

Article

# Preference Dimensions of the Estonian Opera-Consumer: A Comparison of the Audiences at Opera Houses and Mediated Opera Performances



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DOI: 10.1515/bsmr-2017-0013

## ABSTRACT

This article presents the results of a study in which the Estonian audiences of various stage versions of the same opera (live opera theatre performance and live-in-HD, which were shown at cinemas) during the same season were compared in a social constructivist paradigm to underline whether, and to what extent, audiences' membership, cultural consumption preferences, attitudes, expectations, values and perceptions differ or coincide, thereby revealing what audiences distinguish as the differences or similarities between live and mediated opera performances.

It presents the preference dimensions of the Estonian opera audience and provides an opportunity to discuss the issue of whether a technologically mediated cultural event offers any new opportunities for traditional opera to expand its audience, or whether it captures the audiences and creates competition for the theatres whose performances are not mediated.

The survey was carried out among audiences attending performances of *Carmen* (Georges Bizet, 1875) in the 2014/2015 season at five different venues in Estonia. The findings revealed that, due to the fact that the hierarchy of motivators for the target groups of live and live-in-HD opera differs, it does not support the idea that opera theatre will gain new audiences from cinema or vice versa.

## INTRODUCTION

'The theatre is an extremely complex organism. The complexity already begins from the fact that the artistic and economic-organisational side co-exist regularly by depending on each other, and often, also being in conflict' (Kask 1989: 13). There is no question that in today's world, culture and marketing are inevitably tied; and when a comparison is made of the organisation of the Estonia Theatre in the Soviet period and at present as the Estonian National Opera it can be seen that in almost all structural units the dominance of the marketing and administrative personnel has increased many times over (Mikkel, Pappel 1975; Pappel 2009; Kubo et al. 2008).

Opera<sup>1</sup> is one of the most aesthetically complex art forms, which 'represents international more than national culture, and stability more than change' (Saro 2009: 21); 'producing operas is an expensive and large undertaking requiring political and economic stability' (Pappel 2009: 126), and it is seen as cultivating an 'élite' audience with developed tastes or an 'aesthetic gaze' (one with high cultural capital and socio-economic status) (Bourdieu 1984 and 1993). These perceptions make the question of the actual relationship between the audience and opera even more interesting. Volker Kirchberg and Robin Kuchar (2014) have offered a succinct survey and discussion in their article about the similarities and differences of the representative national surveys and studies of cultural attendance. Pierre Bourdieu considered such structural aspects as class membership and habitus to be decisive in explaining cultural consumption behaviour (cf. Bourdieu 1982); for him classical music was the purest and most legitimate form of art and nothing was 'more classifying than legitimate works of art' (Bourdieu 1984: 16). Good examples of

individualistic explanation of cultural consumption are provided by Ulrich Beck and Elisabeth Beck-Gernsheim (1994), Bernard Lahire (2008) and Sebastian Weingartner (2013; Weingartner, Rössel 2016). According to Arthur S. Alderson, Azamat Junisbai and Isaac Heacock (2010), people's preferences for different cultural activities depend on their status and/or prestige, rather than class; 'cultural distinction is being replaced, at least partially, by cultural openness as a status marker' (Roose et al. 2012: 492) or the idea of *cultural omnivorousness*. The idea of omnivorousness has changed significantly over the years, but based generally on Richard A. Peterson's (2005) notes, it has come to mean a wide variety in cultural tastes as measured by the number of different activities in which the person engages.

A number of theorists involved in consumer-interest studies (Durvasula et al. 1993; Sproles 1983 and 1985; Sproles, Kendall 1986; Walsh et al. 2001) have argued that certain fundamental **decision-making styles** can be identified. The consumer decision-making style is defined 'as a mental orientation characterizing a consumer's approach to making choices' (Sproles, Kendall 1986). George B. Sproles and Elizabeth L. Kendall (1986) (using the consumer characteristics approach<sup>2</sup>) developed a consumer-style inventory (CSI)<sup>3</sup> consisting of eight factors, including 'perfectionism or consciousness of quality', 'brand consciousness', 'novelty and fashion consciousness', 'recreational and hedonistic shopping consciousness', 'price and value consciousness', 'impulsive or reckless consumer', 'consumer confused by excess options' and 'habitual and brand loyal consumer'. In addition to

1 Opera in the Western tradition is a staged drama set to music in its entirety, made up of vocal pieces with instrumental accompaniment, usually with orchestral overtures and interludes. In some operas the music is continuous throughout an act; in others it is broken up into discrete pieces, or 'numbers', separated either by recitative (a dramatic type of singing that approaches speech) or by spoken dialogue (Weinstock, Russano Hanning 2017).

2 Among the three approaches of Consumer Decision-Making Styles, the *consumer characteristics approach* – the other two are the *consumer typology approach* (Darden, Ashton 1974; Moschis 1976) and the *psychographics/lifestyle approach* (Lastovicka 1982, Wells 1975); the characteristics approach is considered the most powerful and explanatory since it focuses on the mental orientation of consumers in making decisions (Lysonski et al. 1996).

3 The CSI is believed to be a significant counselling device for consumer affairs specialists and a good instrument for segmentation and positioning for marketers (Lysonski et al. 1996; Sproles, Kendall 1986).

these, 'variety seeking'<sup>4</sup> was a new style identified in Gianfranco Walsh's Germany study (Walsh et al. 2001). Matthew Reason (2004) identifies two key criteria – believability and the live quality – as significant markers of quality for audiences at live performance events. In the present study, the principles for the investigation of audience preferences were borrowed from consumer-interest studies, because cultural commodification is getting considerably stronger. However, since the cultural audience cannot be described exclusively in terms of consumer surveys, it is necessary, when describing these audiences, to also take into account their specific experiences, such as inclusive membership. Therefore, the principles of consumer and audience surveys are combined in this article.

The functioning of art can be defined simply as the realisation of these values (Van Maanen 2009: 205), for example, musical tastes are extremely powerful indicators of taste patterns (Bourdieu 1984, Schulze 1992, Rössel 2004). According to the uses and gratifications theory (UGT) that focuses on audience's needs as drivers for media consumption, the audience wants to be informed or educated; to identify with the characters of the situation in a media environment; simply be entertained; to enhance social interaction; and escape from the stresses of daily life (McQuail 2010). Ben Walmsley (2011) insists that the key motivating factor for visitors is the pursuit of emotional experiences and impact. Values and preferences will also be very relevant in the decisions where no significant difference in the cost of the alternatives exists (Best, Kroneberg 2012). The reasons may be diverse: '...in addition to economic issues, social prejudices or travel difficulties, there may also be the will to attend a theatre performance by hyper-mediation, and therefore, the desire to live the commodification of the opera production itself' (Radigales 2013: 168).

Globalisation, with its profound impacts in the short and long term, has become a crucial phenomenon for any business in the world, and **consumer ethnocentrism** and **domestic brand biasness** are factors that organisations must take into account because they might work for or against their intentions. Ethnocentrism is a sociological phenomenon discovered by William G. Sumner who used it as a 'technical name for the view of things in which one's own group is the centre of everything, and all others are scaled and rated with reference to it' (Sumner 1906: 13). According to Theodor W. Adorno et al. (1950), ethnocentrism can be conceptualised as 'ethnic centeredness'. Analysing ethnocentrism together with consumer behaviour from the perspective of the economic behaviour of consumers results in 'consumer ethnocentrism (CE)'. In a broader sense, highly ethnocentric consumers in different countries evaluate their inherent products as superior to that of other nations; they call into question the appropriateness of preferring foreign products over domestic products (Shimp, Sharma 1987); perceive their national values and symbols as sources of pride and show a tendency to buy local products rather than foreign ones in order to support their own country (Bandara 2014) and to achieve this, for example, they visit the exhibitions of artists from their home country and artists from culturally similar countries (Kottasz, Bennett 2005). As there is no universally accepted scale to measure local brand biasness (Vida et al. 2008), it is also quite obvious that every opera visitor has made a decision to spend a night at the opera, for a variety of reasons.

The aim of this survey is to discover the prevailing reasons audiences have for choosing to go to the opera and which decision-making tendencies are predominant in the two venues. As a next step, those results should lead to a grounded response to the issue of whether technologically mediated cultural events offer new opportunities for traditional opera theatres to find new audiences, or they actually capture existing audiences and create competition

4 *Variety seeking* clients are likely to switch brands, even if their current brands satisfy their needs (Walsh et al. 2001: 128).

for theatres whose performances are not mediated. In order to answer that question, it is important to find out whether the target groups for live and live-in-HD opera overlap. If so, it is reasonable to expect that people with the same interests are willing to visit both places, instead of talking about sharing audiences, or capturing them. But if the hierarchy of motivators differs, then the expectations of each audience differ to the extent that makes each audience prefer a specific location. Therefore, it would be expedient to provide the reasons that are presented on each side, those that are presented equally on both sides, or are prevalent on only one side (for instance, in theatres).

Streamed theatre (i.e. viewing live or recorded theatre performances in the cinema, on TV, outdoor screens or on official online channels) has been seen as a great way to reach a wider audience (LiveAnalytics 2013: 27), and presumably to include the younger generations (Radigales 2013: 166). And, in addition, to limit the decline of opera audiences (NEA 2015) by meeting the expectation of increasingly varied audiences, and benefiting theatres whose productions are mediated, thereby increasing fame, recognition and profits. However, the other side of the coin is the pressure exerted by streamed opera venues on the troupes with fewer resources that are oriented towards local audiences, since they may suffer from an unfair disadvantage. In fact, some have criticised the transformation of this art form into a form of mass entertainment (Radigales 2013: 160) due to the risk that it strips the opera of its aura of mystery and its intensely human drama. Some have debated the role of opera as pop culture (Storey 2002, Zelechow 1991). However, these new tools also create new inequalities, since some cultural productions 'travel' more easily than others (Rohn 2010; Gerhards, Rössel 1999; Moretti 2001), and some places, countries and cultures seem to be more open to cultural imports than others (Heilbron 1995). The process of cultural globalisation certainly cannot be assessed independently since by adding

to the process of cultural convergence, it may also lead to resistance against non-mainstream cultures, and the increase of cultural patriotism.

Technology has removed a number of obstacles thereby ensuring that opera performances are more accessible to the world – for example, the Metropolitan Opera ('the Met') exports its productions to many countries using the medium of cinematic projections in order to increase audience numbers through 'more new productions, more aggressive marketing, and "live" high-def broadcasts' (Munk 2010). Audiences are attracted to opera performances hosted in movie theatres by special features, such as interviews with the artists during live performances and 'behind the scenes' experts and documentaries<sup>5</sup>, which are generally not inherent to or available in opera houses. These added elements take opera performance to a very different level and blur certain genre boundaries linked to the topic. In turn, this new approach creates a new constituency for those who consume art forms through channels that differ from traditional hosts. Thus, opera has undergone a metamorphosis that has transformed its existence 'as a performing art genre into a visual communication medium' (Radigales 2013: 163). As Matthew Causey has emphasised, 'it would be a mistake to imagine that what we experience in the theatre and recorded media is the same experience' (Causey 1999: 384). Also, the most interesting finding of the ETO's survey was that many of the respondents feel that opera in the cinema is actually a different art form (Service 2014).

Some studies point out that cinematic opera performances act to diversify the options provided to audiences rather than attracting new audiences, as 'theatre attendees are most likely to also attend the cinema' (LiveAnalytics 2013: 4). Therefore, the opinion leaders who are worried about the sustainability of the opera genre are faced with a dilemma (Steichen 2011: 450–451),

5 Peter Gelb: 'It's more like a documentary. Because we're following the action, we're not creating the action for the cameras' (Storm 2014).

which in a way hinders their working towards a common goal.

As a result, the future of opera in the contemporary world of mass popular culture, digital technology and the global financial crisis is a highly charged topic, not only for music lovers, but also for cultural critics and scientists.

## METHOD OF STUDY

This survey focuses on Estonian opera audiences, with Estonian culture considered to be an exemplary case of traditional cultural values being combined with a high level of technological awareness (A. A. K. 2013, Statistics Estonia 2015). When it comes to the number of people who regularly frequent theatres, Estonia, which is a small nation, is ranked among the top three European countries (European Commission 2013), with more than a million theatre visits annually (ETA 2015a). Thirty percent of Estonians are characterised as actively consuming culture (while the corresponding percentage in the EU is 18%). Also, while cinema attendance is remarkably higher than theatre and concert attendance elsewhere, according to the European averages, Estonian citizens attended significantly more concerts (54% in Estonia and 35% of Europeans) and theatre performances (45% and 28% respectively) (Reedi 2014). Cinema attendance was 46% in Estonia and 52% across Europeans (Reedi 2014).

According to statistics recently published on operabase.com, the total number of opera productions in Estonia – 131 per one million citizens in 2013/2014 – places Estonia in second place after Austria, surpassing Germany and Switzerland who are in third place. For Estonians, singing and music are not just ways of communicating and performing, but are also tools for promoting culture, national identity and heritage conservation (Bowler 2014). True to form, opera has a long history in Estonia, with the first opera – Johann Valentin Meder's (1649–1719) *The Decisive Argenia* (*Die beständige Argenia*) – being staged in Tallinn, the capital of Estonia, in 1680 (Siitan 1999).

There are several theatrical institutions in Estonia which regularly produce operas<sup>6</sup> starring local artists. The National Opera Estonia is located in North Estonia, in the capital city, and the Vanemuine Theatre is located in the university city of Tartu, in South Estonia. High-quality cinemas can also be found in both cities.

In order to establish a stage for debate on the following issues, this study asked how and to what extent the audiences – the target groups for mediated and live opera performances – differ or overlap, and whether, and to what extent, those audiences' preferences, expectations,<sup>7</sup> loyalty,<sup>8</sup> brand trust<sup>9</sup> and values differ or overlap. Does the development of digital technology, which allows operas to be distributed and screened in various environments or staged in virtual environments, change or transform the audience's experiences and nature of their expectations? Do audiences find virtual operas equally engaging? Do audiences respond to digital opera broadcasts across distributed sites in the same way as they view watching movies?

In order to get the answers to those questions, a researcher-guided survey was conducted in five venues (see Table 1). The survey was conducted in Estonian;

6 In 2014, the Estonian National Opera had 13 operas in its repertoire (three of them new productions) and 94 opera performances were given; the Vanemuine Theatre had five operas in repertoire (one of them a new production), 29 performances were given (see ETA 2015b and 2015c).

7 **Customer expectation** is formed by many uncontrollable factors, including previous experience with other companies, and their advertising, the customers' psychological condition at the time of service delivery, customer background and values, and the images of the purchased product (Davidow, Uttal 1989).

8 **Loyalty** – Anthea Stratigos (1999) defines it as a kind of commitment that is similar to a resistance to change. Loyal customers are also more tolerant when it comes to defects and flaws and they will continue to use the provided products since the business fulfils their personal needs (Stratigos 1999, Reichheld 2003). Christian Grönroos (2000) has declared that paying attention to customer feedback helps to build a relationship between the customer and a business and that will eventually lead to commitment.

9 **Brand trust** is the consumer's 'willingness to rely on the ability of the brand to perform its stated function' (Chaudhuri, Holbrook 2001: 82). At least two mechanisms help to increase brand trust: 1) repeated interactions and long-term relationships (Holmes 1991) and 2) information sharing and dissemination (Ba 2001; Lewicki, Bunker 1995).



therefore, foreign viewers were not included. The PAPI (paper-and-pencil) technique was integrated with face-to-face interviews, based on the recommendations in the handbook for UNESCO's Framework for Cultural Statistics (FCS) in regard to 'combining quantitative and qualitative approaches, bringing measurement and understanding together' (Bollo et al. 2012: 12). In order to obtain a complete picture of the audience(s), it was important to include the largest possible number of visitors. To achieve this, everyone entering the hall for an operatic performance was personally invited by an interviewer to complete a PAPI questionnaire (thereby making it harder to refuse). The technique justified itself as the tools could be transported, distributed and collected easily; it did not require any specific (e.g. computer) skills; each guest had the opportunity to fill in the questionnaire right away since the tools were available on-site; and it also ensured that the viewers' impressions were fresh. Also as people arrived and saw many others participating, they became interested and wished to participate. The subject sparked such interest that most respondents volunteered to add personal comments.

The questionnaire could be completed either before the performance, during the break or after the performance. The same questionnaire was provided to all the audiences that participated in the research. It included 27 questions, some of which were multiple-choice questions and some included freeform sections, where the respondents could add personal and qualitative information. The qualitative data added relevance and helped to obtain an overview of how and why people choose to engage with the arts, their motivations for doing so and the barriers that may prevent them from engaging with the arts (Keaney 2008: 100).

To explore the differing expectations of these audiences and discover how tuned into the topics related to the opera they were, the protocol covered the following social and personal dimensions: the respondents' theatre attendance

habits – preferences related to genre (music theatre, theatre, dance productions, other); visiting frequency for each genre separately and factors that affect visiting frequency; preferences related to location and the reasoning if possible; socio-demographic data including TV channel preferences, whether the viewers defined themselves as opera connoisseurs or not, and educational backgrounds (music school, private lessons, surrounded by musicians, etc.); expectations for mediated/unmediated performances; whether the respondent relates some aspects other than the mediated/unmediated performance; attendance habits – dress code, companions, planning. And finally, what audiences distinguish and see as the similarities and differences between 'live' and mediated opera performances.

Altogether, 427 completed questionnaires (which represented 26% of the entire audience which attended the performances during those days) were received, and the entire survey sample is based on adults (aged 18 or over). Only the main results are included in this article. The audiences were divided into two sets based on venue (theatre or cinema). The responses of the cinema and theatre audiences were compared using a two-tailed Spearman's rank correlation test, which was used for the answers to the questions which allowed for only one possible answer. The answers were coded and a total of 150 variables were defined, which include dichotomous and ordered variables. The statistical analysis and calculations were done using SPSS 22 software. Spearman's rank correlation coefficient was significant at the 0.01 level in 30 cases of 36. In this article, the collected qualitative data is used only as illustrative material.

The questionnaire allowed for the different preference dimensions of opera connoisseurs and random visitors to be distinguished. Four preference dimensions were categorised in relation to **context** (festive atmosphere, sense of being personally invited, exciting to observe, uniqueness of performance; influence of the dress code,

	Live performances		Mediated performances		
Performance location	Estonian National Opera	Vanemuine Theatre Hall 1 + A. Le Coq Suite	Forum Cinemas	Forum Cinemas	Forum Cinemas
City	Tallinn	Tartu	Tallinn	Tallinn	Tallinn
Date	10 January 2015	23 April 2015	1 November 2014	2 November 2014	1 November 2014
Number of seats in the hall	708	696	553	112	150
Hall occupancy	689 (97%)	593 (85%)	216 (39%)	91 (81%)	85 (57%)
Submitted questionnaires	137 (20%)	121 (20%)	58 (27%)	57 (63%)	54 (64%)

TABLE 1. Information about the survey conducted for the research.



etc. were categorised); the **cast and audience (human) factor** – (familiar casts, professional artists, renowned director, professional orchestra, cultivated audience, etc.), and **technological mediation and proximity** (opportunity for close-ups, sound quality, lightning effects, etc.). In a way these dimensions of the consumer-interest study preferences are comparable to the consumer decision-making styles, the latter is broadened by additional factors that are related to being a member of a culture-consuming audience, for instance, the sense of joint participation. In the results section, the differences between the theatre and cinema audiences have been highlighted.

## RESULTS AND FINDINGS

Several surveys have pointed out that opera attendance patterns are related to age and education – opera attendance is most popular among over 55-year-olds (Statistics New Zealand 2003, Guider 2007, Ministry of Culture 2011, NEA 2015, Toronto Art Stats 2015). In the current sample, the average age of the cinemagoers was 53, while the average age of the theatre audience was 46 years. Visitors between the ages of 61 and 70 years most often described themselves as opera fans, while most of the respondents who indicated that they had no particular interest in opera, despite their presence at a particular performance, were under 30.

If we compare the gender structure of opera guests in Estonia to other geographic areas, the female representation in Estonia is significant. Twelve percent of cinema respondents were male and 88% female (in the theatre, 19% male and 79% female). In other countries, the genders are more equally balanced, e.g. in the Czech Republic, the audience of MET's Live HD cinema broadcast was 71% female and 29% male; in North America, the audiences are 53% female and 47% male (Tahal, Stríteský 2016; Van Eeden 2011).

Many opera guests have a background in musical education and 75% of the respondents in current sample had an

undergraduate or graduate degree in music. Fourteen percent of the cinema respondents said they had a higher music education (a BA or higher) compared with only 10% of the theatre respondents).

If we take into account the frequency of attendance at performances, it appears that the respondents from cinema and theatre differ significantly. In the current sample, 34% of the cinema visitors said they went to theatre performances more than ten times in the last year; among the theatre visitors only a tenth of the visitors indicated the same rate of frequency. The interest in music is especially high among the cinema guests. Twenty-two percent of the theatre respondents indicated that they rarely went to musical performances, while only 9% of the cinema respondents said so. This allows one to claim that decision styles for cinema and theatre audiences when attending opera performances differ significantly.

### *Opera theatre audience stood out for their loyalty to own opera house(s)*

The audiences at Estonian opera theatres are in great part loyal to the local opera companies, and only 28% of theatre (and 56% of cinema) respondents indicate that they would prefer more guest soloists and new names. Many of the theatre visitors indicated that they do not favour the employment of guest soloists as they consider it logical that Estonian opera houses take care of Estonian opera singers. Forty-two percent of the theatre (and 21% of the cinema) respondents stated that they were pleased with the Estonian soloists. And 50% of the theatre (and 29% of the cinema) respondents noted that they were satisfied with the opera repertoire offered by Estonian theatres. One-fifth of the theatre respondents said they would favour even more active involvement by Estonian soloists in the theatres, and some even commented that it should be a priority, justifying their argument by saying that Estonia has paid for the professional education of the Estonian soloists and they are a vital part of our cultural heritage.

Going to the opera is not only a question of enjoying a fine cultural experience. Especially in the case of Estonian theatre audiences, one can also talk about the dimension of the attendance and the confirmation of cultural identity. Estonian soloists are seen as the primary promoters of Estonian culture by theatre audiences. Attracting such patriotic-minded visitors to cinema broadcasts would probably be quite a challenge for the cinemas.

### ***The Met Opera HD Live audience yearns for rare productions***

The members of Estonian target groups who attended the Met's broadcast at Forum Cinemas had a rather more global cultural orientation. They actively keep track of the cinema schedule via the internet and search for information related to opera events independently, since most of the cinemas' advertising is focused on movies with larger target audiences. People with a deep interest in opera tend to search for performances that are rarely broadcast, or have never been staged, in Estonia and many of them find their way to the Met's broadcasts.

According to the latest surveys in Estonia, there is a general tendency to prefer works that require immersion on the part of the audience and are avant-garde in nature (Kommel 2008). Both qualitative and quantitative results revealed that Estonian opera fans<sup>10</sup> are eager to attend operas that are not necessarily box office hits, as they value the opportunity to broaden their knowledge of the genre through an extensive repertoire (see Figure 1). Several respondents explained that Estonian theatres frequently present classical operas (such as *Carmen* [Georges Bizet, 1875]) that evoke the

compulsory literature studied at school, and in these cases, only a very interesting production or an especially attractive cast (guest soloists, someone you know on the stage, etc.) will attract an audience.

The theatre and cinema respondents pointed out that they were bothered by overlapping productions in the repertoires of the Estonian National Opera and the Vanemuine Theatre. The respondents thought that local opera theatres should take into account that since the distances in Estonia are relatively short, and easily traversed, opera connoisseurs clearly visit both theatres.<sup>11</sup>

Although the productions, casts and other factors may differ quite a bit in different productions of the same work, opera connoisseurs generally choose one (very often the nearest opera house in order to save on resources, including money and time; and very few go to see both productions). Therefore, this constitutes a loss for both opera houses and it would probably make more sense to coordinate the repertoires in order to create a network of performances to attract opera audiences from all over Estonia.

Furthermore, although the Estonian opera houses often hire guest soloists for more important roles, those who are seeking novelty still tend to choose the Met's mediated productions, which are highly valued since the Metropolitan Opera is world famous for its soloists, its international team and as a brand name. Many respondents also believed that the Met has better sound quality, orchestral resonance and directors, not to mention the excellence of the artistic company, including the soloists (see Table 2).

The cinema audiences' contacts with opera are not limited to broadcast performances at the cinema, since these people tend to search for other information sources in order to stay updated with developments in the opera world, such as special TV channels, the internet and other

10 In his study, Claudio E. Benzecry has described opera fans as fanatical devotees, aiming to dissect the social and psychological components of a passionate devotion to the opera (Benzecry 2011). In this article, it must be considered that, in case of the audience survey, the questionnaire does not contain information about any concept, making the feedback more valuable since it also provides information about how the respondents understand the given concepts, and whether or not they see themselves as falling into these categories. Therefore, in current context it is more justified to consider opera fans as people who are the most devoted and long-standing audience members.

11 The distances between Tallinn and other Estonian major cities are Jõhvi 165 km, Tartu 186 km, Pärnu 128 km, Kuressaare 218 km (Statistics Estonia 2016).

available sources (see Figure 2). The well-known opera channel Mezzo is watched by 68% of the cinema audience and only 30% of the theatre audience. On the other hand, just as many theatregoers as cinema goers watch ETV, the Estonia's public service TV station (ETV2, which appears on the chart below, is the second programme of the Estonian PSB), despite the fact that opera broadcasts on this channel are quite rare. Amongst the Russian speaking audience, the Russian cultural channel Kultura is also popular (in addition to Mezzo and Arte).

Twenty-two percent of the cinema respondents (and 10% of the theatre respondents) said that in order to experience 'real' quality opera performances they prefer to visit theatres abroad (Europe and Russia were mentioned) or attend the Met's performances at the cinema (76% of the cinema respondents; 6% of the theatre respondents), while searching for opera-related information on the internet was also mentioned.

#### ***Members of the mediated opera audiences plan their visits further in advance***

The results of the survey indicated that the cinema audiences are far more purposeful in their attendance at performances and plan their visits further in advance than theatre audiences. Eighty-five percent of the cinema respondents (76% of the theatre respondents) planned their visit at least two or more weeks in advance, and only 4% (10% for theatre-goers) bought their tickets on impulse. This tendency to plan their attendance far in advance can be explained by the limited number of performance broadcasts per cinema, as there are usually only one or two broadcasts of each opera performance, and most of the tickets are sold out weeks before the broadcast is screened.

There are also several reasons for procuring theatre tickets early, as theatres arrange marketing campaigns that prompt patrons to buy tickets several months in advance at very good prices. Purchasing theatre tickets in advance is also motivated

by the operagoers' desire to book the best seats (a factor that does not play a significant role in cinematic productions<sup>12</sup>). There is also a fear of the tickets selling out<sup>13</sup> as audiences have seen that the tickets for the best productions may often be sold out, even several months in advance (Sibrits 2014). This problem was also noted in the additional comments by the respondents and in the interviews. The survey revealed that 68% of the attending operas at the theatre would like to attend performances more often.

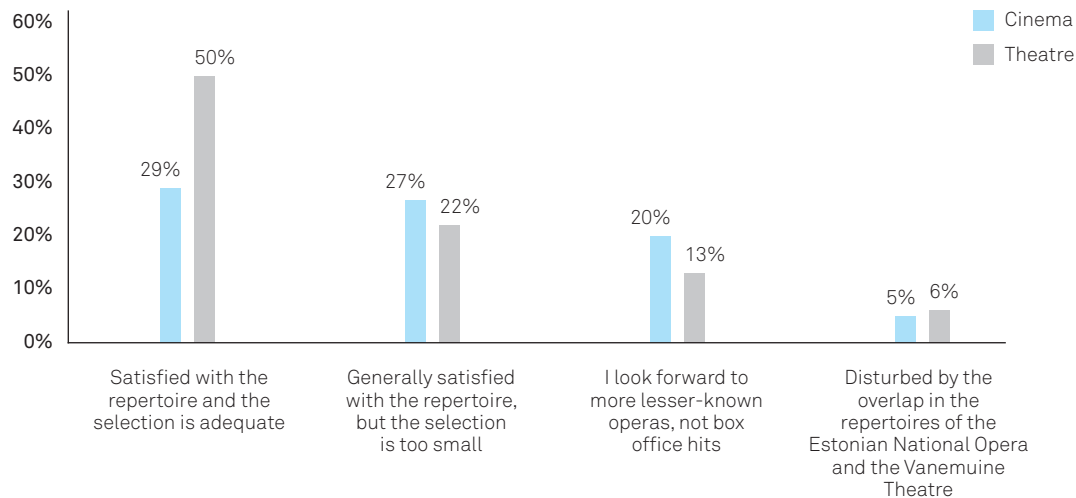
#### ***Cinema audience with deeply rooted interests***

The survey shows that the cinema and theatre audiences' opinions can be diametrically opposed regarding the advantages that mediated/unmediated productions offer. Each side gave the benefits of their preferred version higher ratings (see Figures 3–5). The main tendencies revealed that the cinema audiences appreciated the factors related to the experience of world-class opera performances, while the theatre audience appreciated the live-performance environment and atmosphere, as well as Estonian own theatre and its efforts to keep the opera genre in Estonia alive and in the repertoires.

The tendencies related to the human factor (see Figure 3) show that the members of the theatre audience are quite well-acquainted with the cast members of their local theatre and also appreciate the local orchestra. They sincerely believe that they are in good company when it comes to their fellow operagoers. The members of the cinema audience consider everything related to the professionalism of the cast to be of utmost importance. It should also be noted that the members of the cinema audience were much more appreciative of the theatre

12 In cinemas, the seats are arranged on a sloped floor, so the sightlines are generally quite good. Cinemas also have consistent sound systems, which eliminate the problem of a singer's voice not reaching the back rows, which may occur at the theatre.

13 The Met's *Carmen* was not totally sold out in Tallinn, as the opera was broadcasted in two halls simultaneously, and in addition, the theatre had already added two re-transmission broadcasts to the schedule so enthusiasts had already taken this into account.



	Audiences in cinema (n=169)	Audiences in theatre (n=258)
Excellent soloists can be seen in the cinema	73	20
Excellent soloists can be seen in the local opera houses	4	43
Orchestra with perfect sound can be heard in the cinema	47	9
Orchestra with perfect sound can be heard in the theatre	15	61
Seeing the performers up close is possible in the cinema	84	20
Seeing the performers up close is possible in the theatre	2	63

*Note: All differences are significant at the 0.01 level.*

**FIGURE 1. Satisfaction with the opera repertoire of the Estonian National Opera and Vanemuine Theatre.**  
**TABLE 2. Assessments of the opera (%).**

experience than the theatregoers were of the cinema.

Considering the aspects of technological mediation, the theatre audience appreciated the proximity of the performers and the possibility to actually be in the same room with them. However, the cinema respondents indicated that they have even greater proximity, since interviews with cast members take place during intermission, which provide a very exclusive experience (see Figure 4). And it is also important that the theatre respondents place greater value than the cinema audience on the possibility to decide who and what to observe during the performance – some respondents pointed out the advantage of using opera glasses, while in the cinema one is dependent on the shot (close-up, long shot, etc.) that is being transmitted.

For the theatre audience, contextual factors (see Figure 5) are also quite relevant, e.g. a festive atmosphere and prestigious place, excitement of watching real people act – the performance is born right in the moment, making it unique. People at the cinema appreciated the possibility to observe a world-class performance without feeling the need to worry about anything trivial like a dress code, etc.

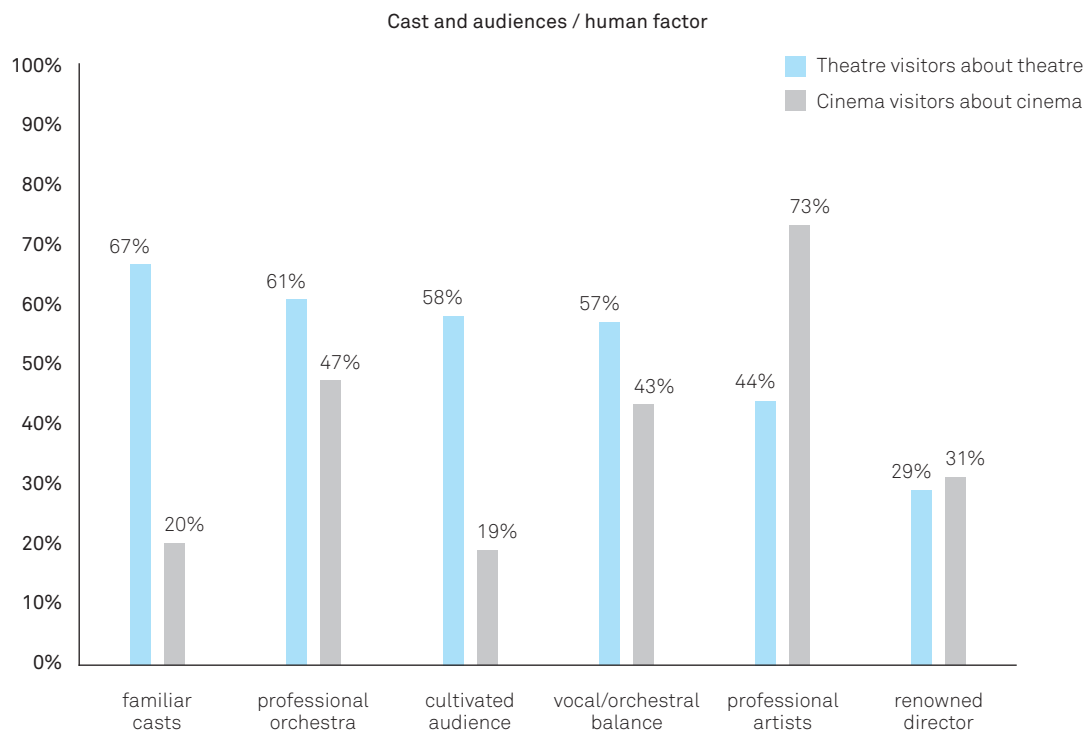
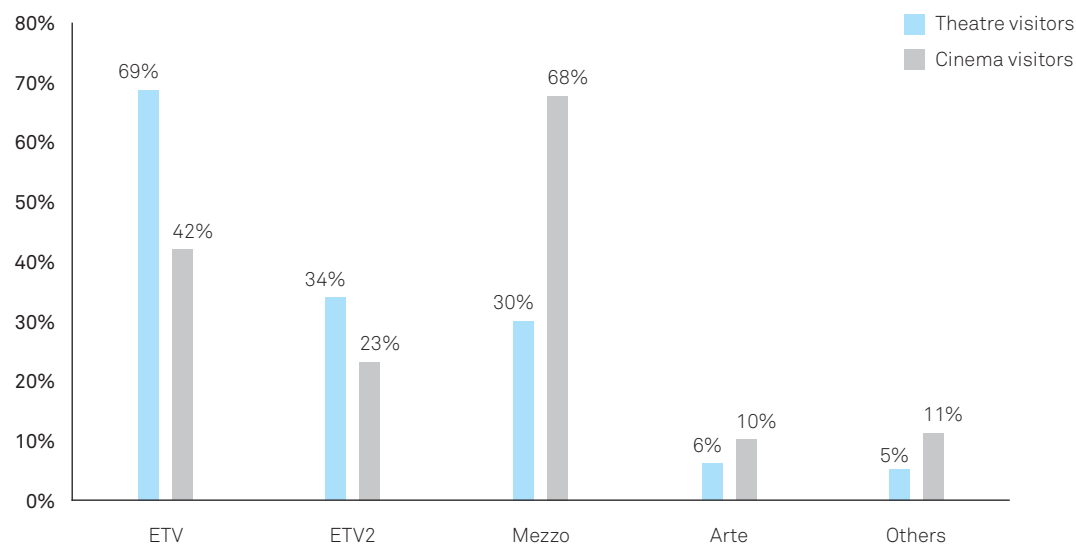
A summary of the responses provided an overview of why a specific target group makes the choice to attend a cinema or theatre production, indicating a difference in the hierarchy of motivators. The factors that attracted respondents to attend mediated opera productions in cinema included: being an opera fan (79% of respondents), the cast members (25%), appealing synopsis (10%), invited to come along (9%) and other motivations (8%). The ranking of the theatre visitors' motivators was different, and included: being an opera fan (31%), attending for other reasons (30%), not normally attending opera productions (17%), the cast members (13%) and invited to attend by others (13%).

The majority of the cinema respondents attended the screened performances because they were interested in opera, enjoyed following cast members in different

roles, and liked to keep up with world-famous names as well as the local opera scene. At the same time, 18% of theatre audiences did not make the effort to follow soloists or the casts in Estonian theatres, or their local theatres, and admitted watching an opera simply for enjoyment and amusement. The cinema audience, in contrast, was very deeply interested in all kinds of information about the cast members and 62% of respondents pointed out that they appreciated the interviews with cast members. Since these were screened during the intermissions, they usually did not leave the hall, despite the fact that this cut into the time to relax between the acts. The main response of the cinema attendees was that The Met's Live in HD broadcasts provide an opportunity 'to see performances they would otherwise not see because of a lack of resources, like distance/time/money'.

The results suggest that the cinema audience is more flexible and more open to innovation because they just want to enjoy as good an opera experience as possible. In the cinema, 76% of respondents had visited at least one unmediated opera performance during the last 12 months. They visit performances frequently to keep track of everything that is going in the opera scene (including locally), so that they can compare and confirm where the best performances are taking place, and make informed choices as to what they like most. Some of the cinemagoers, and also theatregoers, pointed out that another reason for attending performances at the local opera theatre is when relatives or acquaintances are performing in the cast.

Indicators of a deep interest in opera were much lower among the theatre audiences. Only few of them had experienced the Met's mediated opera broadcasts or had regularly visited these cinematic performances: 14% of theatre audiences had visited at least one opera performance during the last 12 months. Therefore, opera fans are represented in both the mediated and the unmediated opera audiences, but the people with a more profound interest in opera tend to attend the mediated performances.



**FIGURE 2. TV channel preferences of theatre and cinema audiences for watching opera on TV.**  
**FIGURE 3. Attitudes about the theatre and cinema expressed by the audiences in these venues (%).**

## CONCLUSIONS AND DISCUSSION

Audience feedback is a vital tool for developing culture, as culture can change only when the possibility of giving feedback exists. The present survey involved the audience in order to provide a comparison of the audiences of live opera performances at traditional theatres and those who attend the mediated opera broadcasts, which employ the visual communication supported at the cinema. It is quite often speculated that successfully attracting new audiences to screened opera performances might attract that audience to unmediated opera performances to discover the roots of opera, and thereby the two would merge and increase the overall opera audience. The current study was conducted thanks to the unique opportunity of having the world-famous opera *Carmen* being presented concurrently in the repertoire of both Estonian opera theatres and in HD cinemas. The audience members were asked to respond in order to ascertain whether, and to what extent, the expectations, values and perceptions of the two audiences differ or overlap and what they perceive as being similar and different in the live and mediated opera performances.

The findings revealed that, because the hierarchy of motivators of the live and live-in-HD target groups differ, the mediated and unmediated opera performances each fulfil different expectations. Therefore, there is little evidence that theatres will gain new attendees from the cinema and vice versa, since their target groups do not coincide to a great degree. The theatre audience appreciates the theatre performances because of the contextual and proximity – important factors include the festive atmosphere, prestigious place, authentic experiences, proximity of the cast and the other audience members. On the other hand, the cinema visitors focus on the technological quality and professional performance of the mediated events. They appreciate the fact that in the cinema the context does not require any prescribing correctness or dress code. Additionally, the technology enables a close mediated

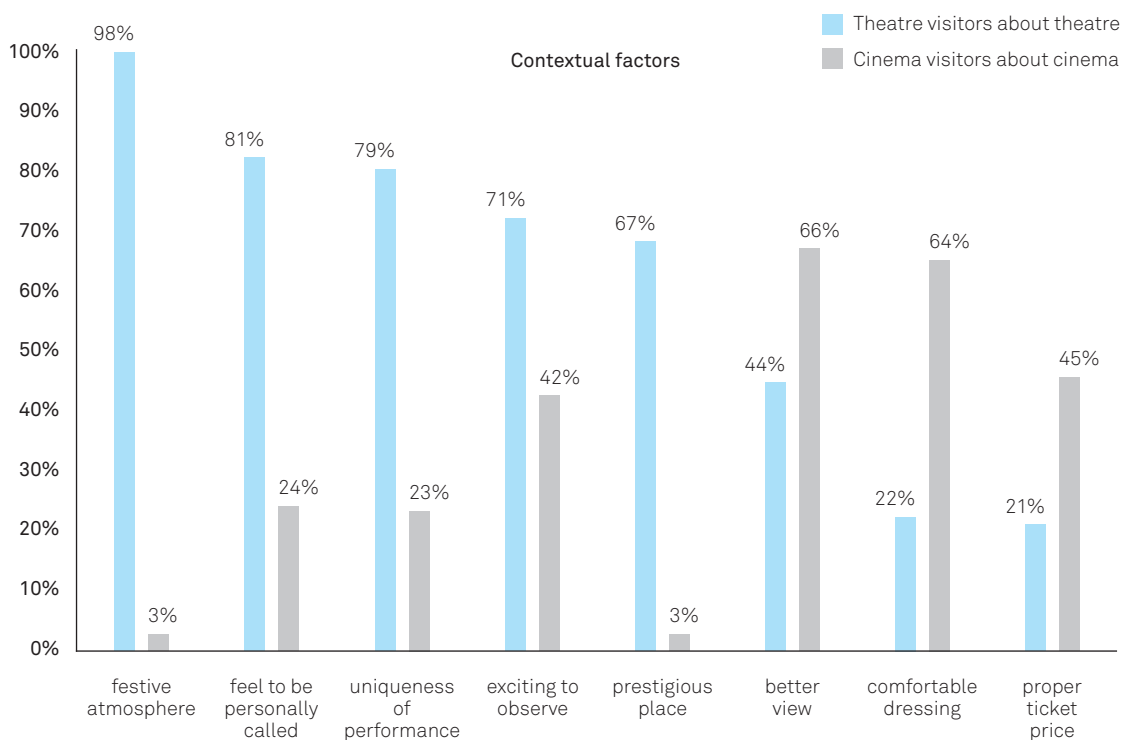
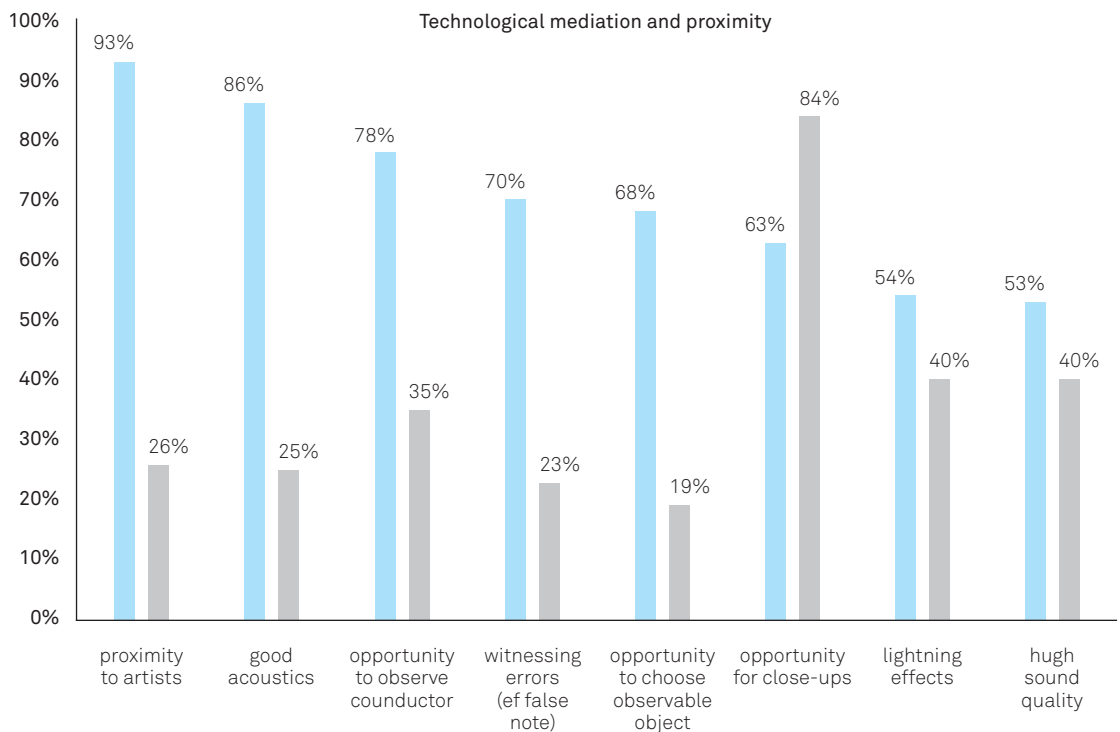
contact to be established with the performers – and it is not true in the theatres.

The audience for unmediated opera is polarised: some have a profound passion for opera while others frequent the opera in order to participate in high-end social events. A large number of the theatre respondents do not keep track of the soloists performing at the Estonian theatres and generally paid little attention to the names of the soloists or the cast, and attended performances for entertainment. Half of the theatre audience had not attended any opera broadcasts hosted by cinemas and most of them lacked information about this possibility. Also, they did not usually watch opera-specific TV channels. They thought that the theatre experience offers more advantages in every respect – it has broader opportunities related to contextual, human and proximity factors.

The current survey echoed the results of several previous surveys by pointing out that opera audiences tend to have a strong educational background and, therefore, are more sophisticated than the average audience (NEA 2015). This educational rating is even higher among the cinema audiences.

The feedback in the current survey provided by the theatre respondents indicates that a large proportion of the visitors is ethnocentric and has a domestic brand bias. They are very loyal to the Estonian opera houses, which contribute to a rather conservative national identity. These people have faith in and love for their theatre; their belief in the local artists is so strong and trusting that many of them are not interested in the novelty of discovering new media. They prefer to stick to their traditions and habits, which conform to the customer loyalty patterns described by several of the authors cited here (Stratigos 1999, Reichheld 2003). Other factors worth mentioning included habits, nostalgia, patriotic feelings, the possibility of supporting one's own theatre, the environment, entertainment and participation as a matter of prestige. Some attend to see artists from their own country, in addition to the problem of overcoming the linguistic obstacles caused





**FIGURE 4. Aspects that the cinema and theatre audience related to cinema or to theatre (%).**

**FIGURE 5. Aspects that cinema and theatre audience related to cinema or to theatre (%).**

by surtitles.<sup>14</sup> Considering the specifics of operatic singing and the resulting limitations in pronunciation, it is no wonder that sometimes audiences even need surtitles in the mother tongue to understand the words (Stewart 2015, Tommasini 2008). The surtitles in the theatres are usually in Estonian, while in the cinema, they are most often in English or another foreign language. Therefore, it is understandable why cinema audiences are more educated – the foreign-language surtitles mostly attract opera connoisseurs who speaks foreign languages, and ‘at the individual audience level, competence, the ability to speak or at least understand the language of the broadcast is an important ingredient in audiences’ selection’ (Straubhaar 2003: 82). So, in a way that is also why older audiences remain loyal to the local opera theatres. At the same time, the loyal part of the audience operates as a sustaining force for Estonia’s own opera production, since they buy tickets to the Estonians’ opera theatres in order to support them, which is crucial for small ethnic cultures.

The results of the comparison between the cinema and theatre-goers reveal that most of the cinema audience is critical and demanding with very high competence and expectations about opera. They are generally very well informed about what is happening in the world of opera (both in Estonia and the rest of the world), and they visit opera houses as well as follow opera-specific TV channels. In order to experience high-quality opera performances, one-fifth prefer to visit theatres abroad (Europe

and Russia were mentioned). This finding coincides with the results of the survey carried out by the English Touring Opera (ETO), which found that the majority of cinema attendees were already experienced opera-goers (Steichen 2011: 454) who chose to go to the filmed production rather than the ‘real thing’ for reasons of cost, accessibility and comfort (Richens 2014, Service 2014).

Despite the fact that the number of broadcasts presented by the Met is quite small<sup>15</sup> compared to the number of productions offered by Estonian theatres (ETA 2015a, 2015b and 2015c), for the Estonian opera fans, mediated performances still represent the possibility of increasing one’s knowledge, developing a heightened sense of taste, comparing local productions and international ones, raising one’s level of expectations to meet higher standards, and even daring to ask for more. This phenomenon has been described as a metamorphosis, as the rise of a new, hybrid opera genre (Cachopo 2014), or a new artistic medium (Žižek, Dolar 2002: 198). According to Walter Benjamin ([1921] 1996: 254), one should talk about the afterlife (*überleben*) or continued life (*fortleben*) of performances. From this point of view, perhaps one will come to see the Met’s HD broadcasts as opera changing and adapting to meet new institutional and economic circumstances (Steichen 2011).

Thus, I must agree with Yuwei Lin and Alan E. Williams in that

the provision of operas through streaming may result in a difference in audience type. However, whether audience groups can be differentiated perhaps depends on the distance / proximity of the sites where ‘real’ operas are staged, and the screens where the streaming versions are displayed. (Lin, Williams 2012: 9)

14 Surtitles, also known as supertitles, are translated or transcribed lyrics/dialogue projected above a stage or displayed on a screen, commonly used in opera or other musical performances. The word ‘surtitles’ comes from the French language *sur*, meaning ‘over’ or ‘on’, and the English language word ‘title’, formed in a similar way to the related subtitle. The word surtitle is a trademark of the Canadian Opera Company. Surtitles are different from subtitles, which are used more often in filmmaking and on television. Originally, translations would be broken up into small chunks and photographed onto slides that could be projected onto a screen above the stage, but most companies now use a combination of video projectors and computers. Lotfi Mansouri, the general director of the Canadian Opera Company at the time, introduced this innovation during the January 1983 production of Richard Strauss’s *Elektra* (1909) (Dewolf 2001, Skantze 2002).

15 In season 2015/2016, there were ten live broadcast performances.

This study indicated that the Metropolitan Opera attracts audiences with high expectations for an opera product and concluded, as Claudio E. Benzecry pointed out in his study, that the majority of opera audience consists of opera fans (Benzecry 2011), so the Met therefore cannot be seen as an educator for new or inexperienced audiences, because this role remains rather trivial at the moment. The broadcasts are direct competitors for the smaller (national) opera houses that do not have the resources for world-class competition. Therefore, the concern that the positive response of the audiences to mediated performances might be so strong that, in principle, 'it could cannibalise established revenues at the box office' (NESTA 2010: 4), is not an empty threat in the case of Estonia.

However, it should be noted that much depends on the choices made by the management of the performing arts institutions; for example, focusing on bringing people of a certain age to the theatre. Theatres in the UK have worked successfully on involving a younger audience, and the theatre audiences are getting younger (Smith 2013). An important factor could be that young people are more 'omnivorous'<sup>16</sup> (Peterson, Kern 1996) and are keen to discover anything new. They will come if the advertising is effective and reaches out to them. However, young people tend to love trying something new, and there are groups who would 'rather not attend the opera' after their first experience. Hence, attracting a younger audience presents diverse challenges, and many young people might take a chance once. The real question is how many of them will return as regular patrons.

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16 Reference is made to Richard A. Peterson's latter article, where omnivorousness is seen as a feature of a dominant class in positive way as a sign of greater tolerance and democratisation, as not 'liking everything indiscriminately', but 'an openness to appreciating diversity'. In his earlier works Peterson (1992) coined the term 'cultural omnivore' to address an anomaly observed in the evidence revealed by his work with Albert Simkus (Peterson, Simkus 1992).

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