Opera Europa

International Forum Meeting
Sofia, 22-25 March 2018

MEMBER MAPPING

Scope and objectives of this presentation

- **To explain the purpose of the mapping and benchmarking**

- **To summarise the data already obtained**

- **To illustrate possible preliminary analysis**

- **To discuss potential opera company classifications**

- **To agree the next steps**

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What is the purpose of Opera Europa's Mapping & Benchmarking?

- <u>Mapping</u>: To assemble a comprehensive map of the sector to help advocate opera in Europe

- <u>Benchmarking</u>: To gather accurate data which contributing members may use to monitor their performance

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What data has Member Mapping collected?

Productivity

- Performances in year (number)
  - Concerts
  - Recitals
  - Education/outreach
  - Dance
  - Spoken theatre
- Tickets sold (number)
- Opera productions (number)
- Permanent staff (number)

Income (€)

- Earned income
  - Ticket sales
  - Other
- Contributed income
  - Public sector
  - Private sector
- = Total income

Expenditure (€)

Labour costs
- Permanent salaries
  - Artistic
  - Technical
  - Administration
- Freelance payments
  - Artistic
  - Technical
  - Administrative
- = Total labour costs

Goods and services
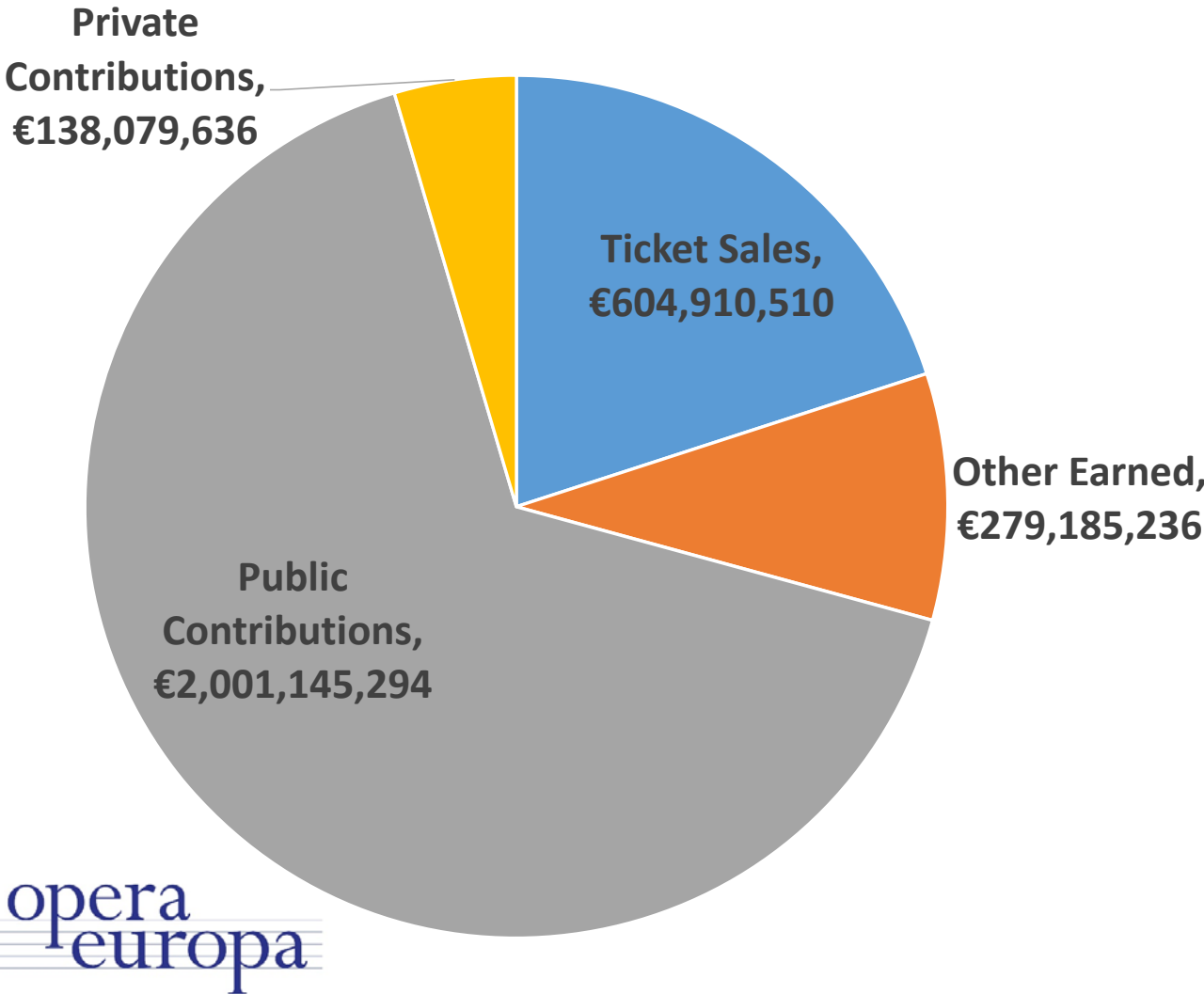- Production costs
- Overheads/running costs
- = Total other costs

How many Members does the data collected currently cover?

- 53 members have completed the brief questionnaire

- Data has been collected for a further 33 member companies from public sources, but slightly less detailed

- In total these 86 cover 23 countries, with from 1 to 21 companies in each country

What are the results of the data collection? – Selected data (All cos.)

Item	Minimum	Average (Mean)	Maximum	Sample Size
Opera performances	4	101	306	85
Public events	4	448	3,981	83
Opera productions	1	13	52	62
Tickets sold	298	197,1744	859,434	82
Permanent staff	4	414	1,496	79

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What are the results of the data collection? – Income (86 companies)

Private Contributions, €138,079,636

Ticket Sales, €604,910,510

Other Earned, €279,185,236

Public Contributions, €2,001,145,294

For 86 companies:

INCOME	€	%
Earned Income	€ 884.095.745	29%
Contributed Income	€2.139.224.930	71%
Total Income	€3.020.837.282	100%

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What are the results of the data collection? – Expenditure

86 companies:

Pie chart: Other, €989,946,945; Labour, €1,993,070,698
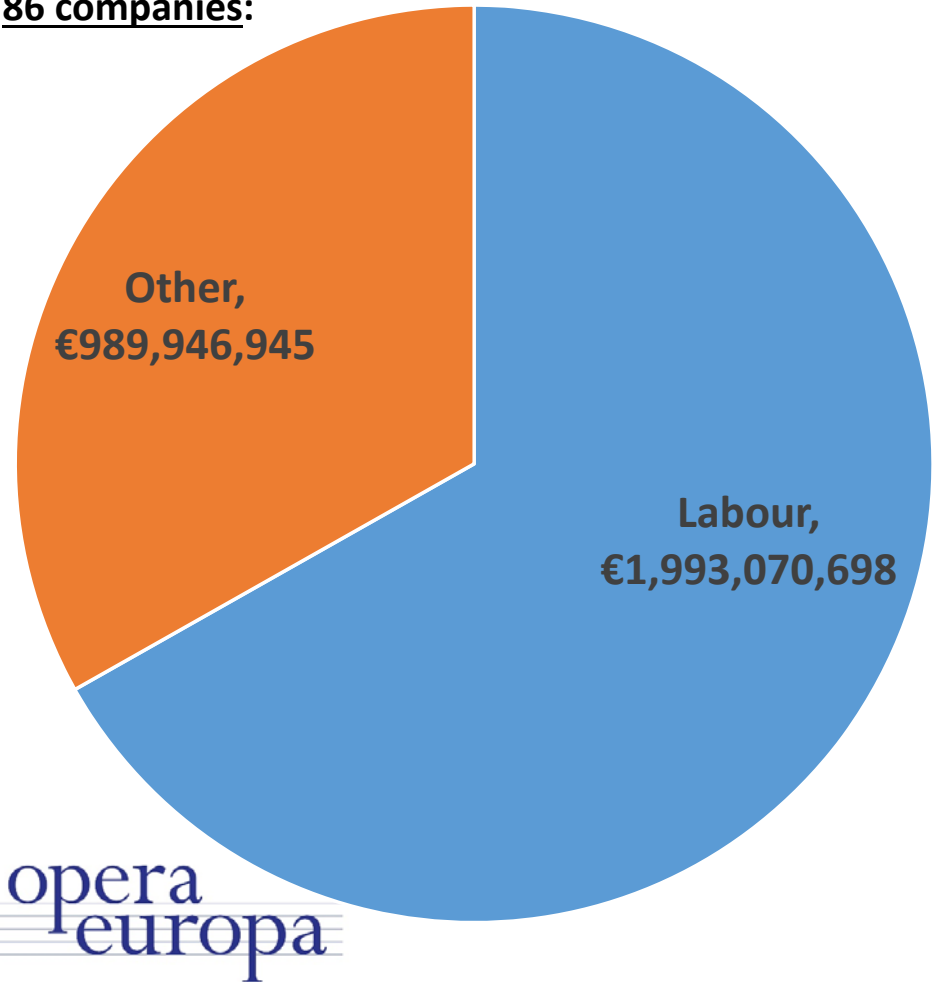
For 55 companies only:

EXPENDITURE	€	%	%
Permanent Salaries	€ 859.311.034	56%	
Freelance payments	€ 180.828.492	12%	
Unspecified Labour	€ 487.834.089	32%	
Total Labour	€ 1.527.973.615	100%	67%
Production Costs	€ 240.678.728	32%	
Other Expenditure	€ 350.695.033	46%	
Unspec. Goods & Servs.	€ 168.643.176	22%	
Total Other Costs	€ 762.016.937	100%	33%
Total Expenditure	€2.289.990.552	100%	100%

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What types of analysis could result?

- **Various data could be analysed for individual companies, groups of companies, or all companies**

Permanent Staff per Opera Performance	3,83
Earned Income / Total Income	29,2%
Contributed Income / Total Income	70,8%
Labour Costs/ Total Costs	66,8%
Average Salary Cost per Permanent Staff	€ 33.118
Average Cost per Ticket	€183,97
Average Revenue per Ticket	€ 37,31

but to be of help these data need to recognise the differences between companies …

Are opera companies comparable?

- **Data cover many different types and size of Members**
- **One of the purposes of this meeting is to classify companies so that data can be used meaningfully**
- **Examples of classifications might be:**

✓ International companies in capital cities
✓ Eastern European companies
✓ Repertory theatres in German-speaking Europe
✓ Seasonal and festival companies
✓ *Stagione* opera companies
✓ Companies staging only opera
✓ Touring companies

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How will this be useful for members?

- **Done skillfully, this benchmarking could help:**

  - **To identify opportunities to improve performance**

  - **To reduce costs**

  - **To get greater artistic output from ever-shrinking resources**

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Next steps

- **Agree key data to be compared**

- **Agree appropriate classifications of opera companies**

- **Agree the way forward**