

# NEXT STAGE

Performing Arts as Driver for a Sustainable Future

**Study Report**

October 2021

KEARNEY



opera  
europa



# FEDORA, Opera Europa and Kearney are collaborating on Next Stage to support change and recovery in performing arts



**Edilia Gänz**  
Director, FEDORA

FEDORA showcases and supports excellence, innovation and renewal in the field of opera and dance

*“The Next Stage initiative will trigger a positive ripple effect on society to build resilience and contribute to building the world of tomorrow.”*



**Nicholas Payne**  
Director, Opera Europa

Opera Europa is the leading service organisation for opera companies and festivals across Europe

*“This change-making initiative will rethink the way we source, create and operate on, behind and beyond the stage.”*



**Sabine Spittler**  
Principal, Kearney

Kearney is a leading global management consulting firm with deep-rooted expertise in strategic transformation

*“We are happy to contribute to Next Stage, which is paving the way to a greener, more inclusive and digitally transformed future through culture.”*



FEDORA, Opera Europa and Kearney all contribute in their specific capabilities to enable lasting impact with Next Stage



The FEDORA Platform **showcases and supports excellence and renewal** in the field of opera and dance. The platform provides **visibility and new funding models** to innovative co-productions, education and digital projects created by emerging artists that are still in the making through the world's largest opera and dance competition: The FEDORA Prizes.



Opera Europa is the **leading service organisation** for professional **opera companies** and **opera festivals** across Europe with over 215 members from 43 countries. Opera Europa welcomes **professional opera companies** and as well as **affiliated organisations**.



KEARNEY

Kearney is a leading **global management consulting firm** with deep-rooted expertise in **strategic transformation**. We work with more than three-quarters of the Fortune Global 500, as well as with government bodies and non-profit organisations. Driven to be the **difference between a big idea and making it happen**, we help our clients break through.

## Introduction

# The Next Stage initiative has been launched by FEDORA and Opera Europa to drive change and recovery in opera and dance



**FEDORA** and **Opera Europa** have launched the Next Stage initiative for **change and recovery** in the opera and dance sector.

It aims to provide **financial support and capacity-building** to boost transformation and innovation through sustainability, inclusivity and digitalisation, building resilience within the performing arts sector.

## About this study

This report is the result of the **first ever market study** among 100 opera and dance companies in Europe and beyond. It captures the state of the industry around **sustainability, inclusivity and digital transformation** to identify the current **challenges and needs**, as well as **opportunities and best practices** of their organisations.

This situation analysis will enable the sector to proactively define **new industry standards and opportunities** for achievements in the upcoming years.

## Next Stage Purpose

By **showcasing** transformative activities, combined with **expert knowledge scaling, peer-learning and best-practice sharing**, this 'lighthouse project' will not only encourage the entire sector to increase efficiency and reduce costs, but also trigger a **positive ripple effect on the socio-economic-environmental tissue of society** to build resilience.

The purpose is for opera and dance companies to **proactively transform themselves**, so that they may become exemplary leaders in the performing arts sectors.

## Introduction

This study takes a holistic view at the sector to identify challenges, opportunities and best practices for the future of opera and dance

#BeyondStage



Sustainability



Inclusivity

#OnStage

Digitalisation

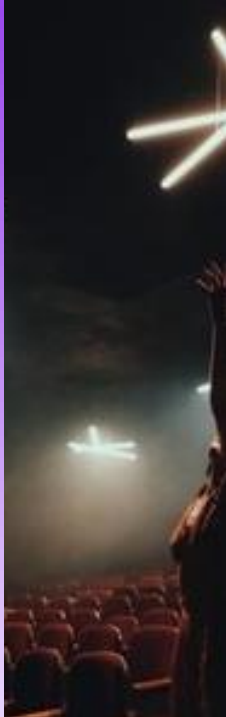
#BackStage



Prologue



# Sustainability, inclusivity and digitalisation are recognised as the three central topics for the future of the sector



The participants have shared **468 ongoing and planned initiatives**, that range from **small changes** that can be easily implemented to **large scale, transformational programmes**

The collection and assessment of these initiatives is a first step in **defining the way forward** for the sector through baselining the status quo, **creating transparency** for setting individual **ambition levels** and **facilitating collaboration and exchange** among companies

We see a variety of initiatives in all dimensions, with **recurring themes across companies**, e.g. online streaming, addressing societal issues in performances and minimising material use on stage

All companies are pursuing initiatives in the three dimensions but have **not necessarily established the organisational backing** to systematically advance

Across all dimensions, **access to funding and limited expertise** are seen as the biggest **barriers to progress**

Regarding **sustainability**, companies see an obligation to **act as role models** through education and leading by example

**Inclusivity** is oftentimes seen as a means to stay relevant and **attract new, more diverse audiences**

**Digitalisation** is acknowledged as opportunity to **enhance** traditional performances and **extend the reach** of the companies



## Summary

All participating companies are pursuing multiple exciting initiatives but are limited by lack of funding and expertise



Sustainability, inclusivity and digitalisation are the three key drivers for the future of the sector

- Following the shock of the pandemic, **over 80% of opera and dance companies** have **doubled down on digital**, but a large share has also **increased their engagement in inclusivity and sustainability**, confirming the importance of the three dimensions for the future of opera and dance
- Among the **key challenges** for the sector are **cost and funding** as well as **technological transformation, staying relevant for a broad audience** and fulfilling their **responsibilities as part of the society** they operate in and for – all of which can be addressed by embracing green, inclusive and digital transformation

We see a variety of initiatives in all dimensions, with recurring themes across companies

- While all companies have individual priorities and their own take on each of the dimensions, we see **recurring themes** across all of them. Among the **most mentioned initiatives** are:
  - **Reducing the use of materials, up- and recycling** of costumes and sets, **waste management** behind the stage and **energy saving lighting** on and behind the stage in the sustainability dimension
  - Addressing **societal issues** in performances, **promoting gender inclusivity in hiring** and **increasing accessibility of performances** in the inclusivity dimension
  - **Online streaming of performances**, digital **back-office systems optimisation**, and digital tools for **audience interaction** during performances in the digital dimension



All opera and dance companies are pursuing initiatives in the three dimensions, but many have not established the organisational backing to prioritise and systematically advance

- While all companies **recognise the importance** of sustainability, inclusivity and digital transformation for their organisation and the sector, they have **not fully set up** their **organisations and processes** to **systematically advance their activities**
- The **highest level of maturity** has been identified in **inclusivity**, with **35% of companies** having **defined, measurable targets**
- The **lowest level of organisational maturity** can be observed in **sustainability**, where around 45% of companies are realising disjointed initiatives or start to build on experiences from previous activities

Summary



Across all dimensions, access to funding and limited expertise are seen as the biggest barriers to progress

# Companies feel an obligation to be more green, inclusive and digital but see this also as an opportunity to transform the sector



## Key takeaways in sustainability

- Companies see an **obligation to act as role models, educate their audience** and community, and minimise their own environmental impact
- Key internal barriers are **missing resources and capabilities**, and **limitations from the environment they operate in**
- Key external barriers are **limited interest of key stakeholders** and **lack of funding**

## Key takeaways in inclusivity

- Companies see the need to **attract a more diverse audience** and make **inclusivity a priority** in all aspects of their work
- Key **internal barriers** are **limited understanding** and lack of expertise to advance inclusivity, **insufficient budget allocation**, and **no clear ownership, targets and measurability**
- **External barriers** include the **public perception of opera and dance** among diverse audiences and the **lack of funding** for inclusivity initiatives



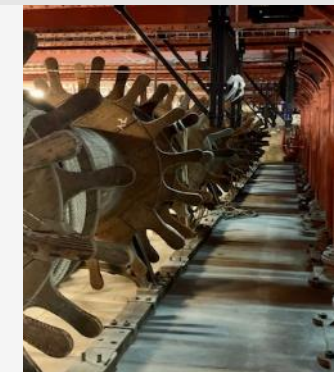
## Key takeaways in digitalisation

- Companies see a potential to **enhance their traditional performances** with **digital technologies** and want to **reach new audience groups** and expand their reach globally
- Key **internal barriers** are **lacking expertise, high investment requirements** and **fear of cannibalisation** of traditional formats through digital offerings
- **External barriers** include the **high speed** and **uncertainty** of technological change, the **tension** between attracting **new** and satisfying **traditional audiences**, and the **lack of public funding** for digitalisation

The participants have shared 468 ongoing and planned initiatives, that range from small changes that can be easily implemented to large scale, transformational programmes – their assessment is a first step in defining the way forward for the sector

Initiatives have been categorised and labelled as ‘widely adopted’, ‘advanced’ or ‘leading’ by their level of adoption, scope and potential impact. The collection and categorisation of initiatives serves different purposes:

- **Understanding** the **status of the sector** and **underlying considerations** of the companies
- Helping companies **set their own ambitions** on both ends by showing what could **become standard practice** and presenting **aspirational initiatives** to inspire a **bold way forward**
- Identifying parallels and **facilitating exchange, knowledge sharing** and **collaboration** among the companies to advance in each dimension



## Summary



# 1. The Overture

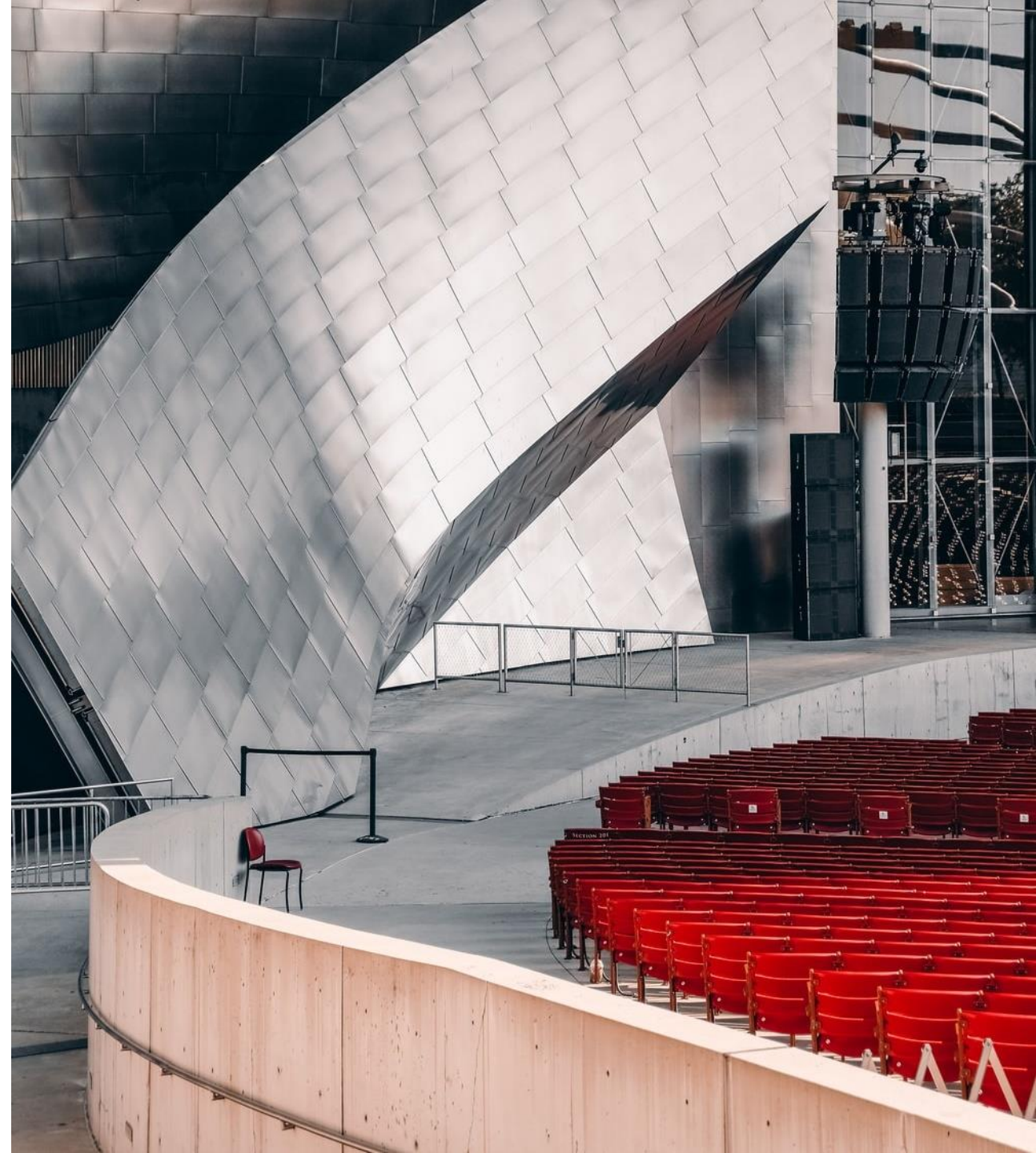
Introduction to the project, its purpose, participants and overview of key findings

# 2. The Act

Insights on status, outlook and initiatives to drive sustainability, inclusivity and digitalisation in the sector

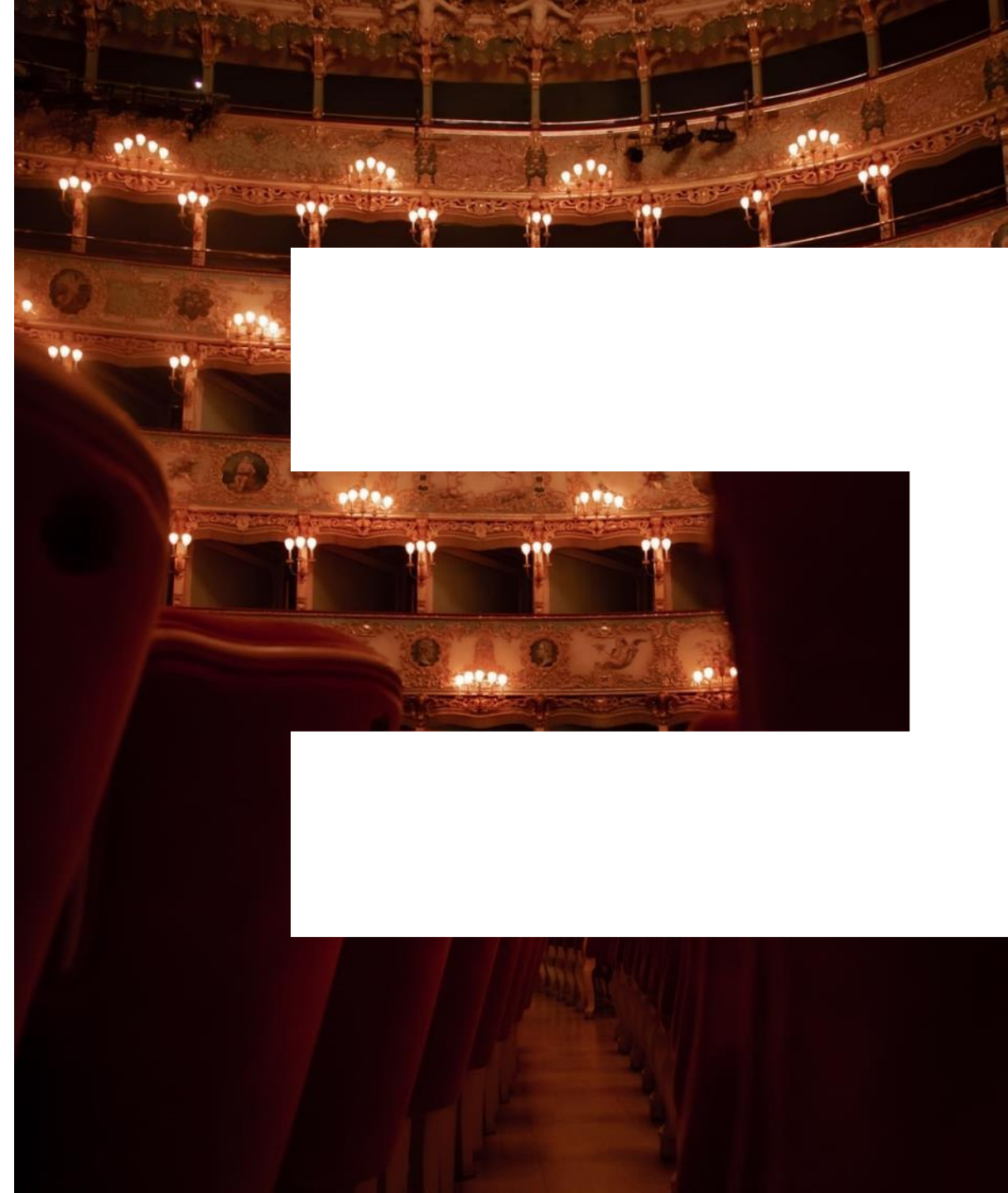
# 3. The Curtain Call

Takeaways from the study, implications and outlook for opera and dance companies



# THE OVERTURE

Introduction to the project, its purpose, participants and overview of key findings



With sustainability inclusivity and digitalisation, Next Stage is focusing on the key drivers for change and resilience in the sector

## Objectives of the Next Stage dimensions



Sustainability



Inclusivity



Digitalisation



Green initiatives increasing **eco-responsibility**



Decreasing the **carbon footprint**



Inclusive initiatives encouraging **equal opportunities**



Showcasing and promoting **diversity and inclusion**



Digital Initiatives driving **efficiency**



Creative opportunities through smart tech **innovation**






For each of the dimensions, we take a holistic perspective to identify actions and opportunities on, behind and beyond the stage

Non-Exhaustive, Exemplary

Introduction

## Next Stage dimensions and example topics

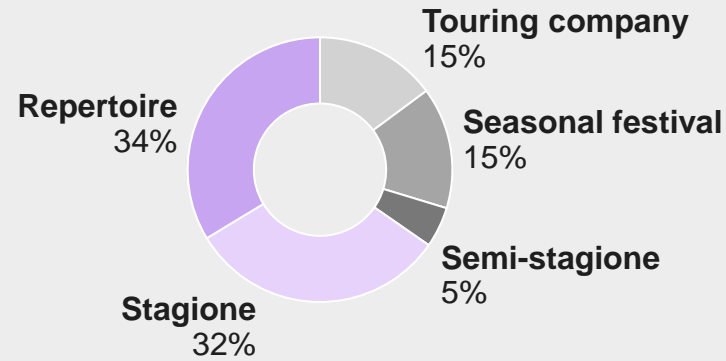
	 Backstage	 On Stage	 Beyond the Stage
<b>S</b> ustainability	<i>“Facility management, energy consumption and management, waste management and reduction, carbon footprint management”</i>	<i>“Alternative material and services sourcing, decrease carbon footprint for sets and costumes”</i>	<i>“Eco-friendly audience mobility, and optimised touring schedules”</i>
<b>I</b> nclusivity	<i>“Diversity of nationality, ethnicity and gender of creative and administrative workforce”</i>	<i>“Diversity of artists and repertory, encourage programmes that achieve artistic vision and tackle inequality”</i>	<i>“Diversity of stakeholders’ ages, social and economic background and inclusion of people with disabilities”</i>
<b>D</b> igitalisation	<i>“Boosting interdepartmental efficiency, build knowledge and adoption of digital tools”</i>	<i>“Renewal of the art forms and their relevance for audiences, new experiences and ways of interacting with audiences”</i>	<i>“Reach wider audiences, development of new revenue streams”</i>

Source: FEDORA Next Stage - Project Architecture (2021), Kearney

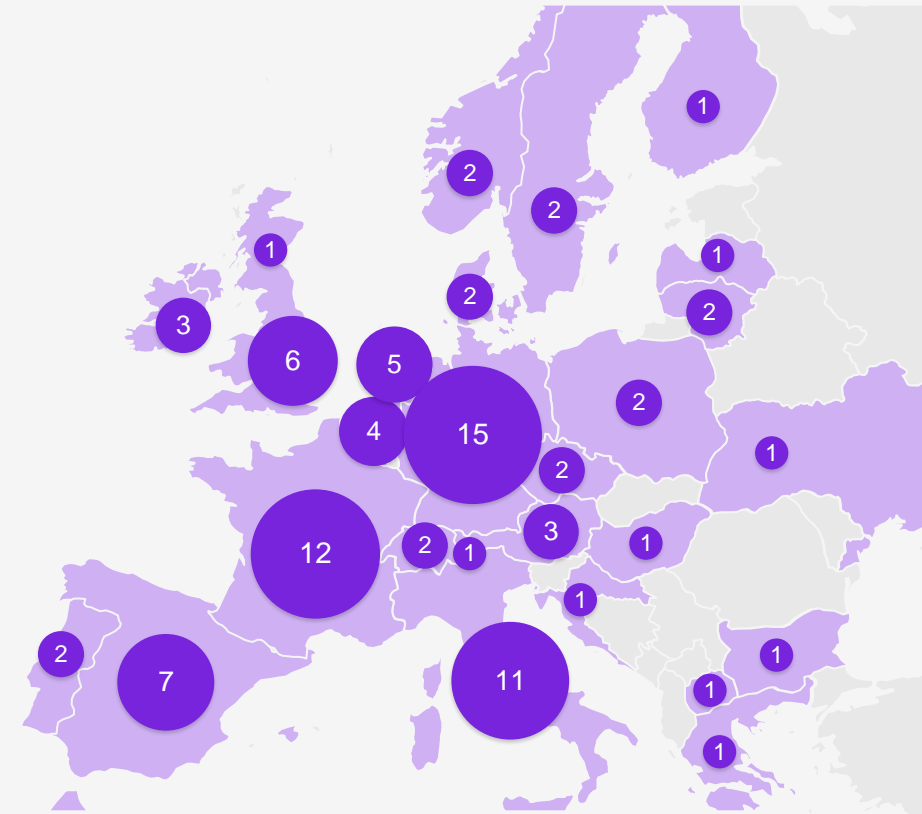


Almost 100 opera and dance companies from 34 countries have participated in the Next Stage survey on the status of the sector

Broad representation of production patterns...



...locations across Europe and the world



...and strong ambitions in all 3 dimensions

Currently, **39%** of companies are **only initiating their efforts or not even prioritising** sustainability, inclusivity and digital transformation.

The vast majority of companies is planning to significantly advance **over the next 5 years**:

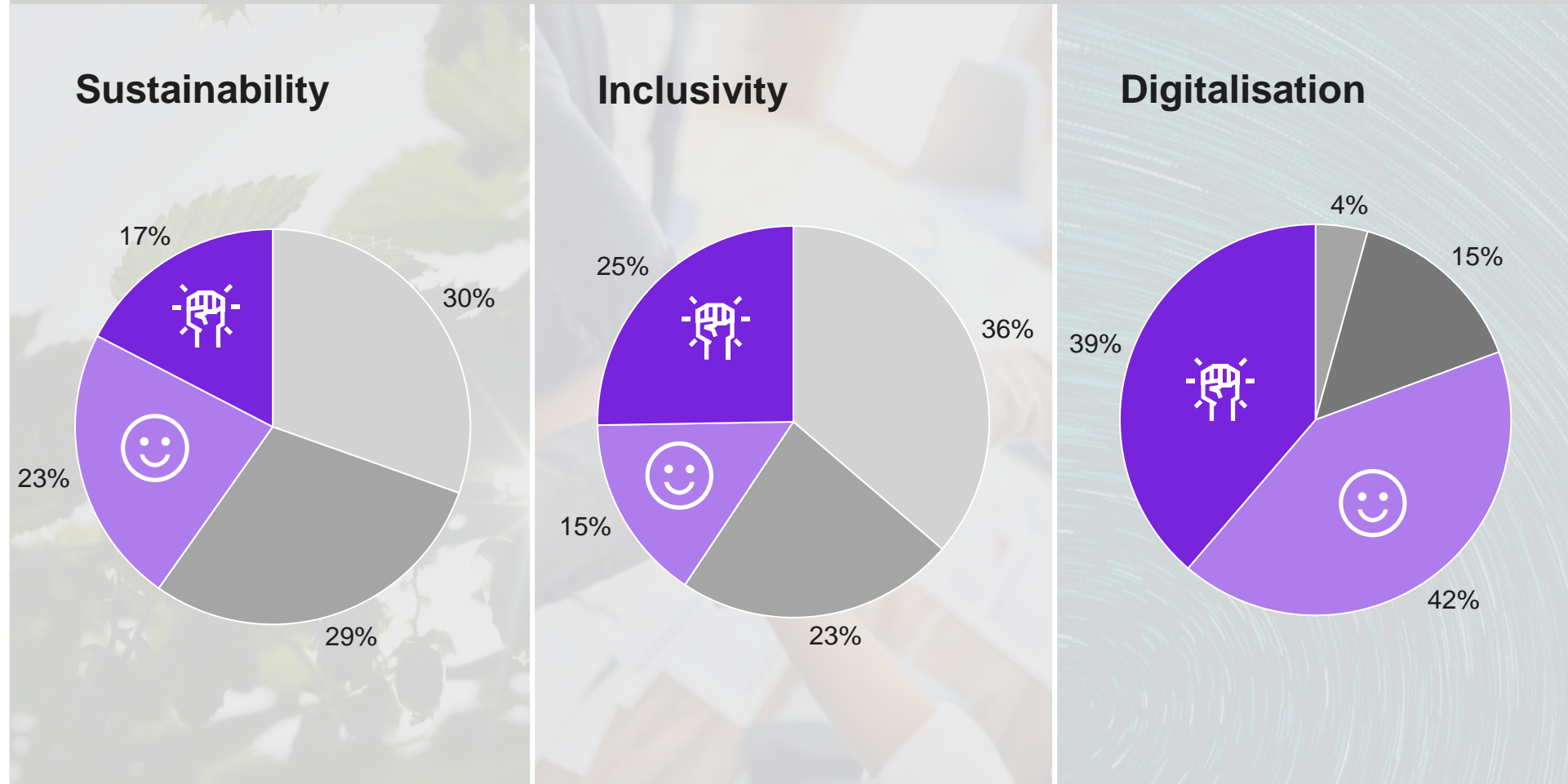
**31%** of participants have the ambition to **actively plan and implement projects**, and

**57%** even see themselves **systematically improving and scaling** efforts in the three dimensions by then.

Source: FEDORA Next Stage - Online Survey (2021), n=98  
Question: How sustainable / equal / digital is your company today/ in 5 years time?

The pandemic has not only boosted digitalisation but has also triggered many companies to double down on sustainability and inclusivity

## Impact of the pandemic on companies' level of engagement



Question asked: Has the pandemic had an impact on your company's level of engagement with the following fields?

- We boosted our already-existing efforts
- Immediately, we embraced the challenge to implement transformation
- Slightly, we are considering transforming our practices
- No, our position hasn't evolved in the past year

Source: Kearney



# THE ACT

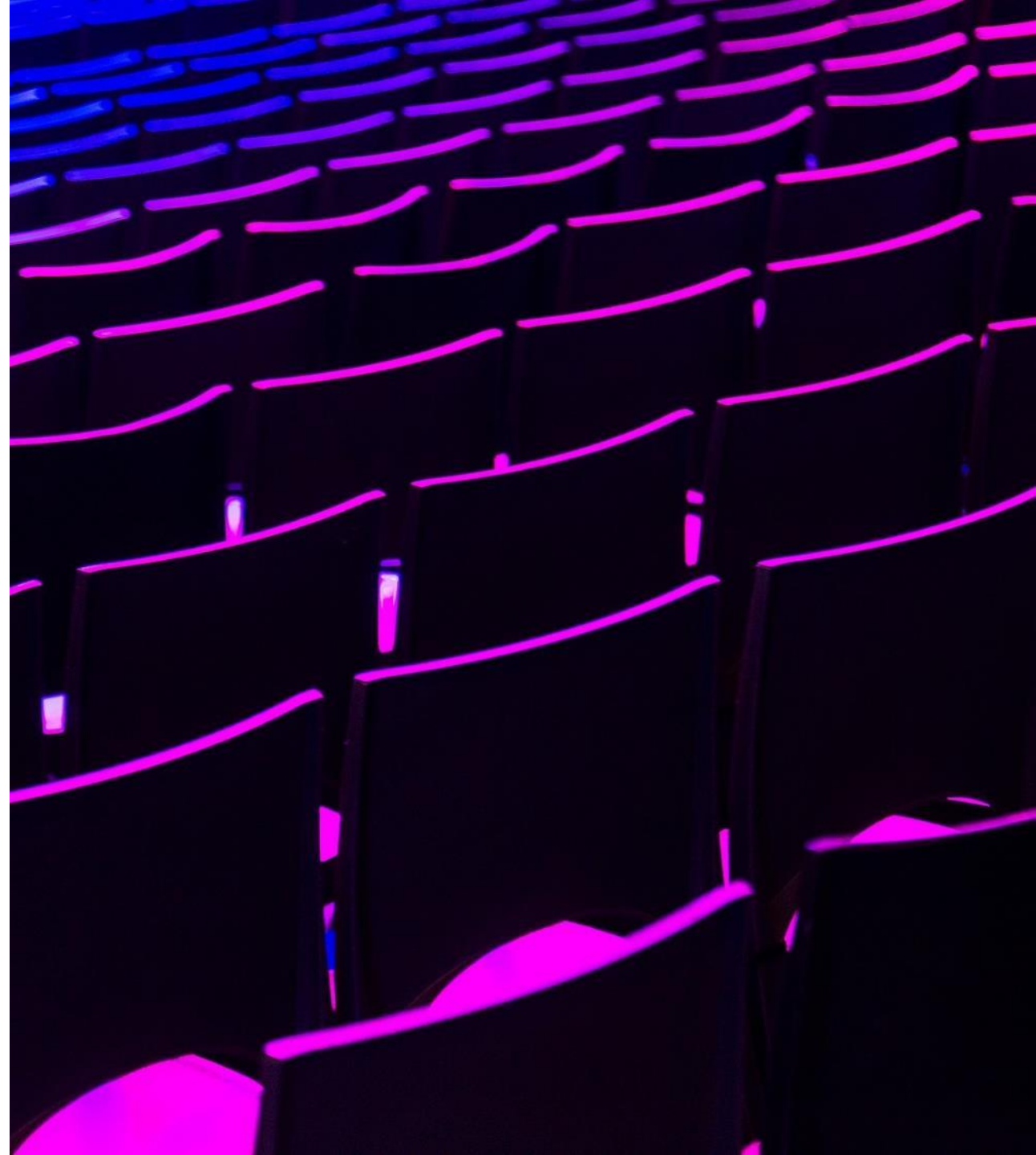
Insights on status, outlook and initiatives to drive sustainability, inclusivity and digitalisation in the sector





# THE ACT

## Sector Overview



Sustainability, inclusivity and digitalisation are recurring themes, both as opportunities and among the most pressing challenges

## Challenges for the sector

Reaching audiences that stayed at home during COVID and never returned

### INCLUSIVITY

*"We need to **diversify** our audience. How can we attract the young generation?"*

Rising material costs

Circular economy

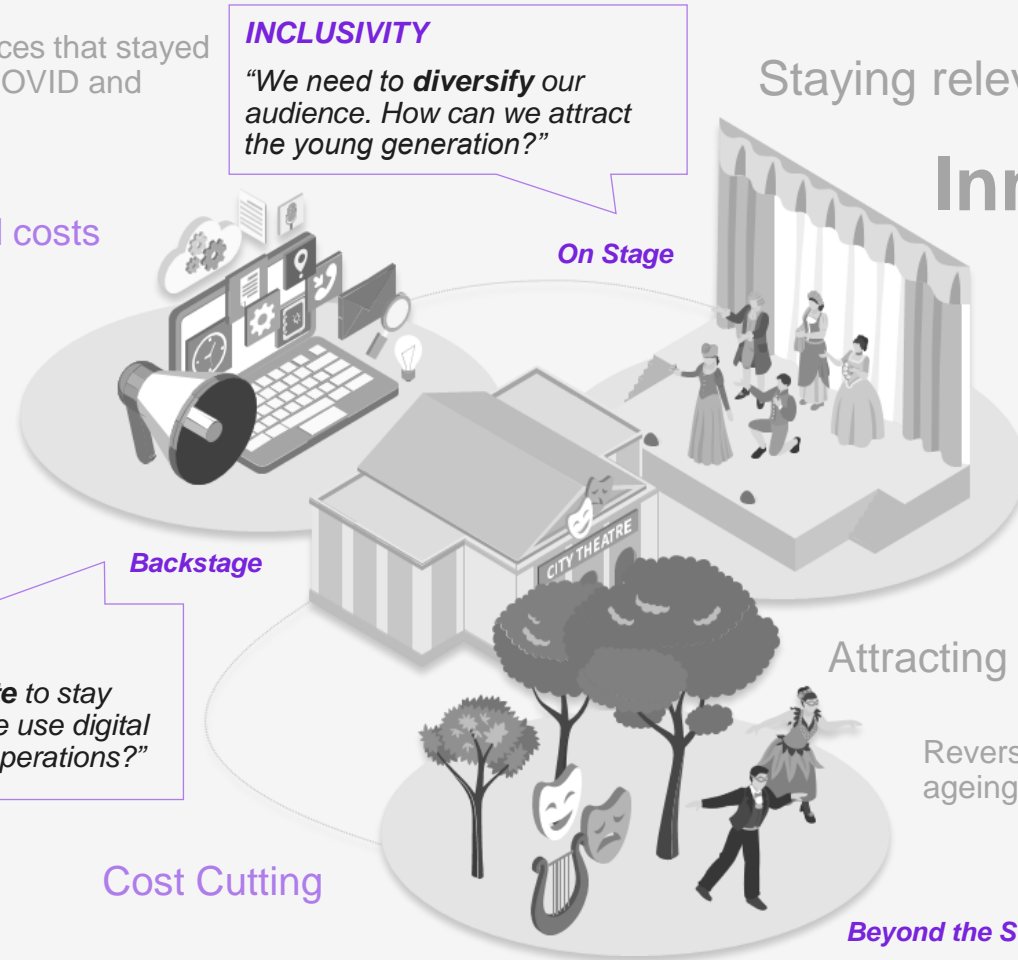
Making use of new digital formats and technologies

Staying relevant

## Innovation

Addressing societal and environmental topics

Bridging the gap between the old world and new digital world



### DIGITALISATION

*"We need to **innovate** to stay relevant. How can we use digital technologies in our operations?"*

## Budget

Attracting new audiences

Reversing the trend of the ageing audience

Fulfilling a societal responsibility

Cost Cutting

Beyond the Stage

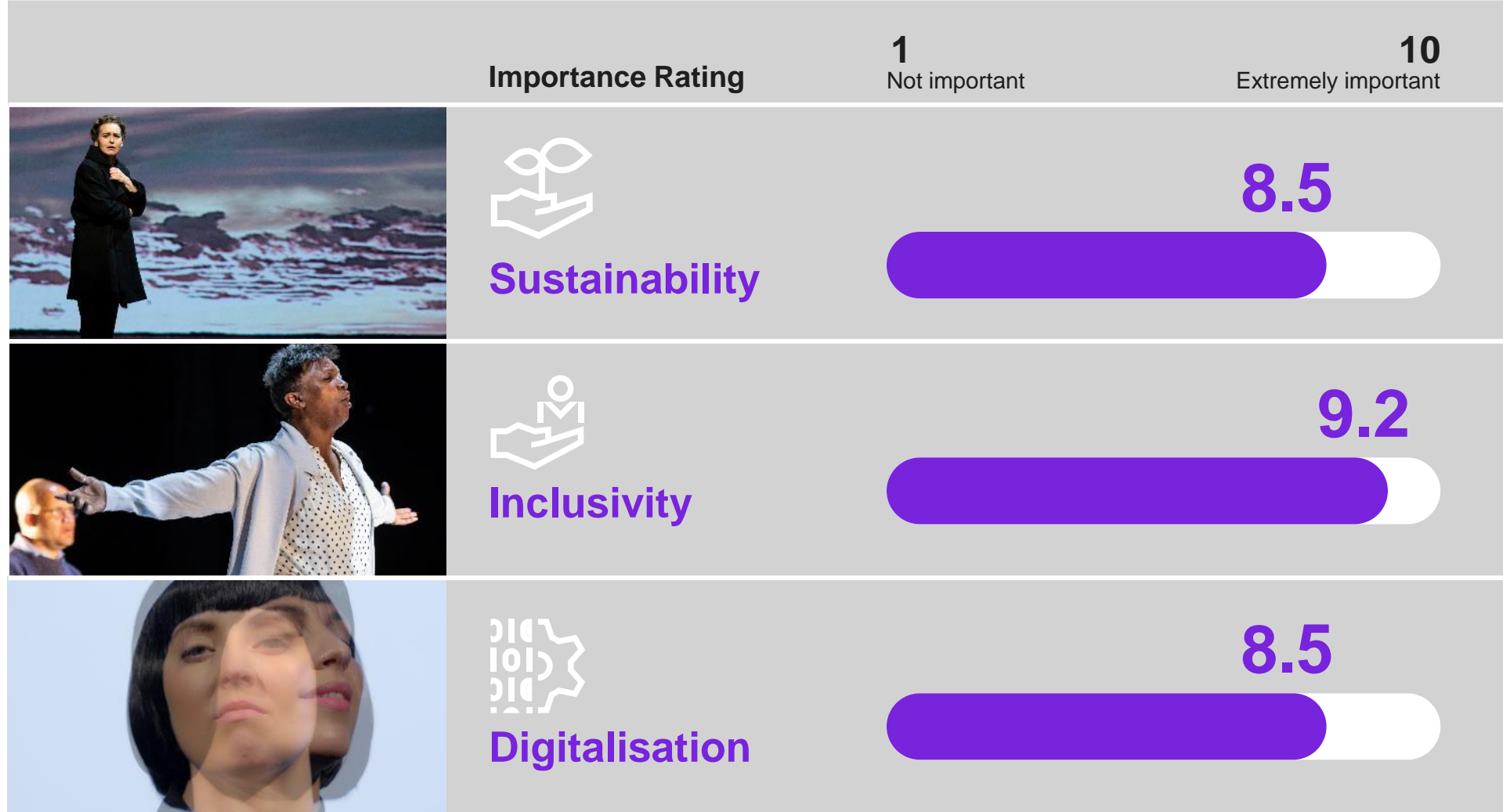
### SUSTAINABILITY

*"We need to become more **sustainable**, our business is historically not very ecological. How can we make a change and be a role model for society?"*

Post COVID-19 recovery

Securing public funding

All participants have ascribed a high importance to each of the three dimensions, with an even higher emphasis on inclusivity



**All interview participants** recognise the importance of sustainability, inclusivity and digitalisation and have confirmed that these dimensions will have a **significant impact on the future of the performing arts sector**

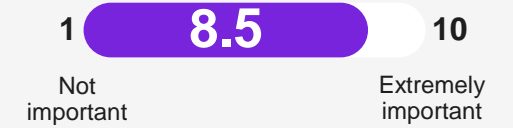
Source: Kearney  
Question: What is the level of importance for sustainability, inclusivity & digitalisation initiatives at your opera house on a scale of 1 (not important) to 10 (extremely important) ?

As one of the most pressing issues of our time, the companies feel they have a social obligation to lead and promote sustainability



## Sustainability

Importance Rating



### Voices from our interviews

*“Everyone needs to take action on climate change – as individuals, but also as public organisations”*

*“Sustainability is important to us. We have developed a sustainability concept to completely modernise our opera house”*

*“Reusing materials from old productions in new productions is a great opportunity to save resources”*

*“We want to live in a beautiful country and do not want to destroy our living space, employees should be responsible in their own ways”*

## Motivation

Fulfil a social responsibility and lead by example



In order to remain relevant and represent their entire community, the companies see the need to drive inclusivity in everything they do



## Inclusivity

Importance Rating



### Voices from our interviews

“**Equality** and **diversity** are at **the core** of our organisation”

“We need to be at the **forefront** fighting **for equality**. So far, I cannot hear a **strong enough voice** from theatres“

“We revised our **Code of Conduct: Anti-discrimination, anti-racism, anti-sexism** – applies to all **not only** to our **employees**, but also to all our professional **partners**”

“We want to be **relevant to the world** and want to reflect the world on **our stage**”

## Motivation

Reach new audiences and support the wider community

Digitalisation helps the companies to optimise their operations and broaden artistic possibilities



## Digitalisation

Importance Rating



### Voices from our interviews

“We need to **innovate** to stay **relevant and justify private and public funding**”

“COVID made clear that **technology is essential** for the future“

“We need to **think beyond streaming** stage performances, and use the **potential of digitalisation** in all aspects of our work”

“Due to lacking know-how, we require **strong partners & budgets** for technology”

## Motivation

Increase efficiency and set up for the future

Source: Kearney  
Question: What is the level of importance for sustainability, inclusivity & digitalisation initiatives at your opera house on a scale of 1 (not important) to 10 (extremely important)?

# We see a deep-rooted motivation for sustainability, inclusivity and digitalisation to boost innovation and fulfil a social responsibility

Exemplary – Non-Exhaustive

Sector Overview



Sustainability



Inclusivity



Digitalisation

*“Climate change is real, a lot of people in the organisation are eager to take action”*

*“There is more to a **sustainable future** than just saving money”*

*“Our art form is **in principle not sustainable**, it’s a one time show to live in the moment”*

*“As a cultural institution, we need to **act as a role model** for society”*

*“Due to the history of our industry, opera **needs to be more open** towards all kinds of people in society”*

*“More diverse audiences bring **us forward** with demand for new ideas and creative partnerships”*

*“The desire should be to represent a **cross-section** of society in theatres”*

*“If we take care of equality, people and employees **will feel more energised** at the opera house”*

*“Digitalisation enables us to reach **new audiences**, such as younger people”*

*“Our vision is to **transform the physical opera house** into a digital media house”*

*“Technology is fast paced, it is **important to keep up** with trends and innovation”*

*“During the pandemic, we did a lot of **experimental work** in digitalisation”*





# THE ACT

## Organisation and process maturity





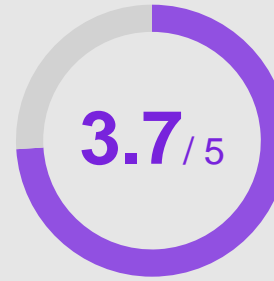
Based on objective criteria, we have assessed the organisational and process maturity of the companies in all three dimensions

## Maturity Level Assessment

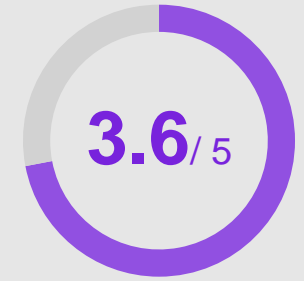
Average Maturity Level



Sustainability

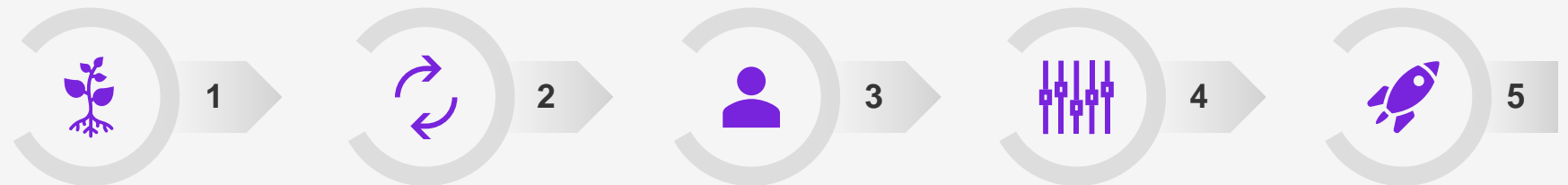


Inclusivity



Digitalisation

## Maturity Levels definition



### Initial

Defined activities, initiatives and / or processes in place

### Repeatable

New activities, initiatives and / or processes are based on prior experiences

### Defined

Specific individuals within the organisation are responsible for implementing initiatives

### Managed

Quantitative metrics and performance tracking is in place

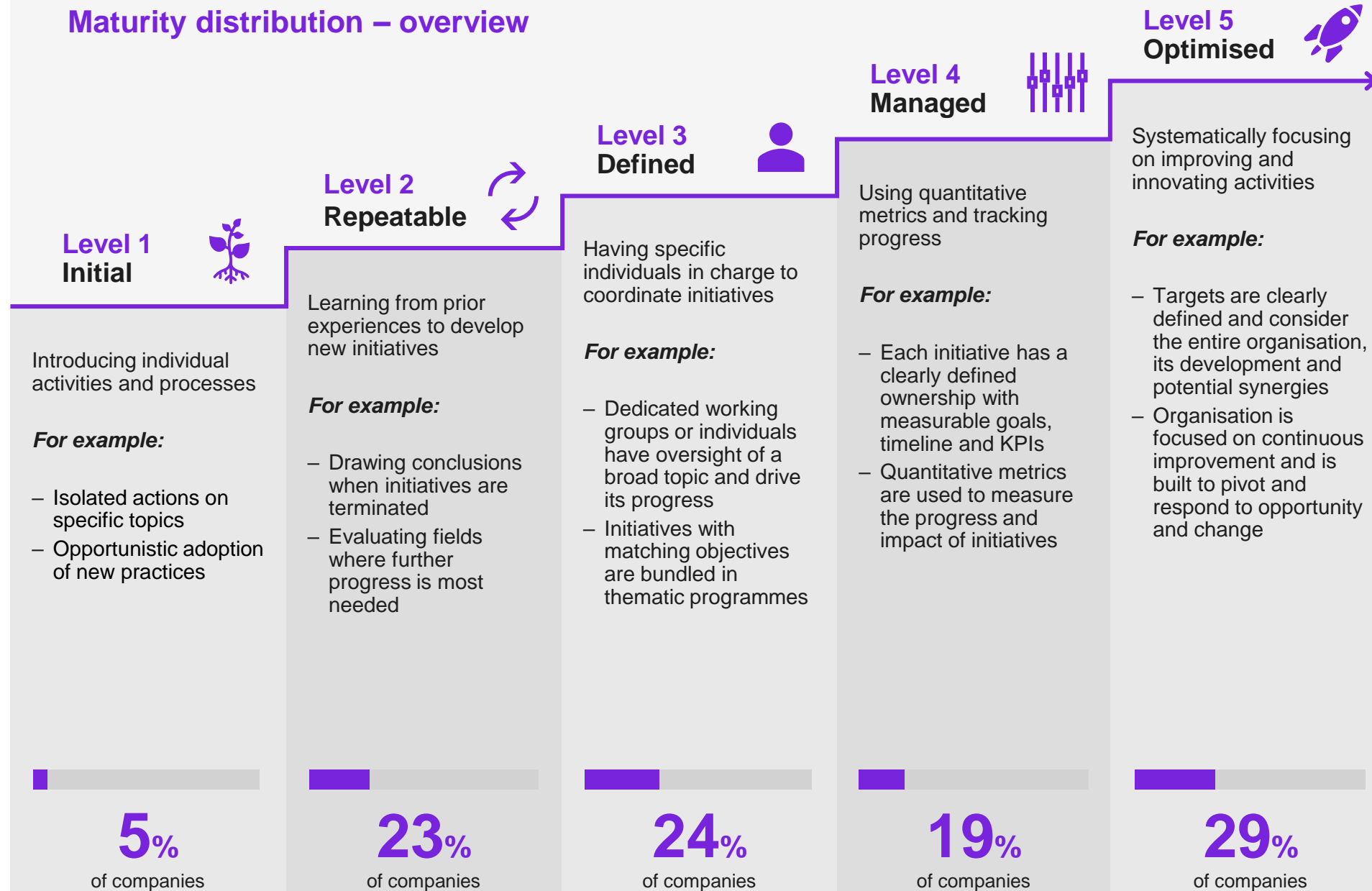
### Optimised

Defined targets and / or systematic focus on improving and innovating

## Organisation & Process Maturity

# Nearly 30% have set up their organisation for systematic optimisation in sustainability, inclusivity and digitalisation

## Maturity distribution – overview



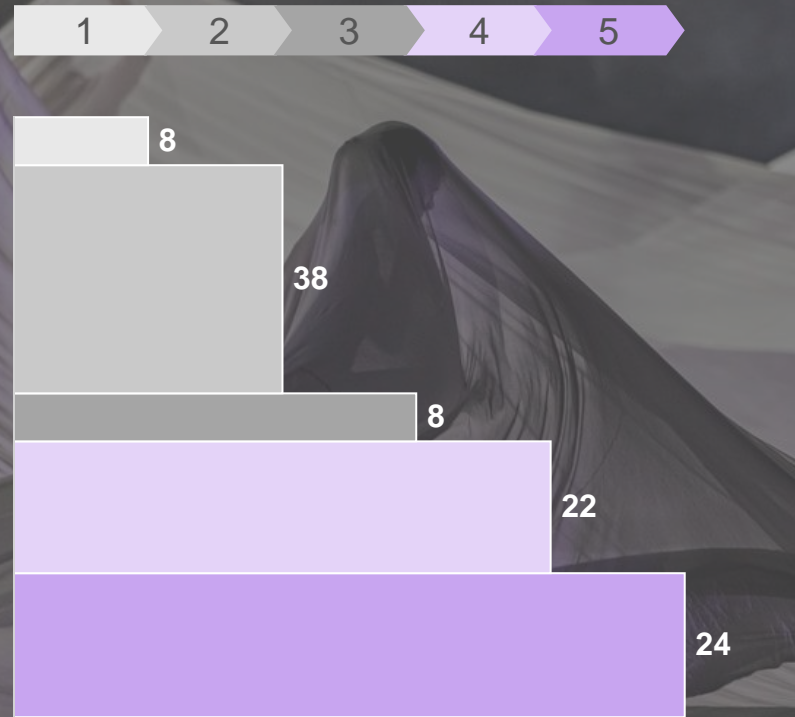
### Organisation & Process Maturity

Source: Kearney

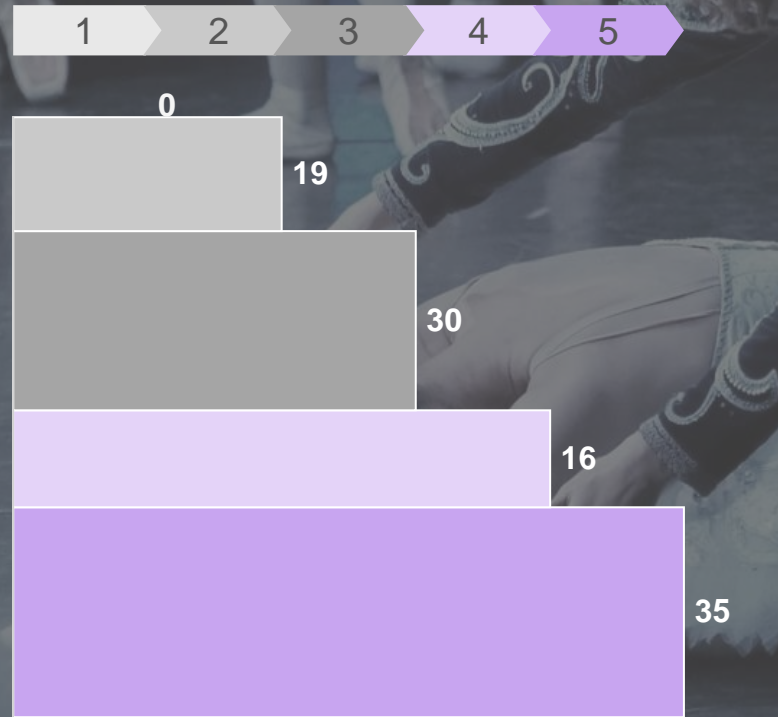
# Especially in inclusivity and digitalisation maturity levels are high: companies dedicate resources and define targets to increase the impact of their initiatives

## Maturity distribution by dimensions (%)

### Sustainability



### + Inclusivity



### + Digitalisation



# THE ACT

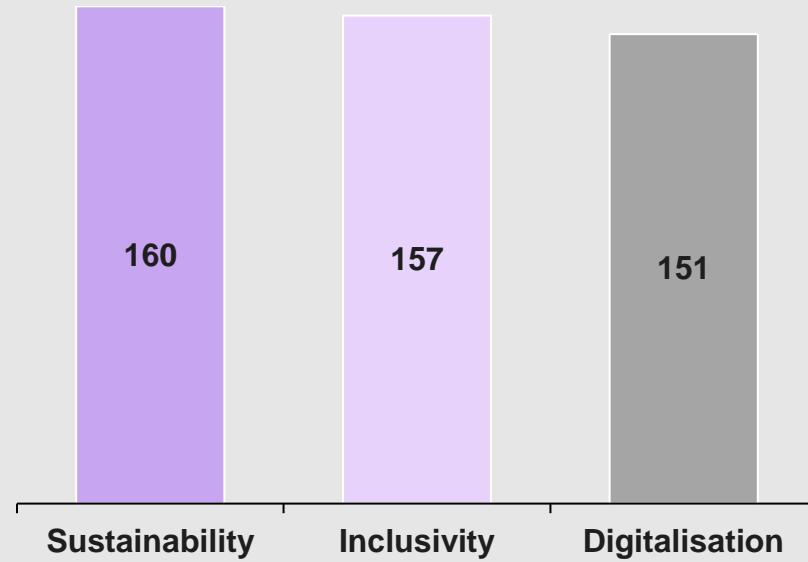
## Introduction to the initiatives



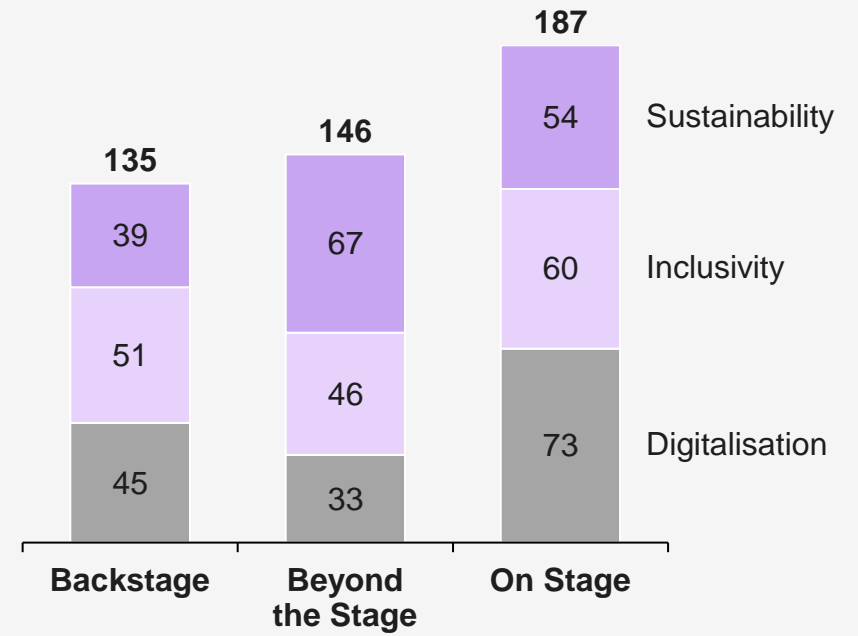


Overall, the opera and dance companies have shared 468 exciting initiatives, covering all dimensions and areas of the study

Initiatives by dimension



Initiatives by area



Initiatives Overview

Source: Kearney

In each dimension, there are common themes that are reflected in the initiatives of various opera and dance companies

### Most frequently mentioned initiatives by theme

Theme	Initiative	# mentioned initiatives
Sustainability	Manage on-stage waste and / or recycle & upcycle materials	22
	Minimise and manage waste and materials use in backstage processes	20
	Use energy saving lighting technologies	16
	Modernise buildings for better energy efficiency and sustainability	15
	Source eco-friendly & sustainable materials for on-stage elements	13
Inclusivity	Highlight issues and societal questions on equality, diversity and inclusivity in performances	19
	Promote hiring and career advancement of female employees to improve gender equality	17
	Adjust programming and content to make shows more accessible	14
	Actively scout and recruit diverse talent, specifically from underrepresented groups	13
	Create comprehensive educational programmes to give diverse groups insights into performing arts	11
Digitalisation	Broadcast opera / dance shows via streaming platforms	27
	Optimise operations with digital back-office systems	14
	Use digital opera formats with VR/AR technology and advanced audience interaction	11
	Use digital paperless ticketing systems	10
	Develop game apps to create interest among new audience groups	8




### Initiatives Overview

The initiatives identified include small actions that are relatively easy to implement, as well as large scale transformational programmes

Exemplary – Non-exhaustive

Initiatives Overview

Overview of rated initiatives

	<b>Widely adopted</b> 	<b>Advanced</b> 	<b>Leading</b> 
	<p>Tried and tested initiatives which are implemented by various companies across the sector</p> <p><b>266</b> <i>initiatives</i></p>	<p>Initiatives that go <b>beyond the standard</b> in terms of scope, innovation or impact</p> <p><b>119</b> <i>initiatives</i></p>	<p><b>Outstanding</b> initiatives that can inspire innovation and serve as examples for <b>future aspirations</b></p> <p><b>83</b> <i>initiatives</i></p>
<b>Sustainability</b>	<ul style="list-style-type: none"> <li>– Recycling / upcycling of materials</li> <li>– Performances with sustainability theme</li> <li>– Reduced travel for staff meetings</li> <li>– Photovoltaic / solar panels</li> <li>...</li> </ul>	<ul style="list-style-type: none"> <li>– Circular economy processes / concepts</li> <li>– Smart storage and material procurement</li> <li>– Green travel concept for audiences</li> <li>– Working group / team for sustainability</li> <li>...</li> </ul>	<ul style="list-style-type: none"> <li>– Holistic green mobility and travel concept</li> <li>– Platform to exchange sets and materials</li> <li>– Smart building concept and comprehensive modernisation</li> <li>...</li> </ul>
<b>Inclusivity</b>	<ul style="list-style-type: none"> <li>– Gender equality in staff hiring</li> <li>– Diversified recruiting and auditions</li> <li>– Multiple languages for performances</li> <li>– Subsidised tickets for selected groups</li> <li>...</li> </ul>	<ul style="list-style-type: none"> <li>– Educational programme for diverse groups</li> <li>– Workshops and talks around inclusivity</li> <li>– Working group / team for inclusivity</li> <li>...</li> </ul>	<ul style="list-style-type: none"> <li>– Inclusivity concept for all aspects of the production and show</li> <li>– Accessible shows for people with additional needs</li> <li>– Objectivity measures for artist recruiting</li> <li>...</li> </ul>
<b>Digitalisation</b>	<ul style="list-style-type: none"> <li>– Broadcast opera / streaming platforms</li> <li>– Digital paperless ticketing system</li> <li>– Digital stage with new equipment</li> <li>– Digital back office systems</li> <li>...</li> </ul>	<ul style="list-style-type: none"> <li>– Create performances with digital elements</li> <li>– Establish own streaming platforms</li> <li>– Produce content specifically for online</li> <li>– Working group / team for digitalisation</li> <li>...</li> </ul>	<ul style="list-style-type: none"> <li>– Digital opera formats with VR/AR</li> <li>– 3D printing in the production</li> <li>– Video game app for audience</li> <li>– Audience data collection and analytics</li> <li>...</li> </ul>

Source: Kearney  
 VR = Virtual reality; AR = Augmented reality



# THE ACT

## Findings on Sustainability





## Most companies are aware of their societal responsibility to become more sustainable, but barriers need to be overcome

### Internal barriers

- Lacking knowledge and expertise about sustainability
- No dedicated resources which are responsible for sustainability initiatives and projects
- Limited budget availability for sustainability initiatives
- Often operating in historical buildings with limiting possibilities for energy efficiency, and making sustainable renovations extremely costly

### External barriers

- Lacking understanding of external parties that more sustainability project support is required
- Need for educating audiences about sustainability, and change their thinking and behaviour
- Difficulties of raising public funding for sustainability projects

Source: Kearney



**38%** of all companies have sustainability initiatives in place based on prior experiences

While only **8%** have dedicated individuals in charge to oversee and coordinate progress in sustainability

### Ambition & Motivation

- Societal responsibility and obligation as public institution to be a role model
- Power to create more awareness about sustainability to their audiences through art and education
- Climate change is one of today's most pressing issues and requires every actor to minimise their environmental impact

# Backstage sustainability initiatives focus mostly on managing and minimising waste

## Selected initiatives in Sustainability – Backstage

### Widely adopted



- Minimise and manage waste and materials use in backstage processes
- Use energy saving lighting technologies

### Advanced



- Establish a working group / dedicated person responsible to advance sustainability initiatives

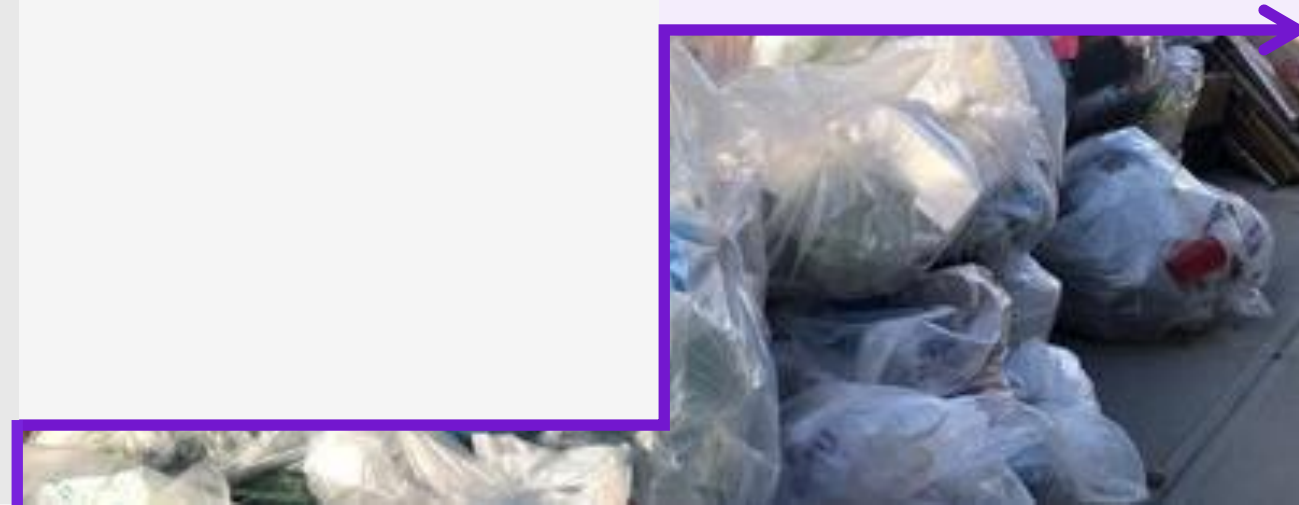
### Leading



- Develop comprehensive recycling & upcycling concept to enhance waste management efficiency

Sustainability x Backstage

Key Insights - Sustainability



# On stage, opera and dance companies embed sustainability topics in their shows, and assure materials are used responsibly

## Selected initiatives in Sustainability – On Stage

### Widely adopted



- Include elements of sustainability and environmental topics in shows
- Manage on-stage waste, and recycle or upcycle materials used on stage
- Source eco-friendly and sustainable materials for on-stage elements

### Advanced



- Create shows that focus on sustainability and the environment within shows
- Embed minimalism and waste reduction in the production planning process and creative approach
- Develop circular economy processes and concepts that assure recycling and upcycling of on stage materials

### Leading



- Embed sustainability in the main storyline and in various aspects of the production to advocate for environmental topics

Sustainability x On Stage

## Key Insights - Sustainability

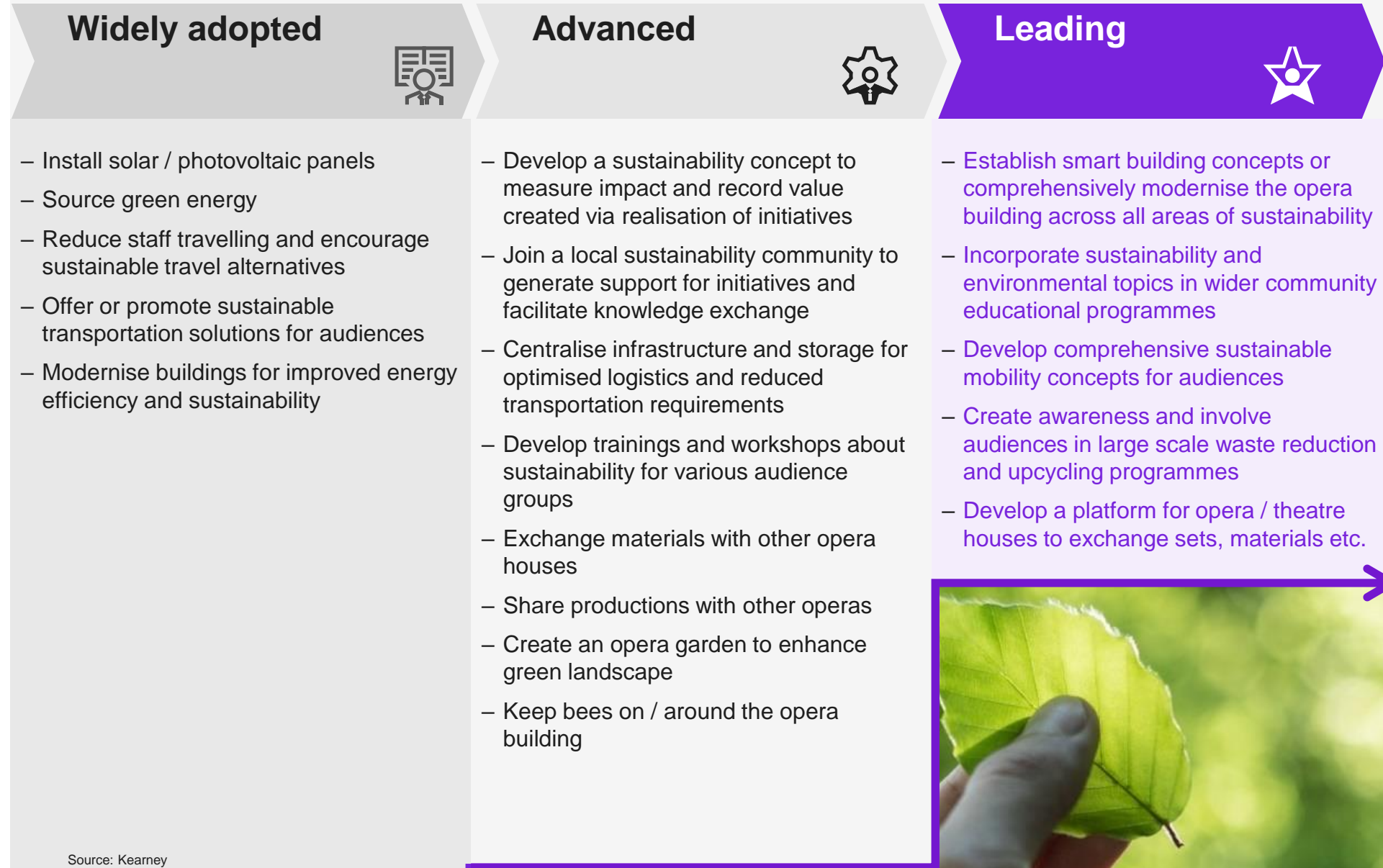


# Numerous innovative sustainability initiatives were identified beyond the stage with the power to create a green future

Sustainability x Beyond the Stage

## Key Insights - Sustainability

### Selected initiatives in Sustainability – Beyond the Stage



Source: Kearney





# THE ACT

## Findings on Inclusivity



**Most companies try to promote inclusivity in line with societal change, but they often lack a clear vision for execution**


### **Internal barriers**

- Limited understanding and awareness among employees
- Lack of expertise in the area of equality, diversity and inclusivity
- Missing budget and resources to implement inclusivity initiatives and projects
- No clear ownership and responsibility of inclusivity topics within the organisation
- Difficulties to set targets and measure impact of inclusivity

### **External barriers**

- Lack of public funding for inclusivity in the sector
- Limited interest from younger and more diverse audiences in traditional Opera
- Perspective and awareness from traditional audiences differs from that of the wider society

### **Key Insights - Inclusivity**



**30%** of all companies have defined individuals to coordinate inclusivity initiatives

and **35%** even have defined targets to measure their progress against

### **Ambition & Motivation**

- Changing the perception of Opera and minimising barriers for all societal groups
- Creating awareness and educating employees to advance equality in all aspects of their work
- Attracting new, younger and more diverse audiences

Inclusivity has become a core value in the opera industry, specifically backstage numerous initiatives are being pursued

Inclusivity x Backstage

Key Insights - Inclusivity

## Selected initiatives in Inclusivity – Backstage

### Widely adopted



- Define a common language for the opera sector to enable international communications
- Promote hiring and career advancement of female employees to improve gender equality in different fields backstage
- Consider diversity dimensions in backstage / office recruiting
- Pay fair salaries for everyone involved in the production
- Provide training programmes specifically for women to improve gender equality backstage

### Advanced



- Develop a code of conduct for anti-discrimination, anti-racism, anti-sexism throughout the organisation
- Establish dedicated diversity agents / working groups / teams to drive inclusivity initiatives within the entire organisation
- Create awareness for inclusivity and diversity among employees via communication or trainings
- Recruit and train refugees to give them opportunities to work in the opera sector
- Define targets for hiring and promotion to advance gender equality

### Leading



- Implement special recruiting and training programmes for underrepresented artists
- Maximise objectivity in artist recruiting with 'blind auditions'





# Inclusivity also plays a major role on stage, where more inclusive and accessible shows are a must to reach diverse audiences

## Inclusivity x On Stage

## Key Insights - Inclusivity

### Selected initiatives in Inclusivity – On Stage

#### Widely adopted



- Adjust programming and content to make shows more accessible and relatable for diverse audiences
- Actively scout and recruit diverse talent, specifically from underrepresented groups

#### Advanced



- Highlight key topics and societal questions on equality, diversity, inclusivity in shows
- Create shows and surrounding activities (e.g. educational workshops) on topics around inclusivity
- Assess audience diversity as basis for optimisation
- Create opportunities in productions to involve artists from underrepresented groups, e.g. transgender chorus singers

#### Leading



- Embed equality, diversity and inclusivity in shows and productions to highlight the topics and promote conversations in society
- Develop accessible, sensory friendly shows for people with additional needs



# Various inclusivity initiatives beyond the stage were highlighted, especially about educational programmes and accessibility

## Inclusivity x Beyond the Stage

## Key Insights - Inclusivity

### Selected initiatives in Inclusivity – Beyond the Stage

#### Widely adopted



- Reach out to the community and create a space for encounters and exchanges
- Minimise / eliminate physical access barriers
- Offer subsidised tickets for selected audience groups
- Celebrate recognition days and participate in public events to raise awareness for inclusivity issues
- Mobilise the community and use crowdfunding platforms to finance productions
- Train and engage young talent
- Develop guiding principles on equality and inclusivity for the company

#### Advanced



- Create comprehensive educational programmes to give diverse groups insights into performing arts and win them as a new audience group
- Perform in different environments to minimise barriers for new audiences
- Organise workshops and talks around equality, diversity and inclusivity topics for audiences or partner organisations
- Provide special workshops and events for vulnerable youth groups and people with additional needs
- Drive social inclusion initiatives in the local community
- Create accessible programmes to attract audience groups from all social backgrounds
- Support diverse artists to find follow-up engagements
- Offer affordable tickets only to minimise barriers for all social groups

#### Leading



- Create workshops, establish educational programmes and make shows accessible for children with additional needs
- Collaborate with theatres based in difficult environments globally (i.e. political instability, limited access to education and performing arts know-how, limited resource and talent availability, limited financial resources etc.)
- Develop specific educational and artistic programmes for selected disadvantaged groups



# THE ACT

## Findings on Digitalisation



**Most companies are eager to seize the possibilities of digitalisation, but have limited expertise and funding to do so**


### Internal barriers

- Lacking knowledge and expertise in the area of digital technologies
- Insufficient budget and resources to implement digital initiatives and projects
- Fear of cannibalisation among digital opera formats and live productions
- Lacking understanding of digitalisation and new technologies among employees
- New technologies require significant investments

### External barriers

- Limited public funding for digital transformation projects is available
- Speed of technological development in other sectors and society make it challenging to keep up
- Limited interest in digital formats from traditional audiences

### Key Insights - Digitalisation



**35%** of all companies have defined individuals to coordinate digital initiatives

and **27%** even have defined targets to measure their progress against

### Ambition & Motivation

- Reduce the distance between online and offline audiences via hybrid formats that include digital technologies, thereby bringing together existing and attracting new audience groups
- Expand globally reach by sharing communication and content digitally
- Develop digital formats as a complement to enhance – not replace – the physical experience of opera and dance performances



# Backstage digitalisation initiatives have been gaining ground, with digital ticketing systems and tools leading the way

Digitalisation x Backstage

## Key Insights - Digitalisation

## Selected initiatives in Digitalisation – Backstage

### Widely adopted



- Use newsletters and social media to reach and engage target audiences
- Use digital paperless ticketing system to increase efficiency
- Optimise operations with digital back office systems
- Use digital tools for (virtual) collaboration and increase efficiency

### Advanced



- Establish a dedicated working group / team for digitalisation topics
- Use advanced digital collaboration tools and integrate such tools in the larger system infrastructure
- Extend the use of digital tools for rehearsals, schedules and scores towards paperless operations

### Leading



- Use 3D printing technology in the opera production department
- Implement digital ticketing system with CRM analytics system, enabling audience data collection, sale predictions, variable pricing and programme optimisation
- Use VR and 3D technology for stage planning and development

Source: Kearney  
VR = Virtual reality



# On stage digitalisation initiatives focus mainly on online streaming and how digital tools can improve audience interaction

Digitalisation x On Stage

## Key Insights - Digitalisation

## Selected initiatives in Digitalisation – On Stage

### Widely adopted



- Create content complementary to live shows and streaming
- Digitise the stage with new technologies and equipment
- Broadcast opera and dance shows via streaming platforms

### Advanced



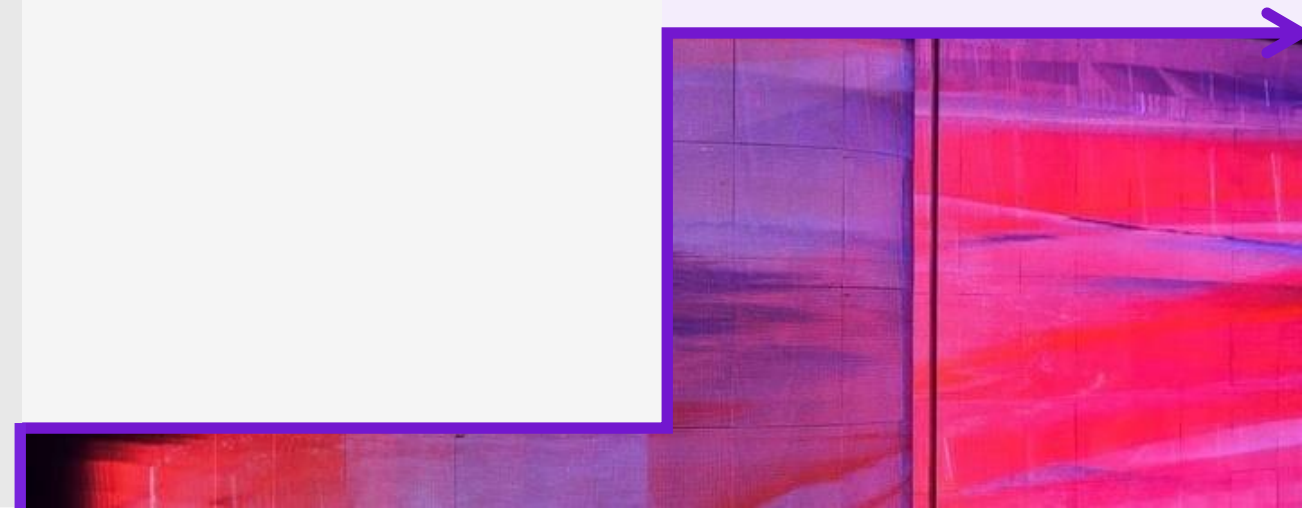
- Develop opera shows that are exclusively streamed via social media
- Produce educational video training materials for staff
- Interact with digital elements on stage
- Use advanced streaming technology and 360° cameras for show broadcasting
- Produce specific content and formats for online and/or public streaming

### Leading



- Develop online format with workshops to interact with audiences
- Develop shows exclusively for online streaming
- Use digital opera formats with VR/AR technology and advanced audience interaction
- Use digital-first formats (e.g. podcast, short videos) and channels (e.g. YouTube, Social Media) to access new audiences

Source: Kearney  
VR = Virtual reality; AR = Augmented reality



# Digital technologies are frequently used beyond the stage to create platforms and engage the audiences in new ways

## Digitalisation x Beyond the Stage

### Key Insights - Digitalisation

## Selected initiatives in digitalisation – Beyond the Stage

### Widely adopted



- Use digital tools for interaction and communication with audiences
- Sell merchandise through online shop

### Advanced



- Collaborate with social media influencers to reach new audiences
- Develop mobile opera app to share information to the audience
- Create opera exhibition combining digital and physical artefacts
- Educate and train different target groups with digital programmes and workshops
- Develop media archive with fully digitalised historic content and data with free public access
- Run own streaming platform with open access for other opera houses
- Use social media channels to reach new audiences

### Leading

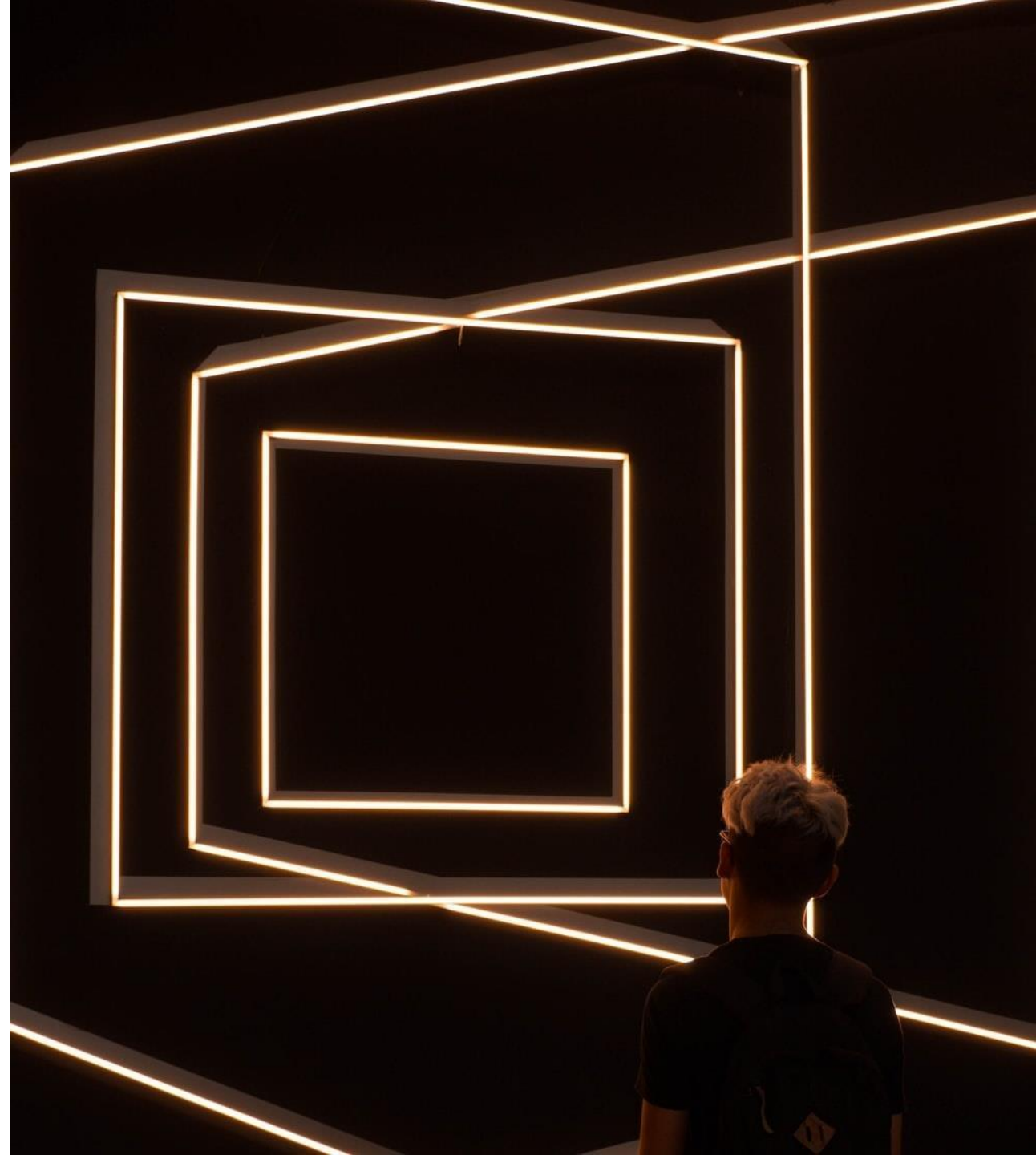


- Conduct digital workshops to create awareness in new audience groups
- Develop a video game app to create interest among new audience groups
- Develop an open source platform for digital tools and documents
- Implement a comprehensive digital transformation programme for the entire organisation
- Engage the virtual community to participate in educational projects with children in conflict zones



# THE ACT






## Aspirational Initiatives









# Innovative initiatives from all across Europe can inspire others to embrace sustainability, inclusivity and digitalisation



Oper am Rhein 	Poznań Opera House 	Opéra national de Paris 	World Opera Lab 	Teatro Regio di Parma 
The Digital Foyer	Anhelli	VR for residential care and the elder	Ine Aya' – voice from a fading forest	Regio 3D
Sustainability Inclusivity Digitalisation <i>#BeyondTheStage</i>	Sustainability Inclusivity Digitalisation <i>#OnStage</i>	Sustainability Inclusivity Digitalisation <i>#BeyondTheStage</i>	Sustainability Inclusivity Digitalisation <i>#OnStage</i>	Sustainability Inclusivity Digitalisation <i>#BackStage</i>

## Non-Exhaustive



Finnish National Opera & Ballet 	Teatro Massimo Palermo 	Croatian National Theatre in Rijeka 	Irish National Opera 	Stara Zagora State Opera 
XR Stage Tool	GREEN MOBILITY	(Re)Discovering Europe	As an nGnách (Out of the Ordinary)	We are musicians
Sustainability Inclusivity Digitalisation <i>#OnStage</i>	Sustainability Inclusivity Digitalisation <i>#BeyondTheStage</i>	Sustainability Inclusivity Digitalisation <i>#BeyondTheStage</i>	Sustainability Inclusivity Digitalisation <i>#OnStage</i>	Sustainability Inclusivity Digitalisation <i>#OnStage</i>

## Aspirational Initiatives

# A snapshot of inspiring initiatives from across Europe

## The Digital Foyer

Oper am Rhein (Germany)

Sustainability Inclusion Digitalisation

*#BeyondTheStage*

"The Digital Foyer" is a project of the Deutsche Oper am Rhein and the FFT Düsseldorf in cooperation with the University of Applied Sciences Düsseldorf. The project designs and tests future forms of community in the theatre and explores new ways of communication between the theatre and the public. It offers spaces of exchange, encounter, creative engagement with the performing arts and digital communication.

The project aims to use new ways of communicating with audiences to open up theatres and reach new audiences. Through new technologies such as augmented reality, art can be experienced differently and thus conveyed in a low-threshold way. A playful approach also brings a new lightness and a different kind of interest.

*This initiative stands out for its innovative use of digital technology for community building, creative exchange and minimising entry barriers for new audience groups*

## Anhelli

Poznań Opera House (Poland)

Sustainability Inclusion Digitalisation

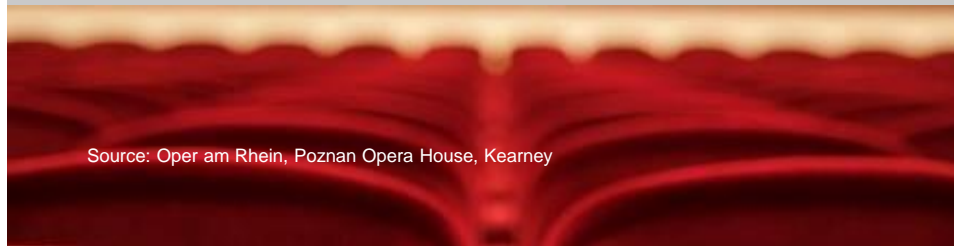
*#OnStage*

"Bring us what you don't need and we'll make a performance out of it" - we encouraged our audience to help. To build set and costumes to the performance of "Anhelli" we collected white and plastic waste e.g. (broken toys, plastic packaging, foil bags / transparent foils; white clothes, paper waste from the shredder, plastic bottles; wine corks; Styrofoam. We collected 7 tons of waste! Absolutely enough to make a performance. The result was stunning - we made high art from recycling.

We managed to involve the local community in the process of preparing the show, at the same time drawing attention to the pollution problem and that it is driving us out of the natural world more and more. It was related to the opera's message about alienation, set in Siberia - a region whose nature and microclimate are strongly affected by pollution. We have also proved that set can be made of non-obvious and reused materials.

*This initiative stands out for combining community engagement and artistic expression to raise awareness for a major societal issue*

## Aspirational Initiatives





## A snapshot of inspiring initiatives from across Europe

### VR for residential care and the elder Opéra national de Paris (France)

Sustainability Inclusion Digitalisation  
**#BeyondTheStage**

The project has implemented 50 VR masks throughout regions in France (beginning with Val de Loire) with Paris Opera performances extracts and specially created 3D contents to discover the theatres and the artists' work.

With this initiative, we give access to the Paris national Opera to everyone, especially those who cannot come to our theatres or to any other theatre. Our aim is to assume our national role as one of the major French cultural institutions.

*This initiative stands out for using digital technology and new formats to bring Opera to those who would otherwise not have access*

### Ine Aya' – voice from a fading forest World Opera Lab (Netherlands)

Sustainability Inclusion Digitalisation  
**#OnStage**

Ine Aya', created by Indonesian composer Nursalim Yadi Anugerah and the Dutch librettist/director Miranda Lakerveld, is the first opera about deforestation. The work is based on two classical works, the Kayan epic Takna' Lawe' and Richard Wagner's Der Ring des Nibelungen. Both stories are about the importance of honoring nature and its resources. Ine Aya' connects Kalimantan Kayan's rich cultural tradition with Western mythology.

The production created media attention and influenced consumer patterns in Europe that affect deforestation. It creates a new form of opera that connects worlds, rooted in cultural heritage and raised media attention for the Kayan culture in Europe. Furthermore, it supported regaining Kayan heritage from Dutch archives.

*This initiative stands out for artistically building on heritage from two cultures to focus on what connects people and create awareness for environmental issues*

## Aspirational Initiatives



Source: Opéra national de Paris, World Opera Lab, Kearney



# A snapshot of inspiring initiatives from across Europe

## Regio 3D

Teatro Regio di Parma (Italy)

Sustainability Inclusivity Digitalisation

### #BackStage

Using creativity for innovation: thanks to the introduction of a 3D printer, the Teatro Regio's scenography workshops have launched a project to create prototypes, components of stage sets, equipment, merchandising, and small restoration projects, combining the ancient knowledge of theatrical tradition with new digital technology.

Expanding the boundaries of creativity with the support of 3D technology allows us actualise artistic creativity by optimising time, costs, and resources according to internal production needs. Perhaps in the future, we will also serve other theatre's production needs with this technology, while always prioritising environmental and economic sustainability.

*This initiative stands out for using digital technology to optimise operations and expand possibilities of production*

## XR Stage Tool

Finnish National Opera & Ballet (Finland)

Sustainability Inclusivity Digitalisation

### #OnStage

XR Stage Tool is a virtual stage environment for design and engineering of the productions, testbed for the next generation performing arts. Focus areas are: 1) Virtual set modelling and illustration to support decision-making, 2) Remote on-line workspace for artistic teams, 3) Pre-design of lighting and stage operations, 4) training of performers, and 5) streamlining of the set manufacturing.

Key benefits to FNOB are improved quality of the artistic and technical set design, smoother set manufacturing process, optimisation of the materials used in set manufacturing, reduced number of technical days needed for the production, improved performer safety through training in virtual reality and a smaller carbon footprint through reduced need for travel.

*This initiative stands out for combining a variety of digital tools to redefine and optimise all aspects of production*

## Aspirational Initiatives



Source: Teatro Regio di Parma, Finnish National Opera & Ballet, Kearney





## A snapshot of inspiring initiatives from across Europe

### GREEN MOBILITY

Teatro Massimo Palermo (Italy)

Sustainability Inclusivity Digitalisation  
**#BeyondTheStage**

Teatro Massimo is promoting the use of bikes, e-cars and e-scooter in a "sharing" mode. Our workers can have special discounts for their personal travels. The audience can have a discount on tour tickets by showing a proof of their travel to the theatre with the app. Also every department of the theatre can rent a car-sharing trip with an account that will be on charge of the Foundation, just like a company car but with a very convenient price and ecological impact

Teatro Massimo is located in the city centre of Palermo, where the parking problem both for the audience and the workers is a real issue. This solution can help solving this problem with a positive impact also for the city pollution. We are aiming also to develop a system to monitor the audience's and workers' use of e-car, bikes and e-scooters in order to calculate the carbon footprint per performance and to promote a wiser use of the green mobility to reach the venues.

*This initiative stands out for its comprehensive employee and audience mobility concept to raise awareness and minimise the immediate and indirect environmental impact*

### (Re)Discovering Europe

Croatian Nat. Theatre in Rijeka / Opera, Ballet (Croatia)

Sustainability **Inclusivity** Digitalisation  
**#BeyondTheStage**

(RE)DISCOVERING EUROPE was a project dealing with the political, social, and cultural challenges of contemporary Europe. It was an attempt to speak about Europe from a minority perspective – how different minorities participate in the creation of the identity of contemporary Europe and whether theatre can offer new perspectives. Project partners were minority theatres/ensembles from 5 different countries.

To raise awareness of the importance of pluralism in contemporary EU and equality of its ethnicities and identities; to create an audience that will be sensitive to diversity, not only tolerate other and different but accept it as equal; to make more visible other underrepresented social groups as well and engage them actively in the cultural life of the community; to enable minority artists and their organisations to participate in collaborative networks and platforms within Europe.

*This initiative stands out for providing a stage to minorities to advocate for diversity and inclusion in society*

#### Aspirational Initiatives



## A snapshot of inspiring initiatives from across Europe

### As an nGnách (Out of the Ordinary)

Irish National Opera (Ireland)

Sustainability Inclusion Digitalisation

#### #OnStage

As an nGnách is a Virtual Reality community opera. A professional creative team conducted a variety of workshops with three different communities across Ireland in order to weave their stories and ideas into a new opera. The opera will be produced as a VR experience.

This project experiments with new technology to uncover new ways of making and experiencing opera. The portable format (VR headsets) will allow the company to bring an immersive opera experience to communities around the country, regardless of their location or proximity to an opera house.

*This initiative stands out for using the potential of digital tools to redefine the production process and audience experience and make both more inclusive*

### We are musicians

Stara Zagora State Opera (Bulgaria)

Sustainability Inclusion Digitalisation

#### #OnStage

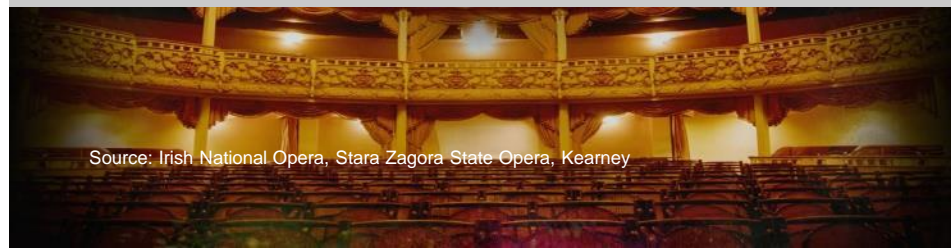
The main idea of the project is to develop the first Bulgarian sensory-friendly interactive opera performance, suitable for children and youth with special educational needs. It is going to provide inclusion activities for young people with developmental and behavioural challenges, who will be supported by young volunteers, psychologists, opera artists and educational experts on their first opera experience.

It aims to provide social inclusion opportunities for young people with developmental and behavioural challenges and their families, as well as to help them overcome the social stigma and provide cultural experiences suitable for their needs.

With this project, we want to create the first relaxed performance in the country and encourage collaboration between cultural and social organisations

*This initiative stands out for its holistic approach in collaboration with social institutions to create accessibility and promote social inclusion of disadvantaged groups*

## Aspirational Initiatives



Source: Irish National Opera, Stara Zagora State Opera, Kearney



# THE CURTAIN CALL

Takeaways from the study, implications and outlook for opera and dance companies





# This study underlines the need and commitment of the sector to act and embrace sustainability, inclusivity and digitalisation

## Selected statements



### Opera of Sustainability

“Everybody can do something, and it will help – together we can make the change. The change is a new way to think: Especially for young people sustainability is very important and we need to act now to not lose the younger audience”



### Be more open

“Opera should be more open and make a commitment to their local communities. We cannot rely on the stereotypical opera visitor and instead need to attract people of all ages and social backgrounds. The Opera is a space for everybody.”

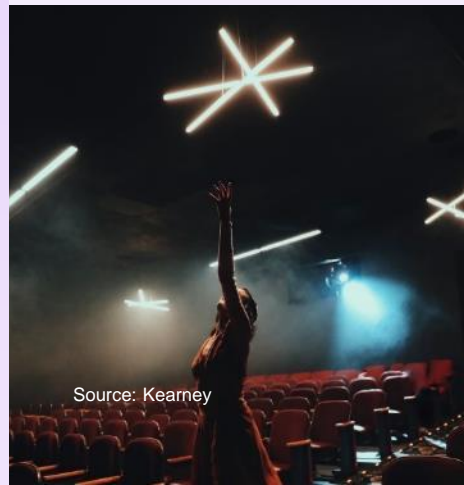
### Be more responsible

“We have a social responsibility. For decades we have not considered our environmental impact but now opera needs to become more eco-friendly and as a role model reflect today’s societal questions about sustainability.”



### Opera of Inclusivity

“The future opera will be a house with staff and audience that is more diverse at every level. People of all different ages, economic backgrounds, and regions will find themselves represented in the opera house.”



### Opera of Digitalisation

“The pandemic has shown us how urgently we need to reinvent ourselves. It has been an accelerator for digitalisation. Now we need to think about how to keep the momentum and progress the interaction of the physical and the digital world.”



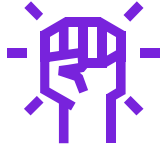
### Be more innovative

“Innovative technology is a great opportunity to interest younger audience groups. But digitalisation cannot replace the emotions created in real-life performances. Our art form is and will be physical and we need to be creative and innovative to evolve it through digital tools.”

## Outlook



## Conclusion



All participating companies have **initiatives in place to advance** sustainability, inclusivity and digitalisation, however, we acknowledge that these are among the **most engaged and ambitious** companies so we cannot extrapolate to the entire sector



The **companies are in the public eye and see** themselves having an **obligation to act as role models**, educate and inspire their audiences, communities and peers and trigger **conversations in the sector and the wider society**



While all dimensions bring their challenges and can be seen as **challenge in itself**, leading companies embrace the **opportunities to proactively shape the future** of the sector:



Potential to minimise their **immediate negative impact** on the environment

**Educate** their audience and community and **inspire** other public and private institution to become more environmentally friendly

Benefit from sustainable operations through **efficiency and cost savings**

Reach and build **new audiences** by representing and including the communities they are acting in

Have a direct **positive impact on society** by educating, involving and connecting people from different backgrounds

As inclusive institutions **prove their legitimacy** to the public now and in the future

**Stay relevant** in an increasingly digitalised world

**Broaden the possibilities** of artistic expression and cultural experiences

**Connect** people globally and **create interest** for the art for beyond the theatre walls

The study has revealed a treasure of **great ideas and impactful initiatives**, irrespective of size, location or heritage of the company

Leading companies do not see sustainability, inclusivity and digitalisation in isolation but **consider these dimensions in everything they do**, leading to transformational initiatives with a multi-layered positive impact

The purpose of **Next Stage** is to foster **capability-building and secure appropriate funding** to help these companies advance and inspire more and more companies to follow their example

We would like to thank all our interview partners contributing to the Next Stage study report 2021



# Performing Arts as driver of a sustainable future



Thank you



## Contacts



### Edilia Gänz

**Director  
FEDORA**

Paris, France

[edilia.gaenz@fedora-circle.com](mailto:edilia.gaenz@fedora-circle.com)

[www.fedora-platform.com](http://www.fedora-platform.com)



### Nicholas Payne

**Director  
Opera Europa**

Brussels, Belgium

[nicholas.payne@opera-europa.org](mailto:nicholas.payne@opera-europa.org)

[www.opera-europa.org](http://www.opera-europa.org)



### Sabine Spittler

**Principal  
Kearney**

Berlin, Germany

[sabine.spittler@kearney.com](mailto:sabine.spittler@kearney.com)

[www.kearney.com](http://www.kearney.com)





## Authors of this report

**Sabine Spittler**  
Principal, Berlin  
sabine.spittler@kearney.com

**Katharina Moll**  
Senior Consultant, Munich  
katharina.moll@kearney.com

**Aviella Schächter**  
Consultant, Vienna  
aviella.schaechter@kearney.com

**David Wang**  
Associated Consultant, Berlin  
david.wang2@kearney.com

**Patrick Frebel**  
Summer Trainee, Düsseldorf  
patrick.frebel@kearney.com



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