



**MAPPING REPORT 2011
ON OPERA AND DANCE EDUCATION
IN EUROPE**

**SURVEY CONDUCTED BY RESEO
October 2011 – March 2012**

This project has been funded with support from the European Commission.

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EXECUTIVE SUMMARY

The mapping exercise of the opera and dance education sector was conducted by RESEO from October 2011 to March 2012, and presents globally positive results. In total, 26 member organisations (39% of all members) from 12 European countries (from a total of 21 in the network) answered the survey. By comparing the data provided by 18 education departments having answered both the current survey as well as the last survey in 2008, general tendencies of the development of the sector over the past years could be highlighted.

Member organisations

RESEO has very diverse members. While the majority are opera houses, one also finds non-profit organisations, small companies etc., which have also been included in this study. Apart from this structural difference, the member organisations are also very different in terms of financial means and staff: the number of staff varies from 10 to over 900 employees. The budgets range from 1 million to over 60 million Euros. Opera remains the leading art form, but dance and cross-arts arts performances nonetheless form an important part of members' productions and creations in the 2010/11 season.

Education departments

Education departments (EDs) are a rather recent development (47% of the departments of the survey sample were founded in the 80s and 90s) and continue to be created (39% were founded in the first decade of the 2000s). Within their organisation, they benefit from relative autonomy, 60% reporting directly to the general direction. The number of staff varies from 1 to 23 in the survey sample, a majority of EDs (14) employing 1- 2 people. The teams have increased in size by 17% since 2008. 1,6 % on average of all opera staff work in education, but as freelance artists, animateurs as well as staff members from other departments of the organisations are often involved in education activities, this average is in reality much higher. It is interesting to note that a large percentage of survey participants, 40%, offer training to the people working in education activities.

Finances of education departments

83% of the survey sample manage their own budget. The majority of the budgets can be divided equally into one of the following two ranges: from 50.000- 200.000 Euros and from 200.000- 700.000 Euros. On average, the budgets of the EDs have increased by 30% since 2008.

They are mainly supported by public funding, even if the current economic context has been causing this source to diminish. The EDs have therefore tried to compensate through alternative sources of financing, especially private sponsors (with more or less success, as this sector has also be weakened by the financial crisis).

The EDs expenditure is mainly for artistic costs (artists, animateurs, mediators and production costs).

Education activities

Opera is the art form upon which the majority of the ED's activities are based (6 education departments exclusively offer opera education activities, for 13 more than 50% are opera education activities), even though there are exceptions. Most activities organised by the EDs are workshops and guided tours. The EDs are also very involved in productions for young audiences, per-and post performance talks and participatory projects. 92% of the organisations in the sample created productions for young audiences in the last season, and 71% toured productions.

On average, 76% of the ED's activities are for young people (from pre-school children to students and young adults), but other participants are also targeted, even though in lesser proportion (senior citizens, people with special needs etc.).

In total in 2010/11, almost 700.000 people participated in the 26 ED's activities (approx. 150.000 in workshops and 500.000 in performances). 61% were newcomers.

It is interesting to note that all EDs except one in the survey sample evaluate their activities, mainly via questionnaires and box office statistics, and combine different evaluation methods.

Education departments and RESEO

The fact that RESEO offers its members the possibility to discuss and exchange on practices and experiences, meet European colleagues and thus also gain a new perspective on their own work are the aspects most appreciated about being a RESEO member. RESEO's conferences serve these needs well, several EDs state having used other members' projects or practical workshops they had experienced for their own work.

87% of the survey sample sees RESEO as providing the sector of opera and dance education with increased visibility, especially on European level.

Conclusions

The sector of opera and dance education is growing. Both education staff and budgets have increased since the last study in 2008. The EDs are also optimistic about the future, and hope to be able to expand their teams in order to reach out to a larger number of people, all the while preserving the quality of their activities.

RESEO

February 2012

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INTRODUCTION

Following two previous mapping surveys conducted in 2002 and 2008, RESEO led a further survey starting at the beginning of the 2011/2012 season involving the 72 members of the current network.

In order to update previous studies on a regular basis and develop knowledge on Opera and Dance education in Europe, RESEO sent a questionnaire on 26th October 2011 to all its members. This questionnaire was very much the same as the previous questionnaire used for the 2008 survey, although certain elements were changed: some of the questions were altered and a new section was added concerning the role of RESEO toward the member education departments in order to improve the survey. The questionnaire can be consulted in the Annex section of this study.

The aim of the mapping report is two-fold:

Firstly, the report aims to provide a panorama of education departments within Opera Houses and organisations that provide opera and dance education to a wider audience throughout Europe in 2011.

But the aim is also to trace as far as possible a parallel with the situation observed in 2008 in order to draw conclusions on the evolution of the sector during the last few years.

RESEO needs to measure the transformations at work in the sector at European level in order to respond as effectively as possible to the needs and expectations of its members. Moreover, the results of the survey will substantially contribute to the network in terms of advocacy and lobbying for the interests of the sector.

Indeed, as a European network, RESEO is a forum for exchange for the benefit of its members on Opera and Dance education at a European level. At the same time, RESEO is a European platform for education in the Opera and Dance sector and supports the sector through studies, advocacy and the setting up of collaborative projects. Knowledge building about the sector is therefore essential as it provides the basis on which actions and orientations are decided.

However, this report could also be considered as an effective resource for the education department members of the network, because it provides them with information about their counterparts in Europe along with precise figures on current practice in the field by other operators. We hope that this survey will provide you with useful information for your ideas and expectations in the field.

A total of 26 members¹ responded to the questionnaire in the framework of this survey (the list of the member companies and organisations that responded is available in the Annex). The percentage of respondents is 39% of all the members that were contacted (a total of 67 were contacted at that time, and since then new members have joined the network). This percentage is less than in 2008 (the percentage at the time was 72% representing a total of 38 respondents out of the membership at the time). This variation can partly be explained by the timing of the request. For this study, the members were contacted end of October 2011 to beginning of December 2011. Many of them replied that they had difficulty finding the time to fill in the questionnaire because of the heavy workload at the beginning of a season. In 2008, the questionnaire was sent between June and July, at the end of the season, which is perhaps a calmer period for members.

¹ The results only concern 25 of the responses as the 26th respondent sent the responses too late for them to be included in the results in the database. However these results have been temporarily added for certain questions in order to draw more significant conclusions on specific points in the study. These exceptions will be indicated throughout the survey.

The geographical balance is fairly well respected; British and French respondents are the most numerous (this can be explained by the fact that these two countries share the largest contingency of members of the network), followed by Spain, Belgium and Sweden, and lastly Austria, Russia, Germany, Denmark, Ireland, Italy and the Netherlands. Data has therefore been obtained in 12 countries which represents more than half the total number of countries in which RESEO members are based (i.e. 21 countries in total throughout the European continent).

This balance reflects the reality of the network in which there is a strong representation from Western Europe, despite the presence of a new Russian member, the Moscow Children's Musical Theatre. This tendency was already prevalent in the former survey and the proportion of participation of nationalities was similar.

Moreover, the organisations illustrated in this study are very diverse, reflecting the heterogeneous composition of RESEO's membership. The majority of members are from Opera Houses, but some are more atypical such as ABAO or the Associazione Musicale Tito Gobbi due to their status or the type of activities undertaken.

This survey, although thorough, can only illustrate the sector and draw conclusions based on the data obtained. Clearly there is a difference in the data collected between 2008 and 2011, as different members responded, the total number of participants varied, the questionnaire was partially modified and structural differences between participants cannot be neglected. This study is far from absolute, but serves to define trends in the progress of Opera and Dance education over the last four years.

In an effort to clearly target the reality of the sector and the future challenges, the study will focus on 5 major points:

- The diversity of members
- The role of education departments in each organisation
- The economic impact of Education in Opera and Dance
- Educational activities: teams and audiences
- The links between RESEO and its education department members

Section A: The diversity of RESEO's members

The aim of this first section is to highlight and define the diversity of RESEO's member organisations based on data such as the number of employees, the budget, the programming, etc.

1. Profile of member organisations

By simply viewing the list of member organisations of RESEO one is struck by the diversity of the network.

Firstly the geographical diversity of the network, counting 80 members present from 21 European countries, and 26 participants involved in this study representing 12 different nationalities. But this sample also illustrates another type of diversity: structural diversity.

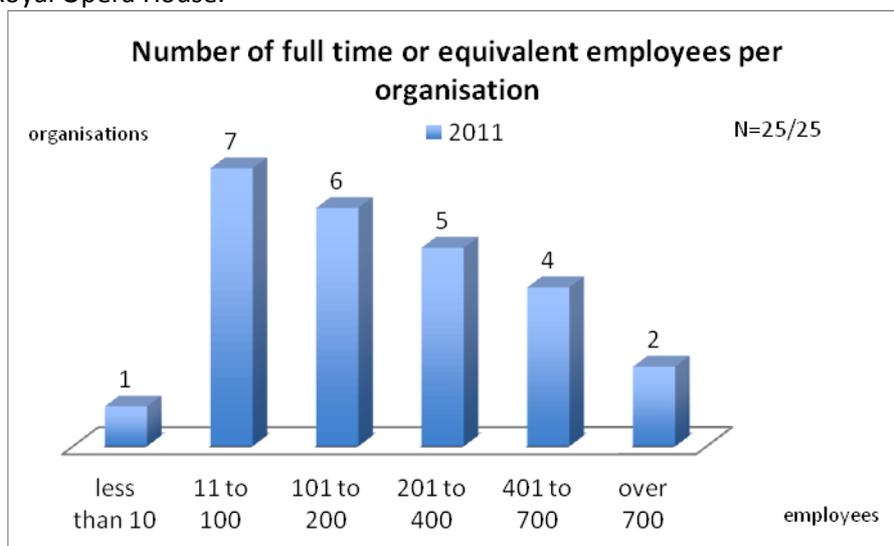
The study groups together a majority of opera houses, some of them looking back on a very long history and tradition. Examples are the Royal Opera House, the Théâtre Royal de la Monnaie, the Royal Swedish Opera or the Opéra national de Lyon that exist since the XVIIIth century.

But other than Opera Houses, RESEO groups together a variety of organisations such as small companies or even associations in order to develop a global vision of education in the Opera and Dance sector. In the panel of respondents were ABAO (Friends of Opera from Bilbao) and the Associazione Musicale Tito Gobbi (a non-profit making Italian organisation running projects addressing school children and teachers) who characterise this diversity, implying that for certain issues, variations on the results obtained statistically must be pinpointed.

These differences in stature and structure correspond to differences in means and resources.

As such, amongst the RESEO members involved in this study, 72% (corresponding to 18 organisations) have their own building with a main stage. Amongst the remaining 28% there is ABAO and the Associazione Musicale Tito Gobbi that do not have a stage because of the nature of their activities. There are also companies strongly associated to a particular building such as La Monnaie/De Munt or companies that present their productions on different stages in a nomadic fashion such as Talens Lyriques.

The number of employees in the various organisations provides an indication of their size and their "importance". On this aspect the range varies significantly from 7 for the Opera Theatre Company to 950 for the Royal Opera House.



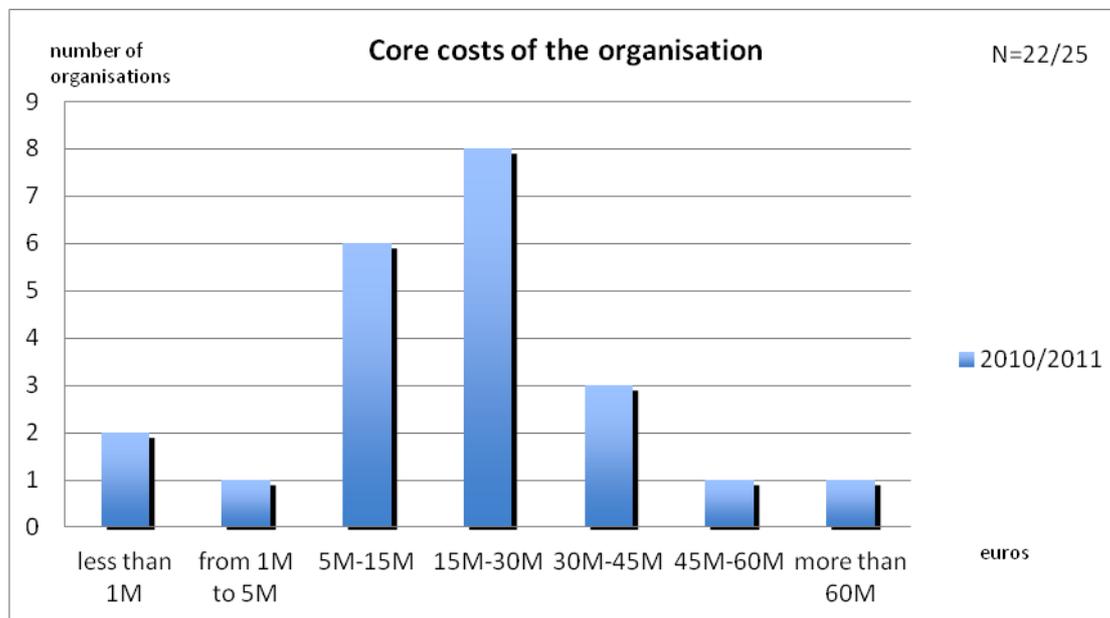
This bar graph (bar graph 1) illustrates the total number of employees (orchestra, choir and ballet included) for the 2010/2011 season and represents answers to question 3 of the questionnaire (see annex) .

We can observe that the majority of the organisations are situated in the three middle bars. 7 organisations employ 11 to 100 people (28%), 6 employ 101 to 200 (24%) and 5 employ between 201 and 400 employees (20%). 72% are in the middle bracket (the majority employing between 11 and 200 employees), whilst the proportion of organisations employing over 700 people is minimal (8%, only two organisations).

This underlines similarities between members. Organisations that are not Opera houses are mainly grouped together in the “under 10” and “11 to 100” categories. Opera houses vary in size from 100 for the Opéra de Rouen Haute-Normandie to 950 for the Royal Opera House.

We can conclude that there is a division between organisations according to their stature and even within the group of Opera houses there is a wide variety.

The budget of an organisation also gives a good indication of its size. The range in this regard is wide, as shown in the following graph (bar graph 2) that represents responses to question 4:



36% (the largest proportion of organisations) are in the intermediary category (15 to 30 millions euros for a season), 27% are in the first category (5 to 15 millions) representing a total of 63% of respondents with a budget ranging from 0 to 30 million euros for a season (in this case the 2010/2011 season).

2. Artistic offer and programming of member organisations for the 2010/2011 season

We defined 4 categories in order to classify works produced by the member organisations for the 2010/2011 season:

- Opera/Music theatre
- Theatre
- Dance

- Cross artforms (This term corresponds to types of production that involve and intertwine throughout the production phase at least two different forms of artistic expression. This notion places emphasis on the permeation of art forms that is characteristic of current practice in live art performances).

Opera is the predominant form invested in. Thus, 9 organisations based their production of the previous season exclusively on opera. In total, over half of the production of 19 organisations were based on the Opera repertoire. It is however interesting to note that 3 organisations placed their emphasis on dance, representing over half of their production for the previous season. As in 2008, the Opéra national de Bordeaux is in this category, along with the Opéra de Dijon and the Opéra de Rouen-Haute Normandie. Surprisingly, out of the three, only the Opéra national de Bordeaux has a ballet company in residence within the organisation.

The member organisations produced on average: 9 operas, 4 dance performances, one theatre performance and 2 productions based on interdisciplinary art forms.

The total number of productions shows major differences, due to the variety of funding resources of the organisations illustrated.

Concerning the new productions created and presented in the 2010/2011 season, 19 out of the 21 respondents to this question presented a new opera production, 5 a dance production, 2 in cross artforms and 1 in theatre. Again, opera is preferred to dance, theatre or cross artforms since, an average of 3 new opera productions are presented per organisation whilst other forms are less presented or not at all. We can conclude, as was foreseeable, a predominance of the opera genre in member organisations. Again, it is interesting to underline that the Opéra national de Bordeaux is an exception, being the only member not to present a new opera production, giving preference to dance (the Opera Theatre Company is also in this case, but this is due to the fact that it does not produce new operas). The Opéra de Lille is the only one to have presented more new cross artform productions than opera.

This section provides valuable information that will be referred to throughout the study. It is essential to understand the diversity of the members of the network before examining the rest of the survey, and the first conclusions drawn can serve to clarify the following sections particularly in terms of the status and activities of education departments.

Section B: The role of the Education Department in each organisation - Staff involved in Opera and Dance education in your organisation

Education departments have been set up only relatively recently, so in this section we will be looking at the status they have adopted within their organisations before looking in section D at the development of their activities and more particularly at the effective progress in the last few years in this matter.

1. Status of education departments

Setting up education departments in Opera houses is a relatively recent phenomena. Putting aside the education department of the Moscow's Children Musical Theatre (set up in 1965) and the Scottish Opera (set up in 1971, currently considered as the first education department in Western Europe), the rapid growth of education departments took place in the 80s and 90s. Over those two decades 47% of education departments were created with a peak in the 90s where the highest number of departments were created. But the upward trend is stable and in the first years of the 21st century 9 education departments were created, representing 39% of departments. We can say that this is a rapidly growing new sector and we are only just being able to define the contours of its development.

Because they are fairly new, education departments must find their role within the organisations that created them.

The majority of these departments (some 60% of the respondents observed) are free-standing, meaning that they report directly to the Board of Directors. 16% are within the public relations department. Thus, line managers of the heads of education are for the most part general directors, then artistic and then public relations directors. Other more specific cases are part of the Dramaturgy department, or part of a larger department in charge of developing new audiences, etc.

The fact that most of the departments report directly to the Board of Directors indicates that education departments appear to have an important role in the organisation. But at the same time this mixed distribution shows that the perception of the role of an education department in each organisation is seen differently: is the aim to produce a high-quality artistic offer to a younger audience? Or is it to draw a maximum of different kinds of audiences to the Opera? Of course these attitudes vary greatly from one organisation to the other and can also overlap in many cases, so this question is far from clear-cut.

In 80% of cases, the person in charge of an education department carries the responsibility alone and is in charge of all the sectors of activity developed by this department. Sub-sections of the department can exist, such as Opera/Dance/Orchestra, which is the case for example of the Royal Opera House. In other cases, sub-sections are defined according to the type of activity undertaken, which is the case of the Welsh National Opera (working with non-profit making organisations/education/Youth Opera) or the types of audiences aimed at in the case of the Opéra de Dijon (Young audiences/Specific audiences).

In the majority of cases the person in charge of an education department is a woman (in 88% of cases). The average age of heads of department is between 30 and 50 (62% of all respondents), which contradicts the idea frequently formulated that the position of head of an education department often corresponds to a first professional experience or a stepping-stone into the sector. It is also clear from this survey that those in charge of an education department have all taken university degrees obtaining either a Bachelors or a Masters or the equivalent. Most of the courses

taken are in the field of arts, with a majority in theatre studies or literature, followed by music and cultural mediation and sometimes associated to artistic training. But some of the professional careers of heads of department show that this major tendency can vary, particularly through studies on education and public relations for example. This diversity in career-building underlines that the work of education departments can be very different from one organisation to another and a variety of professional competencies are used that depend also on the status of the department and how it reports to the Board in order to correspond to the aims and orientations of the organisation at large.

The title of the position of a head of education also underlines this diversity and the status and vision of the department. The most frequent title is “ Head of Education ” or “ Director of Education ”. This is the case for example of the Bregenzer Festspiele, of Glyndebourne, of the Royal Swedish Opera and the Royal Opera House, of Het Muziektheater Amsterdam and the Scottish Opera. In the case of French-speaking members the vision is regularly one of “Développement/Action Culturel²” (Development and Cultural activities), as in the title of the Head of Education at la Monnaie “ Responsable du développement culturel ” (in charge of cultural development) or at Talens Lyriques “Chargé de l’action culturelle” (in charge of cultural activities). The notion of “jeune public” (young audiences) or “pédagogie” (teaching) is regularly identified as for example in the title of the head of department of the Deutsche Oper am Rhein (“Leitende Musiktheaterpädagogin“ (Head of Musical-theatre teaching) or for ABAO “Responsable Programa Didáctico ” (Head of Learning programme).

The variety of wording in this realm is in itself of interest and comparisons abound. The wording used reflects the variety of activities undertaken in an education department as well as the variety of languages, of titles, of perceptions related to the cultural fabric of each country.

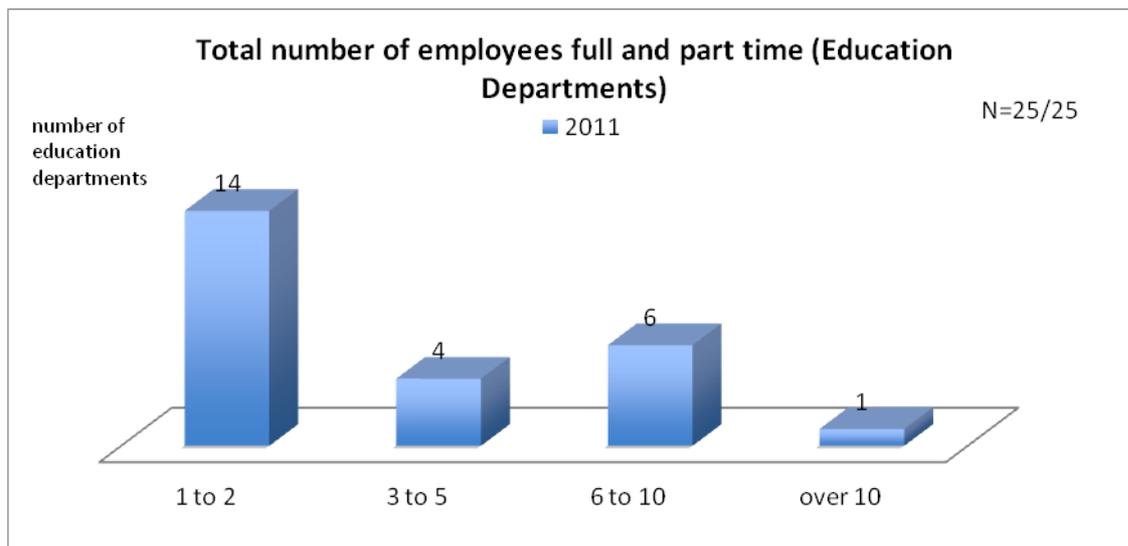
We can however identify major tendencies, particularly the predominance, which was already perceived in the 2008 survey of the term “education” and/or “pédagogie” (teaching). Both of these were used by 10 departments out of the 25 respondents. But this tendency is also counterbalanced by the responses of the French organisations, that prefer the terms “développement/action culturel) since the term “education” would refer to school teaching or scholastic studies. The term “Jeune Public” (young audiences) clearly identifies the public aimed at and this is regularly announced; sometimes referred to as “Service Jeunesse” in the case of the Opéra Royal de Wallonie (meaning youth service).

A significant percentage of respondents however have given a more inventive title to their department: for example “MAX” for the Welsh National Opera, or “ Crossculture ” for the Bregenzer Festspiele, “ Magia dell’Opera ” (“ the Magic of Opera ”) for the Associazione Musicale Tito Gobbi, “ small Liceu ” for the Liceu or “ Operaverkstan ” (“ Operatic workshop”) for Malmö Opera.

2. Size of the education department

Based on the responses we received, the number of employees in education departments (both full and part time employees) varied from 1 to 23 people (see graph 3).

² In French the term “action culturelle” refers to a movement identified in the 70s to bring culture to a wider audience at local level.



The category with the highest rate (14 out of 25 respondents) is between 1 and 2 employees, followed, to a lesser degree, by the category 6 to 10 employees (6 out of 25).

The conclusions drawn from the 2008 survey are therefore still the same: the sector continues to function with small teams, most involve less than 5 employees (which in 2011 is the case for 72% of the respondents).

Education departments are therefore minor departments in the institutions if we compare how many employees work in the department to the total number of employees. This calculation reveals that in 72% of cases (ie 18 out of 25), the number of employees in the education department represents less than 2% of the total number of employees in the organisation. This is the case for the major Opera houses, even if in some cases as for the Scottish Opera for example, the ratio is much higher.

The more atypical organisations such as ABAO or the Talens Lyriques have a ratio that is much more favourable to the education department given their small size.

In order to have a general outline of this sector at European level, with this survey's responses, 109 people out of 7033 are employed in education departments with jobs dedicated entirely to education and outreach. This corresponds to 1,6% of the total number of employees of the participating organisations (NB: The results received from Opera North belatedly were integrated in this calculation.).

However, if 1,6% work exclusively in Opera and Dance education, it is worth remembering that this figure only gives a partial image of reality. Many other departments are regularly involved in the activities run by the education department, for example the production departments, dramaturgy or the artists themselves (singers, musicians and dancers).

When comparing the results with the previous 2008 study, and the education departments that responded to the two surveys (see the list in the annexes), one can observe rather diverse tendencies. Indeed, by analysing these results we can conclude that only 6 education departments have increased the number of employees. The most important increase is at the Royal Opera House, that has increased the number of employees from 2002 to 2011 by 15 people, thus from 8 to 23 employees in almost 10 years. The number of education departments that have kept the same number of employees as well as those that have decreased the number of team members is stable and each time totals 5. However, if maintaining 5 teams is positively interpreted and added to the increase observed in the 6 other education departments, we can safely consider that the sector is alive and well and thriving! Particularly as out of all 16 departments, the number of employees has increased by an average of 17,39%. However, one must nonetheless observe the sector in light of the

current context and economic crisis (that has led in some cases to drastic funding cuts) and question whether this may have led to cuts in the number of staff in certain teams. However, with the information that we have collected, this hypothesis can be neither confirmed nor set aside; the consequences of the economic crisis on education departments will most probably appear more clearly in future studies.

Education departments also employ independent or freelance artists for their activities. Figures vary enormously on this point. Small organisations like the Opera Theatre Company do not employ as many as the large Opera houses, that can employ up to 100 freelance artists per season (the Scottish Opera, the Liceu and the Royal Opera House are, in this range of responses, the organisations that have employed the most freelancers in the last season). Then again, large organisations can only employ a few, such as the Royal Swedish Opera or the Het Muziektheater of Amsterdam (that employ an average of 10 freelancers per season).

Questions that spring to mind about using freelance artists are many: is the reason for employing freelancers due to specific artistic needs, or temporary needs, or exceptional demands? Or does this type of employment lead to lower staff costs, implying less commitment to education activities? The first reason appears to be the most probable when analysing the departments that employ the most freelancers: they are the ones who have the biggest teams.

On average, the employees of education departments (each respondent had to indicate the total number of working hours of the team) work between 1 000 and 10 000 hours per season. This is the case for 56% of the respondents. The French respondents showed that the average for their sector was between 1 600 and 1 700 hours per employee per season. As for the highest figures, these logically correspond to the education departments with the most staff members.

These figures are only estimates and do not provide a precise definition of the number of working hours per team of the education departments of the organisations that responded to the survey. These are simply averages, major trends and do not aim to be complete. Moreover, these estimates are subject to national contexts that are very different: each European country has a specific legal framework concerning working conditions and even if similarities exist, diversity in this sector is still the norm today.

3. Access to professional training

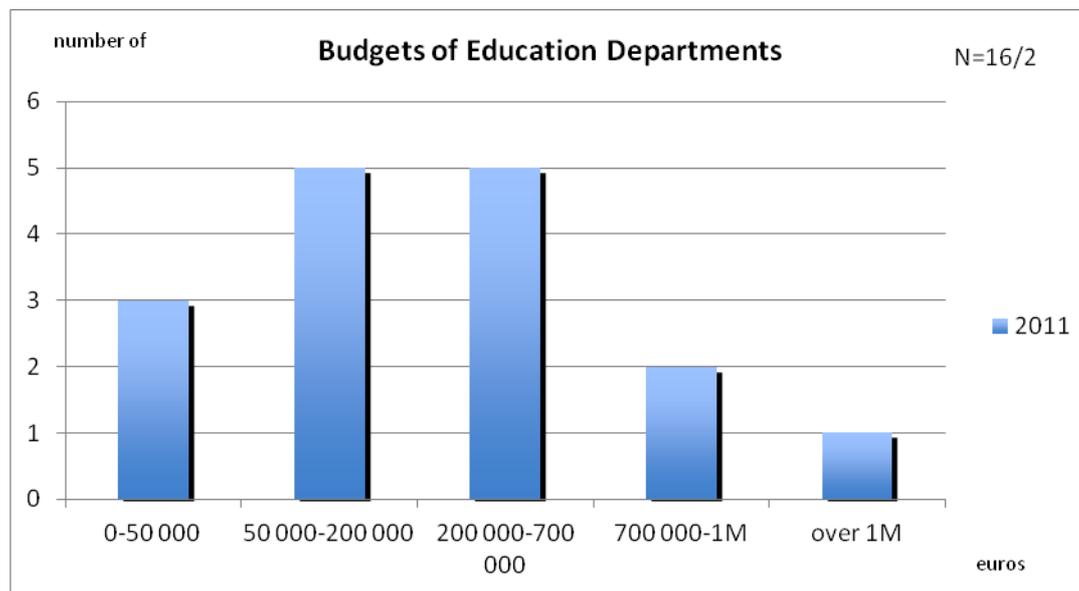
For approximately 87%, heads of department and employees alike have access to professional development schemes, in addition to their participation in RESEO conferences.

This training involves learning and experimenting new computer software and other digital tools such as social networks, etc., as well as public relations or management training, mediation and team management. Training schemes also included learning foreign languages, learning about the arts, or involved an external organisation (for example, in the case of the Deutsche Oper am Rhein it was the national network Berufsverband Theaterpädagogik BuT or for the Scottish Opera, the Scottish Refuges Council).

Section C: The economic impact of the opera and dance education sector – Budgets and funding of the education departments

In this section, we will examine financial resources and the budgets that Education departments have at their disposal to develop their projects and activities. The large majority of education departments (83% representing 20 out of the 24 surveyed) have a specific budget. This appears at first sight to provide them with a relative autonomy. We will study these financial resources in order to define if having their own budget allows them to develop real independence. (N.B.: the percentage of respondents is lower in this section, which can limit the extent of the analysis and interpretation of the results).

1. The budget of an education department: scale



(bar graph 4)

62% of education departments surveyed have a specific budget in the range of 50 000 to 700 000 euros per season.

9 education departments had also provided responses to this question during the last survey in 2008, which has allowed us to draw comparisons and assess trends. Out of these 9 departments, 5 have seen an increase in their budget over the last few years (some have even doubled or more), 1 remained stable and only 3 have experienced a decrease in budget. We could therefore conclude that a general increase in budgets allocated to education departments is a current tendency, which could be interpreted as an organisational policy to strengthen the development of education in Opera and Dance.

From the data provided by these 9 organisations we can observe on average a 29,86% increase of budgets of education departments from 2008 to 2011.

The budgets of education departments represent on average only a minimal part of the total operational budget of the organisations. Apart from ABAO and the Associazione Musicale Tito Gobbi, that we have excluded from this analysis in order to compare similar results, for 6 education departments (out of 14), the budget corresponds to a very low portion of the total budget of the organisation: between 0 and 2% of the total budget. The following most representative portion (3

out of 14) ranges from 3 to 4%. Only 3 education departments have a budget that represents over 5% of the total budget of the organisation. However it should be noted that the Scottish Opera, that is in this range, does not include the salaries of the staff in the budget (which is not the case of the other organisations) thereby significantly reducing the overall budget.

It is interesting to note that the organisations whose budgets are situated in the highest range are for the most part based in the United Kingdom or Ireland. Is it thus these countries that attach greater importance to educational activities?

2. Sources of income for education departments

Sources of income for education departments vary greatly. In our questionnaire, we identified 6 main sources of income:

- Foundations, patrons and trusts
- sponsors
- donations or legacies
- subsidies from the public sector/grant-giving/cultural affairs
- self-generated income
- international subsidies

For 8 out of 18 organisations that responded to the question, public subsidies were the main source of financial revenue, representing more than 50% of the total budget. For example, some organisations like the Malmö Opera or the Opéra de Dijon are funded for over 90% by public subsidies.

Self-generated income is the main source of funding for 4 education departments (for over 50% of their budget).

Sponsors represent between 5 and 20% of the total funding of education departments.

Only Glyndebourne is mainly funded by “foundations, patrons and trusts”.

International subsidies are mentioned in only one case; that of the Opéra national de Lyon, where these represent about 25% of the total budget.

European diversity becomes very clear here, showing great differences in funding resources and the allocation of these funds within the budgets of education departments. The only general tendency that we could draw from this study is that public subsidies provide the main source of funding for most of the education departments throughout Europe.

Sources of income for education department budgets are however undergoing substantial changes over the last few years. The current situation is very irregular, with a significant transformation taking place in the allocation of the budget which is progressively branching out to various levels (European, national, local, etc.).

Many education departments express a significant drop in public funding and subsidies. This tendency is particularly visible in the countries that are most affected by the economic crisis. The Liceu (Spain), the Associazione Musicale Tito Gobbi (Italy), the Opera Theatre Company (Ireland), the Opéra national de Bordeaux (France) and the Opéra national de Lyon (France) in particular have underlined a decrease in the proportion of public subsidies in their budgets. An increase in the proportion of public funding is only observed for the Opéra de Dijon. This is due, in this specific case, to the fact that the education department was set up in 2009 and therefore still requires strong support from the public sector for its development.

Some, such as Associazione Musicale Tito Gobbi, compensate this decrease in subsidies by turning to sponsors. The Opéra national de Lyon found additional resources in European funding and the Opera Theatre Company found new donors.

But to follow these examples may be impossible, due to a certain decrease in funding on behalf of the sponsors as well, as some respondents reported, in particular the Liceu, the Bregenzer Festspiele, the Welsh National Opera or the Moscow Children's Musical Theatre.

3. Budget sub-sections

It is difficult to relate any general tendencies in this field because of the relatively small number of responses received for this question (11 out of 25). However, if we grade the budget allocations for education departments we can observe the following:

- Most of the funds are assigned to artists/session animators/mediators³: ranging from 40 to 80% in all of the cases. This section is on average the one to which most of the funds are provided (about 58% of the total on average).
- The second section is the production costs. They range from 10 to 60% and education departments spend an average of 23% of their budget on this section.
- The third section is educational equipment and supplies which represents 8% of the budget on average.
- The fourth section is communication which represents an average of 7,25% of the total budget.
- Finally, external assignments and connection to networks represents about 3,3% (1,8% for external assignments, 1,5% for RESEO conferences on average) and 2,6% (only 6 respondents filled in this section) respectively.

As for annual fees to RESEO, the survey reveals that 50% of the respondents take their annual membership fees to RESEO from the education department budget and the other 50% take it from the total operational budget of the organisation; the two options are equally represented.

4. Pricing policy

The general public often regards Opera houses as elitist institutions and therefore considers that the ticket price is too expensive. However, making Opera "accessible" is one of the priorities of opera houses' global policy, aiming to provide special ticket offers so that everyone can go to the Opera.

Here-below we have grouped together the various ranges and categories of prices proposed by our member organisations for a performance on their main stage.

For a child (not in a school group), the price for the majority of members is between 6 and 10€ (for 10 organisations out of the 22 who responded to this specific question), for four of them it was from 0€ to 5€ or from 11€ to 15€. We can observe that out of the 22 respondents, 14 organisations, thus more than half, offer children a price of less than 10€, a price easily accessible for most.

These prices tend to be even lower for children in school groups. 17 organisations offer school groups prices from 0€ to 10€. This tendency is particularly noticeable in the British organisations (Glyndebourne, Royal Opera House), where prices drop by 2 ticket rate categories depending on whether they come as individuals or in a school group.

Some vary the price according to the type of performance: Het Muziektheater Amsterdam for example prices an opera ticket at a higher rate than a ballet and the least expensive tickets are for other, specific performances. The Associazione Musicale Tito Gobbi alters the price according to the age of the spectator; children under 6 have a cheaper ticket than the over 6.

In comparison to 2008, the average price for a child's ticket in a school group for a performance on the main stage has remained relatively stable. Out of the 12 organisations that provided the

³ Artist working within an educational artistic activity

information in 2008 and again in 2011, 8 kept the same price (7 within the ticket range of 6€ to 10€ and 1 in the range of 0€ to 5€), 3 have lowered their prices and enter the category of 6€ to 10€, and 1 organisation has increased its prices entering the 6€ to 10€ category.

For young people, the price is a little higher: in 16 out of the 22 respondents their price falls in the range of 6€ to 15€ (10 organisations applied prices ranging from 6€ to 10€, and the other 6 are in the next category from 11€ to 15€). Offers for students are at the same price.

For families, the prices are mostly within the over 20€ price range, and also in the intermediary range of 11€ to 15€.

For other target groups (people with special needs, senior citizens, etc.), the range is very diverse, and the limited number of responses to this question has not allowed us to draw any general conclusions.

When the education departments were asked to explain the offers that they were the most proud of, a great range and variety of offers could be observed; not only special offers but also subscriptions for young people, for partners and even in some cases the possibility of free ticketing.

Many education departments presented a variety of special offers, particularly the Deutsche Oper am Rhein (“prices for children in school classes: 4€/5,5€/6,5€”), Het Muziektheater Amsterdam (“special offers for young people in secondary schools”), the Opéra de Dijon (“tickets at 5,50€ for school children for all the performances of the season”), the Opéra de Lille, the Opéra de Rouen Haute-Normandie and the Opéra national de Lyon (“6€ for pupils (free tickets for accompanying adults)/ 3€ for partner establishments (Ville de Vénissieux)”). Special offers for school children and free tickets for accompanying staff are regularly mentioned by the members. Glyndebourne, the Opera Theatre Company and the Liceu receive subsidies that allow them to greatly lower the price of a ticket for schools.

There are also special offers for families, particularly at the Opéra de Lille (“family performances with a single price for families even in the 1st category of Opera seats (eg: 15€ for a seat that is usually paid 62€)”), at the Opéra national de Bordeaux (“seats at 2€ for children and families that are part of the “ma voix et toi” (my voice and yours) project”).

The education department of the Royal Opera House has concocted a mixture of offers by launching the “Welcome Performance”, that includes matinees for school children, performances for families and special opportunities for students. The price of all the tickets for these performances is very much lower than the usual price .

Many education departments have subscription policies, sometimes in partnership such as the Opéra du Rhin (“Culture Card and See all ticket (University of Strasbourg): 5,50€ under 26/ 5,5€ or 12€ for school children”) or the Opéra de Lille (“partnership with a local employment centre offering a ticket to the Opera for 1,50€ (chèque Crédit Loisir – Leisure credit cheque)”). The Opéra Royal de Wallonie has set up an offer for young people up to the age of 32 and a cluboper@ ticket for young adults.

Some education departments have managed to provide free tickets within different schemes. Den Jyske offers “free tickets for workshops”, the Associazione Musicale Tito Gobbi does not charge children with special needs. For Talens Lyriques, free tickets are given for all artistic and educational activities and events as well as free visits for those that have taken part in the cultural activities. As for the Opéra de Lille, they offer a free “Happy Day”.

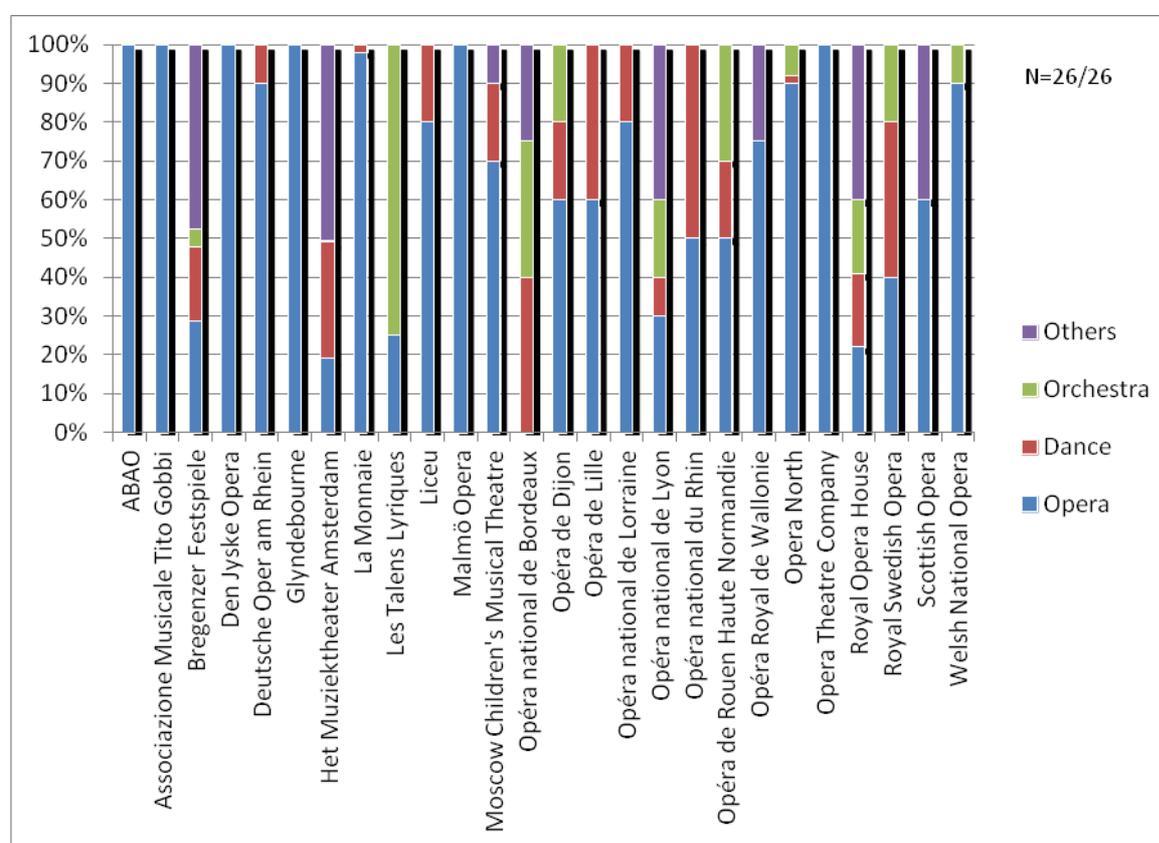
Section D: Who runs education departments and for whom? - Your education work

In this section, we will study in closer detail the activities lead by the education departments. We will see what areas are engaged in and why, what type of activity is focused on and the degree of involvement in the productions, projects and workshops. We will describe the target audience and try to define the spin-offs. We will also address the issue of communication on the activities, the different types of resources used by the education departments and the overall evaluation of the work undertaken.

1. Main activities organised by the education departments

It is a good idea to start with an inventory of the activities lead by education departments of member organisations. This chart (bar graph 5) groups together the approximate percentages of the education activities undertaken in each artistic discipline for the 2010/2011 season.

Assessment of the activities undertaken by education departments in each artistic field



A clear predominance of opera can be observed, with 6 education departments running all their activities in this sector, and 13 of them running over half of their activities in opera (out of 26 respondents). In comparison, dance and orchestra are much less represented. But this preponderance was to be expected in view of the fact that RESEO's member organisations are mainly Opera houses.

The Opéra national de Bordeaux stands out as an exception in this case: out of the 26 participants, it is the only one that does not organise any activity strictly linked to Opera. Their focus is on dance, orchestra and other interdisciplinary forms.

14 education departments out of 26 lead activities in dance, but these represent only an average of 16% (with a few exceptions such as the Opéra national du Rhin that runs 50% of its activities in this

sector, the Opéra National de Bordeaux, the Royal Swedish Opera and the Opéra de Lille with 40%). It's important to underline that out of 14 departments, only 7 are part of organisations that have their own in-house ballet company. The other half, do not have a ballet company and bring dancers into their activities from elsewhere which shows an interest for dance as an educational tool and a form of apprenticeship that is different from Opera, which takes precedence traditionally.

Orchestra is the major activity of Talens Lyriques only (due to the nature of the institution). 11 education departments out of 26 include orchestra in their activities. On average, education departments run 12% of their activities in this sector.

In the "Others" category we can find many activities cross artform activities. For Bregenzer Festspiele this sector represents 50% of its activities, for the Scottish Opera 40% and for the Royal Opera House 30,5%. This category also includes workshops, guided tours and and concerts.

Education departments cover a vast range of activities. We have grouped them together by category in order to identify which type of activity is most often run by an education department at European level; the list that was presented in the questionnaire highlights only a certain number of possible activities and could be further elaborated upon.

The following results present figures that group together the major trends in activities and do not necessarily draw a line between activities in which the education department is a leader or those in which it is co-organiser even if there are clear distinctions in this field, too.

- **Productions for young audiences** – 80% of the respondents produce works for young audiences. This is therefore one of the main activities of education departments, especially as in 19 of these cases, the productions are under the direct responsibility and leadership of the education departments.
- **Community operas/ Participatory projects** – 68% of respondents work in this field and are the responsible leading parties.
- **Guided tours** – This activity is the second most frequently named, with 84% of members organising such visits. The large majority of education departments initiate this activity.
- **Discussions before and after the performance** – 80% of respondents run such activities, and are most often the organisers.
- **Training and target groups** – The main target groups of training programmes offered by the education departments are teachers, followed to a lesser degree by session animators and/or artists. 76% of education departments offer this type of service, but half of the respondents share this responsibility with other departments.
- **Workshops** – This activity is the one with the highest percentage: 92% of respondents (23 respondents) organise workshops. This is the main activity of all education departments following our estimations, with the majority of members directly in charge of this element.
- **Thematic debates/Study day sessions** – Only 32% of respondents run this type of activity.
- **Others** – This category covers all the other activities that may be run by an education department and that are not listed in the questionnaire. There are many examples such as working with orphanages or children with special needs (Moscow Children's Musical Theatre), making presentations in school classes (Deutsche Oper am Rhein) and other specific participatory activities (Welsh National Opera).

It is important to indicate that in 79% of cases, education departments work in close cooperation with the non-profit and social welfare sectors (19 out of 24 respondents). In the 21% remaining, 2 indicate that there is another department in charge of these activities, that is separate from the education department (ex: "A bridge between two worlds" at La Monnaie), 3 indicate that such a department does not exist in their organisation as a separate entity.

Concerning more specific events such as the European Opera Days or the Open Door events, the situation is very different from one respondent to another. Education departments are more involved in 84% of the cases in Open Door events than for the specific event of the European Opera Days (76%)⁴. They are mainly leaders of such projects, but for only just over half of the cases.

In the case of Het Muziektheater Amsterdam or the Welsh National Opera an interesting fact is that the education departments are the main organisers of the Open Days- but “only” co- organisers of the European Opera Days. These examples lead us to suppose that European Opera Days represent an occasion for all the departments of an organisation to work together and they are encouraged to do so, whereas the Open Days are more reserved for the education departments alone to organise.

Other activities that were mentioned in which education departments took part within the organisation were: “Orchestres en fête” for the French organisations (Opéra national de Bordeaux, Opéra de Lorraine), festivals (Moscow Children’s Musical Theatre), special days such as (“ Music Days ” from Den Jyske Opera), or events that consisted of broadcasting works of the season (“ Liceu at the beach ”, “ Opera Oberta ” (programme with partner universities) to provide some examples from the Liceu).

2. Productions for young audiences in the programming of the member organisations

Almost all organisations that responded to our questionnaire (92%, some 23 organisations out of 25) have created performances for young spectators during the 2010/2011 season. Opera is, once again, the artistic discipline that is most invested in. Dance and orchestra are not explored as much, with respectively 6 and 4 organisations that created performances based on these artistic disciplines.

A minority of organisations (4 out of 23) have created performances that use other forms of art, often cross artforms, such as musical theatre (Bregenzer Festspiele), or “recitals and concerts” (Opéra de Lille).

Thus, on average, the member organisations create one opera performance for young audiences per season.

We could ask ourselves whether the organisations that presented the most productions for the 2010/2011 season are also the ones who created the performances for young audiences, and if there is a link between the overall dynamism of the organisation and its level of implication in the education sector. However, the situation observed does not allow us to really draw a conclusion in this respect. The organisations that presented the most productions are not necessarily those that produced works for young audiences as well. The Het Muziektheater Amsterdam or the Opéra national du Rhin, for example, respectively created 1 and 2 performances for young audiences which is a relatively low proportion in comparison with the 11 general new productions presented during the season.

On the other hand, the Deutsche Oper am Rhein has a more significant result with 5 new performances for young audiences for 17 “general” new productions; thus a ratio of almost 30%.

The Opéra de Lorraine and the Welsh National Opera demonstrate an even higher ratio, producing 5 and 4 new works respectively and 2 and 3 new productions respectively for young audiences.

These very different tendencies show again the diversity of situations in Europe.

Concerning the touring of works for young audiences, the figures are slightly lower in the 2010/11 season: only 17 out of 24, representing 71% in comparison to the production of new works for young audiences. However, it is interesting to note that while members are overall less numerous in touring performances for young audiences, when they do tour them and buy others’ productions, they will

⁴ These figures represent cases in which the education departments were leaders or co-organisers in order to have an overall vision.

be touring and or buying even more than they will be creating new work themselves. Thus, on average, a member organisation will show 2 opera performances they have bought per season, against only one own new production. Again there is a strong predominance of Opera rather than dance, orchestras or other cross artforms.

The number of productions for young audiences presented on the main stage of an organisation is another factor that demonstrates interest in education activities. 17 out of 23 respondents are in this case, some 74% of the panel, which is very positive and contributes to giving more visibility to the activities of the education departments.

3. Mediators

Education departments ask a certain number of mediators to take part in their activities. We can separate them into two groups: the staff of the organisation and freelance or independent workers. We saw earlier that education departments tend to recruit artists and freelance session animators on a short-term basis for specific needs. Thus, there are many dramaturgs, scenographers, stage directors and artists (singers, musicians, dancers) working for the education department.

The chart here-below shows the different mediators that were requested and indicates to what extent they took part in activities related to the education departments. In order to simplify the calculation, distinctions were not made between staff members and freelancers.

The first column shows the number of respondents having indicated that they work with the listed category of mediators (the number of respondents having answered this question was 25) and the second column expresses this same figure as a percentage.

Singers	24x	96%
Dancers	17x	68%
Musicians	22x	88%
Conductors	16x	64%
Repetiteurs	16x	64%
Stage directors	19x	76%
Dramaturges	12x	48%
Choreographers	15x	60%
Scenographers	11x	44%
Set designers	14x	56%
Lighting designers	19x	76%
Technical staff	22x	88%
Make-up artists	17x	68%
Costume designers	19x	76%
Prop makers	16x	64%
Planning	18x	72%
Marketing/Communication	24x	96%
Archive Department	9x	36%
Music Library	18x	72%
Friends of the opera	6x	24%
Others	6x	24%

Artists are amongst those that are the most involved (96% in the case of singers, 88% for the musicians – dancers are less requested, due to the fact that less organisations run activities related to dance).

It is interesting to note that the “Marketing/Communication” department is involved in 96% of all cases, underlining the need to provide visibility to the activities undertaken by the education departments. Technicians are listed right afterwards together with lighting designers, costume and set designers, stage directors, the archive department, planning, followed by make-up artists, prop makers, conductors and repetiteurs.

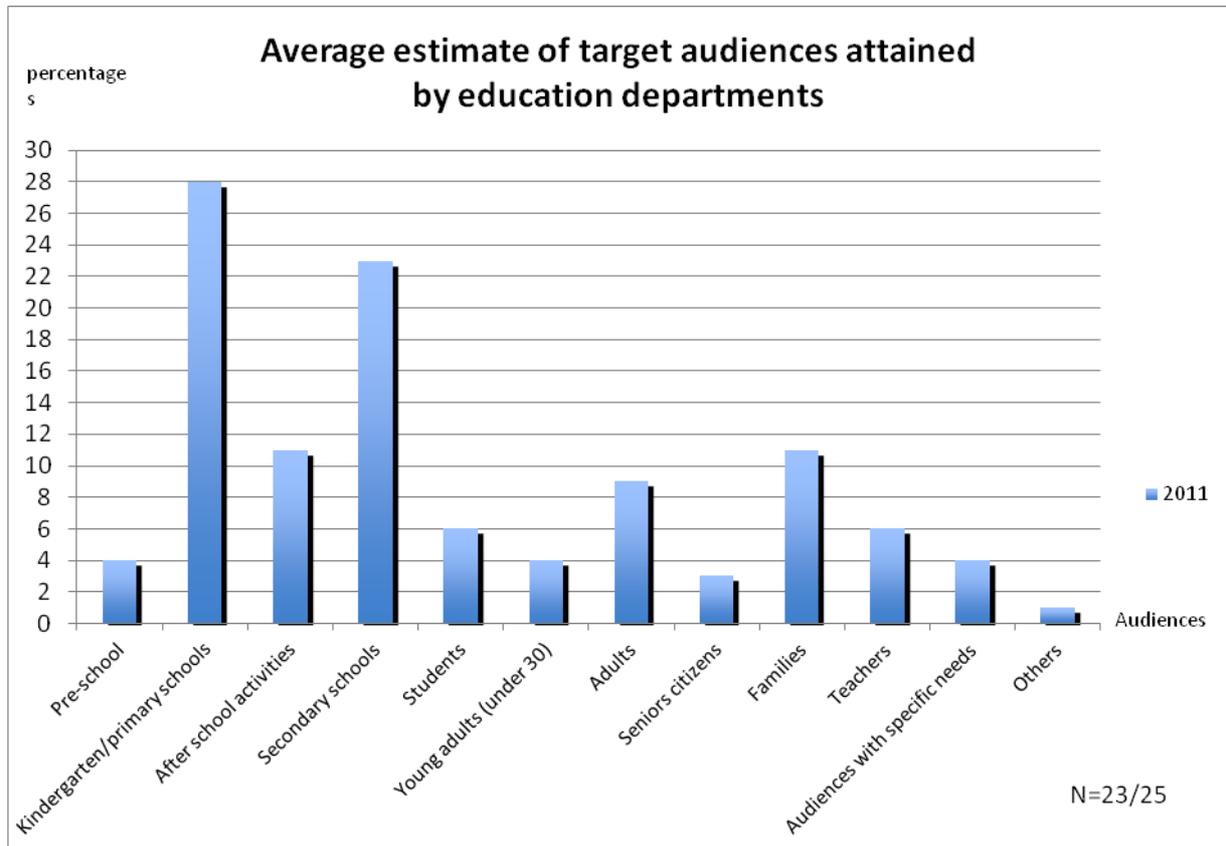
These figures show that that there are very many different professions and many services in the organisation involved in the activities of an education department.

10 out of 25 respondents offer training to their mediators and/or employees involved in these activities in order to work with young audiences. This represents some 40% of respondents. This

figure is quite significant. The attention given to training of mediators and session animators clearly contradicts the idea that is often widely accepted that training is not necessary in order to work with young audiences.

4. Target audience /Audience actually reached

The list⁵ indicated in question 30 aims to evaluate the main target audiences for the education departments of our members.



The figures indicated in the graph here-above (graph 6) are **averages**, based on the responses of 23 education departments that responded to the corresponding question.

Children in kindergarten and primary schools represent 28% of the target audience of education departments, followed by pupils from secondary schools (23%). These estimates established by the education departments show that the main target audience is young: the first four categories (up until pupils from secondary school) represent 60% of the target audience. If we consider the adjective “young” in its broadest sense by including students and young adults, then young audiences represent 76% of the target audience (in comparison to the total of audiences concerned). The following category is “families”, targeted at 11%, whereas this category can be annexed to young audiences.

Teachers represent 6% of the target audience, senior citizens 3% and audiences with specific challenges (prisoners, hospitalised people, people with special needs, etc.) 4%.

⁵ The list serves as a basis and can be further elaborated.

One could analyse whether the fact that young people are the main target is linked to the name of the education department: is it those departments that clearly state in their title that they are “for young audiences” that focus almost all of their activities on this specific audience?

This applies to four departments, the Deutsche Oper am Rhein, the Royal Swedish Opera and the Opéra Royal de Wallonie who devote 70% of their activities to young audiences (in the broadest sense), but the Opéra national du Rhin is an exception with only 29,8%, in contradiction with its name: “Département Jeune Public” (Department for Young Audiences).

This parallel can also be observed amongst the education departments that include the notions of “education” or “teaching” in their titles: ABAO, Den Jyske Opera, Glyndebourne, Het Muziektheater Amsterdam, the Opéra de Lorraine, the Opera Theatre Company and the Scottish Opera target young audiences for 60 to 90%. The Opéra de Rouen Haute-Normandie, however, mainly targets adults (60-65%). The Royal Opera House is also an exception, with young audiences targeted at 44%.

64% of education departments that took part in our survey regularly work with groups of young people.

Considering the examples mentioned by our members, we can identify several types of groups of young people depending on their way of participating:

- **Projects**

- o *With schools/universities/specialised centres*

Projects are highlighted by the Opéra de Lyon, the Opéra de Lorraine or the Royal Opera House with the project “Chance to Dance” that offers a creative introduction to dance and workshops for children from 20 primary schools. Not to mention les Talens Lyriques and their weekly orchestra class in a Parisien secondary school. Another example is the project “Ma voix et toi” by the Opéra national de Bordeaux that involves a weekly singing workshop with 100 children from day care centres on a voluntary basis.

- o *Theatre classes*

Den Jyske Opera will set up a weekly musical theatre class in 2012 and the Moscow Children’s Musical Theatre has set up a non-profit making theatre organisation.

- **Clubs for young people**

The Deutsche Oper am Rhein set up a youth club to “test” the performances. The Opéra Royal de Wallonie also set up a “young spectators club” and the Opéra de Lille a “Carré jeunes” (a youth forum) as well as a page on facebook especially for young subscribers.

Another example is from the Deutsche Oper am Rhein that directs a play with a youth club.

- **Youth Opera**

These are only mentioned by education departments in Britain, which could denote a national specificity. For example the Youth Opera Company (from 9 to 13 years of age) of the Royal Opera House, or the Youth Opera of Glyndebourne and the Welsh National Youth Opera (from 16 to 25 years of age).

- **Choirs**

We can record many examples such as “WNO Singing Club” by the Welsh National Opera for children from 10 to 14 years old, or children and young people’s choirs by the Deutsche Oper am Rhein.

- **Young artists**

The Scottish Opera works with a group of young orchestra musicians and singers aged 14 to 21.

To estimate the audiences reached through the activities of the education departments of our members, we tried to find out how many people took part in the activities of education departments during the 2010/2011 season. After having collected the number of participants in the workshops

and productions, we calculated the totals and compared the figures obtained with the previous survey.

We decided to exclude the results of the Liceu, as these were very different from the others, and would thus have falsified the analysis and not reflected reality. On this point also we added the figures of Opera North⁶.

During the 2010/2011 season, and based only upon the sample of members having participated in our survey, 144.269 people took part in the workshops organised by the education departments of our members. This figure corresponds to approximately one third of the total number of participants in the education departments' activities. The total number of people that took part or assisted in a production is much higher, and amounts to 473.853, thus approximately two-thirds of the total.

The total amount of people reached during the 2010/2011 season (taking into consideration all of the activities of the education departments) amounts to 693.772 based on the sample of respondents, which is a very positive, encouraging and valorising figure for the work undertaken by education departments.

However, in comparison to the figures in 2008, based as before on the analysis of the results from 14 organisations and Opera houses for which we have both the figures for 2008 and those for 2011, there appears to be a slight decrease in the audience reached. The global percentage of decrease corresponds to -11,26%. Firstly it must be underlined that these figures correspond to sources that are sometimes only estimates, secondly the economic context of the crisis may have had a dissuasive influence on the decision of the public to take part in an activity (rather than the decrease being the result of a diminished offer of education activities). Moreover, we were not able to include the figures from education departments set up after the 2008 survey in this comparison.

It is important to underline that the figures we have are very diverse, for example we can see a significant increase at the Opéra Royal de Wallonie (over 80% increase) and the Opéra de Lille (approximately 510%, which is the highest increase observed throughout the panel of participants), the Opéra national de Bordeaux (approximately 90%), or even Glyndebourne (approximately 90%).

At first glance, there appears to be no direct link between the number of employees in an education department and the number of people reached by its activities. The Opéra de Lille shows this particularly well, with an increase of 510% in the number of people reached- in spite of a decrease in the number of employed staff. The results thus do not allow us to establish any direct link. Indeed, some organisations diminish the number of staff and reach a wider audience, but the reverse is also true. In any case, one cannot draw a parallel between the number of people reached and the success of an activity, as the quality of an activity must also be taken into consideration.

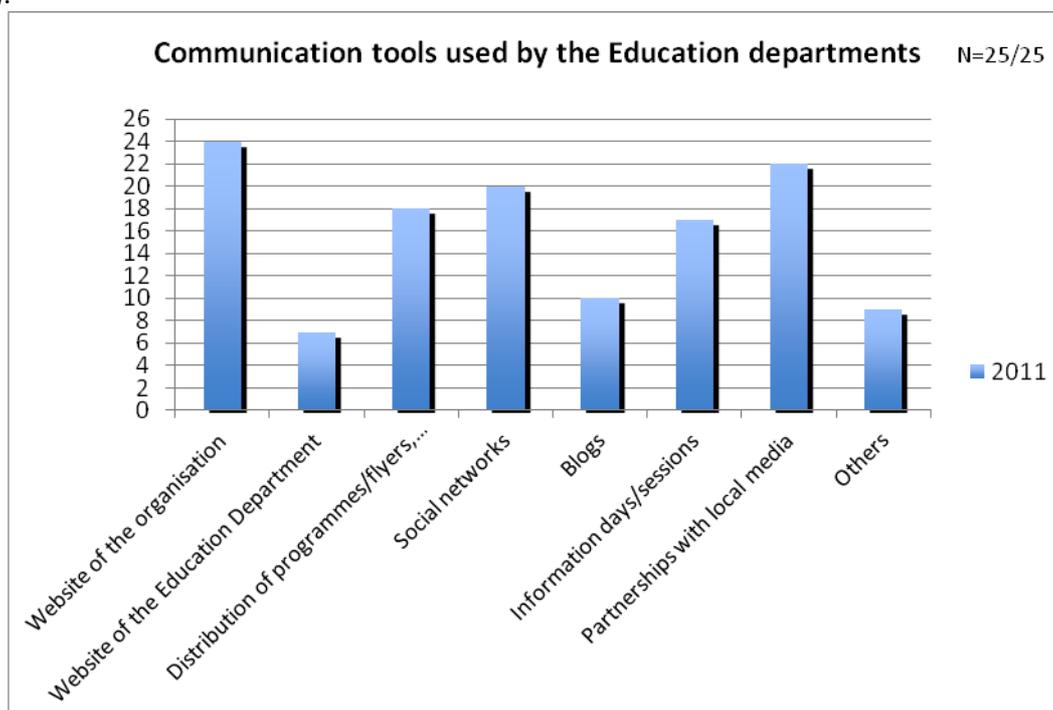
We were able to evaluate the proportion of beginners that took part in the activities of 16 education departments who provided information on this section. The total estimated number reaches 241.264, representing 61% of the total number of audiences reached by the 16 education departments. This figure is extremely positive and shows the dynamism and outreach of the activities organised and promoted by the education departments that are members of RESEO.

5. Education material and communication

Communication on the activities of education departments is essentially transmitted via internet. The communication tool most used is the website of the organisation (used in 96% of cases),

⁶ Opera North sent the completed questionnaire in January, so it could not be included in our database. However, we included their results every time it appeared coherent.

followed by partnerships with local media (used in 88% of cases), and social networks (used in 80% of cases).



(Graph 7)

Internet may be the preferred medium, the majority of the information is accessible via the website of the organisation. Very few education departments have their own website (only 7 out of 25 participants).

In the “others” category, we can find reports, direct communication with the public, or emailing campaigns and/or distribution of invitations.

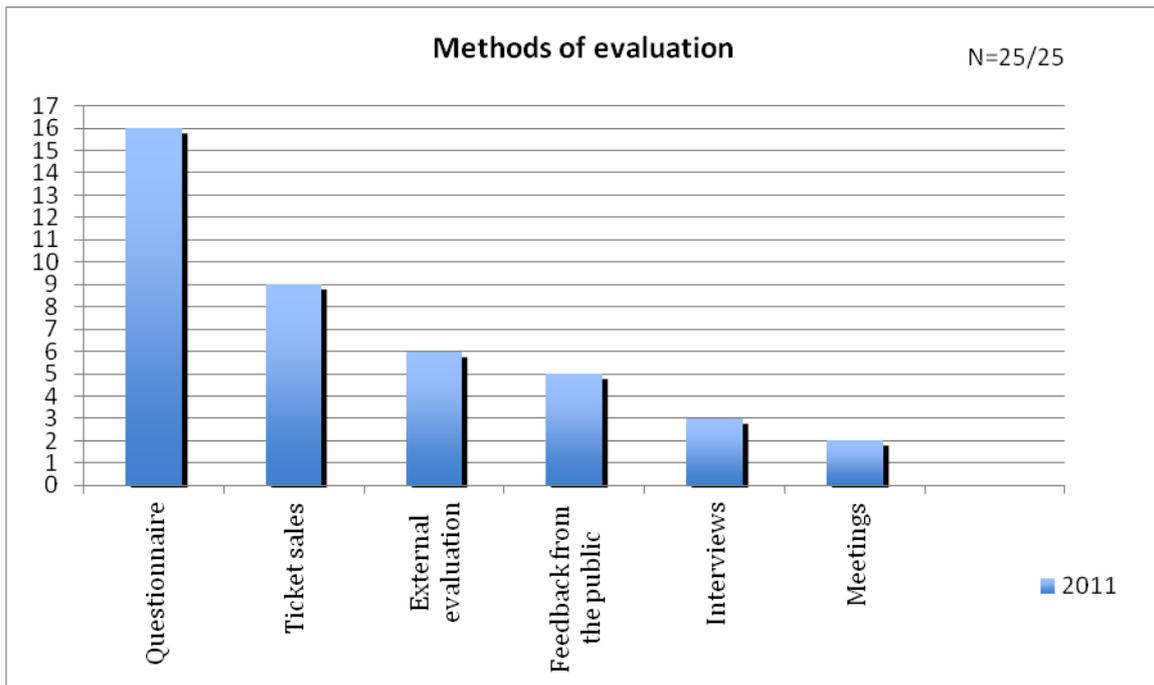
The majority of education departments (59%) do not collaborate with the “Friends of Opera” in their activities. Out of the 41% that do associate them, this is often in the context of fundraising for new productions, specific projects and activities organised by the Friends of Opera or the organisation of joint conferences or debates.

Education material groups together various methods for a variety of audiences.

The most common education material used by a majority of education departments (92% of respondents) is for teachers. Electronic equipment is also used in 76% of cases, as well as programmes for children (76%). Education material for children is produced in 68% of cases by the education departments involved. To a lesser degree, there are publications such as posters (64%), DVDs on opera/recordings of past productions (48%), presentations on CDs (40%) and books on Opera, which is the least used tool representing 28% only of the education departments published works. The “others” section represents for example digital resources used by the Royal Opera House such as an interactive white board for teachers and youngsters.

6. Evaluation

All the responding education departments except one (representing 96% of the total number of respondents) evaluate their work. This result shows that the evaluation process has become an integral part of the work of RESEO’s member organisations.



(Graph 8)

Out of the 25 respondents, 16 combine several methods of evaluation in order to receive more precise, comparative results. The methods of evaluation most often used are illustrated in the graph here-above. Methods used are both quantitative and qualitative.

Questionnaires are the most often used form of evaluation. 16 education departments use them, sometimes combined with other methods. Looking into box office statistics comes in at second position (9 departments), followed by cooperation with an external evaluator (6 departments). This is followed by the feedback of “test” groups (e.g.: Opéra de Lille, Deutsche Oper am Rhein), used by 5 education departments, then interviews, run by 3 education departments. Finally, the method that is the least used (by 2 education departments) is the organisation of meetings to establish an assessment.

6 departments indicate that they compile reports of different sorts, looking back upon their activities.

SECTION E: RESEO's contribution to your education department

In this section we will evaluate the relationship that the organisations and education departments have with RESEO: does the network respond to their needs and/or their expectations? What are the actions undertaken by RESEO that are the most appreciated and valorised? And from the other standpoint, how do education departments communicate their membership in the RESEO network?

1. Communicating membership in RESEO

Considering that it is the organisations and not directly the education departments that are members of RESEO, we wanted to find out to what extent the entire staff of the organisation was informed of their membership to the network.

It appeared that all the members (except for one) who responded to our survey had informed their staff (or at least the majority of staff members) of their membership to RESEO. This was mainly communicated via meetings or direct/oral communication in 11 member organisations. This method is therefore the one mainly used and preferred, followed by the distribution of publications and/or internal newsletters, which come in second place.

Communicating on membership to RESEO is also made through distributed communication material sent to partners and the public. We tried to find out if the logo of RESEO, that is easy to add into any document, was used by our members- and in what type of communication tool.

The results demonstrated that 50% use the logo in the organisation's season programme or on the website of the organisation and/ or the education department. Surprisingly enough, the logo of RESEO was least systematically used in the promotional tools of the education departments themselves: only 9 education departments used it in their documentation.

50% did not use the logo at all.

The reasons why the RESEO logo was not systematically used are diverse. Concerning the promotional material of the education departments, the number of negative responses should be viewed bearing in mind that the departments do not necessarily publish specific documentation. Another reason is that RESEO is not necessarily known outside of the Opera world. Others prefer to mention their membership in the network whilst not inserting the logo. The desire to limit the amount of space taken up by partners' logos in the organisation's season programme as well as the websites is also put forward.

However, the fact that this question was addressed has incited certain members to think about the absence of the logo or a reference to RESEO in their documentation and they are now thinking about correcting this.

2. Being part of RESEO: what are the advantages?

RESEO aims to respond as best as possible to the needs and expectations of its members; with this aim in mind it is important to understand what the members hope to achieve through their membership to the network. In order to guide our actions, we tried to find out what aspects in their relationship with RESEO, or which of the network's contributions the members valorised the most.

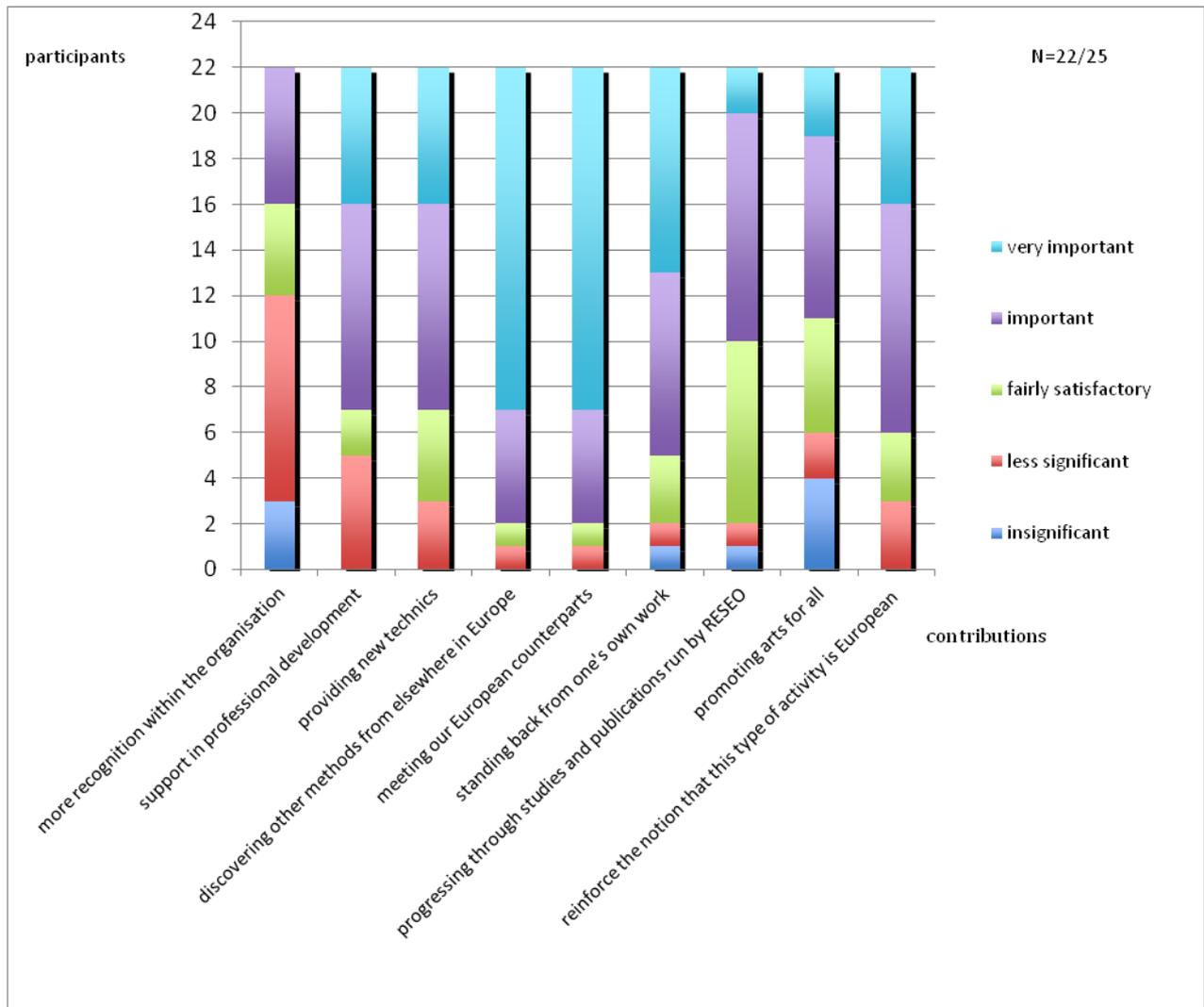
Thus, 87% of the members that responded (out of 23) considered that RESEO provided more visibility to their actions externally, particularly thanks to the direct exchanges between members involved in the network and the website. Several members emphasised the fact that visibility plays a central role in the European context due to the ramifications and mission of the network, but that this is less

significant at national level. Others indicated that this visibility, apart from the added European value, is essentially within the professional Opera world and not towards the general public.

Regarding the legitimacy/credibility that RESEO provides to education departments within their organisations, the results are mixed, with a ratio of approximately 50/50 (out of 22 respondents). Out of those who responded positively to this question, the education department of the Royal Opera House for example considered that their engagement in RESEO allowed them to raise interest in opera education and to promote this at European level as an essential activity of Opera houses. They also state that membership also provides them with prestige regarding the other departments, as their activities were being valorised through membership in RESEO. The education department of the Welsh National Opera suggested that being informed of the work of other education departments internationally was an essential factor in promoting their own legitimacy in their organisation.

It would be interesting to know, regarding this balanced result, if the fact of being a member is in itself an indicator for the value accorded to education work, which a RESEO membership then additionally reinforces. On the other hand, the situation may be the complete opposite: that education departments feel more fragile than other departments and perceive having to frequently ask to be allowed to go to RESEO conferences, for example, as uncomfortable exceptions made on their behalf.

Global notation of the contribution that RESEO provides to member organisations



(graph 9)

The contribution that RESEO provides which was the most appreciated is undeniably the fact of meeting European counterparts and discovering new methods from elsewhere in Europe. This allows us to suppose that the biannual conferences of RESEO are amongst the activities of the network that are the most appreciated by the members. The fact that education work is part of a European dynamic and being able to stand back from one's own work are also essential aspect that contribute to the valorisation of RESEO as a network.

The aspects members chose less often were the increase in the profile of the education department within its own organisation, the promotion of arts for all, as well as, to a lesser extent, the impact provided by RESEO's publications or researches. On the latter aspects, the fact of being a member of RESEO seemed not to have been perceived as an added-value to the members.

On the whole, the results are nonetheless very encouraging and allow us to assess the expectations of RESEO members with regard to the network. Thus, exchanges and sharing techniques, ideas and perceptions is one of the main contributions of RESEO, and the points that were the most valorised by its members. The European dimension is seen as a major advantage, diversity as an enrichment, allowing one to reassess one's own work and reposition it in a global perspective as well as learning from successes and/or failures of others.

The members also indicated a number of concrete examples in which RESEO had influenced their work directly. It is very encouraging to identify the diversity of ways in which the activities of RESEO have inspired the members.

The conferences, as could easily be supposed, are a major source of learning and exchange between members, as was underlined by the Bregenzer Festspiele, for whom *“exchange provides new ideas for cooperation, new joint projects such as the project of creative residencies and allows for opportunities to meet counterparts in Europe during the conference, where we can talk about the possibilities of joint collaboration”*.

These exchanges can involve more informal discussions or practical technical aspects through workshops and the presentations of projects. Thus, it appeared that the workshop *“One-day-orchestra”* by Baudoin de Jaer at a RESEO conference in Berlin on orchestra education strongly influenced some members such as the Opéra de Lille or the Opéra de Lyon. The Scottish Opera indicated that a workshop during one of the conferences *“in Oslo presented a project of fairytales based on the Japanese “Kamishibai” (paper theatre). We used the storyline 5 times for one of our performances after this RESEO conference. This allowed us to show the work of the Scottish Opera to a wider audience in a creative and innovative fashion thanks to the techniques learnt during this RESEO event”*. The Opéra national de Bordeaux and the Malmö Opera also mentioned being inspired by the work of European colleagues: *“When I returned, I wanted to set up workshops for our permanent artists and I was particularly inspired by the experiences that had taken place at the Opéra de Lyon” / “We used several methods that we learnt during RESEO conferences”*. The Opéra de Lorraine also explained that *“the workshops we have set up with schools and universities were copied from examples provided during the conferences”*.

Projects (such as the creative residencies in particular) are often quoted by our members during the survey as having provided a source of inspiration. The Den Jyske Opera, Royal Opera House as well as the Royal Swedish Opera have indicated this. The idea of collaborating on the setting up of European joint projects is also very present, as can be seen in the remark made by the Welsh National Opera : *“the way was clear for possible collaboration throughout Europe even if for the moment we have not been able to set up a performance together”*.

The RESEO website is also regularly quoted, particularly by the Opera Theatre Company and the Opéra de Rouen Haute-Normandie: *“the videos that are available on the website are very interesting to obtain new ideas and thoughts”*.

In a more anecdotal manner, Glyndebourne referred to *“evaluating digital strategies”*, the Liceu mentioned support in *“searching for partners to establish a network of cooperation with the aim to request European funding in the framework of the 2007-2013 programme”*, and the Opéra national de Lyon included the invitation to *“Knight Crew”* at Glyndebourne and the *“visit of the workshops at Covent Garden”* at Thurrock Park. The Opéra Royal de Wallonie considered that due to *“heavy (...) work”*, *“meeting European colleagues was reassuring. We are not alone”*.

Finally, the Talens Lyriques valorised the *“meeting with Isabel Joly (one of RESEO’s Network Managers)”* (who) *“enabled us to have ideas about possible collaborations”*, which is why it is important to establish solid and long term ties between the network and its members in the framework of doubly beneficial exchanges.

CONCLUSION

Despite the difficulty to elaborate this study due to the relatively small amount of respondents, the results obtained allow us to trace the major tendencies of the current state of affairs in the sector in 2011 as well as the evolutions in comparison with the former study in 2008, thanks to the responses of many members that took part in the two surveys.

This study has the mission to provide an image of the sector of opera and dance education for the 2010/2011 season. The information provided now from the two surveys in 2008 and in 2011 will enable us to keep track of the sector's evolution and follow long-term developments via a future follow-up study.

As in the former study, we have found that the member organisations of RESEO are extremely diverse, whether it be at a geographical level, financial level or statutory level. The study unites Opera houses and small companies, who as a result have very varied responses to our questions, particularly in terms of the number of employees or their budgetary situation.

Education departments are mainly composed of a least 5 employees and compared with the 2008 report, out of the 15 members that participated in both (and here we decided to include the results from Opera North for higher representativity), the percentage in increase of the number of employees is approximately 17,39%, which is a relatively significant increase and shows a global tendency to increase the staff involved in awareness raising for Opera and Dance. Based on the results of the 26 respondents (including Opera North for more significance), we can see that 1,6% of the staff of the Opera world in Europe is involved in activities related to opera and dance education.

The budgets of education departments also show a slight increase. During the last season, close to 700.000 people were reached the activities of the 26 members that responded to this survey. These actions mainly target young audiences, however the range of audiences covers all ages of the population.

The activities undertaken mainly explore the art of Opera and involve productions for young audiences, workshops and guided tours, etc. This tendency is generally in line with the overall policy of the organisation, the majority of RESEO's members investing in Opera more than in other artistic fields.

With an independent and autonomous status (for the most part) within the hierarchy of their organisations, with a budget and staff at their disposal, education departments benefit from a certain independence to realise their activities.

Education departments in Europe therefore have staff and financial resources that are sufficient for them to acquire and preserve a certain form of autonomy; however, internal collaboration with all the other departments remains fundamental and is observed in many cases (taking part in activities, co-organisation of events, etc.).

Finally, we wish to mention the reactions obtained as a response to question n°47 of the questionnaire, that concerned the perception one has of the future of the sector for each education department in their organisation over the next 5 years. We have collected some very positive, even enthusiastic responses on the future of the sector, therefore a feeling of optimism shared in Europe on the future of the sector of Opera and Dance education and outreach, despite the worries concerning the current economic climate affecting the extent of public funding for certain members. The majority of our members see the future as stable and on the rise, with the creation of always more productions for young audiences and different projects in an "*innovative and creative*" dynamic.

Many hope to see their department develop, particularly with the possibility of employing an additional person (e.g.: Deutsche Oper am Rhein: "*we would like to reach an even larger public and*

have a third person full time”), to reach a wider audience, or hope that their department will have an even more prominent place within their organisation, as in the case of Glyndebourne (“as a strong, internal part of our organisation”) or at Royal Opera House (“A core element of ROH’s mission, strategy and programme, with a shared sense of ownership and responsibility for delivery across senior management, not least the artistic directors of the Ballet and Opera Companies”).

The education departments that responded have a very “pragmatic” vision of the sector of Opera and Dance education, and emphasised the projects that they hoped to develop. Few express global expectations, and most of them explain the situation as they foresee it in their organisation, as requested in the question formulated, without going beyond this.

However, the points of convergence are the following:

- Broaden the fields of activities and the current projects;
- Create new activities/productions for young audiences, as for Talens Lyriques (*“Develop commented public rehearsals and educational concerts/ Develop the training of mediators, of professors (academic training) and musicians”*) or the Het Muziektheater Amsterdam (*“Own (co)productions for young audiences, balletfanclub, traineeships, more focus on (pre)primary-school children, focus on amateurs. Focus on talent development. Emphasis on active involvement of the participants within the scope of the projects.”*);
- Reach a larger and more varied audience (e.g.: Opéra de Dijon: *“Opening up towards programming for young audiences and more projects for special audiences”*) by developing new education strategies (e.g.: Opéra national de Bordeaux: *An auditorium is being built and I think that this will create new strategies in terms of education and outreach with a wider variety of tools (video and sound in particular). But we are careful to respect the authentic nature of the performance...”).*

On this positive note, we would like to thank all the members of RESEO for their participation in this survey, in the hope that these conclusions will be useful for all.

ANNEXES

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Annex 1 - List of the 26 participants by alphabetical order

ABAO (ES)
Associazione Musicale Tito Gobbi (IT)
Bregenzer Festspiele (AT)
Den Jyske Opera (DK)
Deutsche Oper am Rhein (DE)
Glyndebourne (UK)
Het Muziektheater Amsterdam (NL)
La Monnaie/De Munt (BE)
Les Talens Lyriques (FR)
Gran Teatre del Liceu (ES)
Malmö Opera (SE)
Moscow Children's Musical Theatre (RU)
Opéra national de Bordeaux (FR)
Opéra de Dijon (FR)
Opéra de Lille (FR)
Opéra national de Nancy et de Lorraine (FR)
Opéra national de Lyon (FR)
Opéra national du Rhin (FR)
Opéra de Rouen Haute-Normandie (FR)
Opéra Royal de Wallonie (BE)
Opera North (UK)
Opera Theatre Company (IE)
Royal Opera House (UK)
Royal Swedish Opera (SE)
Scottish Opera (UK)
Welsh National Opera (UK)

By country:

Austria : 1
Belgium : 2
Denmark : 1
France : 8
Germany: 1
Ireland : 1
Italy : 1
Netherlands: 1
Russia : 1
Spain : 2
Sweden : 2
United Kingdom : 5

NB : RESEO had 67 members organisations when this survey was initiated.

Annex 2 - Questionnaire sent to members

RESEO Questionnaire



Mapping the Opera and Dance Education Sector in Europe – 2011

This questionnaire aims to obtain an objective ‘fact-based’ overview of the opera and dance education work of RESEO member organisations in 2011. It will help RESEO update the results of the last mapping exercise in 2008 as well as provide a base for comparison, enabling us to map the evolution of the sector over the last years. The 2008 questionnaire serves as the base for the present questionnaire. However, some new questions have been added, and a new section has been dedicated to the effects of RESEO’s work.

The questionnaire is composed of 5 sections:

- The diversity of member organisations (Section A)
- How education is structured within member organisations (Section B)
- Opera/Dance education’s economic impact (Section C)
- Who runs education activities and who benefits from them? (Section D)
- RESEO and your department (Section E)

The mapping also aims at providing RESEO members with a European vision of the sector of opera and dance education, as well as a better knowledge of practices and actual situations of all members. It may also feed into your communication strategy and help you better position yourself in a European context.

All financial information will remain confidential.

When filling out the questionnaire, please use the data of the most recent season for which you have complete information. For most, this will be 2010/2011 (or 2009/2010 if no other information is available, please indicate at the beginning of the questionnaire).

Remember – diversity is Europe’s and RESEO’s strength! Diversity also means that transnational comparisons may be complicated. For this reason, not all questions will fit all members; some questions might seem a bit “off” or strange. But please be indulgent and try to answer as logically as possible!

If you have any questions, do feel free to contact: chine@reseo.org

Your name:

Your organisation:

Season: (the most recent season for which you have complete information)

Section A: The diversity of member organisations - Information on your organisation

This section aims at gathering general information on your organisation.

Given the diversity of the RESEO members and for practical reasons, we will use the term 'organisation' for the institutions/companies/opera houses/others to which your education department belongs.

1. Founding year of your organisation:	
2. Does your organisation have its own venue?	Yes/No
3. How many full-time employees did your organisation employ during the 2010/2011 season? <i>(including orchestra, choir and ballet)</i>	
4. What was the operating budget of your organisation for the 2010/2011 season?	euros
5. How many different productions did your organisation produce during the 2010/2011 season in these categories? <i>(Do not include recitals, concerts, etc. Please count only the number, in all venues, of staged <u>productions</u> and not individual performances.)</i>	Opera/Music theatre: Theatre: Dance: Cross artform:
6. How many new commissions did you present this season?	Opera/Music theatre: Theatre: Dance: Cross artform:

Section B: How education is structured within member organisations - Education staff of your organisation

7. Founding year of the Education Department of your organisation:	
8. What is the title of the person responsible for education in your organisation?	
9. The person responsible for education is: <ul style="list-style-type: none">• Gender:• Age:• Diploma obtained / Academic/Artistic Background:	
10. If applicable: Is there a person responsible for each sector of education (opera, dance, orchestra), or, as person responsible, do you manage all sectors yourself?	
11. What is the name of the Education Department? <i>(please specify the original name and its English translation)</i>	
12. Where is the Education Department situated within the structure of your organisation? <i>(tick one of the following):</i>	

Free-standing <i>(reporting directly to the directors)</i>	
Within Marketing	
Within Communication	
Within International Relations	
Within Dramaturgy	
Other <i>(please specify)</i>	
13. Who is the line manager of the 'head of education'? <i>(i.e. the title of his/her post)</i>	
14. Does your Education Department also do community work? If not, is there a specific department dedicated to community work in your organisation? <i>(if yes, please specify its name)</i>	Yes/No
15. How many people work in your Education Department? <i>(please indicate the background/diploma of each person in the appropriate column)</i>	
	Full-time Part-time Backgrounds
Employees	
Independents/Free-lancers	
Volunteers/Interns	
Staff seconded from other organizations <i>(if applicable)</i>	
16. Do/Does: - the head of education - the employees of the Education Department have access to training sessions (excluding RESEO conferences)?	Yes/No Yes/No <i>(if yes, please specify - e.g.: communication, etc.)</i>
17. Could you make an estimate of the number of working hours of the employees of the education department during the season 2010/2011? <i>(average)</i>	

Section C: Opera/Dance education's economic impact - Finances of the Education Department

18. Does the Education Department have its own specific budget?	Yes/No
19. If yes, what is the total budget?	euros
20. What is the proportion of your budget within the operating budget of your organisation? <i>(percentage of budget allocated to the Education Department)</i>	%
21. Out of the budget of the Education Department, what percentage is allocated to each of the following: (in percent)	
Missions :	
- External missions	%
- RESEO conferences	%

Artists/animateurs/mediators						%
Membership to associations/networks <i>(please specify)</i>						%
Production costs						%
Education material						%
Communication						%
Other <i>(please specify)</i>						%
22. The annual membership fee for RESEO is deducted from:	the budget of the Education Department.					
	the operating budget of your organisation.					
	<i>(delete the incorrect statement)</i>					
23. What are the sources of your budget?						
Trusts/Foundations <i>(charities)</i>						%
Sponsors <i>(businesses)</i>						%
Legacies <i>(gifts)</i>						%
Public funding						%
Self-generated income						%
International grants						%
Other <i>(please specify)</i>						%
24. Since you joined the Education Department, what are the financing sources that have risen/fallen the most?						
25. What is the average price of a ticket (in euros) to attend a performance on your main stage for:						
	0-5€	6-10€	11-15€	16-20€	More than 20€	
A child						
A child in a school group						
An individual young person						
A student						
A family						
Other target groups <i>(please specify)</i>						
26. Which ticket price measure/ strategy established by the Education Department are you the most proud of? <i>(please specify the content of this measure and why you are proud of it)</i>						

Section D: Who runs education activities and who benefits from them? - Your education work

27. What is the balance between your activities ? <i>(in percentage)</i>	% opera % dance % orchestra % other <i>(please specify)</i>	
28. Which activities does your Education Department (co)organise? <i>(tick as appropriate)</i>	Leading role	Co-organisation /Participation
Productions for young audiences		

Community opera		
Guided Tours		
Pre & post-performance talks		
Training (<i>please specify by target group</i>)		
Workshops		
Thematic debates/ Study days		
Others (<i>please specify</i>)		
29. Which events does your Education Department (co)organise? (<i>tick as appropriate</i>)	Leading role	Co-organisation /Participation
European Opera Days		
Open doors		
Other events (<i>please specify</i>)		
30. Who were the Education activities aimed at (approximate percentage by type of participants)?		
Pre-school children		%
Primary school children		%
Children and young people (outside schools context)		%
Secondary school children		%
Students		%
Young adults (≈under 30)		%
Adults (≈over 30)		%
Seniors (≈over 65)		%
Families		%
Teachers		%
Special groups: prisons, hospitals, disabled, etc.		%
Others (<i>specify</i>)		%
31. Did your organisation commission productions for young audiences in 2010/2011?	Yes/No	
32. If yes, how many:	Opera: Dance: Orchestra: Other (<i>specify</i>):	
33. Did your organisation tour productions for young audiences in 2010/2011?	Yes/No	
34. If yes, how many:	Opera: Dance: Orchestra: Other (<i>specify</i>);	
35. How many productions for young audiences took place on your main stage in 2010/2011?		

36. Which staff members or departments are involved in your activities?		
<i>(tick as appropriate)</i>	Staff of your organisation	Free-lancers or independents
Singers		
Dancers		
Musicians		
Conductors		
Repetiteurs		
Stage directors		
Dramaturgs		
Choreographers		
Scenographers		
Set designers		
Lighting designers		
Technical staff		
Make-up artists		
Costume designers		
Prop makers		
Planning		
Marketing/communication		
Archive department		
Music library		
Friends of the opera		
Others <i>(please specify)</i>		
37. Have you trained any of the above to work in education?	<i>Please indicate your answer by marking a "T" next to anyone you have trained on the list in question 36 (above).</i>	
38. Which of the following materials did you produce in the context of 'education' in 2010/2011? <i>(tick as appropriate)</i>		
Programmes for children		
Workshop materials for teachers		
Workshop materials for children		
Posters		
Books/Booklets on operas		
Opera videos/recordings of productions by participants		
Websites, blogs, etc.		
CD Introductions		
Others <i>(please specify)</i>		
39. Does your education department run a youth group or club which meets regularly?	Yes/No	
40. If yes, please specify:		
41. Overall, how many people directly benefited from your education activities last season? <i>(include audiences for your productions and participants in projects/workshops)</i> <i>(Please state if your answer is based on precise numbers or on an estimate.)</i>	Participants in workshops: Participants in productions: Total :	
42. Can you give an estimation of the number of	%	

neophytes/novices who participated in your activities last season?	
43. Has the audience your Education Department reached out to: <ul style="list-style-type: none"> • grown • diminished • remained stable compared to its beginnings? <i>(please specify)</i> <ul style="list-style-type: none"> • Please supply numbers if available: 	
44. How do you communicate your activities to stakeholders? <i>(Please grade by order of importance, 1 being the most used)</i>	
Website of your organisation	
Website of your department	
Distribution of programmes, flyers, etc.	
Social networks (Facebook, Twitter, etc.)	
Blogs	
Information sessions with your partners	
Partnerships with local media (eg: newspapers, television, radios...)	
Others <i>(please specify)</i>	
45. Do you evaluate your education work?	Yes/No
46. If yes, how do you evaluate your work? <i>(i.e. types of evaluation methodology: written questionnaires, interviews, independent evaluators, box office statistics, head counts, etc.)</i>	
47. How do you see the future of opera and dance education in your organisation in 5 years time?	
48. Do you work together with your Friends of the Opera association/group? <i>(please specify)</i>	

SECTION E: RESEO and your department

49. Does belonging to RESEO help give your activities more external visibility (outside of your organisation)?	
50. Does belonging to RESEO give you more legitimacy / credibility within your organisation?	
51. Is your organisation's staff aware that your organisation is a RESEO member? If yes, how do they know this information?	Yes/No
52. What is RESEO's main added value on a professional level? <i>(Please rate the following propositions using the proposed scale)</i>	

<p><i>Scale :</i></p> <ul style="list-style-type: none"> - 0 : no added value - 1 : limited added value - 2 : average added value - 3 : significant added value - 4 : very significant added value - NA : non applicable/no answer 	
Raising the recognition and valorisation of the Education Department in your organisation	
Professional development	
New practices and methods	
Discovering approaches from elsewhere in Europe	
Meeting your European colleagues	
Gaining a new perspective on your work	
Learning from the studies and publications of RESEO	
Promoting the democratisation of the arts	
Helping to see your work as part of a European dynamic	
Other (please specify)	
53. Is the RESEO logo integrated:	
In the season programme of your organisation?	Yes/No If no, why not?
In the promotional material of the Education Department?	Yes/No If no, why not?
On your organisation's website or the Education Department's website ? <i>(please specify)</i>	Yes/No If no, why not?
54. Can you cite a concrete example of a way in which RESEO (via a conference, an exchange with a European colleague, etc.) has influenced your work?	

Thank you for your time and your help!

Please return this questionnaire to chine@reseo.org by Monday 14 November 2011.

The RESEO Team
Katherine Heid, Isabel Joly, Chine Venturi