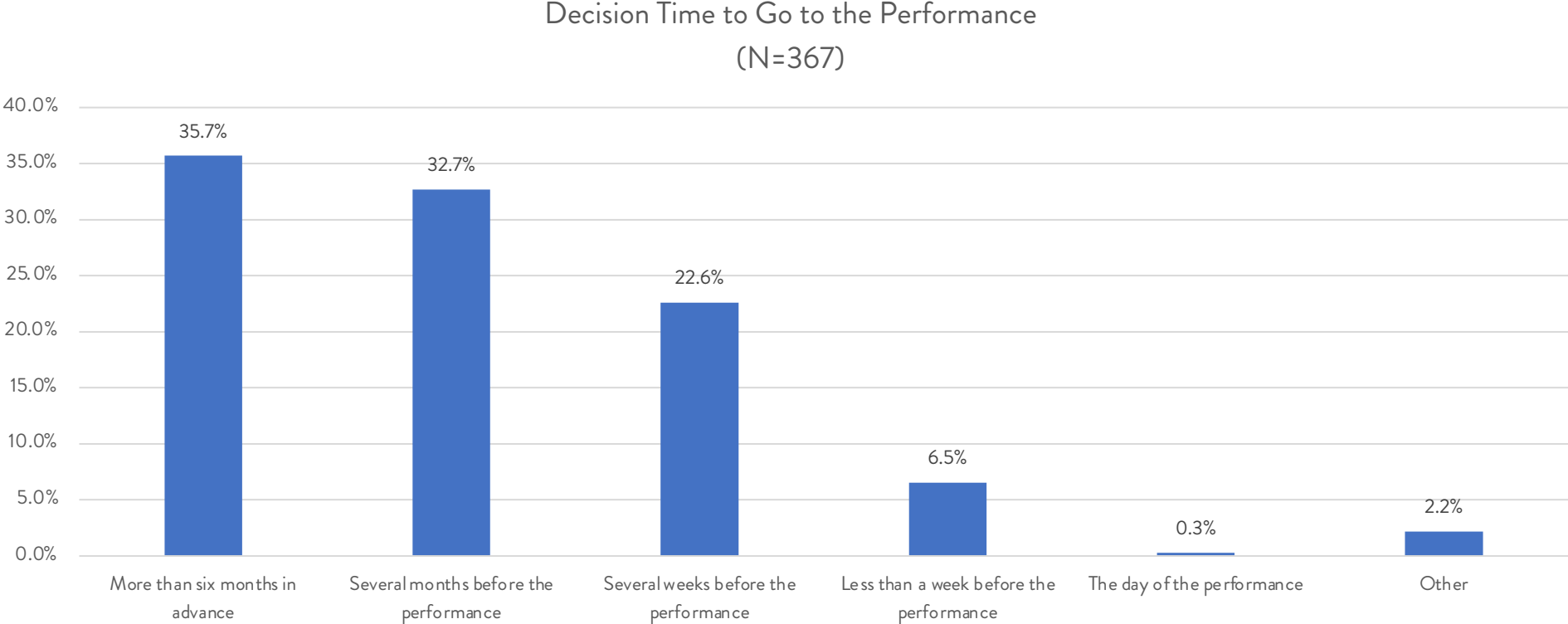
Likelihood to Repurchase Tickets of the Same Following Elements (N=367)



Q11: How likely or unlikely are you to recommend a similar performance to friends or colleagues?



Q21*: How far in advance did you decide to go to this performance?

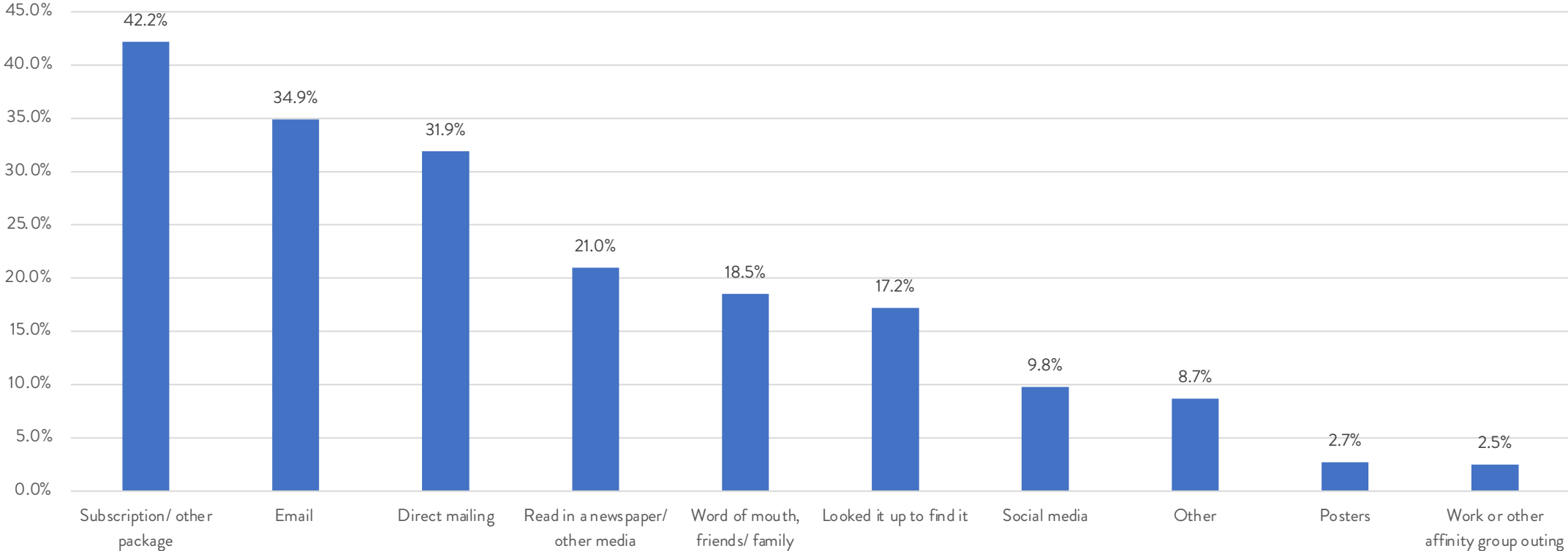


**See other write-in responses in the Excel report.*

Performance Questions

Q4*: How did you become aware of the performance?

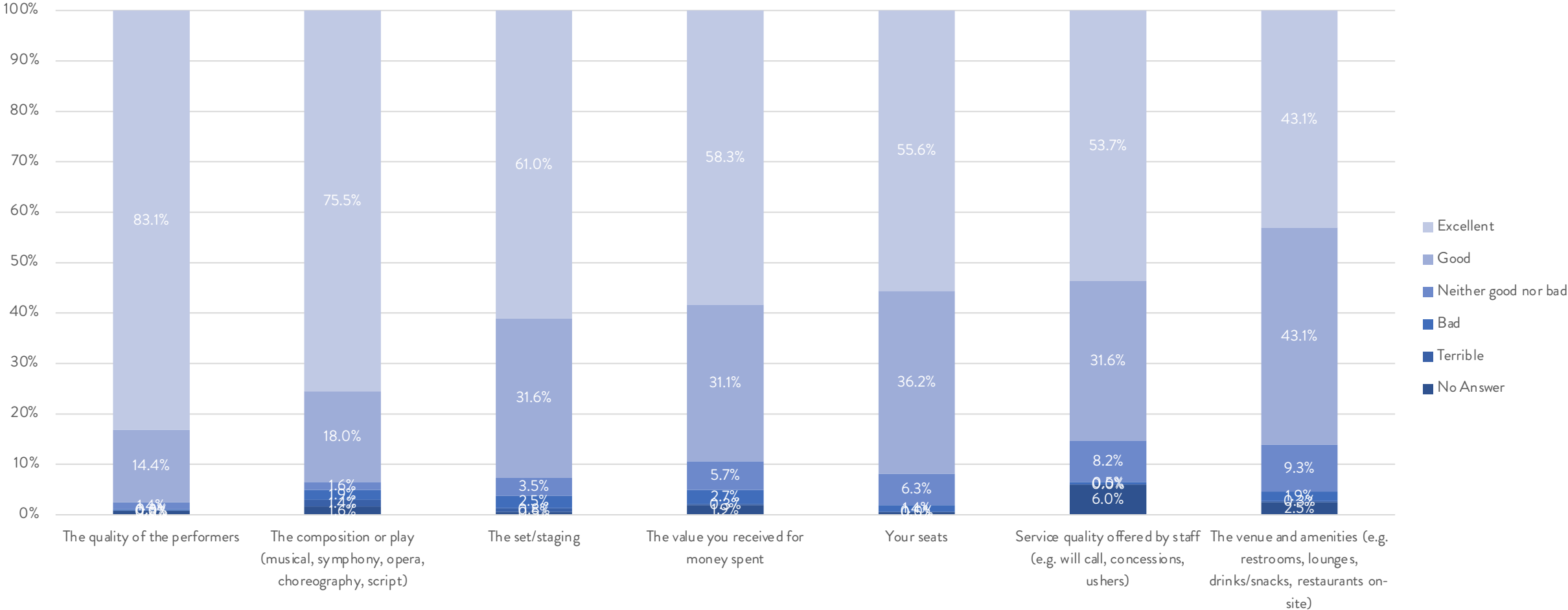
Methods of Awareness of the Performance
(N=367)



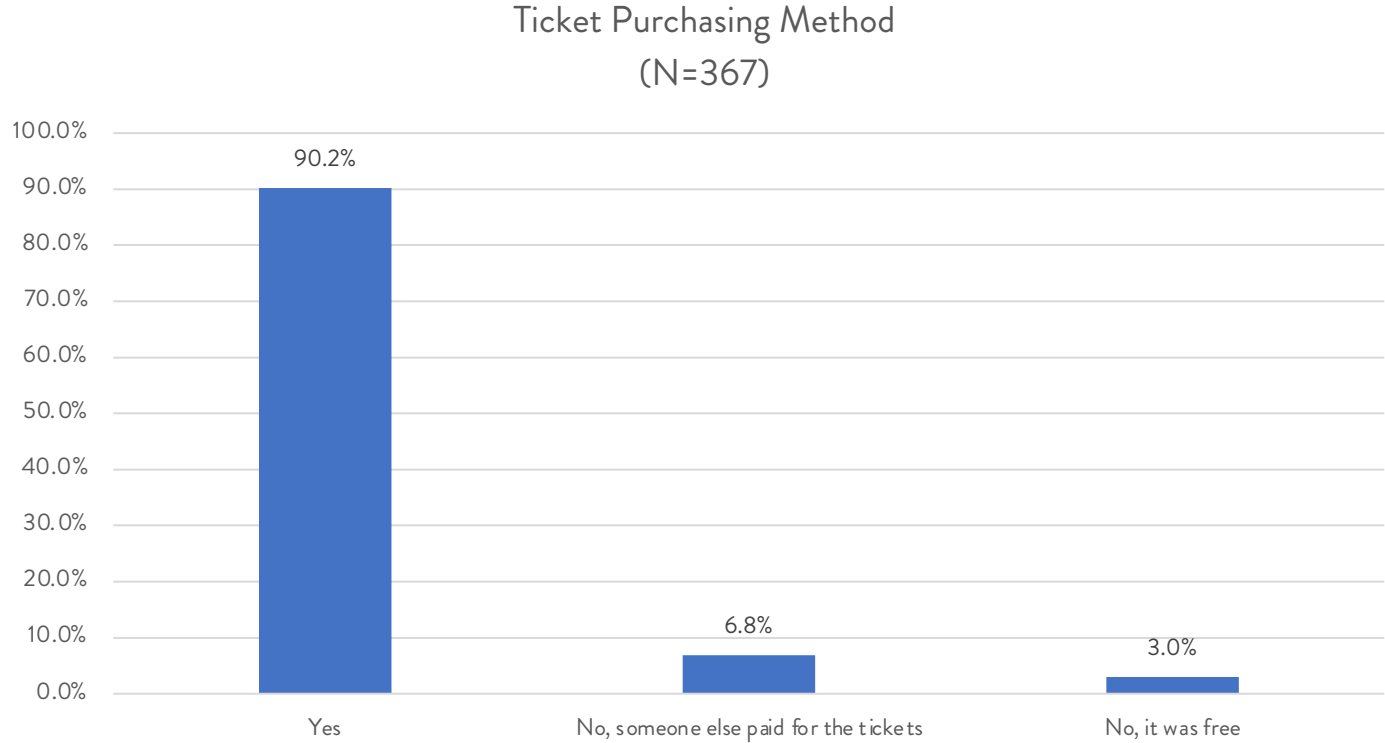
**See other write-in responses in the Excel report.*

Q9: How would you rate each of the following elements of the performance or experience: (a) quality of performers, (b) composition or play, (c) the set/staging, (d) your seats, (e) the venue and amenities, (f) the value you received for money spent, and (g) the service quality offered by staff?

Ratings of Performance Elements
(N=367)

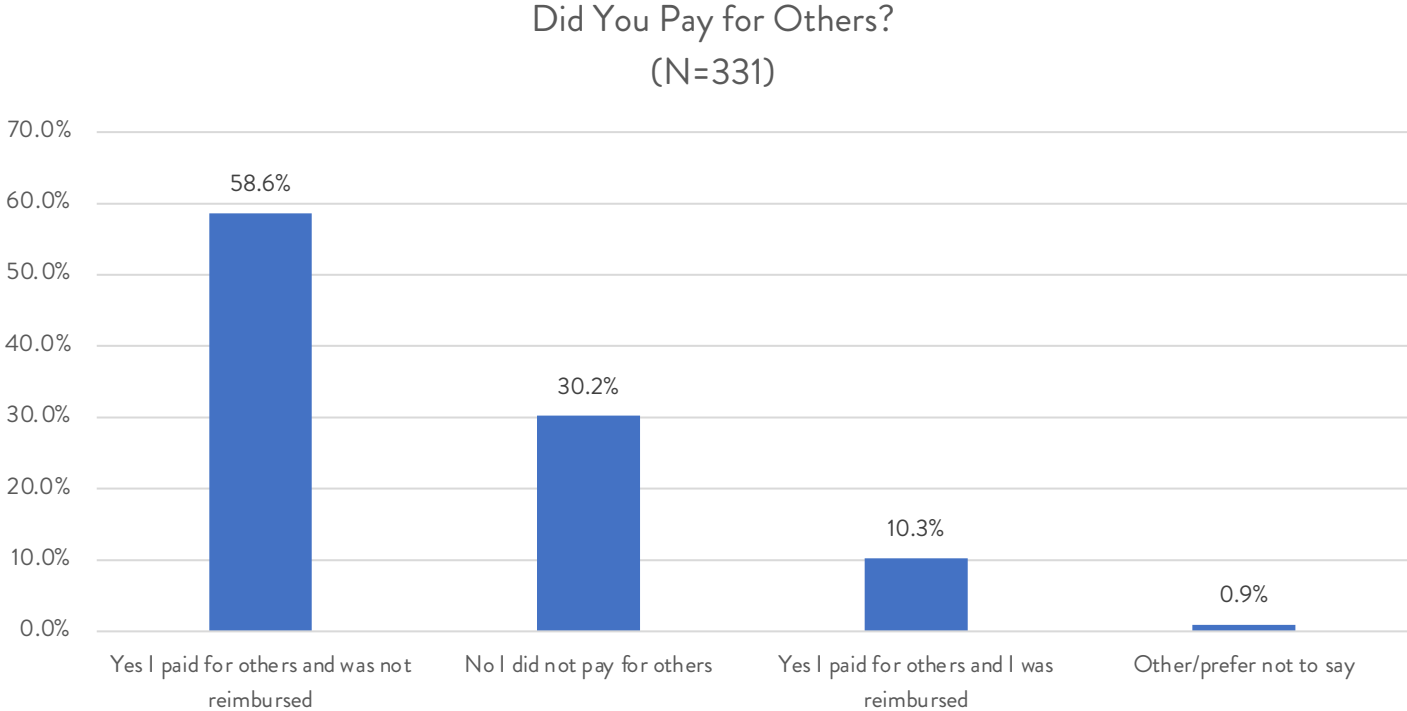


Q15: Did you purchase and pay for tickets for the performance?



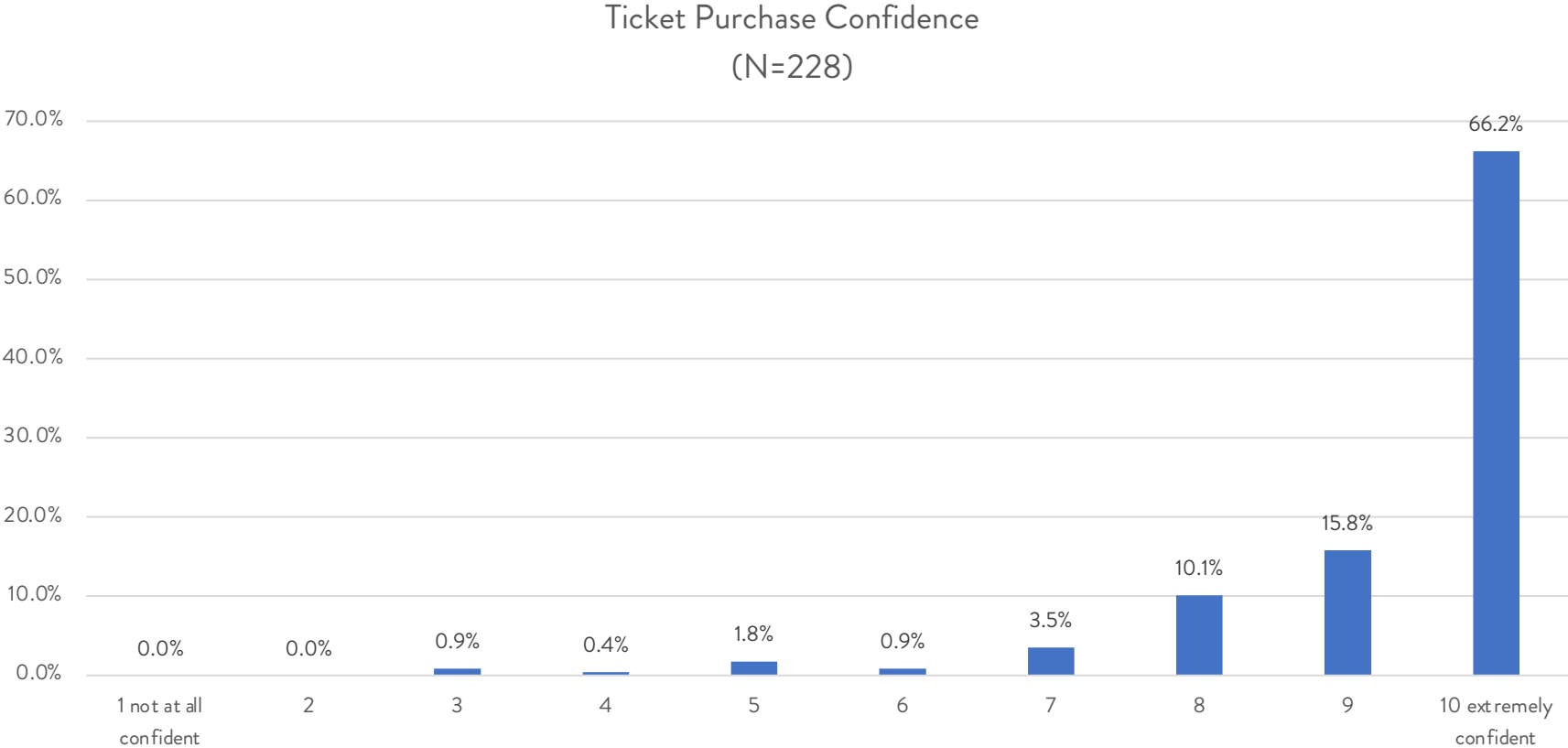
Q16: Did you pay for others (spouse, family, friends, etc.) to attend?

→ Related to Q15, excludes those who didn't pay



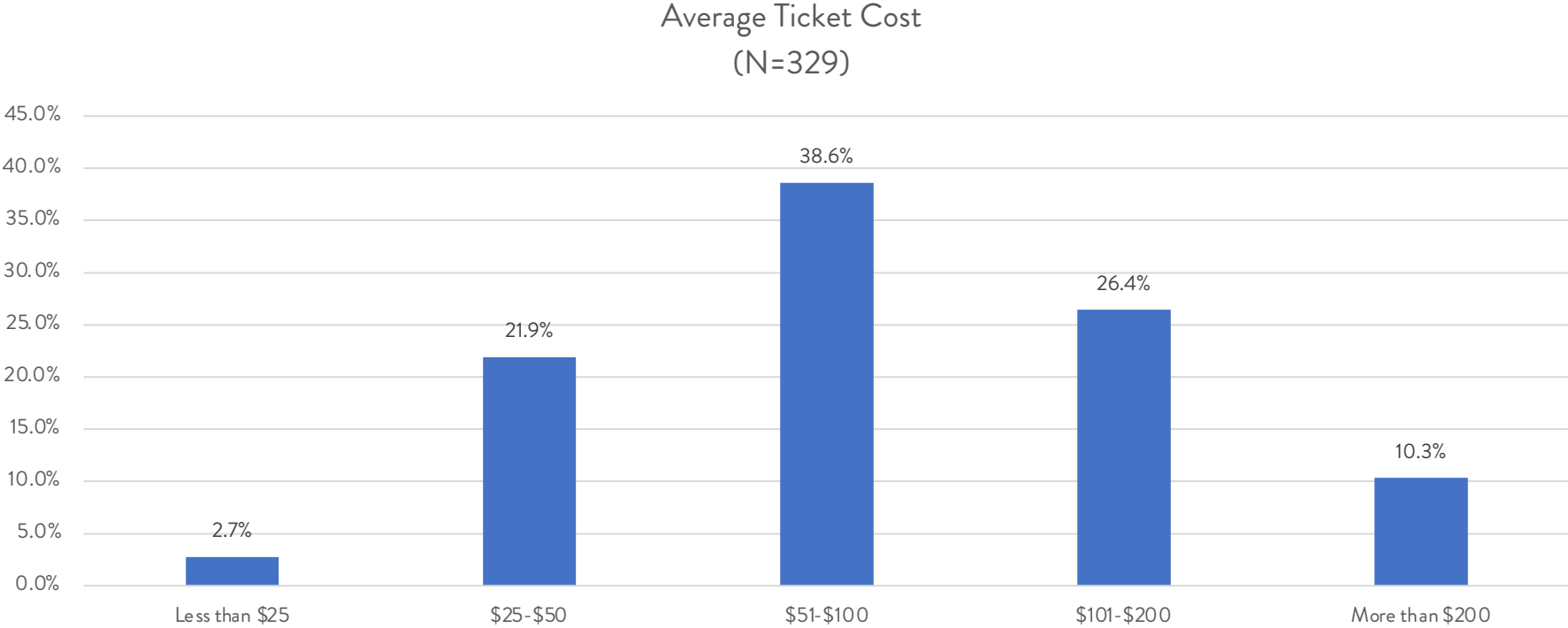
Q17: How confident did you feel about the purchase?

→ Related to Q15, excludes those who didn't pay



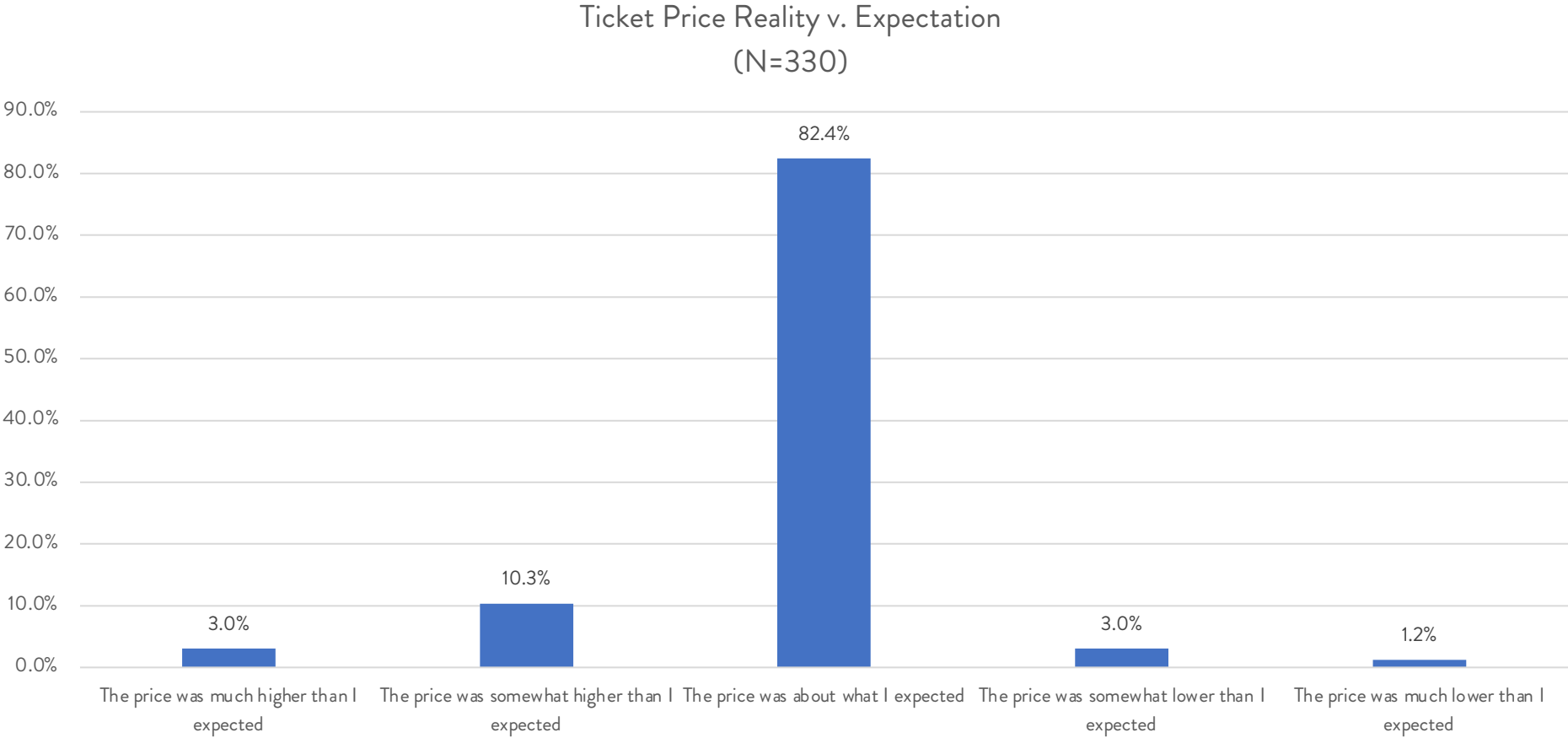
Q18: On average, how much did each ticket cost, including fees? (For subscription-holders, please estimate the cost of this one performance based on the total subscription cost and number of performances)

→ Related to Q15, excludes those who didn't pay



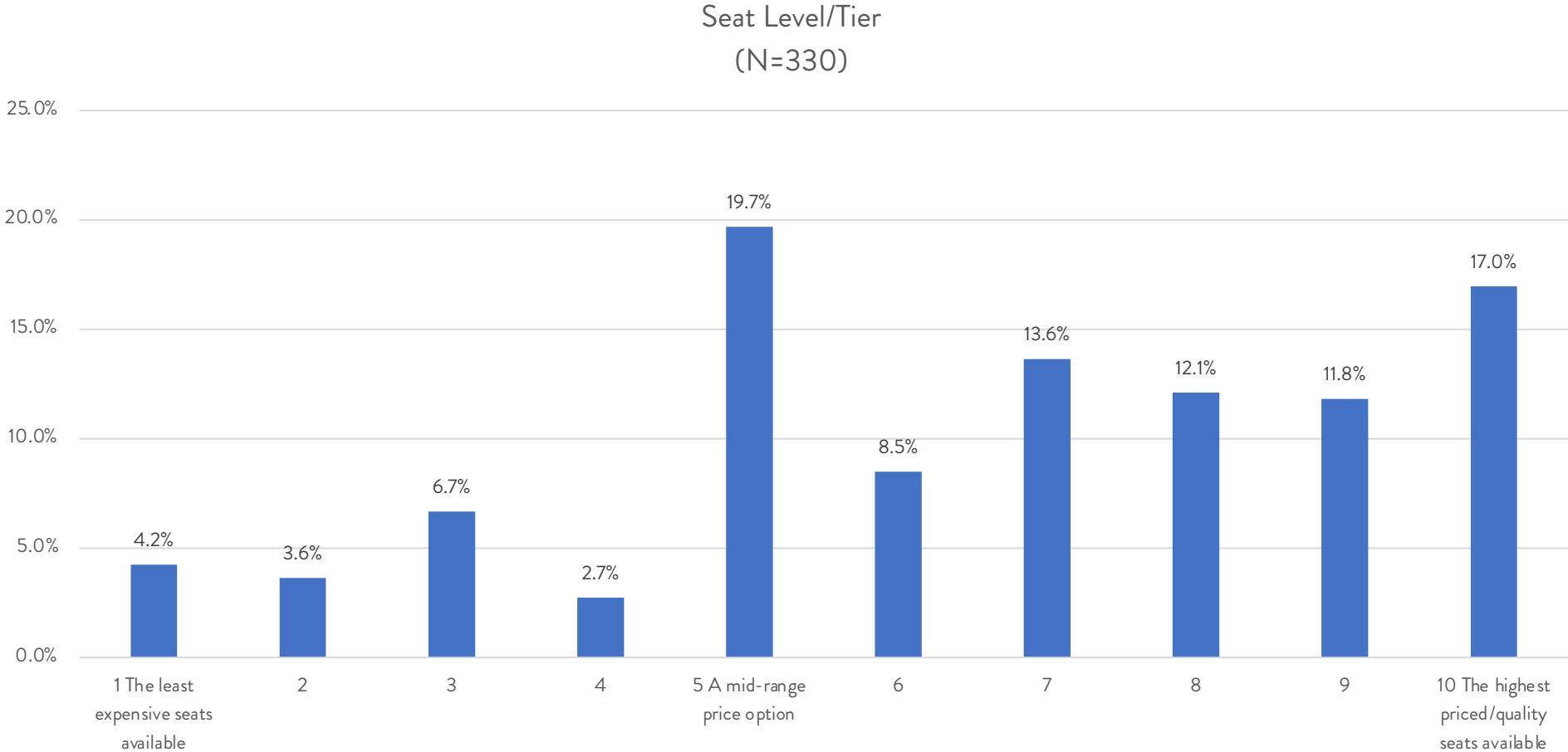
Q19: What did you think about the ticket price?

→ Related to Q15, excludes those who didn't pay

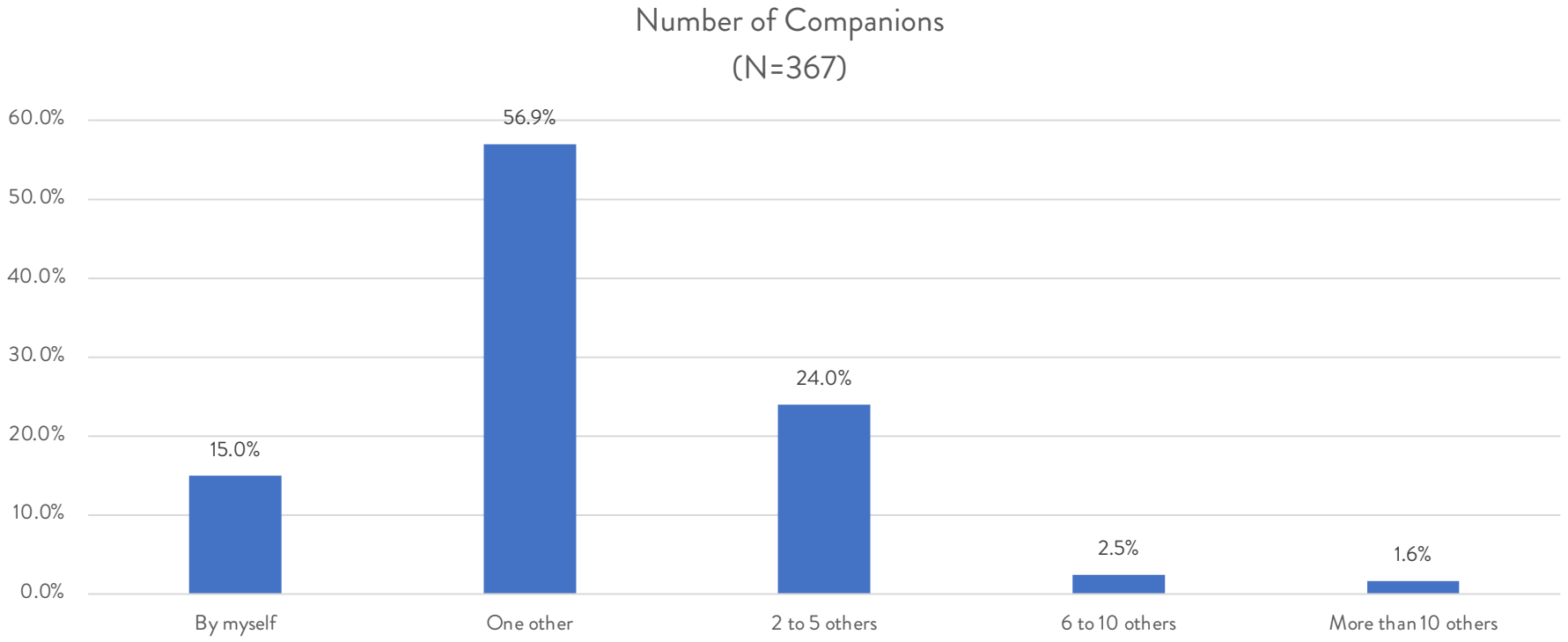


Q20: What level or tier of seats did you purchase?

→ Related to Q15, excludes those who didn't pay

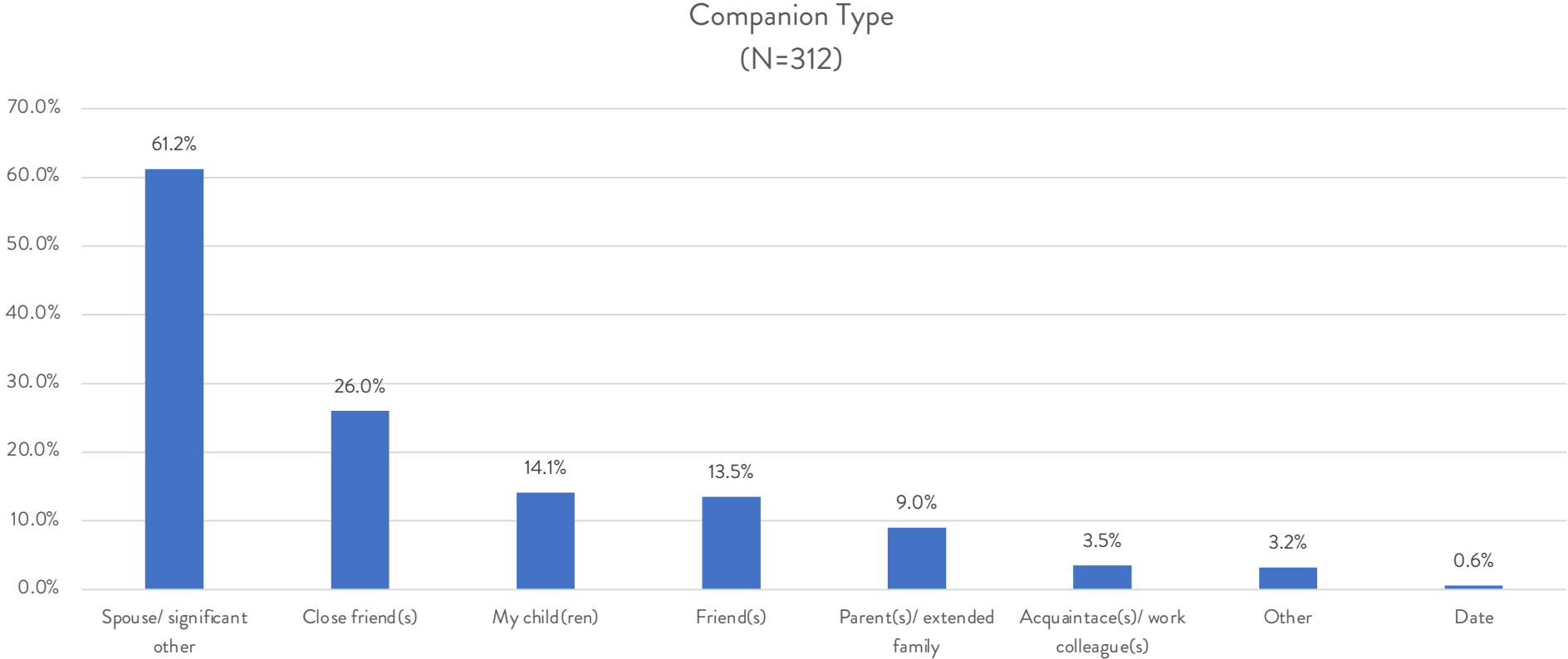


Q22: How many people did you go with?



Q23*: With whom did you attend?

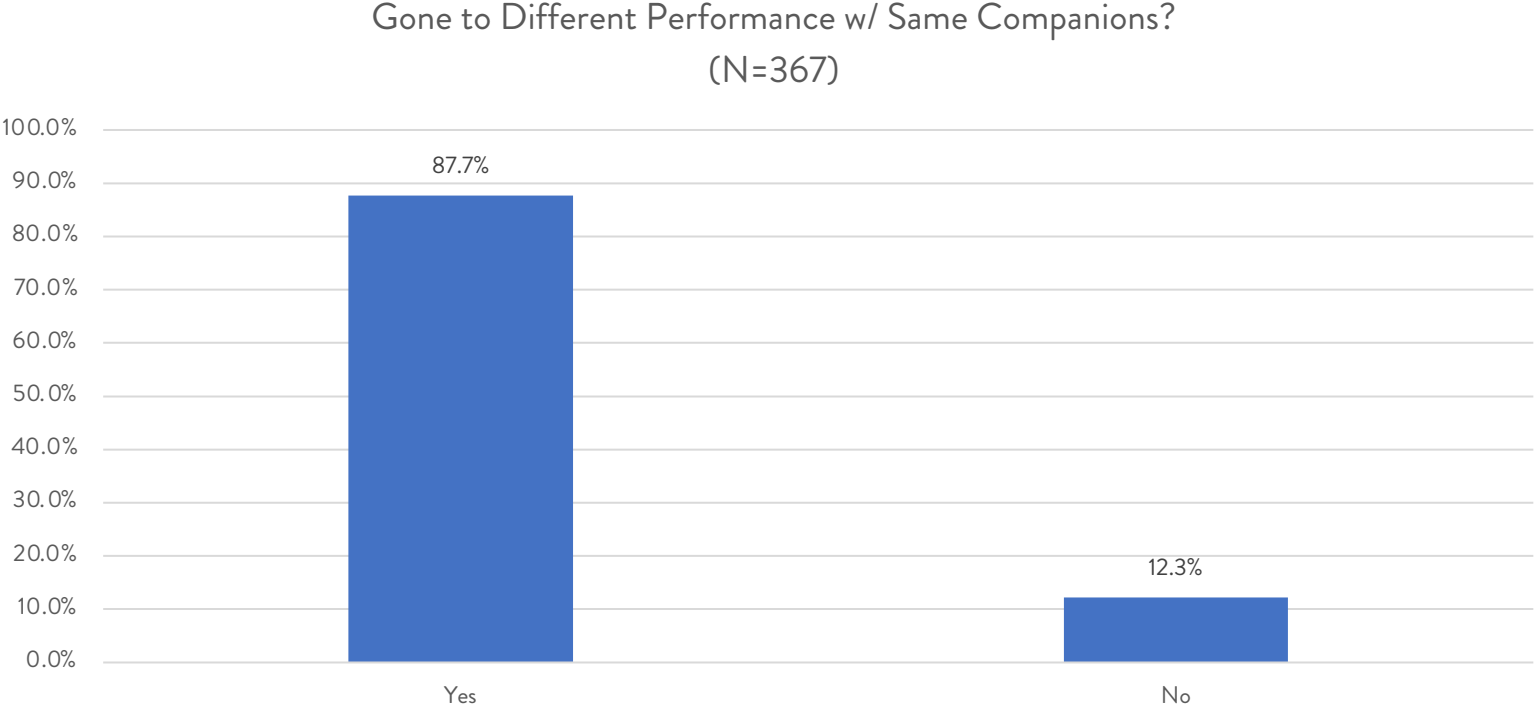
→ Related to Q22, excludes those that went solo



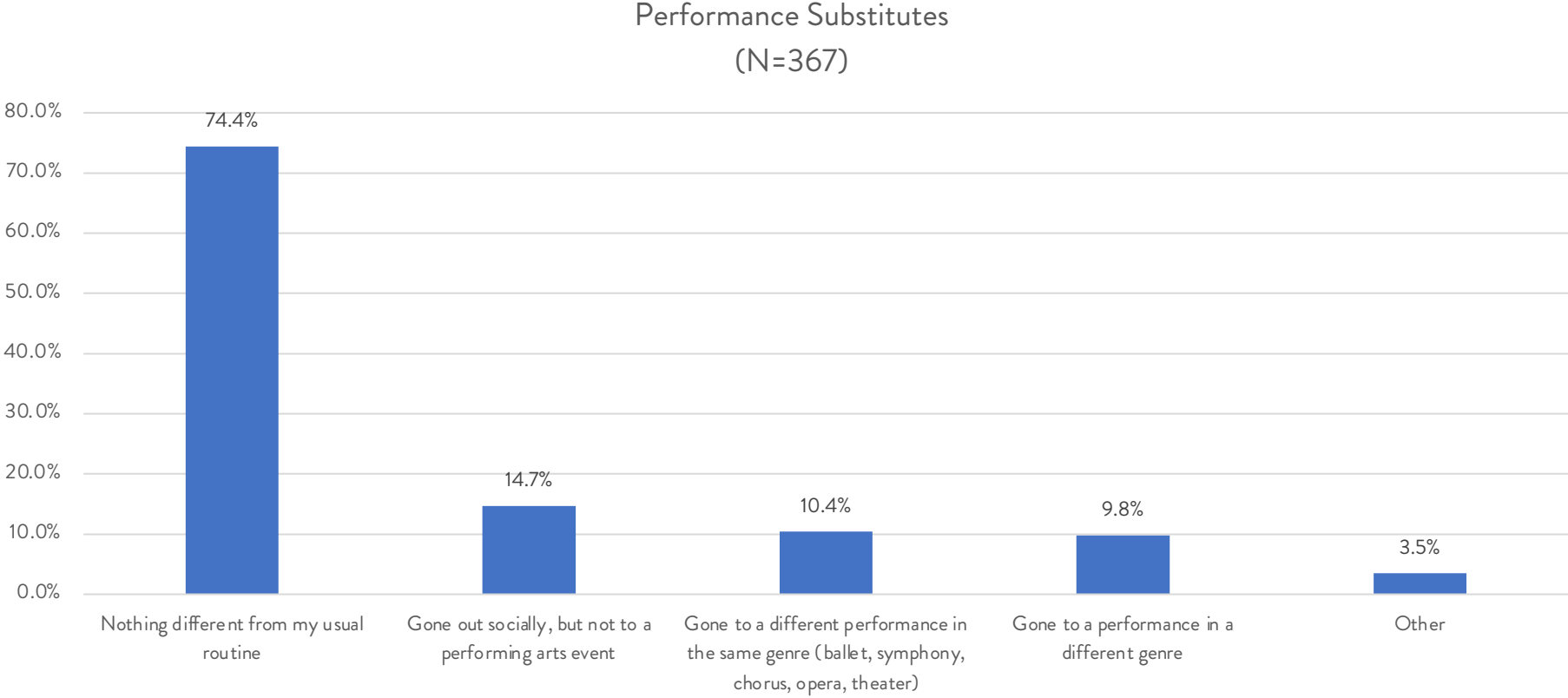
**See other write-in responses in the Excel report.*

Q24: Have you gone to another, different performance with any of the same people in the past year?

→ Related to Q22

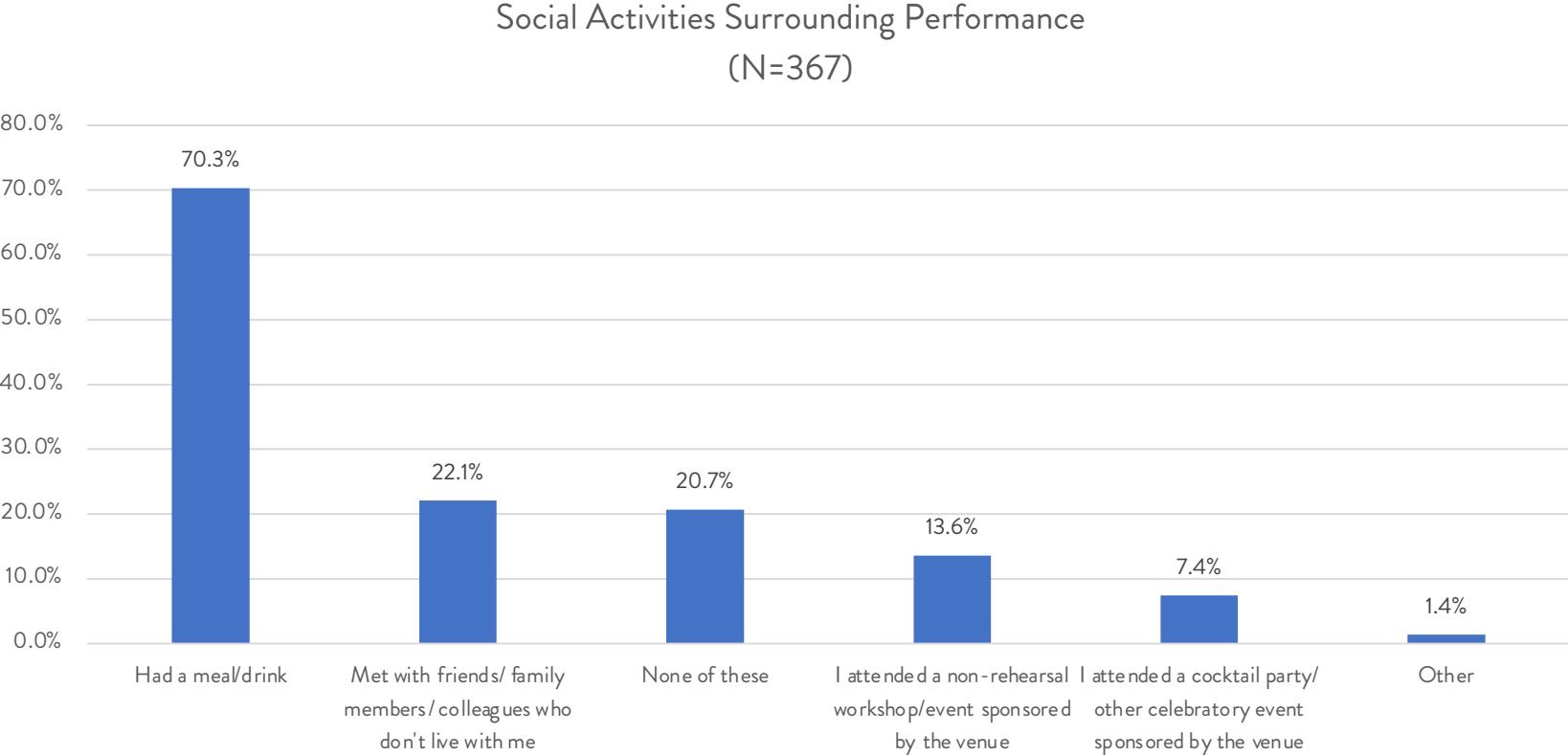


Q26*: If you hadn't gone to this performance, what would you have done during this time?



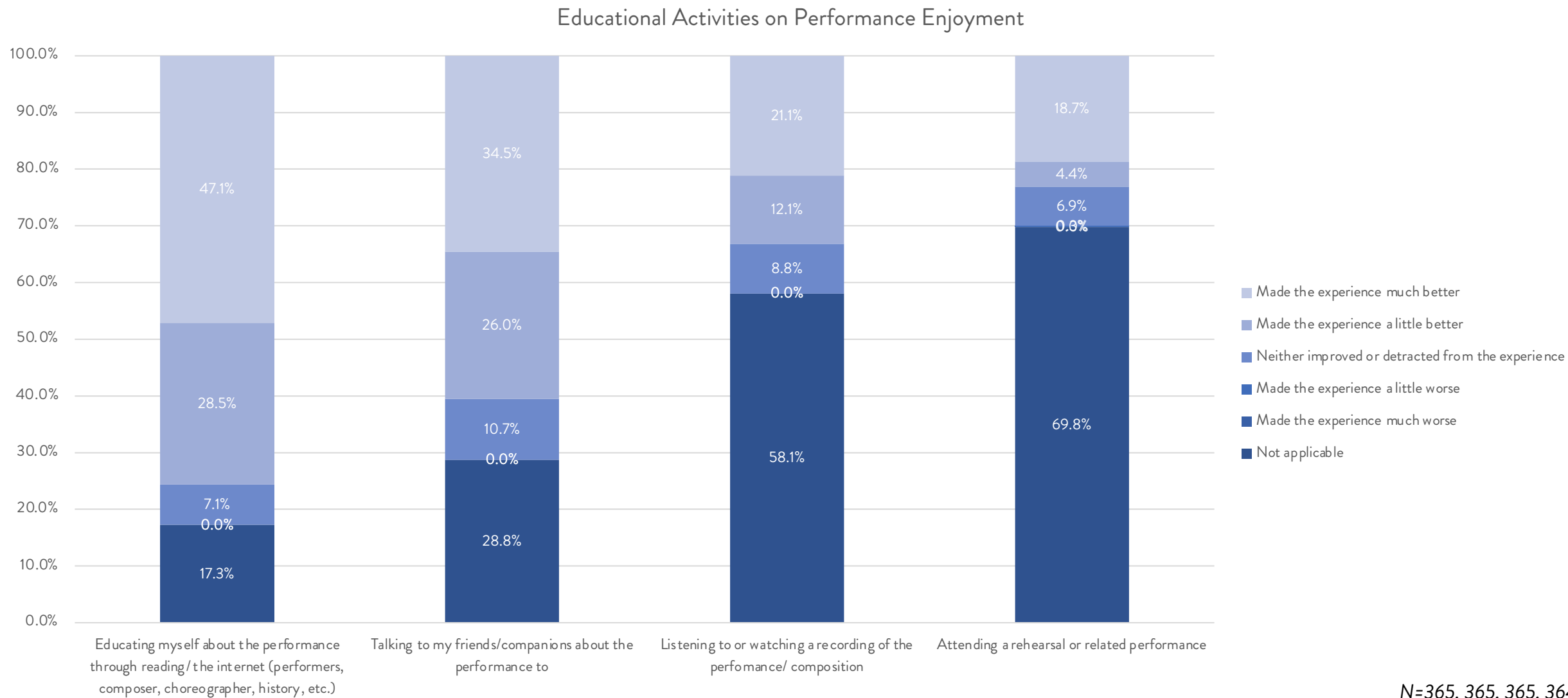
**See other write-in responses in the Excel report.*

Q27*: Did you participate in any of the following social activities before or after you attended the performance?



**See other write-in responses in the Excel report.*

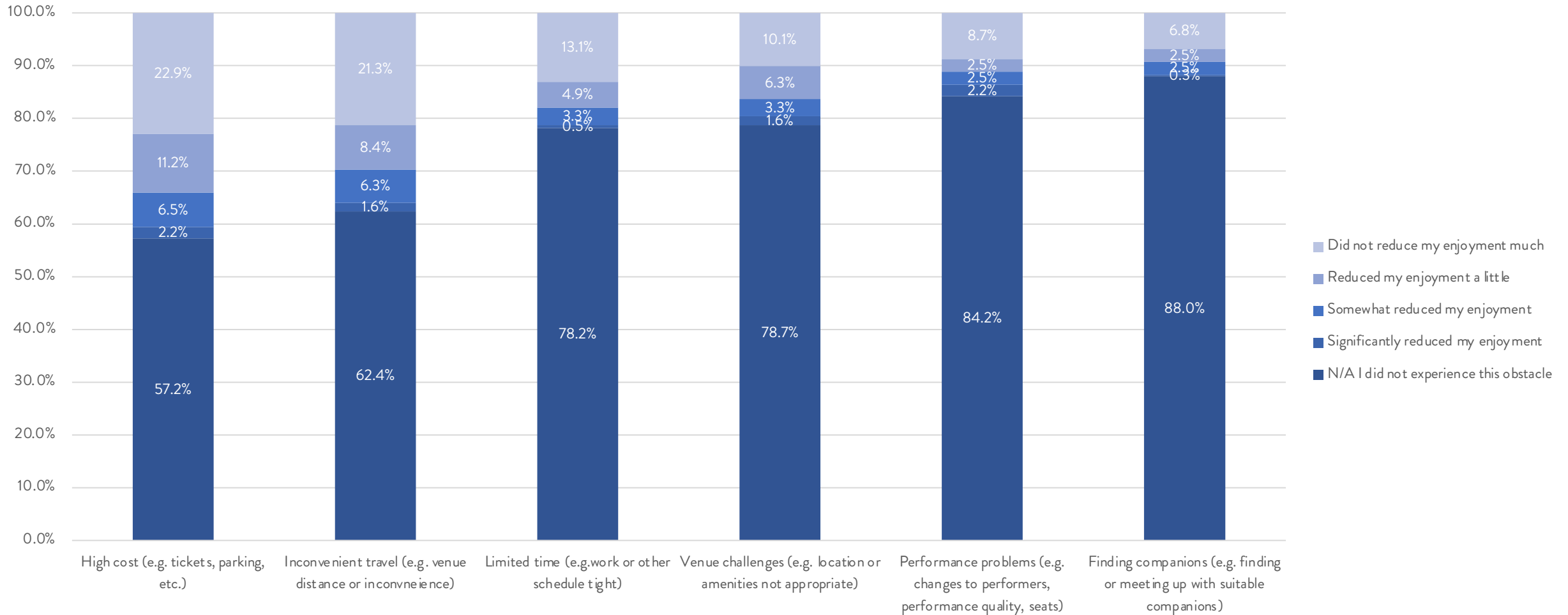
Q28: To what extent did each of the following educational activities improve or detract from your enjoyment of the event: (a) talking to your friends/companions about the performance; (b) educating yourself about the performance through reading or the Internet; (c) listening to or watching a recording of the performance/composition; and (d) attending a rehearsal or related performance?



N=365, 365, 365, 364

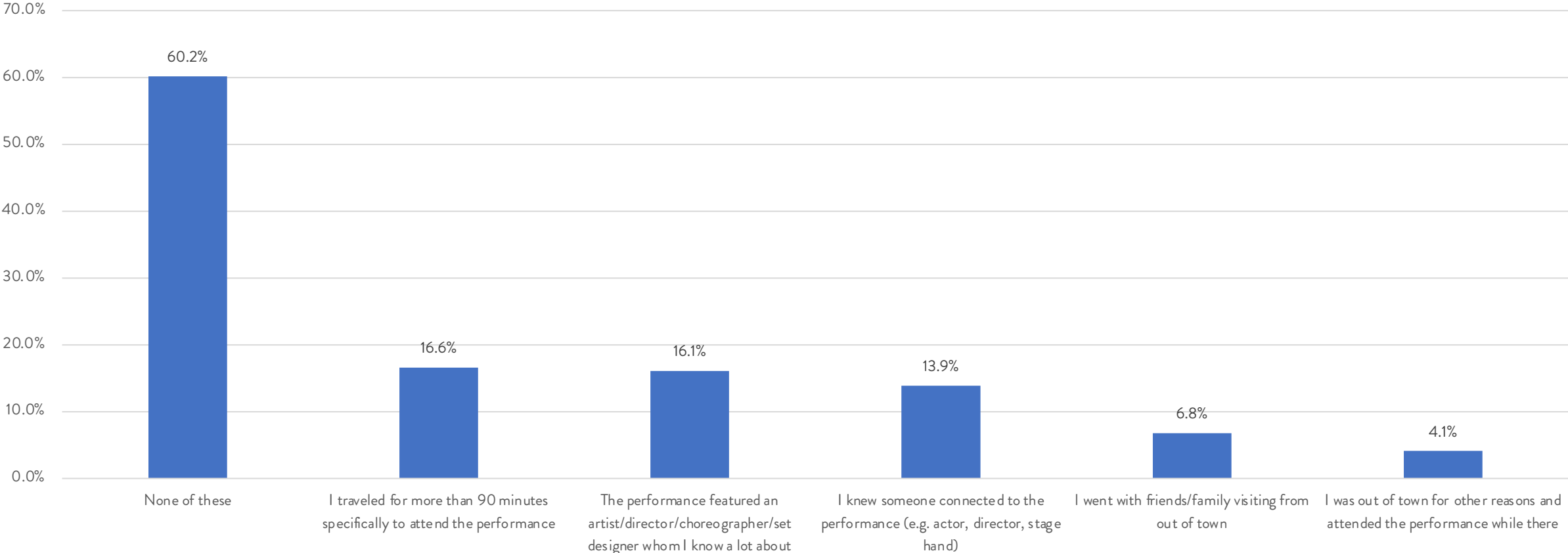
Q29: To what extent, if at all, did any of the following obstacles reduce your enjoyment of the event: (a) high cost; (b) inconvenient travel; (c) finding companions (e.g. finding or meeting up with suitable companions); (d) limited time (e.g. work or other schedule tight); (e) performance problems (e.g. changes to performers, performance quality, or seats); and (f) venue challenges (e.g. location or amenities not appropriate)?

Effect of Obstacles on Performance Enjoyment
(N=367)



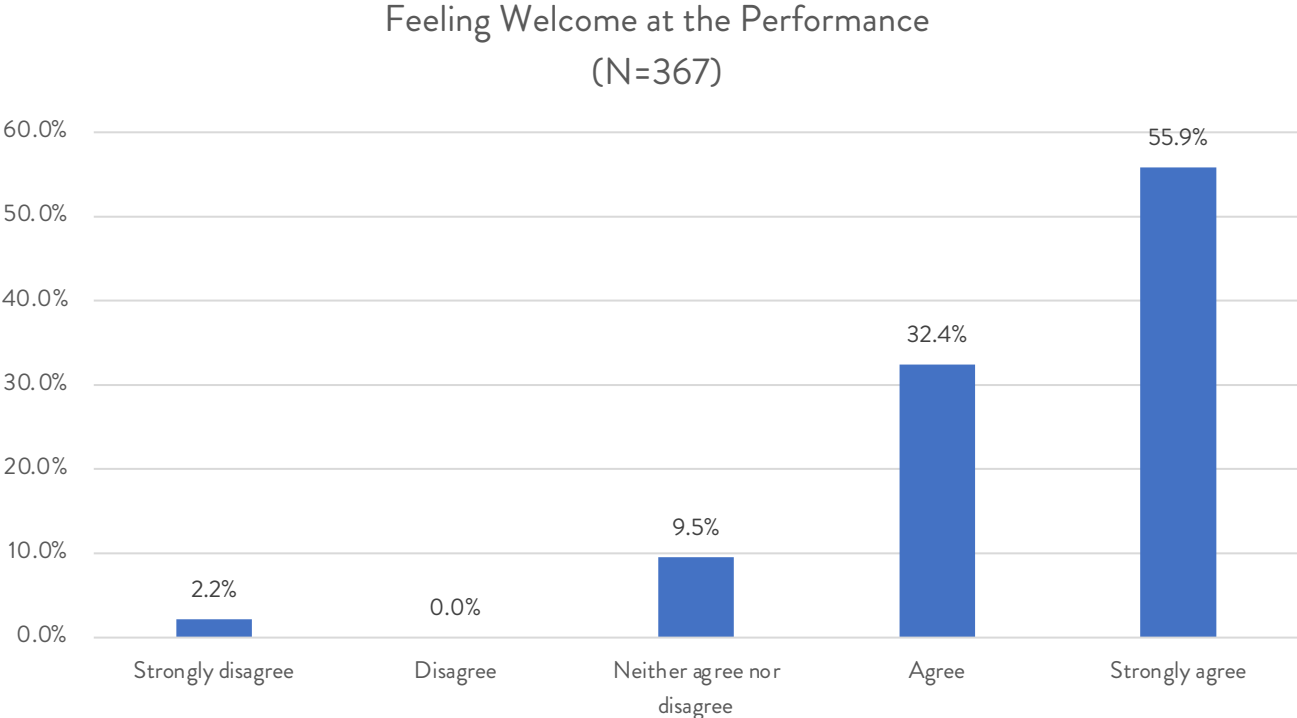
Q30: Were any of the following true about this performance?

Miscellaneous Performance Factors
(N=367)

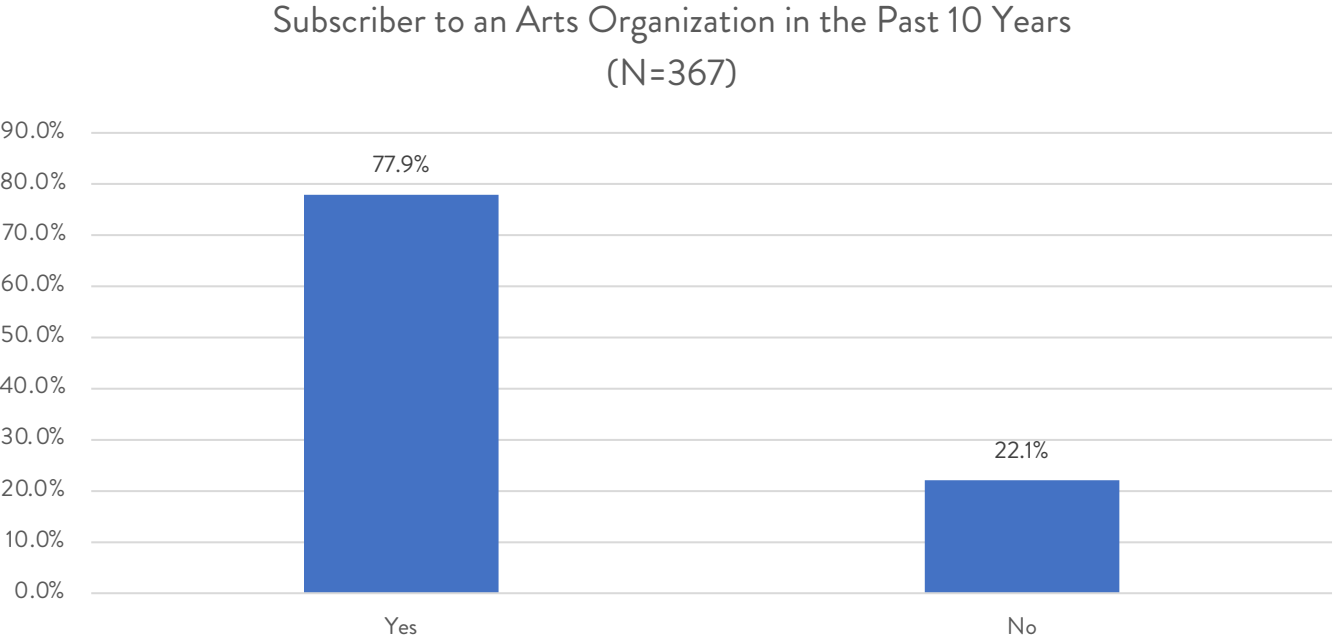


Organizational Questions

Q32: Indicate how strongly you disagree or agree with the statement: I felt welcome at the performance.

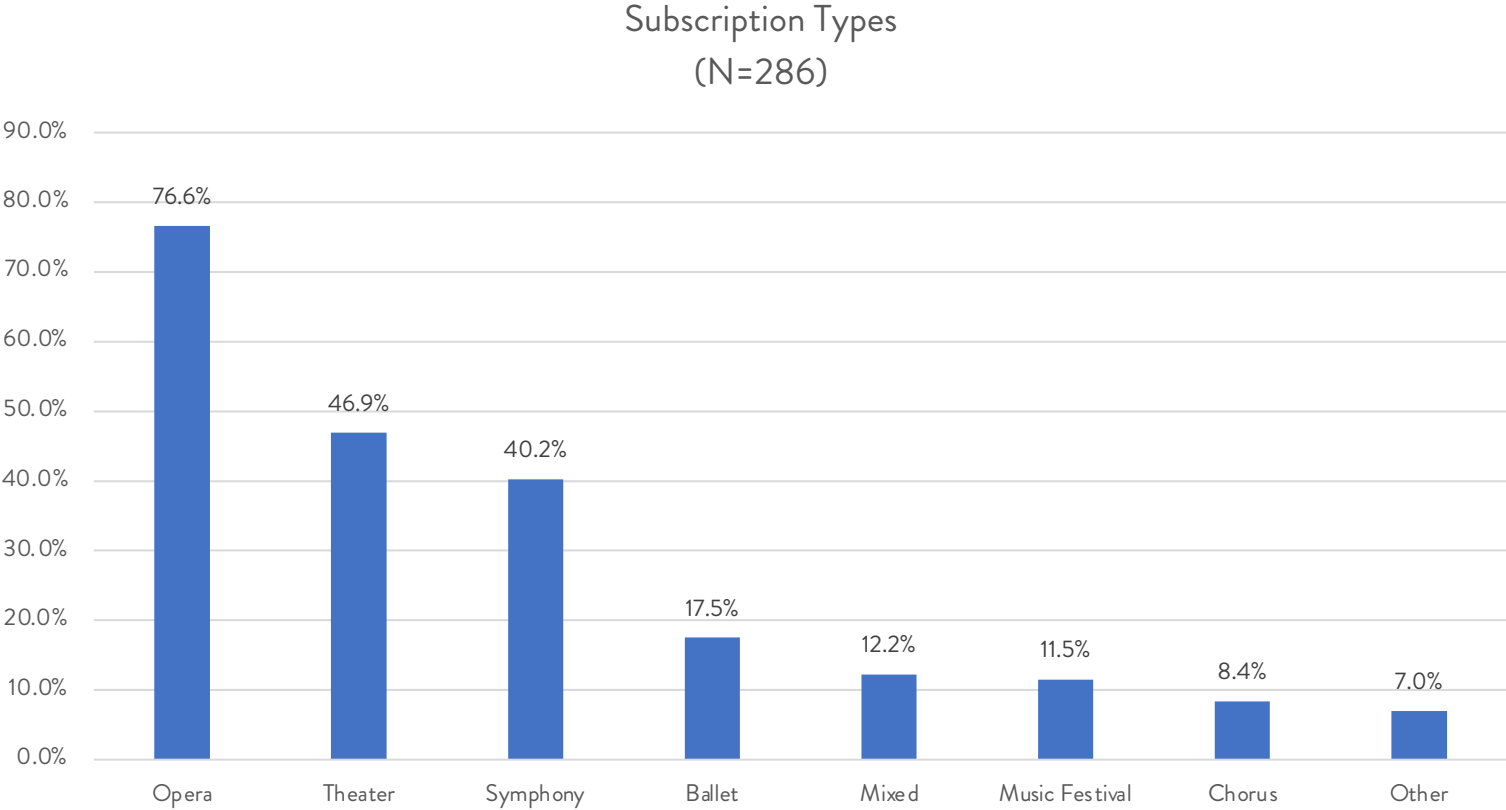


Q36: Have you subscribed to an arts organization ticket series in the past ten years?



Q37*: What types of subscriptions have you had?

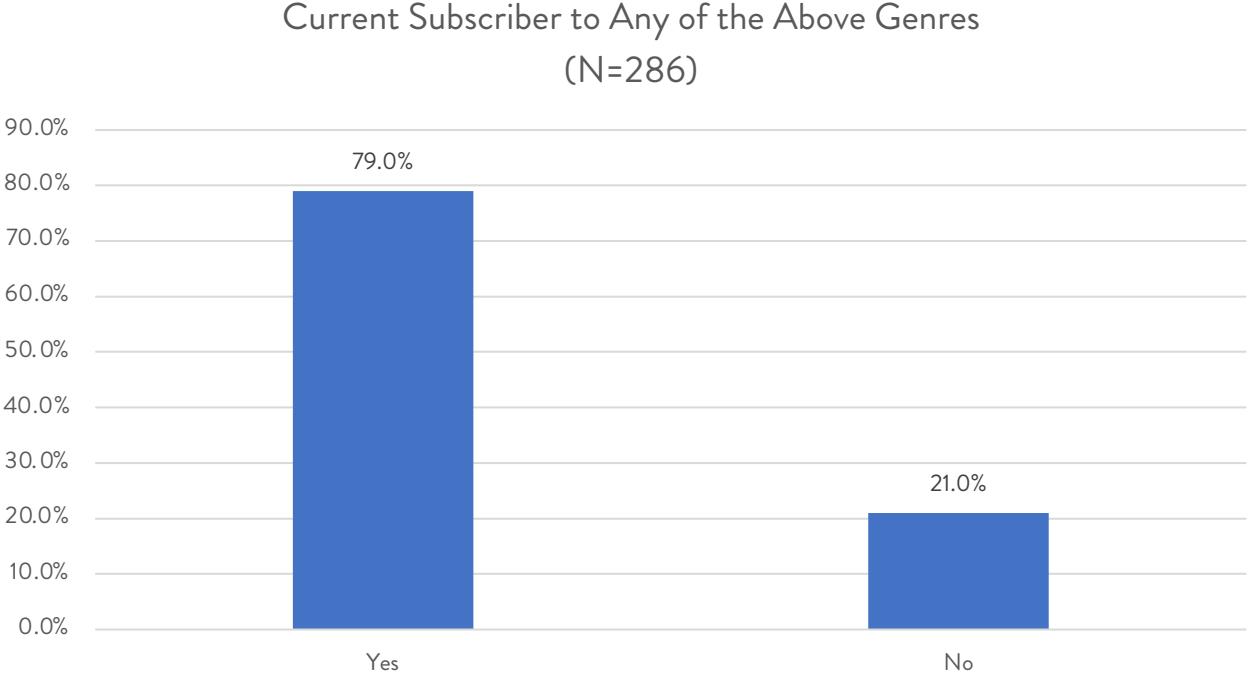
→ Related to Q36, excludes non-subscribers



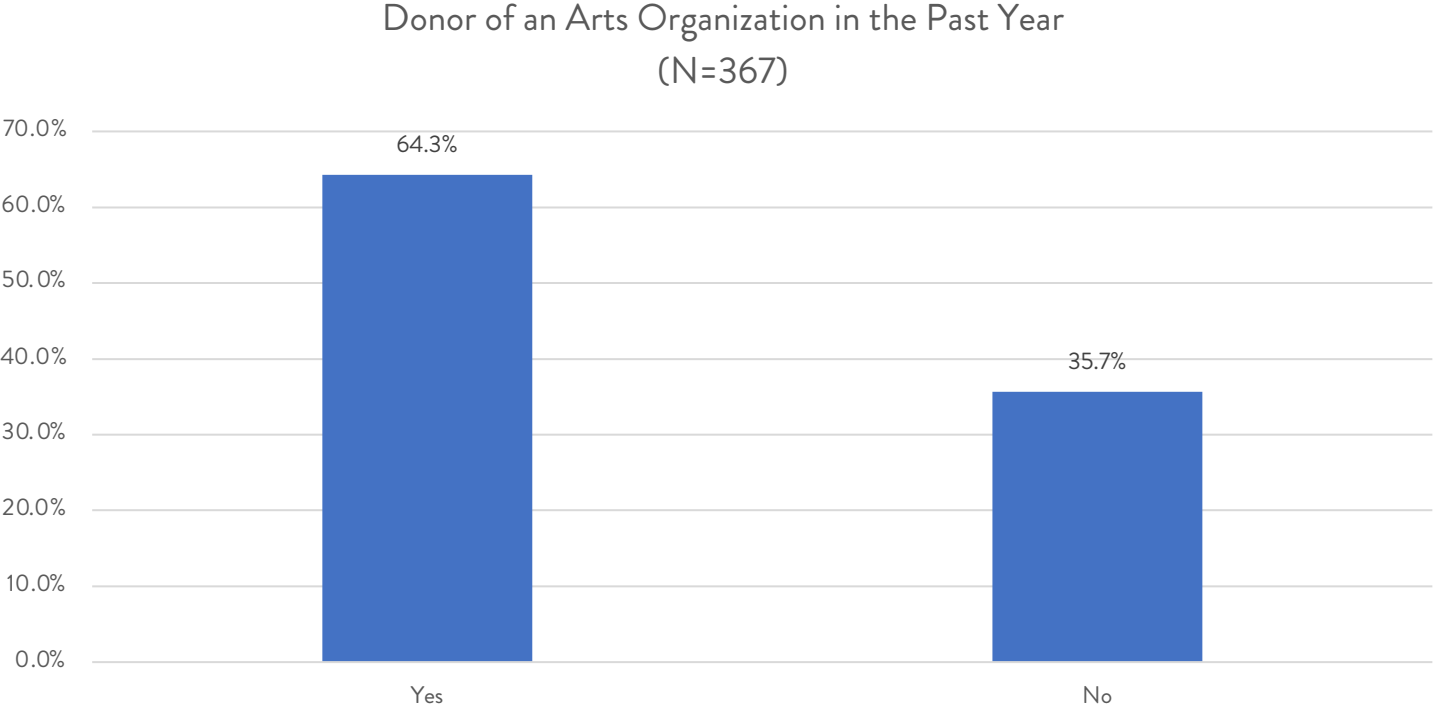
**See other write-in responses in the Excel report.*

Q38: Are you a current subscriber to any of these subscriptions?

→ Related to Q36, excludes non-subscribers

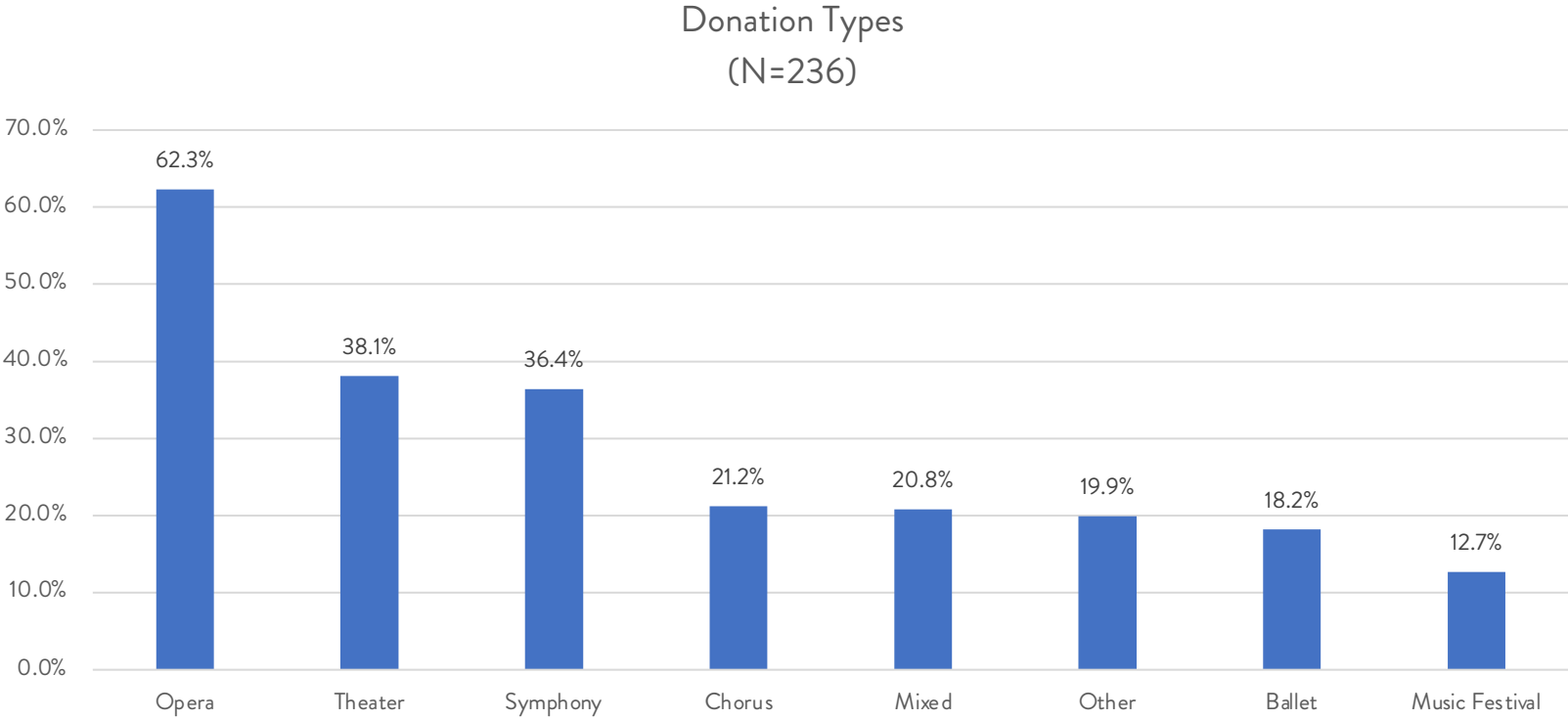


**Q39: Have you donated money to a symphony, opera, theater, ballet/dance, chorus or music festival in the past year?
Do not count your ticket purchase, even if it included a donation, or in-kind volunteer activities.**



Q40*: To what types of organizations have you donated?

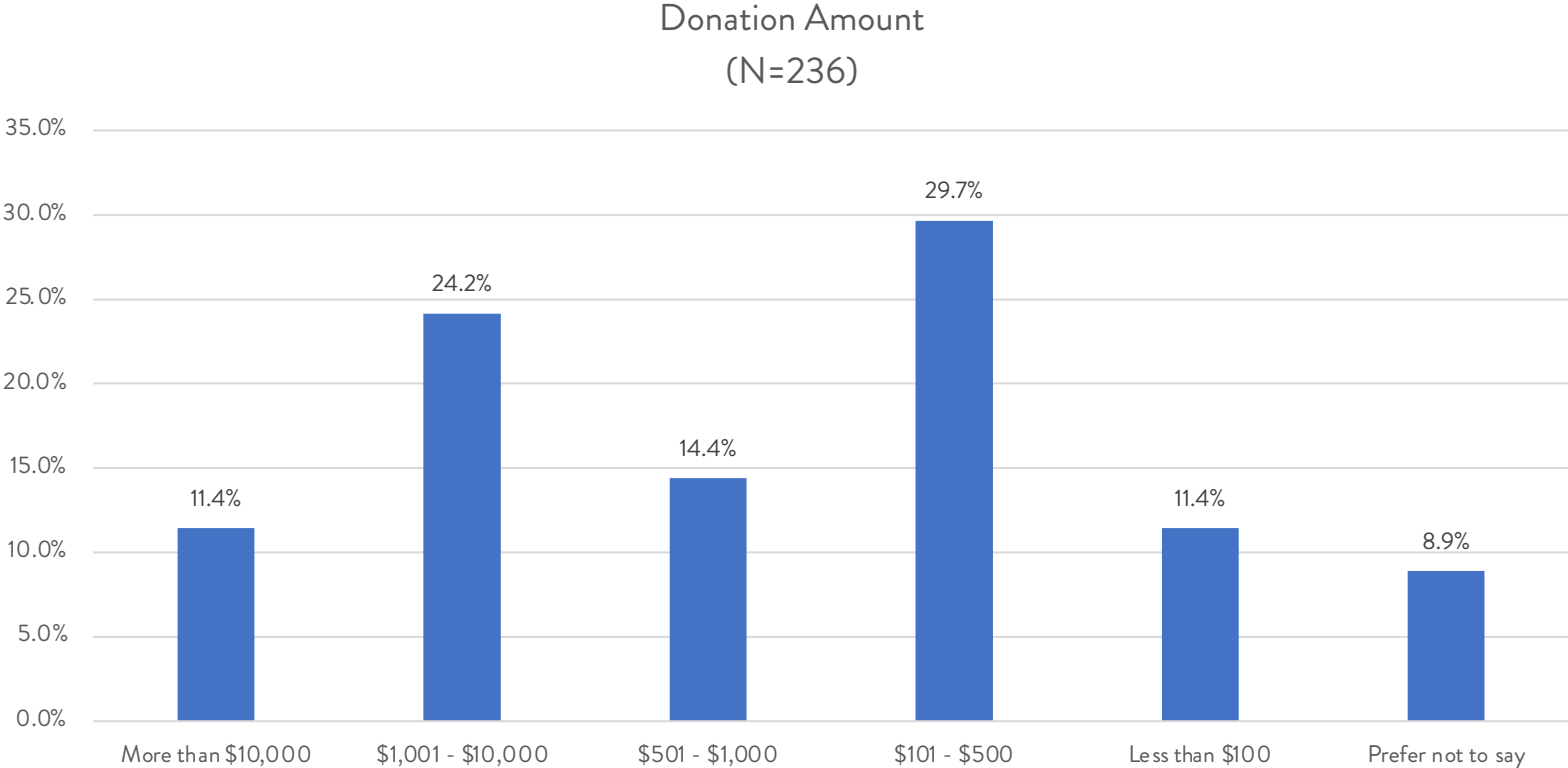
→ Related to Q39, excludes non-donors



**See other write-in responses in the Excel report.*

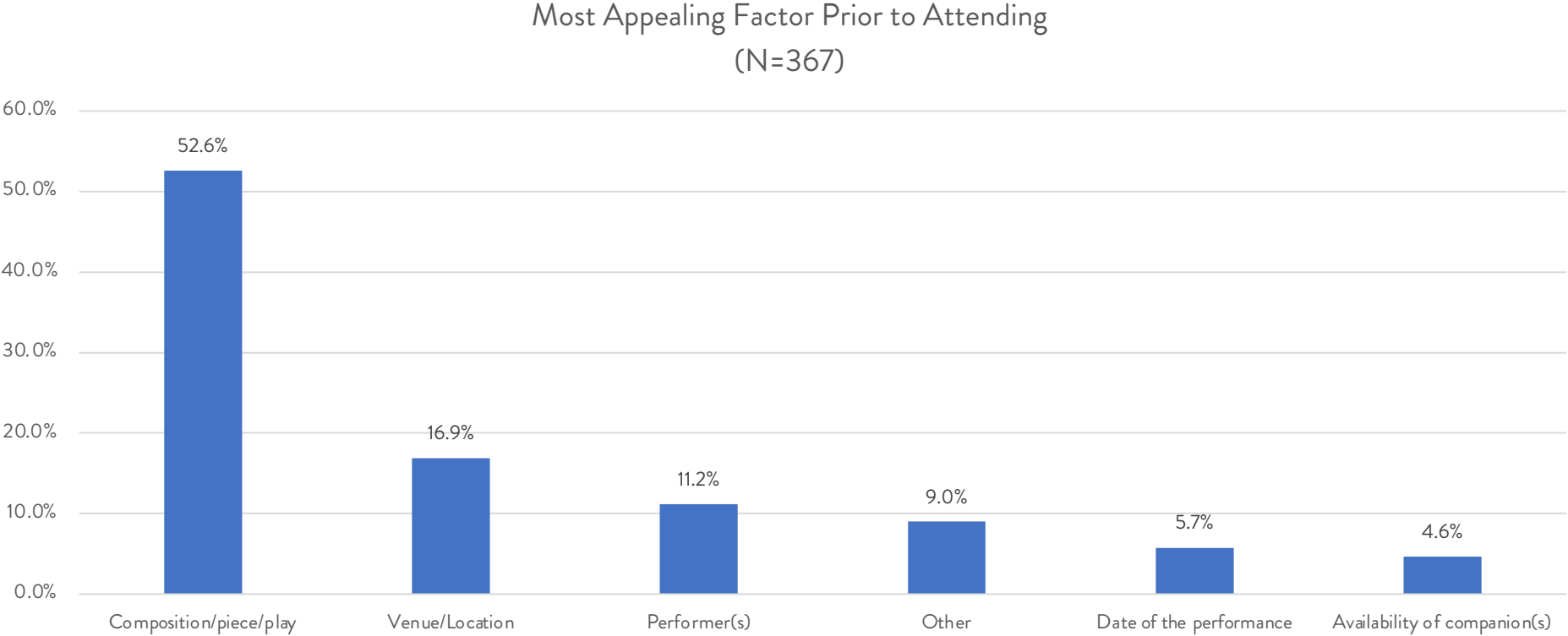
Q41: Roughly how much have you donated to the arts in the past year?

→ Related to Q39, excludes non-donors



Motivation Questions

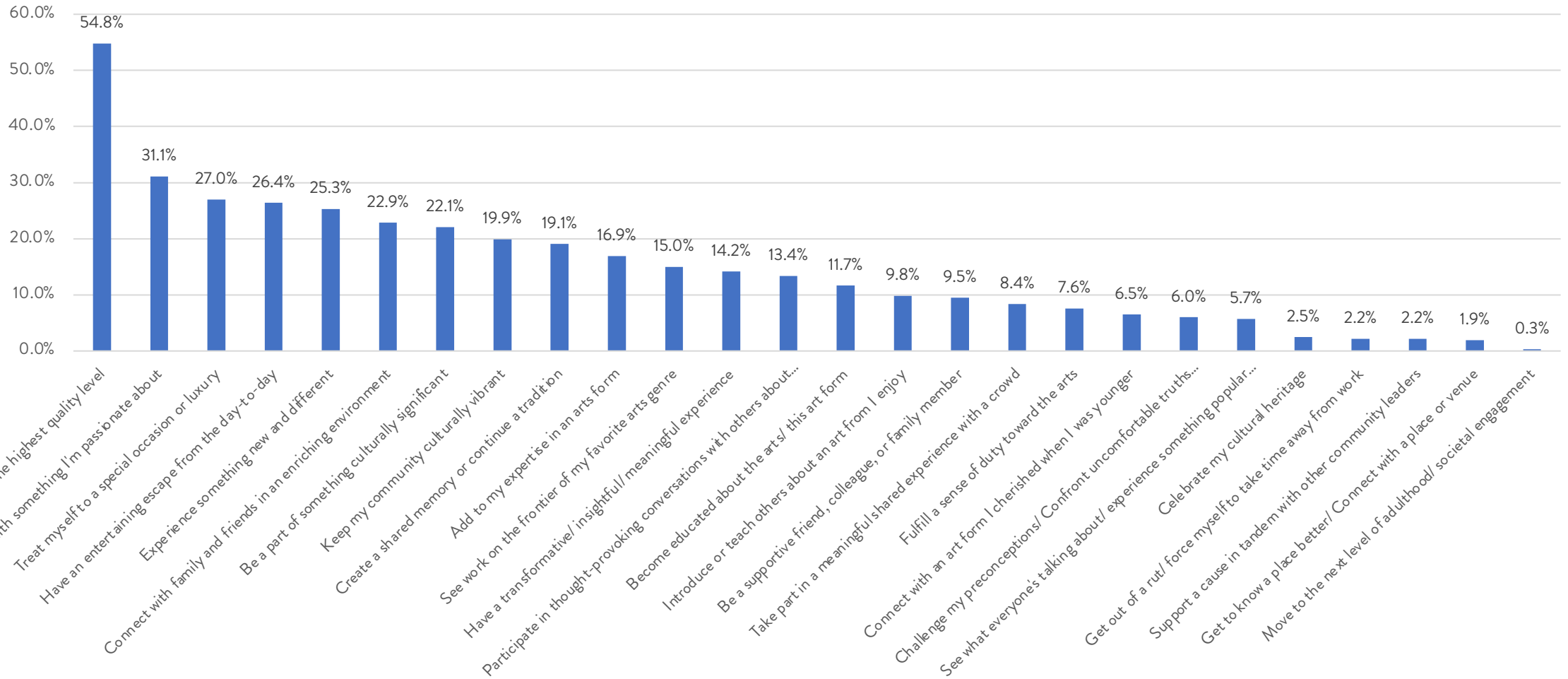
Q5*: Prior to attending the performance, which did you find most appealing?



**See other write-in responses in the Excel report.*

Q6: To what extent did the following elements motivate your decision to attend this particular performance? (Choose up to 5)

Distribution of Motivations Behind Attending Performance (Choose up to 5)
(N=367)

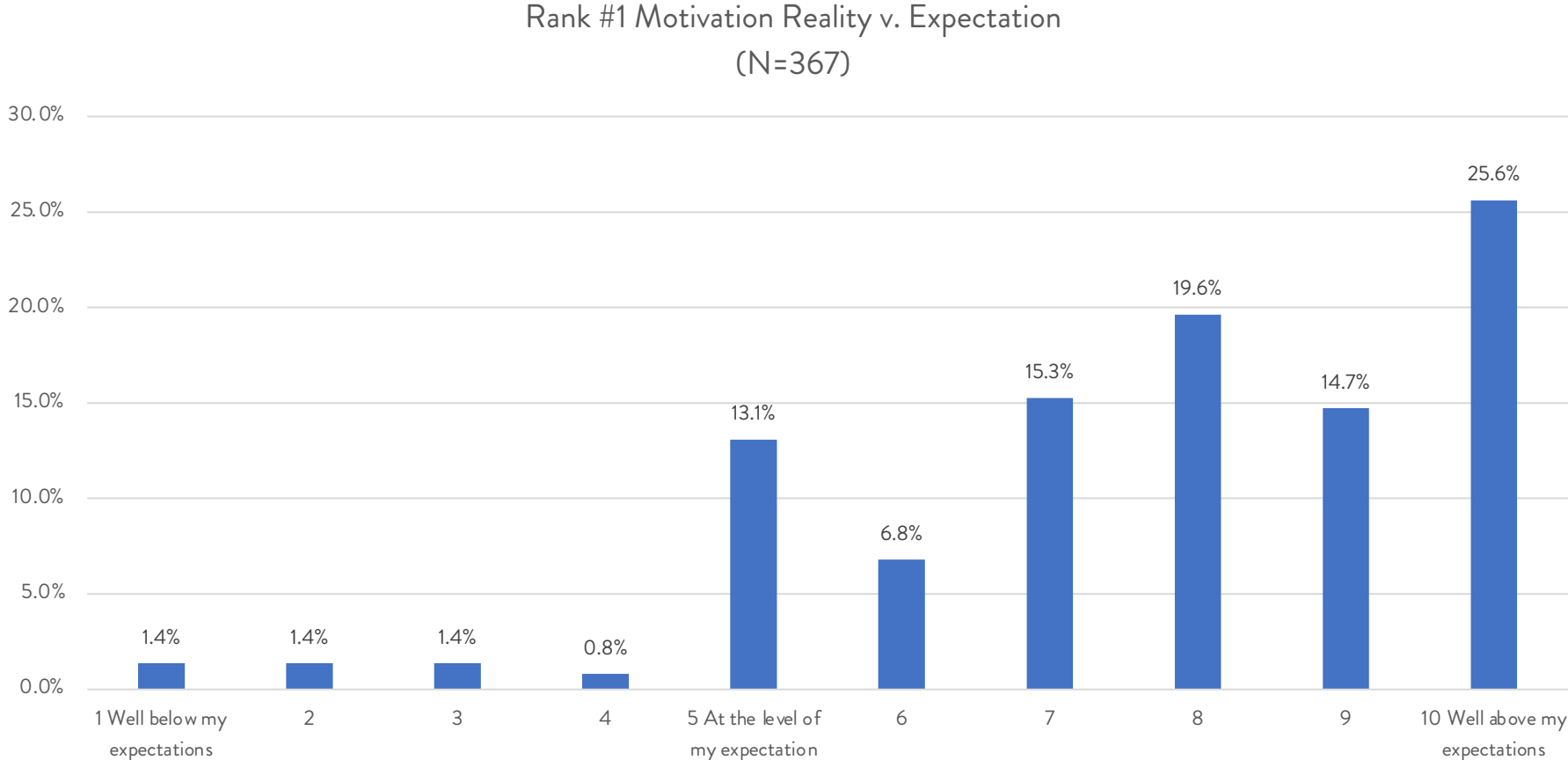


Q7: Please place your top motivations to attend in rank order, starting with the most important.

→ Related to Q6

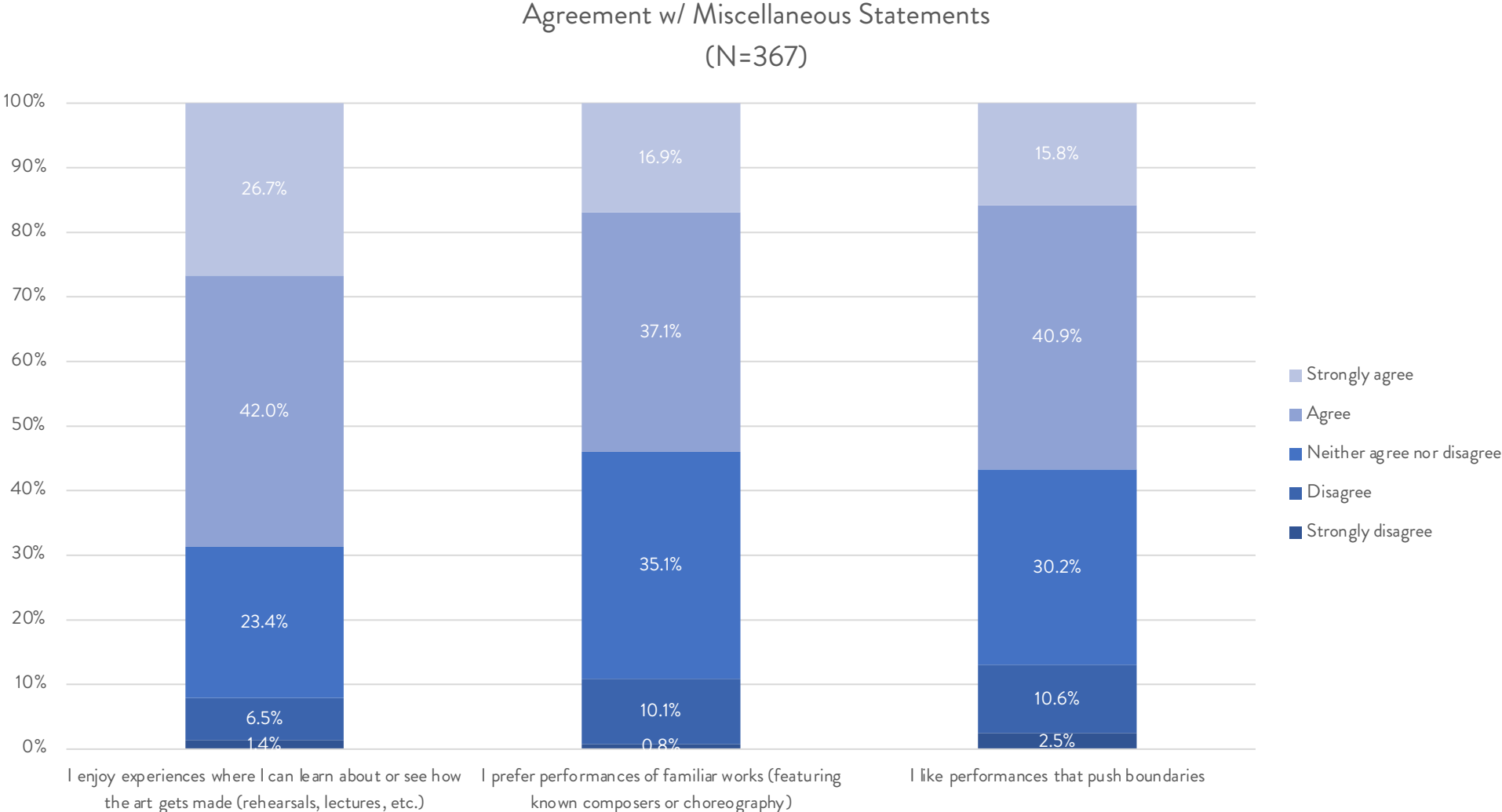
Motivation	Ranked #1	Ranked #2-#5	N=
See performance executed at the highest quality level	60.6%	39.4%	198
Connect with something I'm passionate about	36.0%	64.0%	111
Treat myself to a special occasion or luxury	16.7%	83.3%	96
Have an entertaining escape from the day-to-day	17.9%	82.1%	95
Experience something new and different	36.7%	63.3%	90
Connect with family and friends in an enriching environment	29.6%	70.4%	81
Be a part of something culturally significant	14.3%	85.7%	77
Keep my community culturally vibrant	10.0%	90.0%	70
Create a shared memory or continue a tradition	70.0%	30.0%	15.7
Add to my expertise in an arts form	14.3%	85.7%	56
See work on the frontier of my favorite arts genre	31.4%	68.6%	51
Have a transformative/ insightful/ meaningful experience	23.1%	76.9%	52
Participate in thought-provoking conversations with others about the performance	12.8%	87.2%	47
Become educated about the arts/ this art form	4.8%	95.2%	42
Introduce or teach others about an art from I enjoy	17.6%	82.4%	34
Be a supportive friend, colleague, or family member	47.1%	52.9%	34
Take part in a meaningful shared experience with a crowd	10.0%	90.0%	30
Fulfill a sense of duty toward the arts	11.1%	88.9%	27
Connect with an art form I cherished when I was younger	23.8%	76.2%	21
Challenge my preconceptions/ Confront uncomfortable truths through art	0.0%	100.0%	20
See what everyone's talking about/ experience something popular or someone famous	4.8%	95.2%	21
Celebrate my cultural heritage	11.1%	88.9%	9
Get out of a rut/ force myself to take time away from work	12.5%	87.5%	8
Support a cause in tandem with other community leaders	25.0%	75.0%	8
Get to know a place better/ Connect with a place or venue	28.6%	71.4%	7
Move to the next level of adulthood/ societal engagement	0.0%	0.0%	0

Q8: (In Q7, respondents placed their top motivations in rank order, starting with the most important). To what extent did this performance deliver or fail to deliver on your top motivation, versus your expectations?



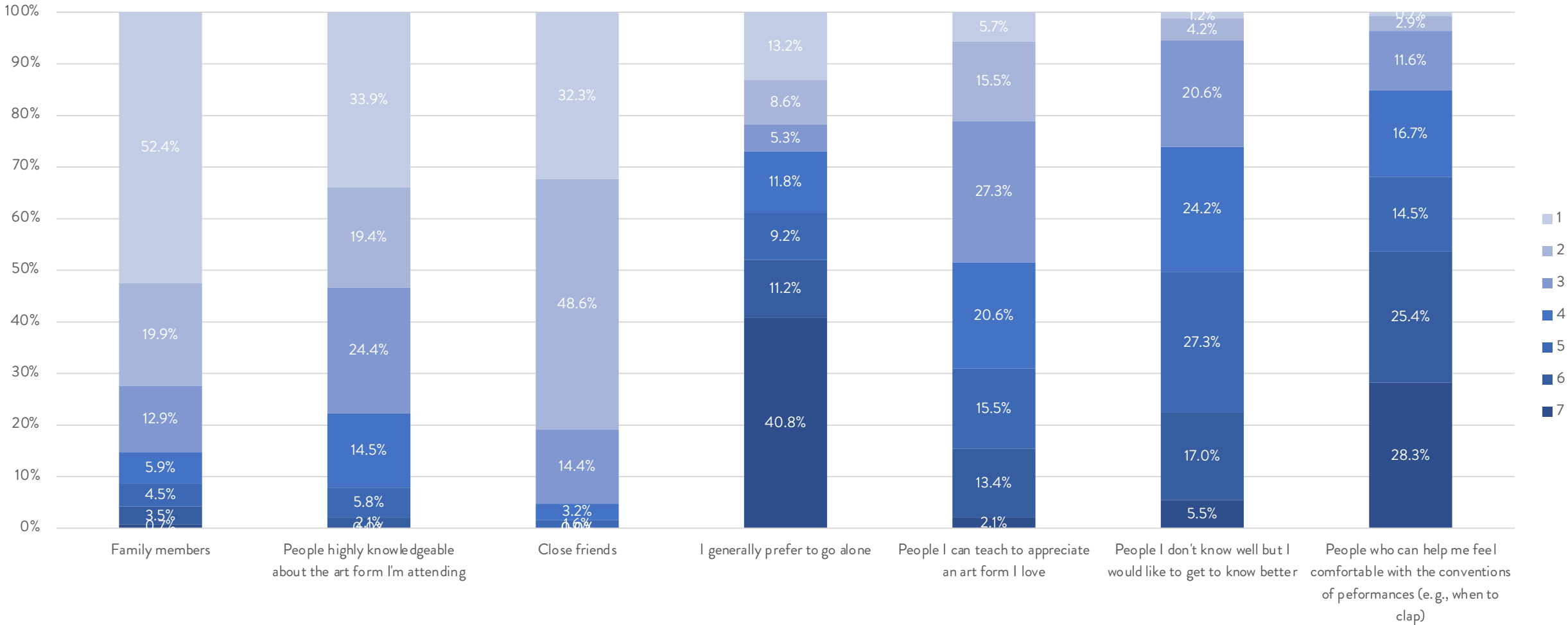
Preference Questions

Q12: How much do you agree or disagree with the following statements?



Q25: Setting aside who actually went with you, who would have been the 'ideal' companion(s) for this performance?

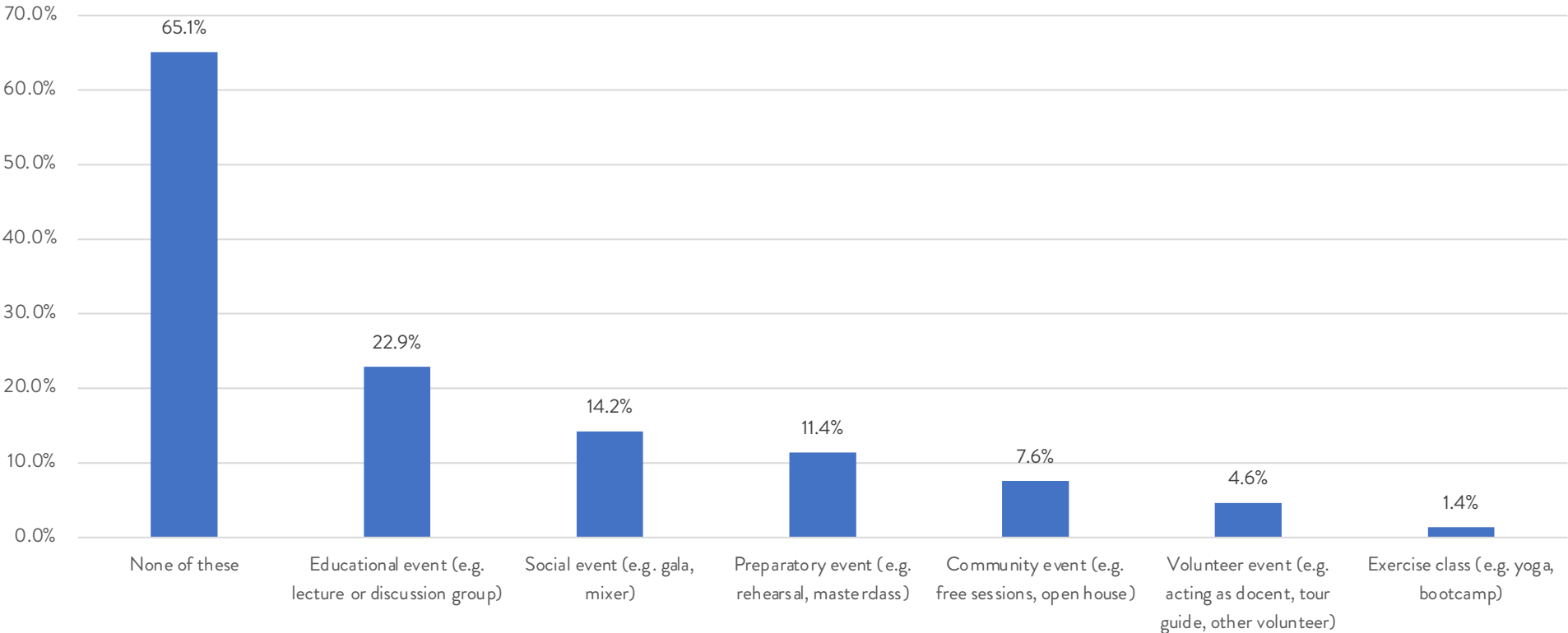
Rankings of Ideal Companions



N=286, 242, 313, 152, 194, 165, 138

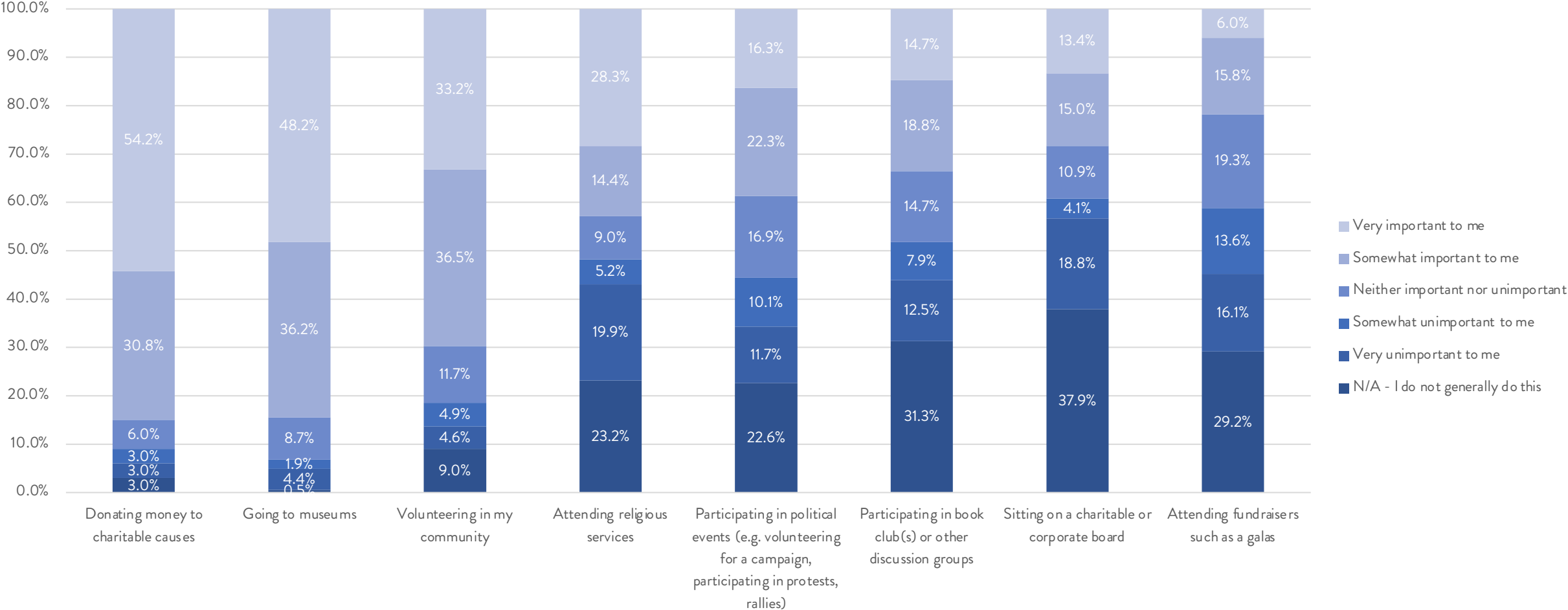
Q31: Have you attended non-performance events with the organization that sponsored your performance, in the past year?

Attendance of Non-Performance Events w/ the Arts Organization
(N=367)



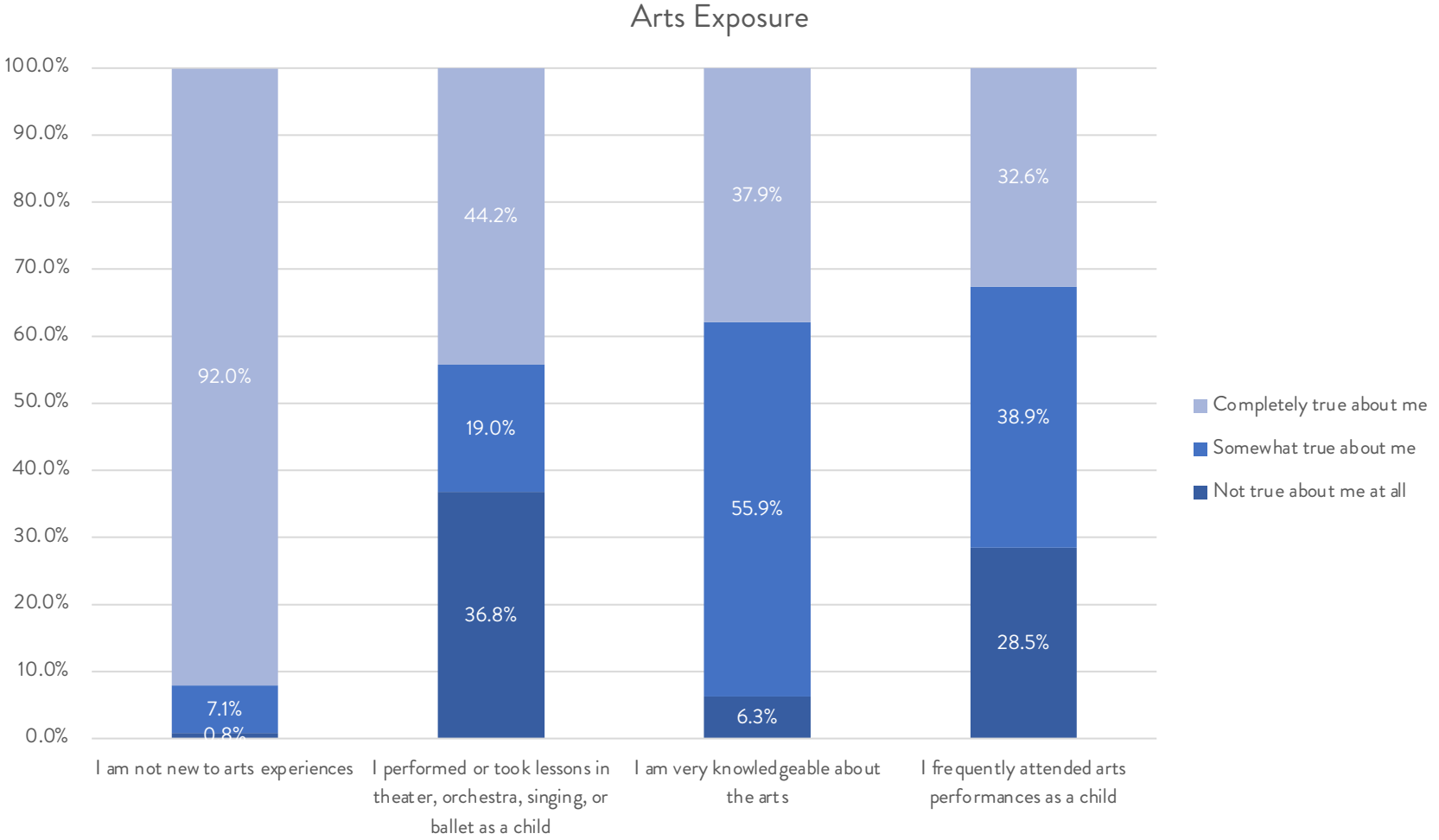
Q34: How important or unimportant is it to you that you do each of the following activities regularly?

Importance of Other Related Activities
(N=367)



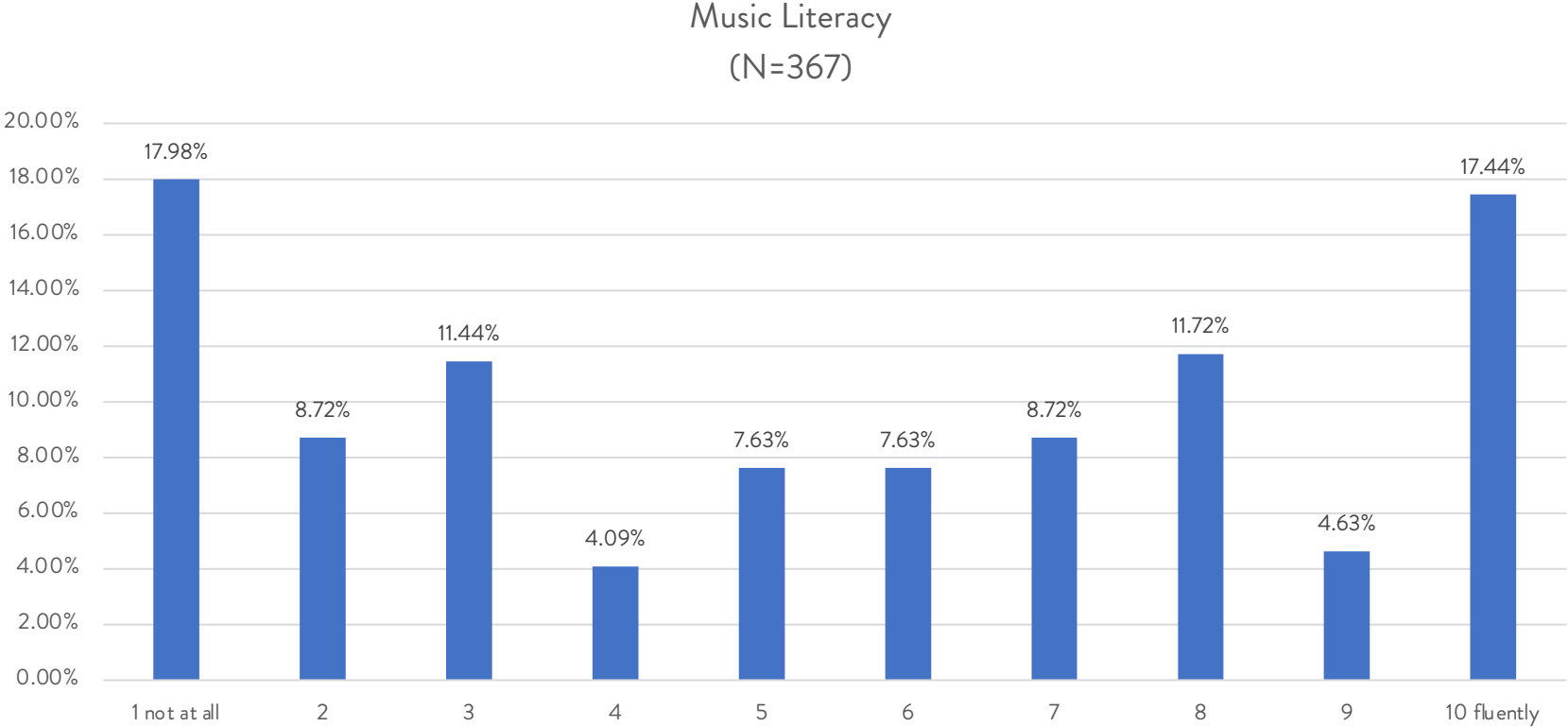
Background + Demographic Questions

Q13: How true or false are the following statements about your arts exposure?



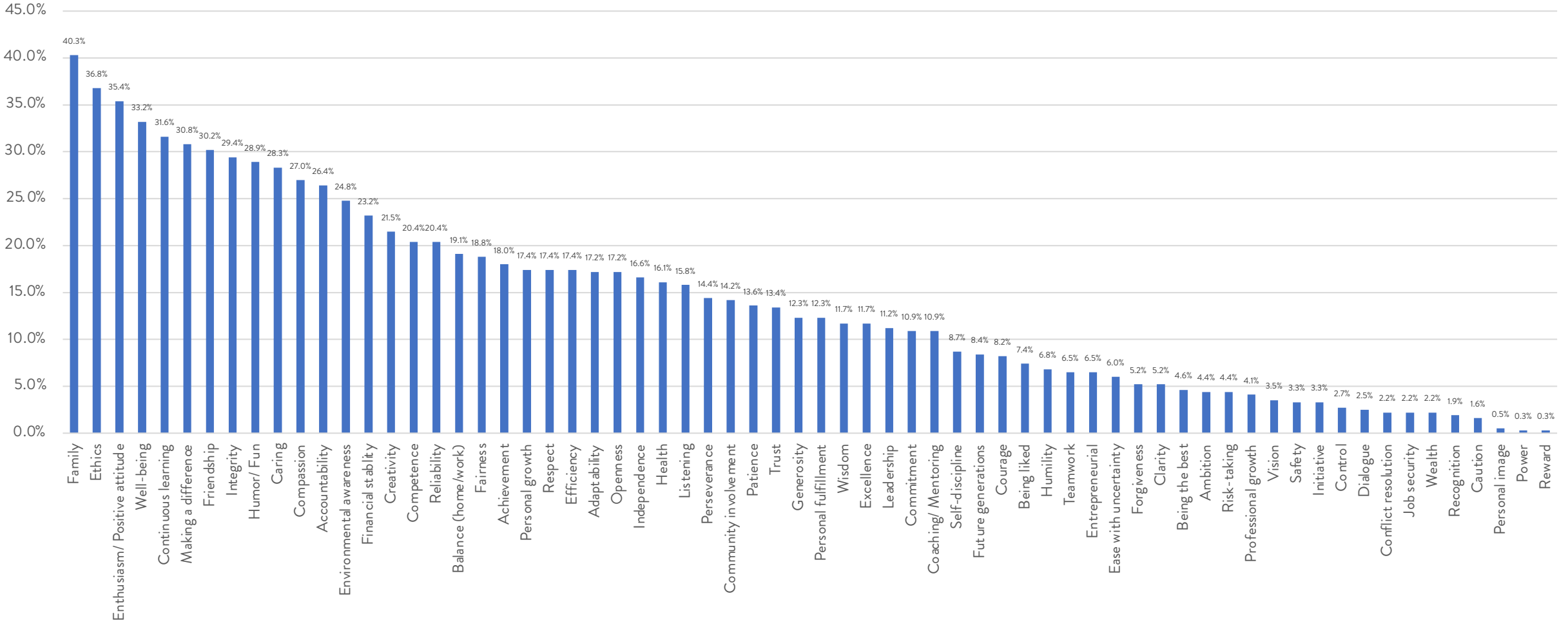
**The original question was worded, "I am new to arts experiences." We switched the scale in order to match the other questions
N=364, 364, 367, 365*

Q14: How well can you read music?

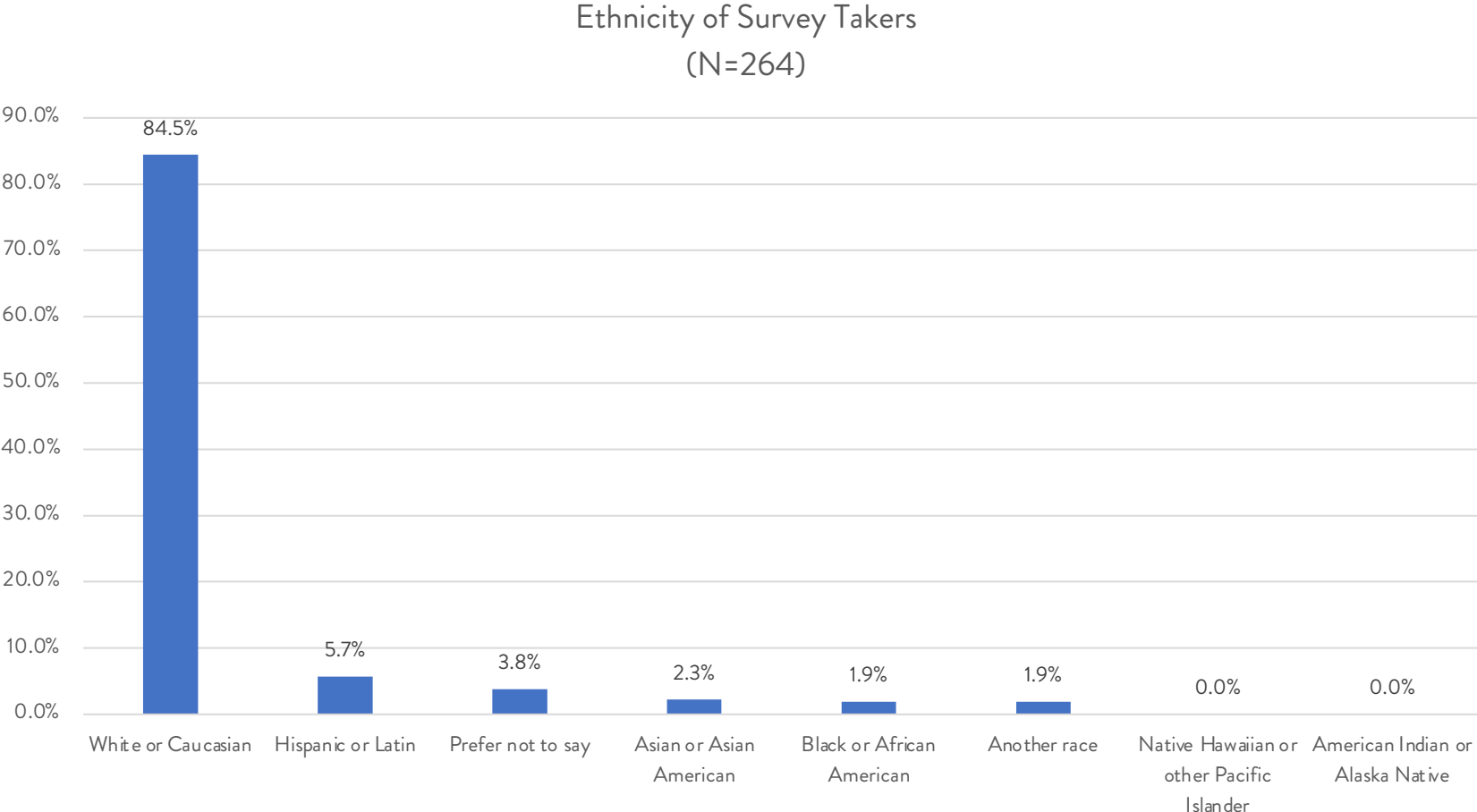


Q35: Please select up to 10 of the following values/behaviors that most reflect who you are, not who you desire to become.

Values that Most Reflect Your Patrons
(N=367)

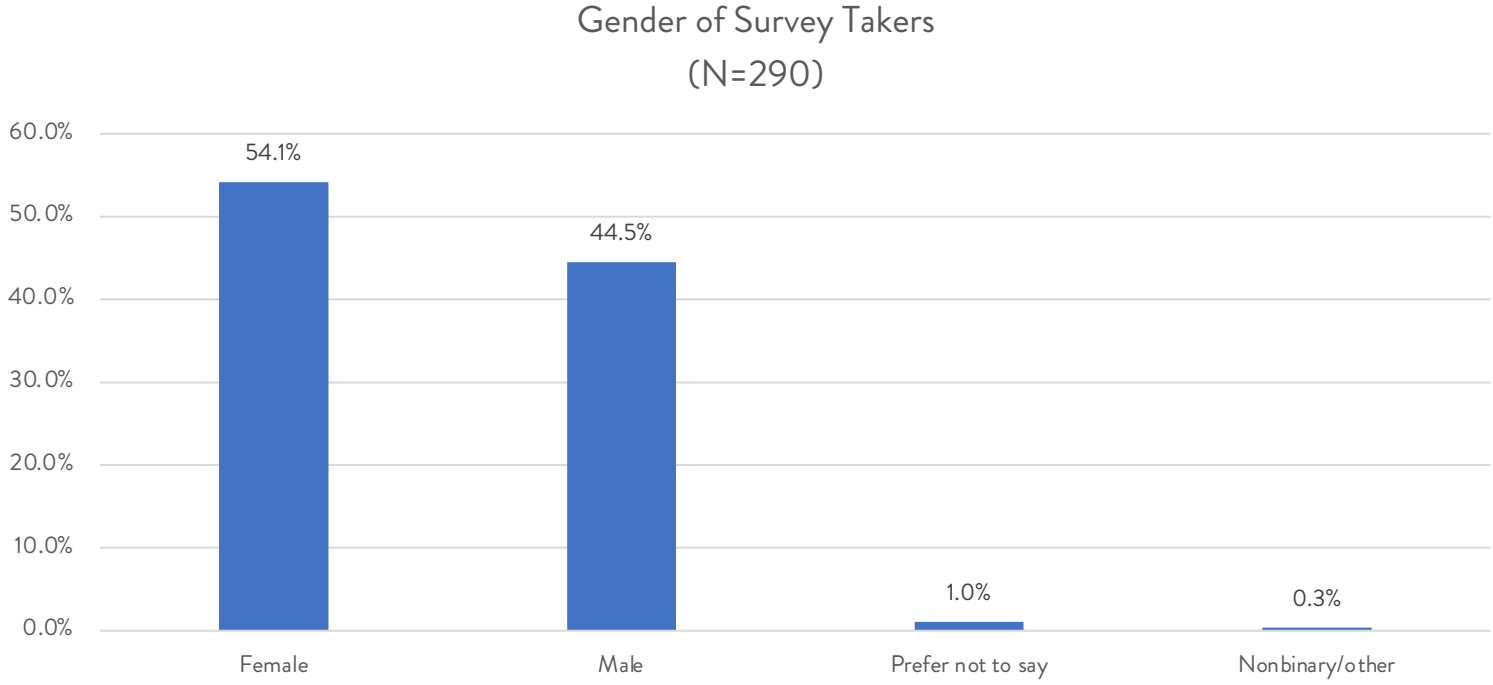


Q42*: What is your ethnicity?

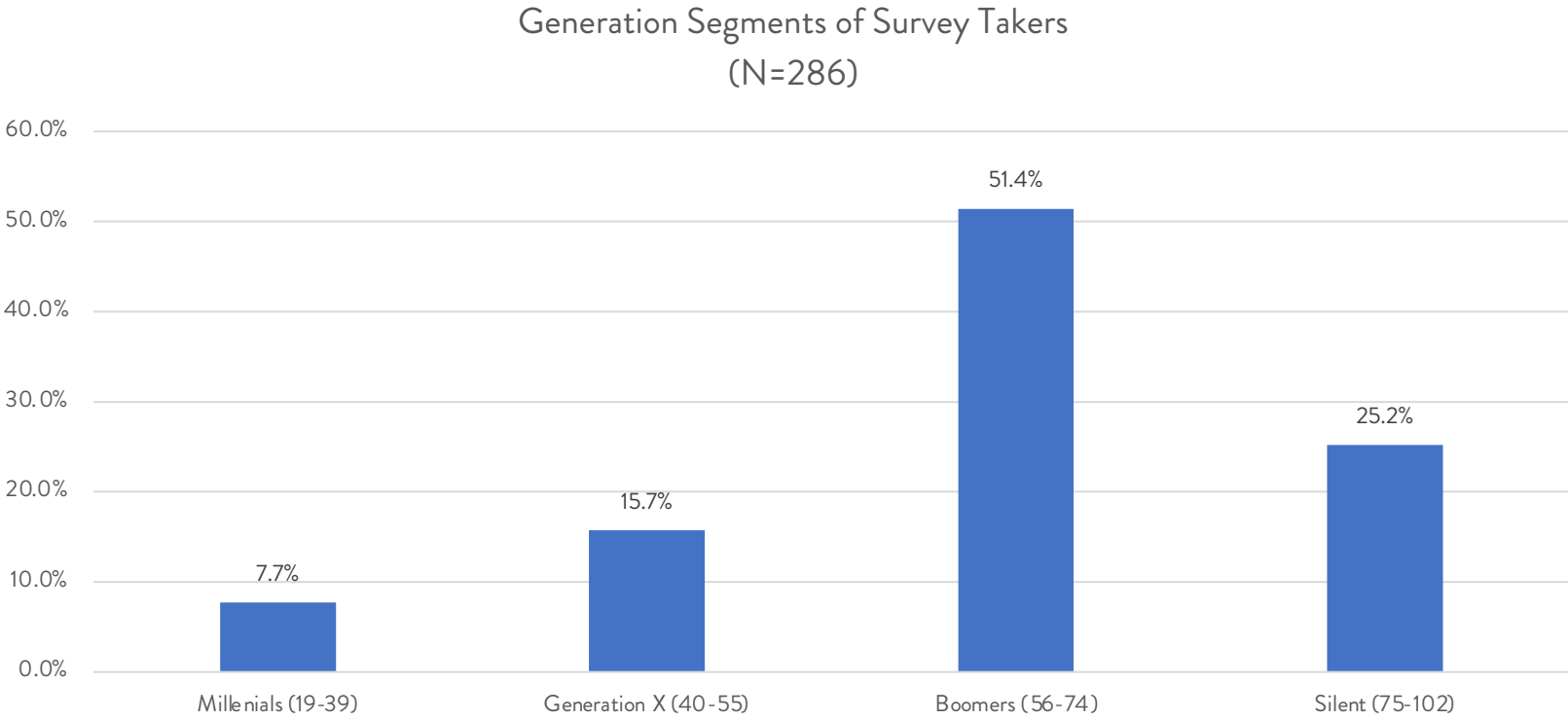


**See other write-in responses in the Excel report.*

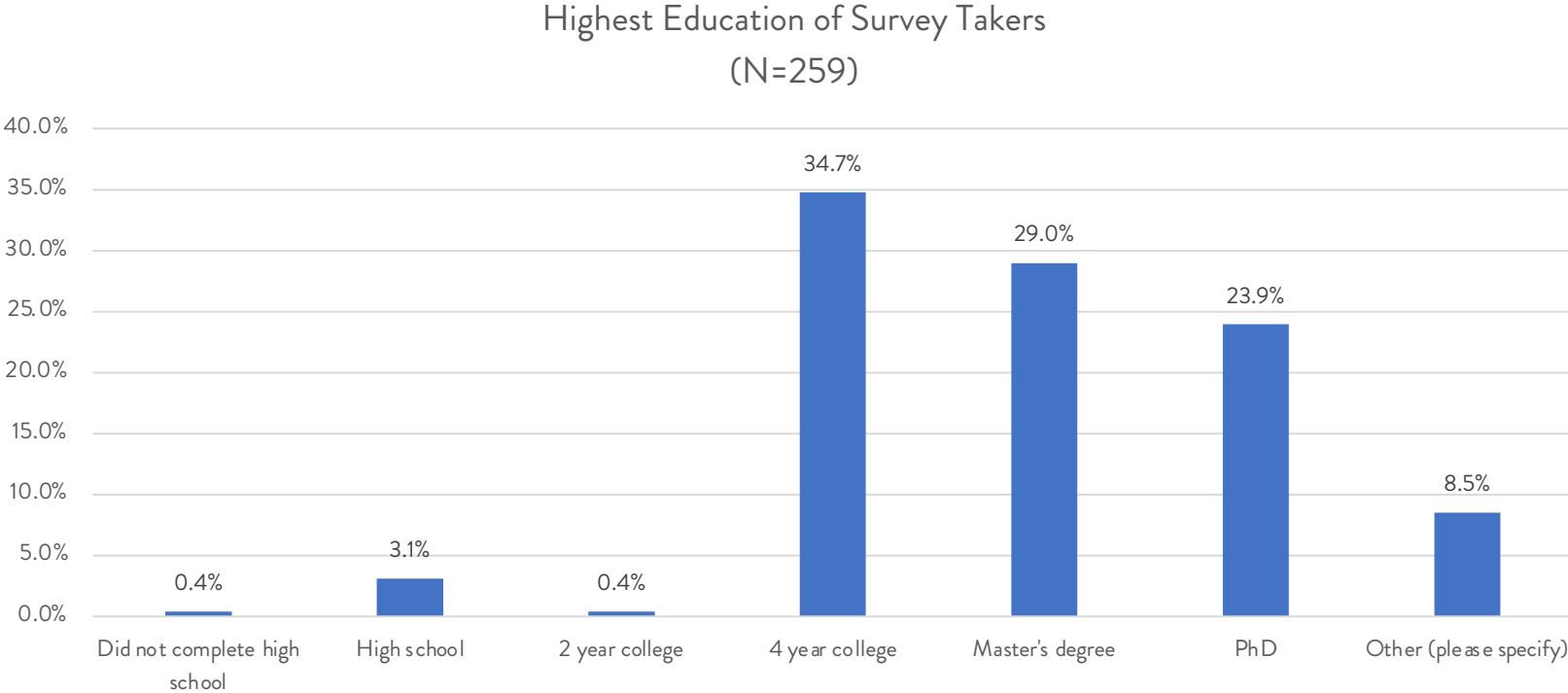
Q43: What is your gender?



Q44: What is your birth year?



Q45*: What is the highest level of formal education you have completed?



**See other write-in responses in the Excel report.*