Critical assessment of the production and consumption impacts of digital technological developments on opera companies and consumers

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Abstract: This article critically assesses the impact of digital technological developments on opera companies and consumers. It examines the production and consumption implications, with a focus on streaming opera and audience engagement. The study highlights the transformative role of digitalization in the opera industry and its effects on traditional viewing relationships. It discusses the challenges faced by opera companies in adopting digital platforms and the potential benefits in reaching a wider audience. The article also emphasizes the need to attract new audiences, particularly the younger generation, and explores strategies for making opera more accessible. Overall, it provides a comprehensive analysis of the evolving landscape of opera in the digital age, shedding light on the opportunities and challenges that arise from digital technological advancements.

1. Introduction

This paper discovers the advertising effect of digitalization in the cultural industry and a critical analysis of the impact and future trends from the perspective of consumers and the production companies involved, particularly in (Western) opera. The evaluation is based on a crucial assessment of the relevant literature and comprehensive initial research consisting of a restrained quantity of casual interviews with opera managers and experts.

The focus of academic research in the field of opera revolves around satisfaction, perceived quality, and servicescape. Moreover, the opera industry is currently undergoing a digitalization project and transitioning to a multichannel approach due to the recent groundbreaking advancements in streamed opera [1].

With the rapid development of modern information technology and multimedia technology, the exploration and discussion around the influence and integrated application of technology and new media on theatre creation also has reached a new level of fervour and height. The opera as a product offers a highly immersive experience [2]. Consequently, studying the consumption experience within this domain is particularly valuable, as it has received limited attention in research thus far. While traditional performance viewing is more of a one-way output, one-way acceptance and understanding relationship, digital technology has changed the traditional viewing relationship.
2. The survival of opera in the digital age

Starting with a seeming paradox, from December 2006, the rise of ‘Live in HD’ broadcasts from the Metropolitan Opera (and shortly thereafter, other major opera houses) led some commentators to renew their fears for the survival of opera. From the early days of sound, light and electricity on the theatre stage to the present day, with the progressive use of real-time video, holographic projection and virtual reality, the integration of new technologies with the art of opera theatre is not new to theatre creators.

Grotowski’s perspective that “theatre is what happens between the audience and the actors, everything else is a supplement” highlights the unique nature of theatrical experiences. However, applying widely accepted advertising and marketing practices to the opera industry has been challenging. This is primarily due to the distinct characteristics of the opera business, including significant barriers to product development and the complexities arising from balancing the cultural mission of opera institutions with more customer-centric approaches in production planning.

From a product-centric viewpoint, opera performances are known for being highly intricate and costly endeavors within the performing arts sector. They typically involve a large number of individuals, including orchestra members, chorus singers, stage directors, crew members, props staff, venue personnel, managers, and administrative officers. New manufacturing could additionally mean fees associated with innovative paintings and the production of levels and costumes. Besides, building and renovating a theatre also requires a significant investment.

Research findings indicate that the process of digitization has not led to the creation of new opera audiences; instead, it has served as an extension of the opera experience for the existing customer base. Recently, the concept of “metaverse” has been introduced in the field of opera and theatre arts, forming a “digital person” with a high degree of proximity to a natural person in terms of appearance, form, voice, facial expressions, etc., and enabling real-time interaction.

![Figure 1. The audiences’ education level.](image)

The majority of opera's consumer base believes that: opera's complex forms of expression and multicultural, international and transnational character are more in keeping with their identity and tastes. Opera houses and opera house brands have become an integral part of luxury marketing strategies, as evidenced by collaborations with renowned designers who create costumes for opera productions. For instance, the 2017 opera-inspired collection by Dolce and Gabbana, presented at La Scala theatre in Milan, exemplifies this trend. This is a side-effect of the fact that, to date, opera performances still suffer from the problem of high ticket prices due to high costs that plague financially sensitive users. There is a high degree of overlap between the consumer base of fine wine and the audience of opera, and according to data, which is shown in figure 1, the consumption of
large amounts of entertainment and recreational types requires a certain level of intellectual and cultural reserves and aesthetic taste [5].

High-end tickets for opera performances cost around €200-500 per ticket. It is puzzling that, although more and more entertainment offerings are distracting people's attention and time, data indicating that the number of opera performances has not decreased in recent decades, but rather that several new theatres are being built [6].

3. Is opera still irreplaceable when new issues arise?

Looking back at the history of opera, it is as if there are issues that have not been addressed. The early days of opera carried the label of an aristocratic culture that could not accommodate the lower-income groups to enjoy opera performances [7]. In contemporary times, opera houses have evolved into expansive venues designed with distinct areas that facilitate communal viewing of performances. This arrangement promotes shared experiences and enables visibility and recognition between individuals from different social strata, including elites and the general public [8]. Along with this comes the problem of an ageing audience. From figure 2, you can see that over fifty per cent are older people enjoying the opera performances, and it is rare to see at least a young loyalist. Attracting new users and nurturing young opera lovers is only the first problem facing opera in the digital age.

The Metropolitan Opera in New York made history in 2008 by becoming the first opera house to introduce a streaming platform [9]. Subsequently, other renowned opera houses such as the Bavarian State Opera in Munich, the Teatro Real in Madrid, and the Wiener Staatsoper in Vienna followed suit. Concurrently, professional opera platforms like Operavision have gained public attention. As a result, opera houses are grappling with the question of whether they should invest in streaming, which can be a costly endeavor to implement. This novel approach to experiencing opera has the potential to reshape the relationship between opera houses and their audience. Hence, it is crucial to comprehend how viewers perceive and respond to the opera streaming experience, which differs from the traditional "live" opera experience and can be accessed from any location with electronic devices, such as the comfort of one's home. Digital opera may replace the traditional way of seeing a performance. A platform for many enthusiasts who are unable to travel to offline theatres to attend performances, allowing them to participate and have the same experience for a small membership fee. 213 responses for a questionnaire were collected by Wiener Staatsoper (153) and Operavision (60) for the number of streamed and lived operas watched per year, and the result is shown in figure 3. Streaming opera does not pose a threat to lived opera performances, but we can see from the data that the future development of live opera still needs to face great challenges.

Figure 2. Age distribution of opera’s audiences.

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Figure 3. Total number of streamed and lived opera watched per year (Wiener Staatsoper and Operavision, 2023)

According to a study by the Vienna State Opera, an analysis of the core elements that attract opera audiences indicates that consumers have a strong desire for knowledge, enrichment, and intellectual stimulation, which is divided into the following three points [10].

1. Hedonic: looking at a streamed opera lets in visitors to relax, get away and neglect about each day realities. The overall performance offers them the possibility to revel in feelings that vary over an extensive spectrum. When engaging with streamed opera, viewers experience various dimensions of value. Firstly, they appreciate the grandeur of the artwork and performance conveyed through the music, voices, staging, sets, and costumes. This aesthetic dimension contributes to their overall enjoyment. Secondly, the epistemic dimension comes into play, as streaming opera allows audiences to engage in intellectual enrichment, reflection, and introspection. The artists and the production itself become central to this evaluation. In a broader sense, the experience of streamed opera can serve as a significant intellectual stimulus for viewers. Thirdly, there is a functional dimension to streaming opera, where viewers benefit from enhanced visibility of the lead singers' facial expressions, which are often emphasized in audio-visual productions. Lastly, streaming opera offers the convenience of flexible scheduling, allowing viewers to appreciate the ease and accessibility it provides. Given these reasons, it is evident that good value should be regarded as a multidimensional concept [11].

4. New challenge and chance

In an effort to make opera more accessible to a broader audience, opera managers and artists recognize the importance of "opening" theaters and exploring socially inclusive approaches [12]. This may involve offering low-cost or free performances that specifically target students, workers, and even tourists. The aim is to break down barriers and make opera more inclusive, reaching a wider segment of the population. In addition, several product innovations have been used to achieve the aim of restoring mass audiences. For example, instead of watching an entire opera, the most popular pieces will be packaged in a concert, including a selection of famous arias. The combination of classical and popular music has also attracted a younger audience (the "Three Tenors" and "Pavarotti
and Friends” events, Andrea Bocelli, Sarah Brightman, Rebecca Newman, etc).

Streaming applications in the digital age will not replace live performances in opera houses but could attract a new group of opera lovers and users. Streaming opera will bring a more convenient and comprehensive viewing experience, allowing people to easily watch opera productions from around the world in different languages and periods at home. New works are presented, and people have more channels to discover and enjoy them.

Introducing paid streaming options for opera performances can serve as a means for opera houses to generate additional revenue, particularly in light of the uncertainties brought about by the COVID-19 pandemic. The pandemic prompted opera houses to initially stream performances for free as a way to maintain connections with their audiences. However, there is now a growing trend towards charging audiences for streamed opera experiences. For instance, the esteemed Liceu in Barcelona has recently introduced a paid subscription model for streamed operas, marking a significant departure from its historical practices at the beginning of the 2021/22 season. Nevertheless, the profitability of this broadcasting model needs to be carefully assessed, considering the substantial investments it entails. Both opera houses and streaming platforms must also carefully consider pricing strategies for streamed performances and gauge the audience's willingness to pay for such experiences.

5. Conclusion

This paper analyses the impact of digital developments on opera through the survival of modern opera, the limitations of new technologies in opera media, audience distribution data, changes in theatre business models, and the role of streaming media for new customers. And the future challenges and directions the opera industry will face in the data age.

The rise of new media does not really threaten the opera industry, and the primary issue that needs to be addressed is the contradiction between the cost of theatre production and the imbalance in revenue. Not precisely an outstanding investment compared to other arts and cultural industries. The benefits of digitalization have been minimal and have not generated new opera audiences but instead increased costs, which we don't want to see.

The construction of small theatres has become the mainstay of current live opera performance productions. Digital opera has the potential to significantly boost consumption levels and foster brand loyalty among consumers from middle-class and average-income social groups, as well as those residing in geographically marginalized areas, including opera enthusiasts in second-tier cities. By leveraging digital platforms, opera houses can reach and engage with a broader audience, providing access to high-quality opera performances regardless of geographical limitations. This inclusivity can cultivate a sense of belonging and appreciation among traditionally underserved opera enthusiasts, leading to increased consumption and stronger connections with the opera house brand.

In the early 21st century, the advent of digital technology has provided opera with newfound spatial and conceptual flexibility, enabling it to transcend, dismantle, or creatively adapt to the perceived boundaries between the physical and digital realms. However, despite these advancements, the persistent challenge lies in the limited expansion of the live theatre audience as a result of these technological developments. Addressing this issue and finding ways to effectively engage and attract new audiences to live opera performances should be a primary focus of attention.

References


