Positioning Italian Opera in the Global Opera Field

Foto Erio Piccagliani © Teatro alla Scala

Paola Dubini – Alberto Monti
ASK Research Center, Università Bocconi
Venice, May 23 2014

ASK: WHO WHY WHAT

- We are a multidisciplinary research team at ASK – Bocconi

- We are interested in the interplay between individual theatres, national policies and the characteristics of opera

- We are looking at opera:
  - **As a field**. Theatres are interconnected players in a growing and globalised cultural world
  - **As a network of relationships**. Opera houses and festivals are characterized by multiple collaborative relationships (artistic, productive, reputational). Each theater is positioned simultaneously in different networks

- Our questions:
  - What is happening to opera at the global level?
  - What is the place of Italian opera in this field?

Why Italy?

- Because we have been asked so....
- Because opera is a sophisticated expression of European culture and was born in Italy
- Because Italian opera is very popular worldwide, and the world is globalizing
- Because this is a very delicate moment for Italian opera houses and for European Opera

ASK Bocconi

The Dataset – where we stand

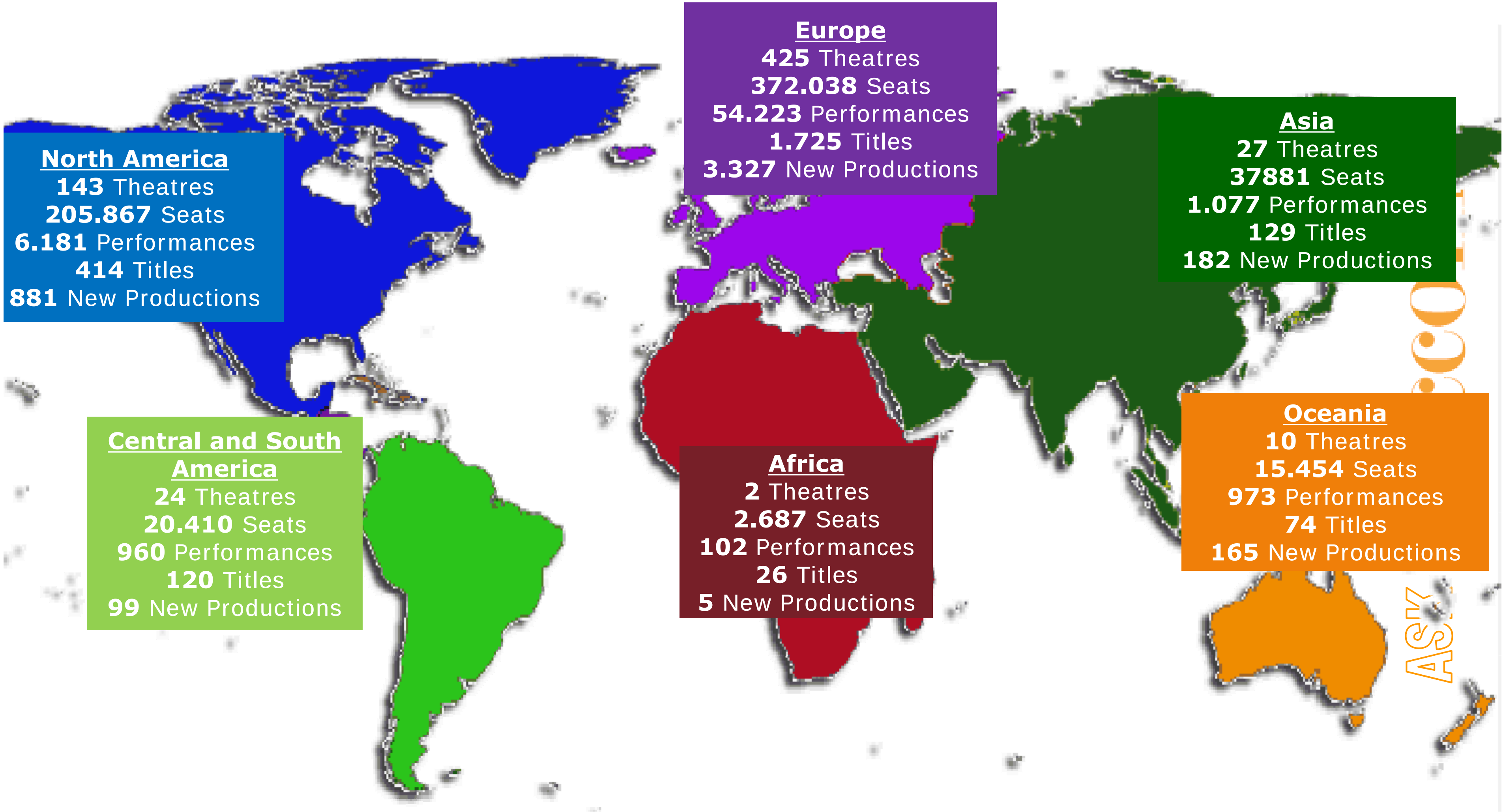
- The Global Dataset
  - Timeframe: 2011 – 2014
  - Theatres and Festivals: 808
  - Countries: 71
  - Cities: 504
  - Titles: 1.866
  - Performances: 63.516
  - Data on theatres - Performances – Productions – Prizes

- The Italian Dataset
  - Population: 90 among theatres and festivals between 2006 and 2014
  - Same data as in the global database plus economic data and governance
  - Financial data for the 14 national Lyric-Symphonic Foundations (2001-2013)
  - We wish to have an extensive dataset covering Italian opera from 2001

- Our sources
  - Operabase
  - EDT
  - ASK own research

ASK Bocconi

The Geography of Opera



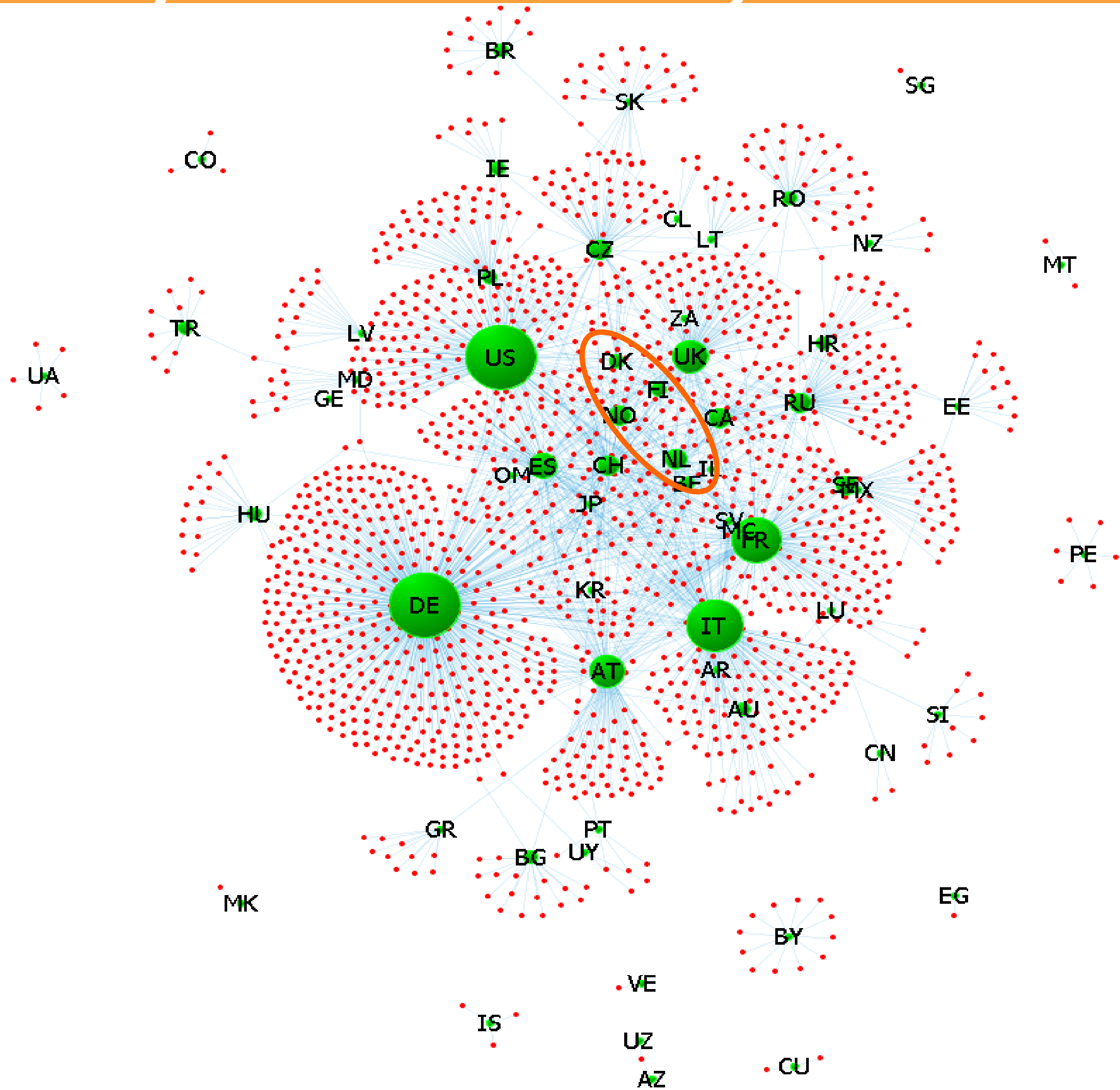
Our empirical base: a Concentrated Sector

	Worldwide	Germany	USA	Italy	France	UK	Austria	Spain	Switzerland	Russia	TOP 3 %
Theatres and Festivals	808	**129**	**151**	**84**	58	42	31	27	20	18	45%
Titles 2011 - 2014	1.866	**772**	**385**	301	**423**	255	235	151	196	186	**85%**
Performances 2011-2014	63.516	**21.314**	**5.574**	**4.618**	3.616	2.134	3.134	1.096	2.195	2.332	50%
New Productions 2011-2014	3.646	**1.437**	196	**400**	**305**	115	150	112	178	55	**59%**
Coproductions 2011-2014	1.225	**163**	129	**219**	**249**	57	17	90	60	28	52%
World premières 2011 - 2014	251	68	26	18	27	10	12	2	12	-	**48%**

A metaphor for describing global opera

ASK Bocconi

A strongly interconnected network - performances (theatres by conductors 2012)



A strongly interconnected field - performances

- The core of the field consists of theatres located in a limited number of countries. Germany , United States, Italy, France, Austria and UK are central in the system, with Germany showing a dominant position
- Japan and Korea position themselves right in the center of the network by hosting very established and networked conductors
- The Nordic European region is an active and interconnected cluster also connected with the core of the field
- Eastern European, Asian and Latin American countries are progressively entering the network, as they invest in infrastructures and in attracting international directors
- Number of theatres, reputation and big pockets seem to be drivers of the position of specific countries in the peonia

ASK Bocconi

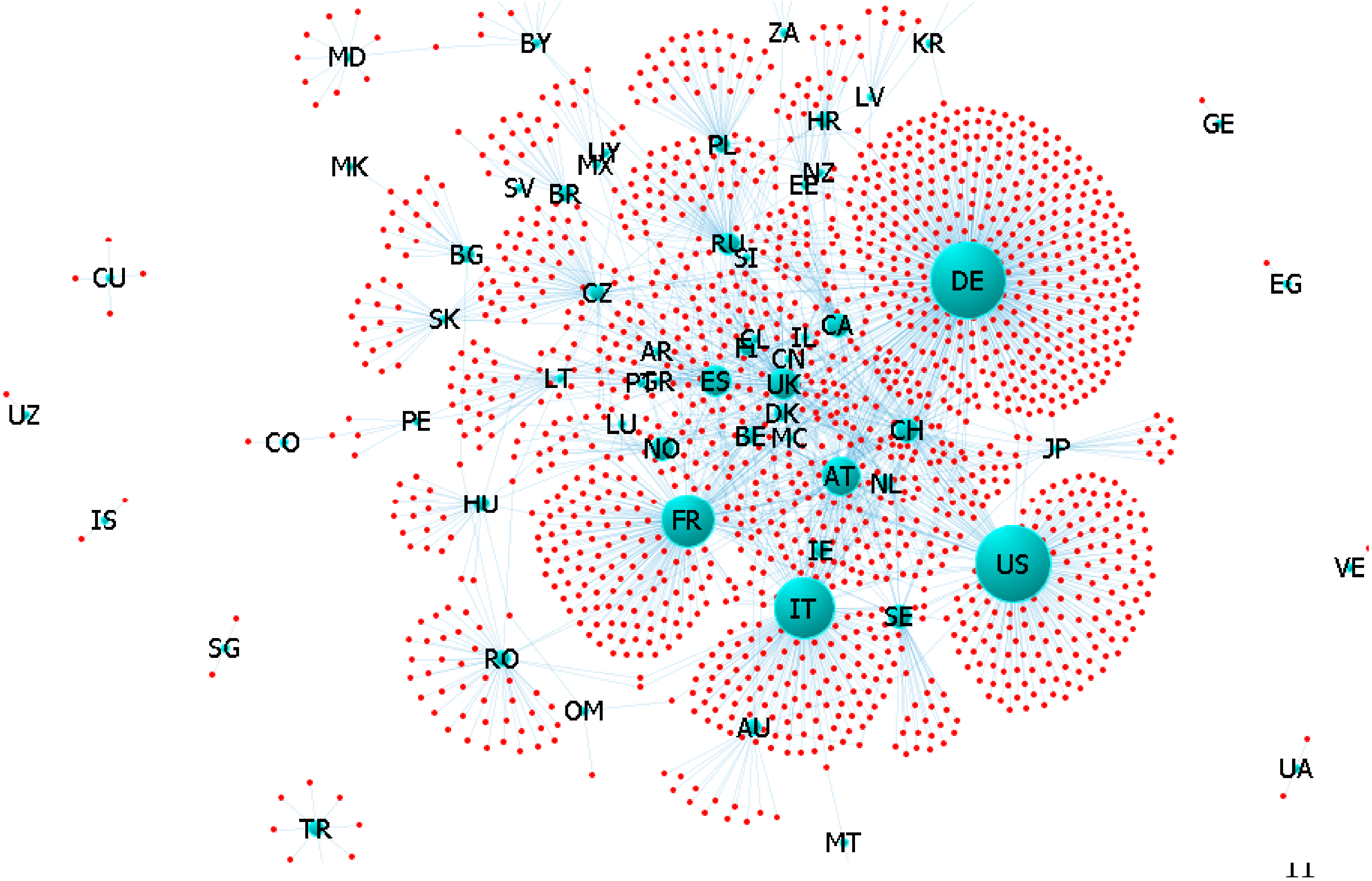
A GROWING SECTOR: New Markets and New Capacity

City	Theatre	Est/ment	Major Change	Δ Perf/nces 2011/2013	Titles
Beijing	NCPA Beijing	**2007**		**225%**	15
México City	Palacio de Bellas Artes	1934	**2010**	**89%**	24
Tallinn	Rahvuso oper Estonia	1906		**30%**	29
Oslo	Norwegian National Opera and Ballet	1957	**2008**	**108%**	31
Warsaw	Teatr Wielki Opera Narodowa	1833	1965	**154%**	36
São Paulo	Teatro São Paulo	1911	**2011**	**140%**	27
Sydney	Sydney Opera House	**1973**		**241%**	33

Timeframe of Est	N. of New Theatres	N. Of New Seats
1961-70	36	42.768
1971-80	55	73.630
1981-90	44	47.030
1991-00	53	57.118
2000-10	29	29.718
2011+	8	12.391
Total	**225**	262.655
Δ		**+67%**

ASK Bocconi

A strongly interconnected network (theaters by directors 2012)



A strongly interconnected field – performed productions

- Four countries (Germany, US, Italy and France) dominate the space for performed productions, nevertheless the producers network is somewhat less dense than that of conductors, opening up for a variety of positioning
- Many countries share directors associated with theaters in the four main countries
- Eastern European theatres seem to favor local productions developed by directors who are marginally connected to theatres in core countries
- New global markets are scattered and still marginal
- Reputation, local tastes, geography, big pockets, number of theatres seem to be drivers of the position of specific countries in the “peonia”

The role of Italian Opera

Foto Brescia/Amisano © Teatro alla Scala

What do we mean when we talk about Italian opera

- Opera made by Italian composers worldwide
- The network of Italian theatres
- Opera made in Italy

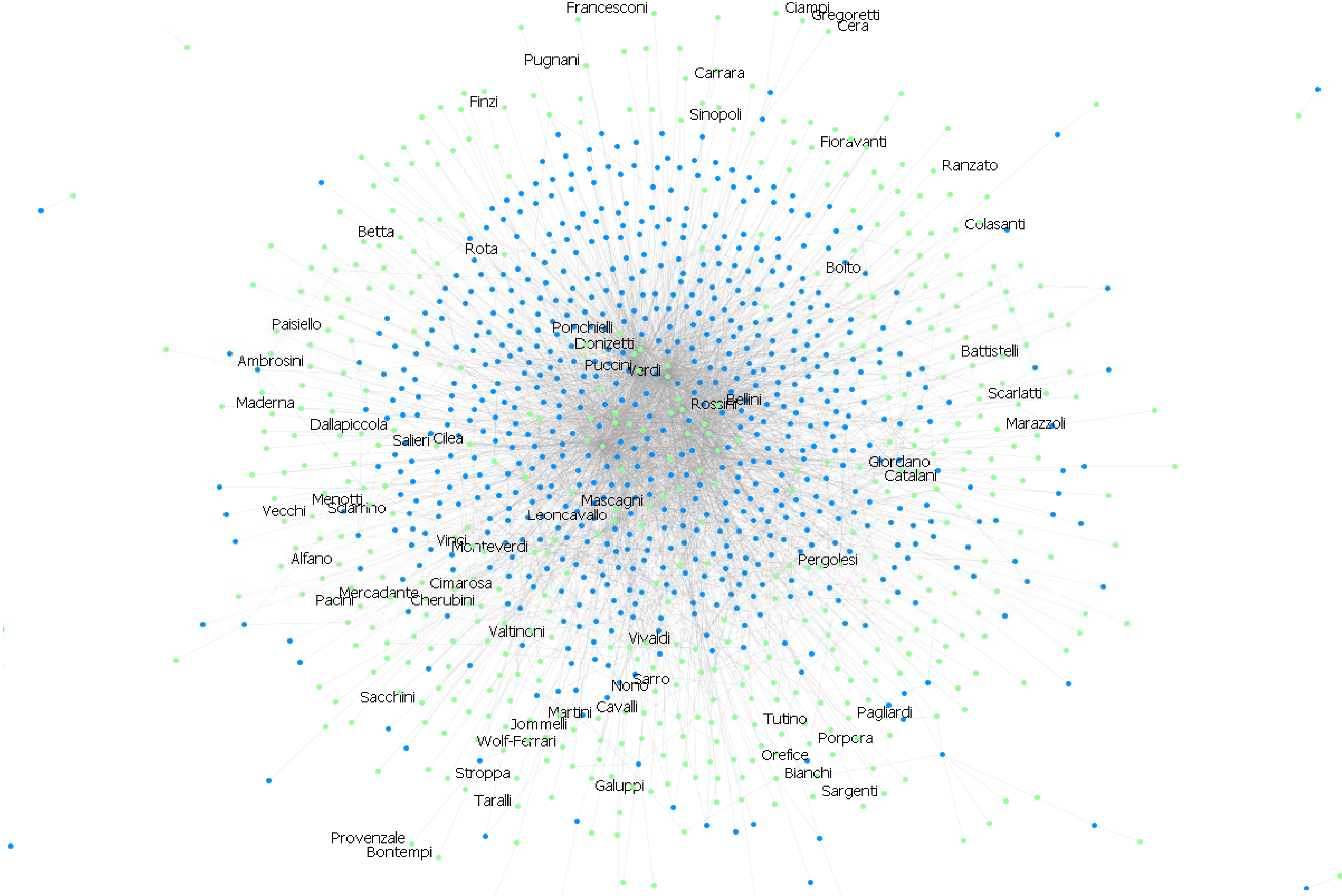
The popularity of Italian composers and the Blockbuster Effect

Composer	Title	Performances
Verdi	La traviata	2.046
Mozart	Die Zauberflöte	1.868
Bizet	Carmen	1.638
Puccini	La bohème	1.611
Puccini	Tosca	1.333
Puccini	Madama Butterfly	1.303
Rossini	Il barbiere di Siviglia	1.300
Mozart	Don Giovanni	1.268
Verdi	Rigoletto	1.204
Strauss	Die Fledermaus	1.147
Total performances		14.718
Total performances global sample		63.516
% top 10 titles/ tot performances		23,17%

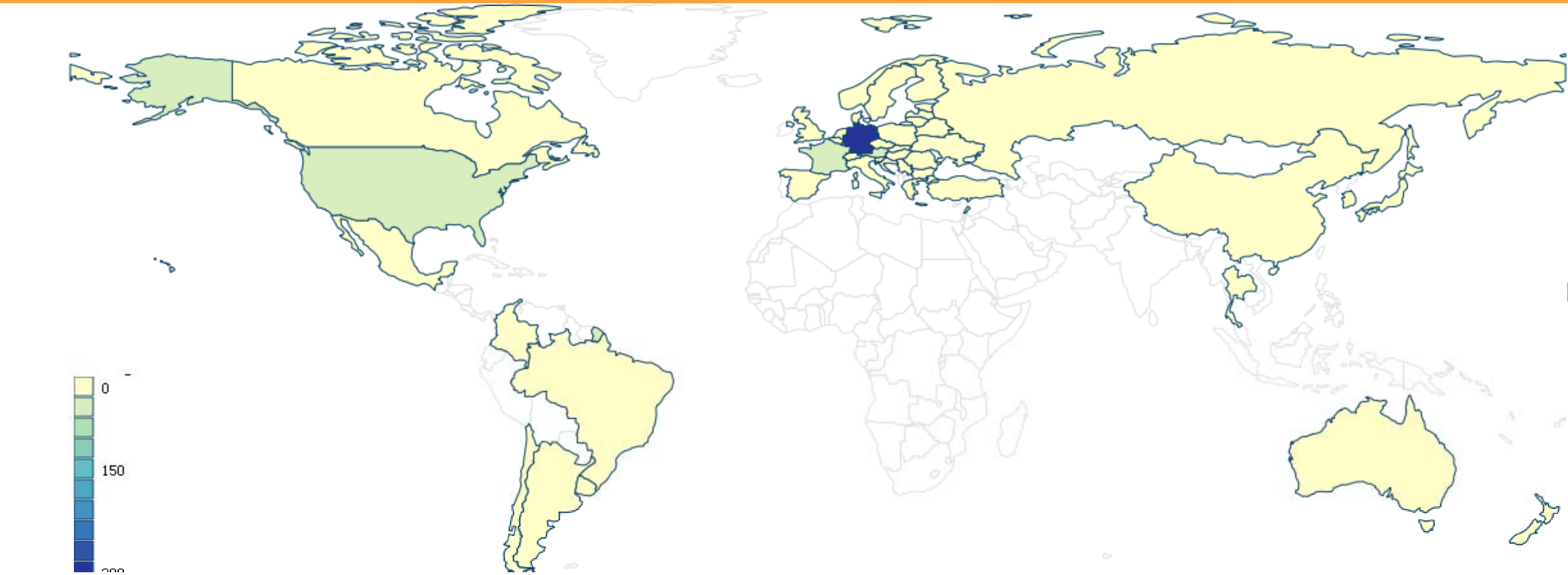
	Composer	Country	Performances 2011/2014
1	Verdi	IT	8.905
2	Mozart		5.977
3	Puccini	IT	5.778
4	Wagner		2.777
5	Rossini	IT	2.525
6	Donizetti	IT	2.359
7	Bizet		1.815
8	Strauss		1.479
9	Strauss R		1.317
10	Tchaikovsky		1.096
	Total performances		34.028
	Total performances global sample		63.516
	% top 10 composer/ tot performances		54%

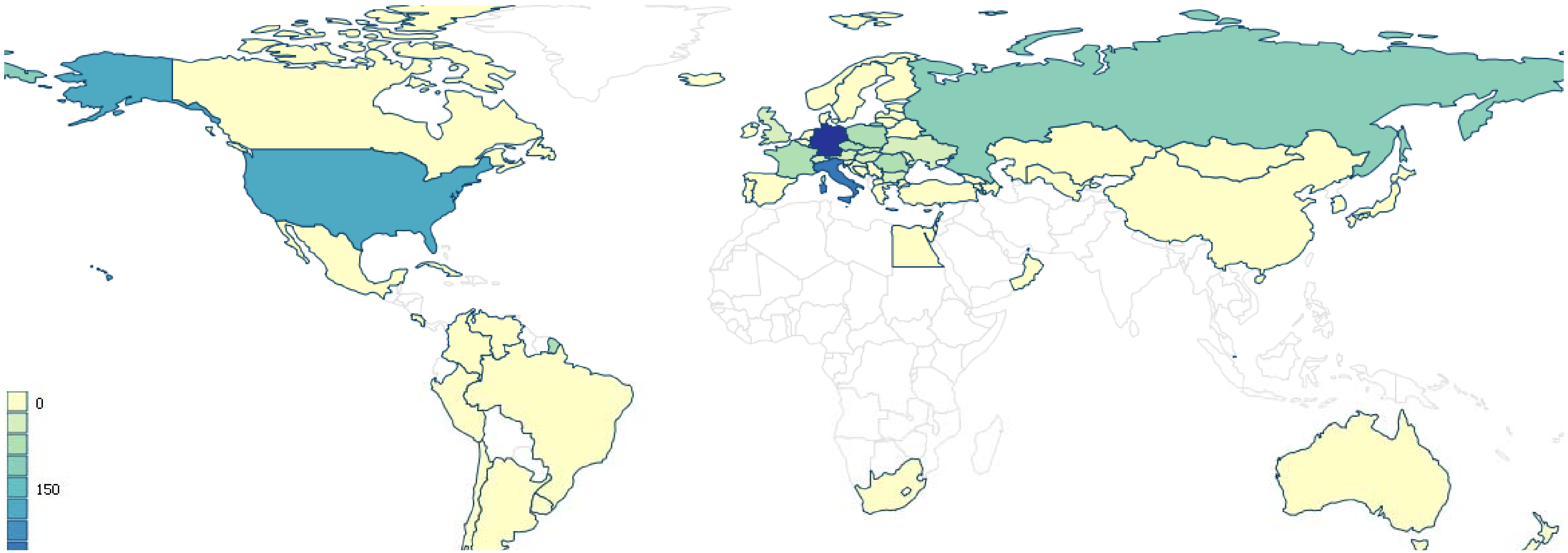
ASK Bocconi

The centrality of the happy few – 2012: quite some room for differentiation



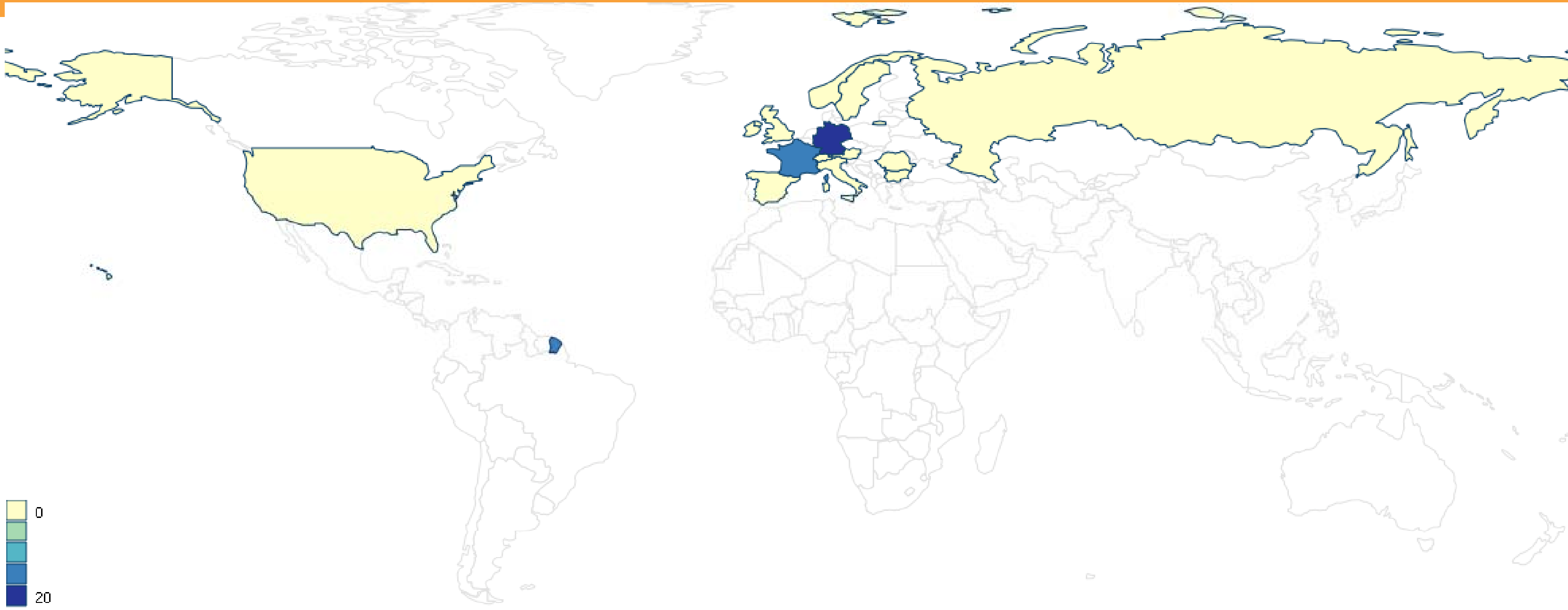
Italian composers are pop ….

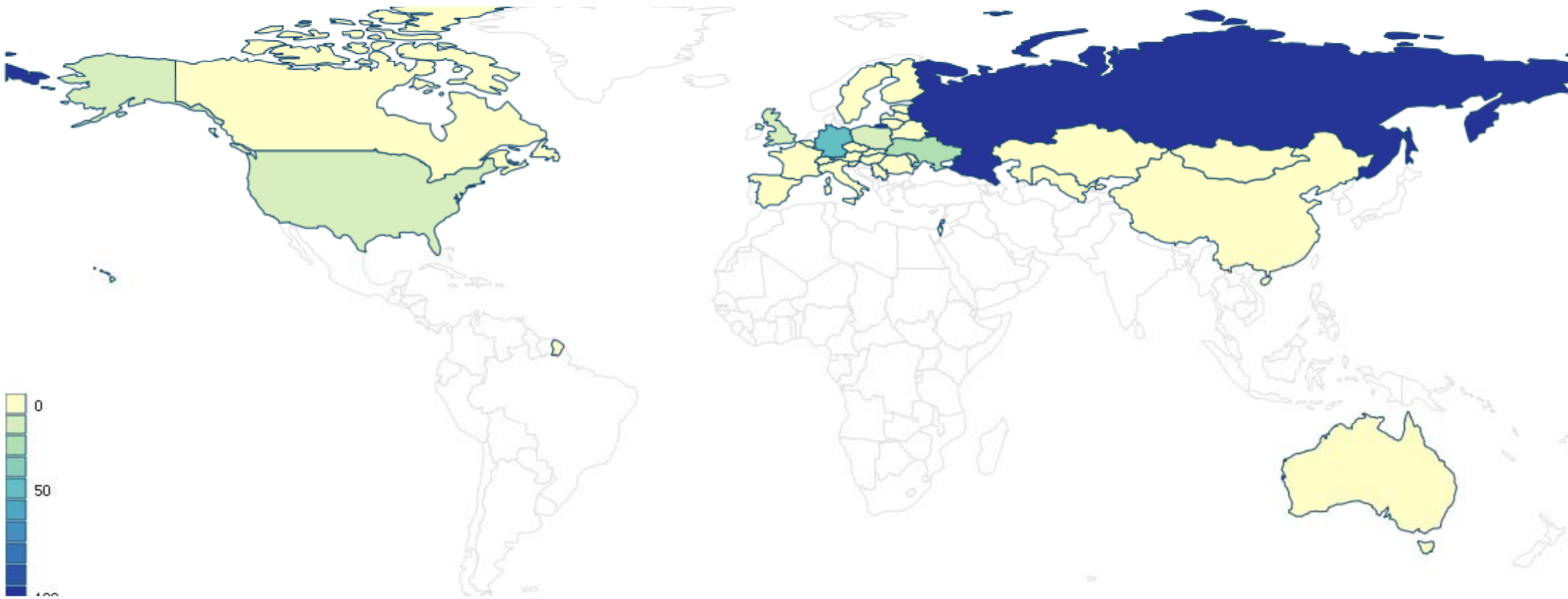




Wagner and Verdi

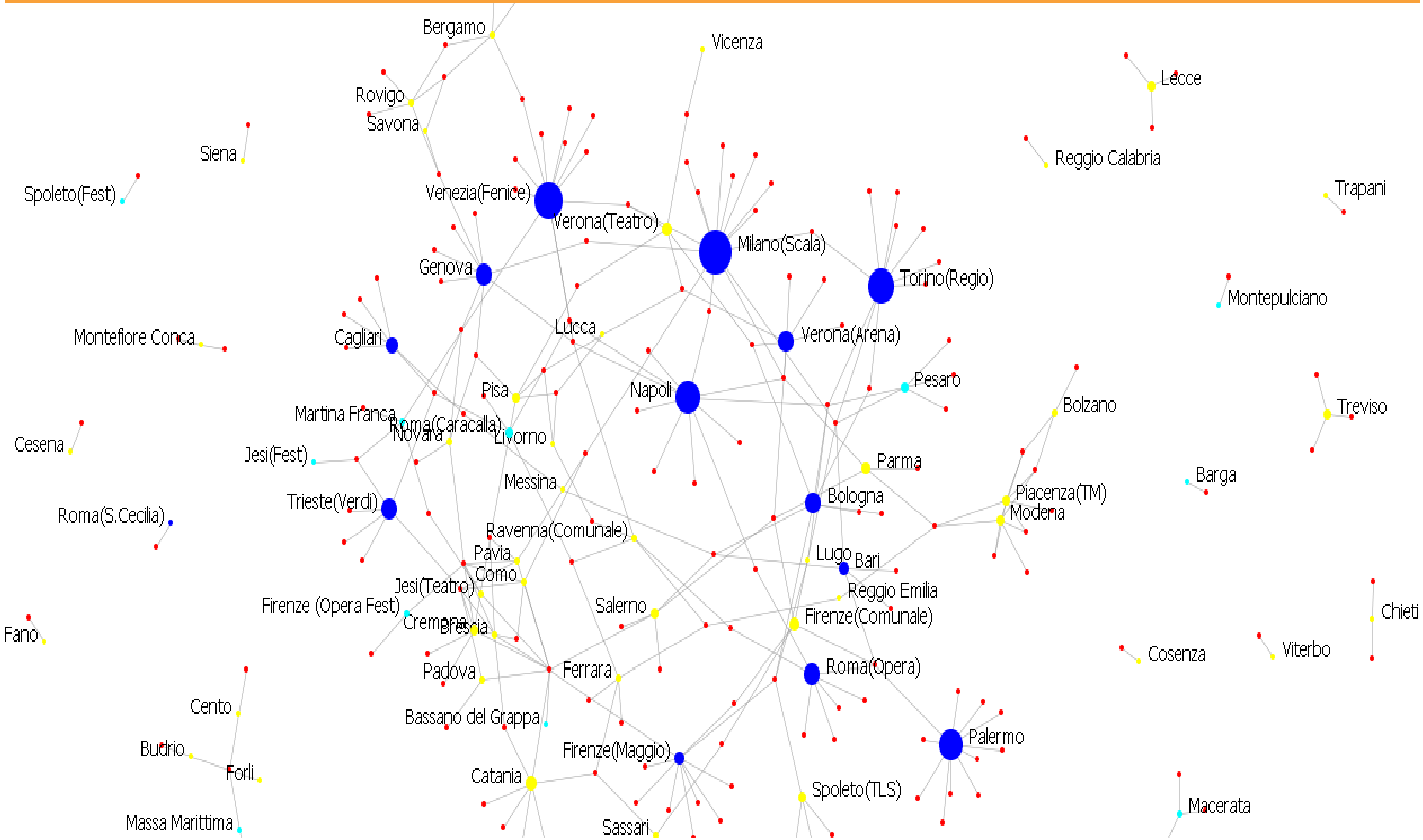
…. But not necessarily championed domestically





Monteverdi and Tchaikovsky

The network of Italian theatres – conductors 2012 – a two sided picture



State funded theatres
Local theatres
Festivals

The network of Italian theatres

- There is a significant difference among theatres based on governance structure.

- Local theatres tend to reduce the number of performances and to increase collaborations within geographic clusters and consolidated collaborations

- Festivals, in particular Verona and Pesaro, play a broker role among Italian theatres.

- Concerning the conductors choices:
  - Lyric foundations tend to differentiate among themselves, in order to stress identity and specificity.
  - Local theatres replicate patterns of collaboration as far as producers and conductors are concerned

ASK Bocconi

The impact of crisis

- Crisis is severely hitting opera houses in Italy: -4% of performances between 2011 and 2012

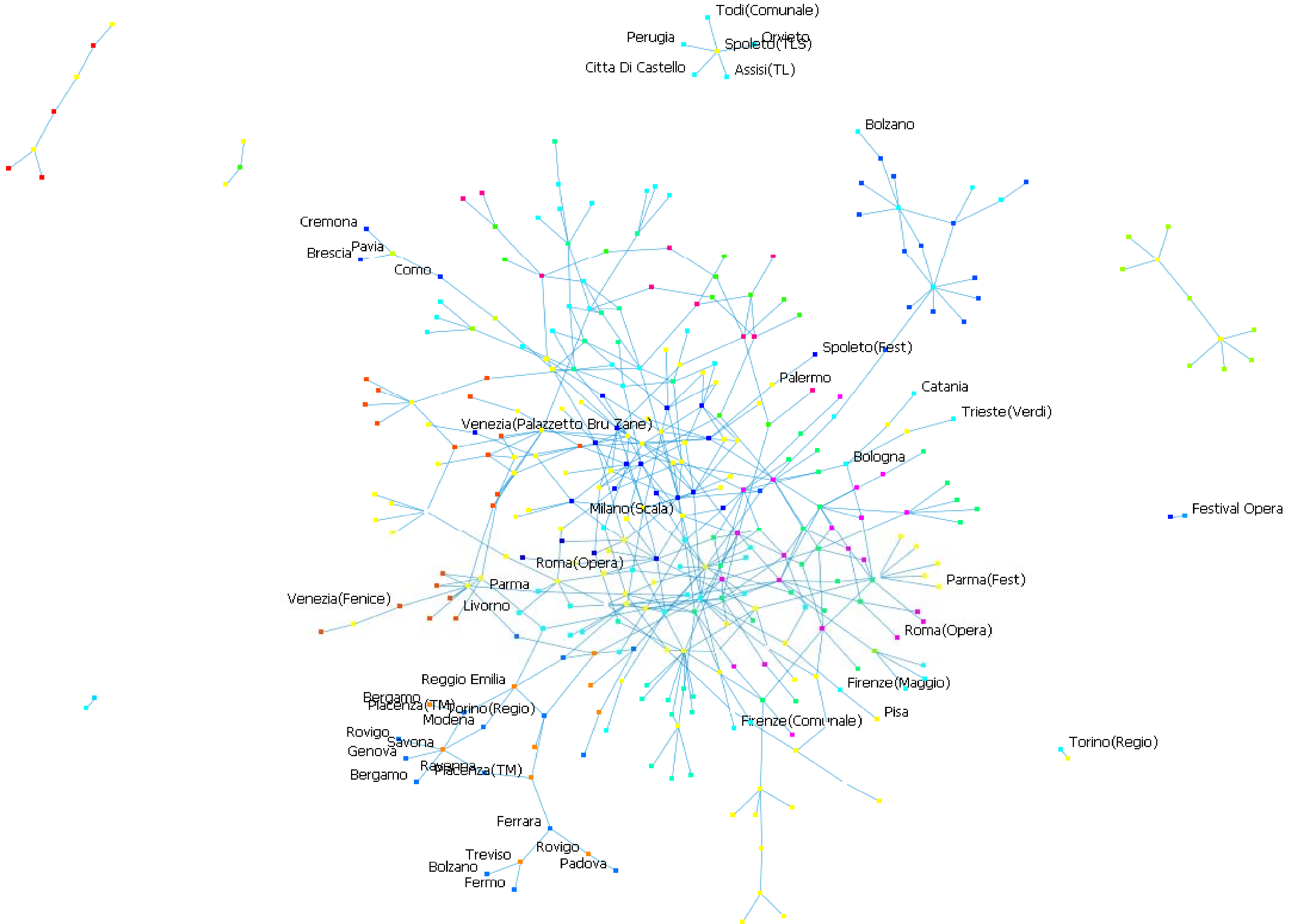
- Local theatres are particularly affected: -11%

Performances	2011	2012
FEST	171	152
Local theatres	446	395
Lyric Symphonic theatres	749	770
	1366	1317

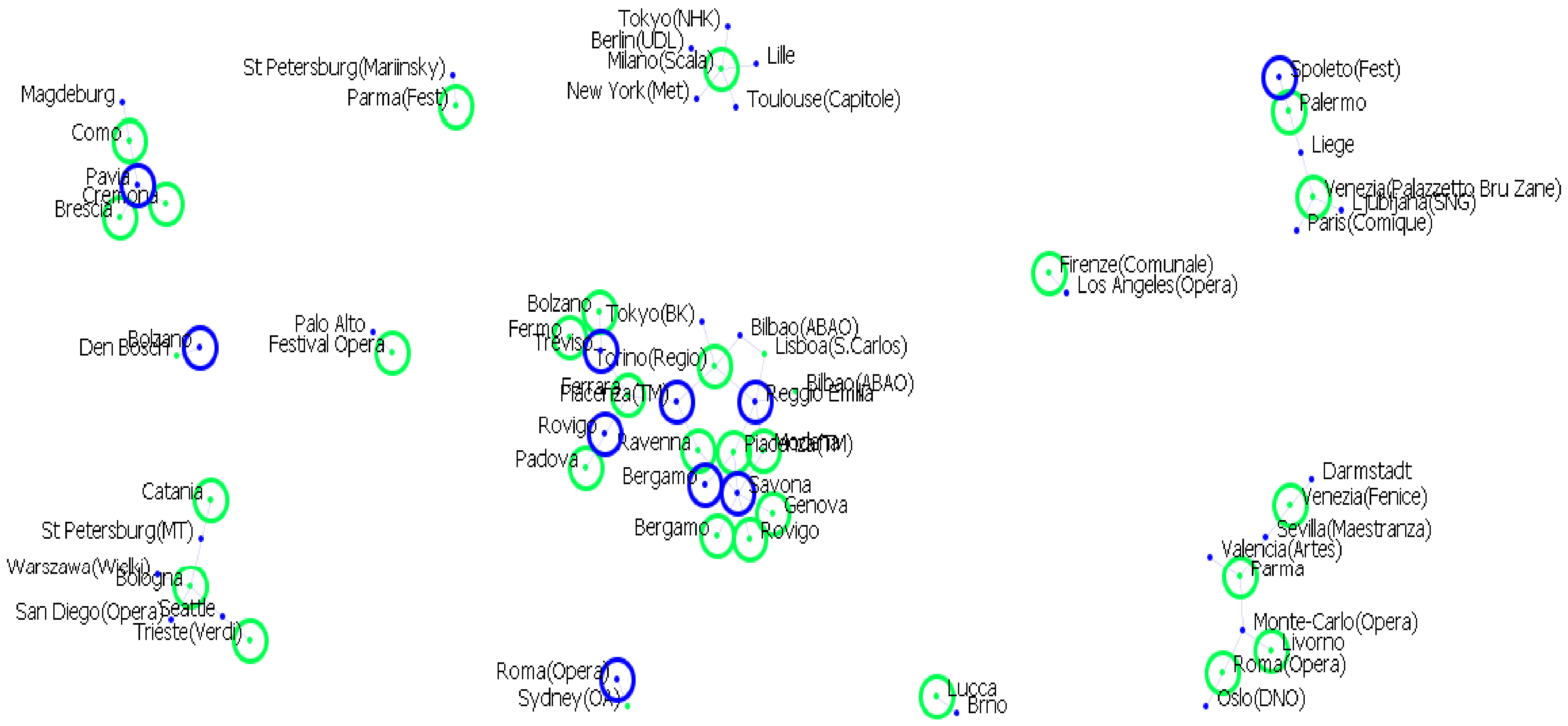
Titles	2011	2012
FEST	53	39
Local theatres	167	154
Lyric Symphonic theatres	114	122
	334	315

ASK Bocconi

Communities of producers - 2013



An industry of communities of producers 2013 – the direct partners of Italian theatres



- In Italy, in 2012/2014 400 new productions and 219 coproductions
- 2 partners in the average per coproduction
- 83% of the coproducers are Italian. International partners are moslty from: DE, ES, FR, UK, US (11%).

Italian theatres in the global community of producers

- Italy is the second producer of opera worldwide. Teatro alla Scala is the third entertainment producer in Italy

- The network of international productions is quite dense. There is one big interconnected network together with several marginal/specialised ones. Marginal/specialised networks are either justified by geographical proximity, by genre specialisation or by individual projects. Within the main component, different sub-networks exist.

- Several Italian theatres produce alone. As coproductions tend to increase, Italian theatres increasingly contribute to the global community of producers, however their role is not central.

- Italian theatres tend to activate coproduction agreements with either different networks of international theatres (particularly Milano, Venice, Turin and Florence) or with local theatres characterized by geographic proximity.

- The geography of collaborations changes quite significantly year by year.

ASK Bocconi

In a nutshell….

- **Global Opera is alive and kicking**

  New markets and new theatres open up and progressively converge to compose a dense network of relationships.

- **New opportunities are growing at the borders of the system**

  The geography of global opera shows the dominance of the traditional players in the field, but different resource availability among theatres and countries is likely to reshape such geography. Therefore, national and local policies need to be carefully designed, in order to orient production and distribution strategies.

ASK Bocconi

In a nutshell....

- **The image of the Italian opera abroad is standardized**

  Only a handful of Italian composers are extremely popular worldwide, while a good number of them is only marginally present in the global operatic scene and not necessarily in Italy.

- **Opera is an expression of made in Italy**

  Production of Opera is very concentrated. Italy is a producer of Opera, but sustainability of many theaters is at stake

- **Production strategies become a priority**

  Not all Italian theatres are embedded in the global network. As coproductions are growing and resources are shrinking, it is extremely important for Italian theatres to build on their strengths, reputation and tradition, in order to benefit from the broadening opera global market.

ASK Bocconi

Thank you!

Paola.dubini@unibocconi.it

Credits

The research team
Alberto Monti
Ilaria Morganti
Christos Papanikolaou

The collaborators
Francesca Arcodia
Anna Aseeva
Gaia Brunelli
Mario Buatier
Silvia Giordano