

**Determining strategies for success in the opera industry: a case
study from Gauteng**

by

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I declare that the work I am submitting for assessment contains no section copied in whole or in part from any other source unless explicitly identified in quotation marks and with detailed, complete and accurate referencing.

Abstract

This study investigates strategies for success in the opera industry. It evaluates the current opera market and how it is affected by the negative economic climate that is being experienced.

In order to achieve this aim, this study focuses on Salon Music, an entrepreneurial company that produces operas in Gauteng, South Africa. Through the study of both the artistic and financial management of the company, uncertainties faced by the directors were uncovered. The directors were then questioned on possible strategies that could be implemented to curb these uncertainties.

In conclusion two aspects, namely funding and audience preference, were highlighted as the main elements in the market that create uncertainty. Strategies were then suggested to manage these uncertainties successfully.

Key Words

Arts funding

Arts management

Cultural and Creative Industry (CCI)

Entrepreneurship

Opera

Performing Arts Entrepreneurship (PAE)

Performing Arts

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CHAPTER 1

Introduction

The relevance of an art form founded in the seventeenth century to a more modern culture has been asked at many times during its more than four hundred years of development. Opera, like drama, seeks to be a commentary on the society of those who view it. It can address relevant challenges, or triumphs, in a society. The operas *Nabucco* and *Aïda* by Giuseppe Verdi were reflections on the Italian peoples' struggle for freedom from imperialism. Contemporary operas based on the lives of famous people such as Jacqueline Kennedy Onassis (*Jackie O*; Daugherty; 1997), Jerry Springer (*Jerry Springer: The Opera*; Lee & Thomas; 2001), Anna Nicole Smith (*Anna Nicole*; Turnage; 2011), and, in South Africa, the late president Nelson Mandela (*Madiba: The African Opera*; Njeza; 2014), target a younger, modern audience. But opera also communicates universal truths, like the ever present struggle of good over evil, or love triumphing over all, as illustrated in the operas *Die Zauberflöte* (W.A. Mozart) and *Orphée et Eurydice* (C.W. Gluck).

The spectacle of opera has fascinated me since the age of five. To me, there is nothing more invigorating than sitting in a theatre and allowing the overwhelming sights and sounds on the stage to wash over you and penetrate your very being while engaging with an enthralling drama. To me the question of its relevance has never been in any doubt. The fact that there are opera houses throughout the world that stage numerous operas every year, ranging from lavish to shoestring productions, indicates that the relevance of this musical art form is also not questioned by the audiences that attend those performances.

My interest in producing operas started during my third year of opera studies at the Tshwane University of Technology (TUT) when I had the privilege of working with the great Italian-South African opera singer and director Angelo Gobbato as his assistant on the operas *Gianni Schicchi* and *La Navarraise*. I developed a keen interest in the inner workings of staging productions as a result of which I, along with Gertjan Holtzhausen (one of my fellow students), was asked to write the text for two student productions, both celebrating the 250th anniversary of Mozart's birthday. These were performed by the TUT Vocal Art Department in 2006.

After my studies, being a young artist with an entrepreneurial spirit, I decided to form a small production company called LionHeart Productions cc with Gertjan Holtzhausen. We subsequently staged our first mini-opera, *The Mikado Miniature*, in 2009 and toured with it to Durban and Empangeni in 2010. This production was staged on a shoestring budget and after salaries, production costs and loan payments were deducted there was no profit.

Ticket sales, on both occasions, were the only means of income. The 2009 production featured three performances and the 2010 tour featured thirteen performances of which twelve were in Durban and one in Empangeni. For the 2009 performance in Pretoria the audience consisted mainly of friends and family and averaged 60 patrons per performance. This may seem a small number, but the theatre we staged it in could only seat 65 people. During the Durban tour to the Catalina Theatre in 2010 two performances were cancelled due to lack of interest and audiences averaged 40 patrons per performance. The Empangeni performance was performed in the conference hall of the Empangeni Casino. We played to the largest audience during this performance with a total of 320 patrons.

My personal experiences led me to question what it takes to be a successful entrepreneur in the arts. Arts entrepreneurship is concerned with the interaction between artist and the penetration of the market place. Markets are governed by many complex and interrelated variables challenging entrepreneurs to stay creative in order to survive financially. Classical musicians are further faced with the indisputable fact that their work appeals only to a small percentage of the population. This is further exacerbated by the market being saturated with many other participants. Music schools and conservatoires in South Africa have been reluctant to introduce business skills training as part of their curriculums, yet, in order to survive in our harsh financial environment, guidance based on tried and tested strategies for success need to be examined.

Research into strategies that could make an operatic entrepreneurial venture possible is scarce in the international arena and no studies have been done on South African opera companies and their development in the post-apartheid years. A glimpse into the challenges faced by an apartheid-era opera company can be found in *Eoan: Our Story* (Muller & Roos, 2013). This book charts the development of the Eoan Group, situated in District Six and later in Athlone, which performed grand opera, full scale ballets, dramas and choral concerts in the Cape

Peninsula. Because of the paucity of research, the current research project is especially relevant as it will directly contribute to the field.

1.1 The research questions

The main research question is:

- What strategies can an entrepreneur use to ensure success in staging operas?

The following sub-questions are also posed:

- How do financial and uncertainty management strategies impact on repertoire selection when staging operas?
- How does an entrepreneur balance artistic integrity and financial gain?
- How could other strategies (for example concert performances) form part of the solution?

1.2 The purpose of the study

The purpose of this study is to contribute to the development of complementary case studies to those of Dempster (2006: 232), which could permit replication and cross-case corroboration of specific propositions that she made.

1.3 The objectives of the study

Through the information gathered, the study further aims to provide young musicians seeking to start their own entrepreneurial enterprises in our current economic climate with strategies gleaned from successful opera companies, focusing in particular on the way in which the local company, Salon Music, has approached the business.

1.4 Research methodology

Case studies form the knowledge base when presenting an exploratory analysis of a real world system. It has therefore been selected as the research strategy for this study, due to the lack of information available on the staging of opera in Gauteng during the post-Apartheid years. A more detailed discussion of the case study methodology is provided in Chapter 2.

1.5 Literature review

The literature review seeks to familiarise the reader with current developments in the field of entrepreneurship in the performing arts. Uncertainties and strategies implemented to ensure survival by creative entrepreneurs are reviewed. The business and funding of operas is also discussed. The final section investigates the present nature of creative entrepreneurship in South Africa.

1.5.1 Entrepreneurship in the creative industries

Van Zuilenburg (2011: 207–208) identifies a global phenomenon faced by many graduating professionals of the 21st century. Conservatoires produce thousands of music graduates a year who then have to enter an already saturated market. These graduates are therefore forced to become entrepreneurs or seek a livelihood in other sectors of the jobs market, which may, in many instances, fall outside of their field of interest or expertise (Van Zuilenburg 2011: 210).

Goodrich, Rossiter and Shaw (2011: 13) examine the various drivers of the entrepreneurial musician. Although there can be any number of stimuli for starting one's own business, three main motivations govern all entrepreneurial enterprises, namely: independence, wealth, and necessity (Goodrich, Rossiter, & Shaw, 2011: 14). For entrepreneurs in the music industry additional factors that govern their motivation to become an entrepreneur are passion, innovation and creativity.

Because business skills are generally not taught to classical music students at tertiary level, many musicians are ineffective as businesspeople and administrators. It is therefore imperative to clearly conceptualise entrepreneurship in the performing arts industry to address these shortcomings.

1.5.1.1 Defining creative entrepreneurship

Although there is no consensus, in general three main factors seem to classify a venture as being entrepreneurial: it should be risk-bearing, it should involve enterprise creation, or it

should stimulate innovation. There is less clarity on the matter when entrepreneurship within the creative industries is discussed (Hogeschool voor de Kunsten Utrecht, 2010: 10).

The United Nations Educational, Scientific and Cultural Organization (UNESCO) defines creative entrepreneurs as those industries that combine the creation, production and commercialization of goods or services which are intangible and cultural in nature. These products are typically copyrighted (Minty et al, 2011: 6).

The study *The Entrepreneurial Dimension of the Cultural and Creative Industries* conducted by the Hogeschool voor de Kunsten Utrecht [HKU] (2010:10), however, points out that the significant contribution to society, both financially and culturally, by the creative industries warrants a clear definition. An unambiguous classification is paramount in order to highlight how such enterprises may be assisted and to examine the numerous obstacles faced by the creative entrepreneur.

The HKU (2010: 11) study expands on this by first examining the characteristics attributed to the creative entrepreneur. Four main characteristics were identified. The creative entrepreneur:

- is active within demanding market conditions;
- generates “cultural” products;
- collaborates with individuals who are more content-driven than commercially orientated;
- operates within the realm of the small to medium enterprise.

Creative entrepreneurship can therefore be described as being practised by those entrepreneurs who operate a cultural or creative enterprise that is driven by an explicit strategic cultural mission, who take risks in balancing creative and management values, and who contribute to a vital infrastructure in the community. This led the HKU (2010: 14) to assert that the industry should be known as the Cultural and Creative Industry (CCI).

As the CCI encompasses such a large number of enterprises, further distinction of all its elements are required. To achieve this, the United Kingdom Technology Strategy Board

based their model on how commercial value was generated (HKU, 2010: 29). Four main categories were proposed:

- Creative service providers (involving the fields of design, architecture, new media, advertising).
- Creative content providers (encompassing TV, radio, fashion, music recording, film, books).
- Creative experience providers (performing artists).
- Creative original providers (visual artists).

1.5.1.2 Conceptualizing creative entrepreneurship in the performing arts

In her study *Conceptualizing entrepreneurship in music: A project-based view of entrepreneurship in high art music performance* Crookes (2008: 1) seeks to re-conceptualise the term entrepreneurship within music performance practice. Both terms have been polarised in the past: entrepreneurship to the sphere of economics, and music performance to music studies. In her opinion this stifles innovative developments in music activities due to a limited comprehension of entrepreneurship within the music community (Crookes, 2008: 1).

In her search for locating music practice within traditional entrepreneurship, Crookes (2008: 14) finds it best located within the description given by Lindgren and Packendorff (2003) of project-based entrepreneurship. They view entrepreneurial acts as temporary projects; these acts may take on the form of temporary organizing processes. Lindgren and Packendorff refer to Lundin and Söderholm's (1995) perspective on temporary organizing processes to illustrate the process of carrying out project-based entrepreneurship. According to Lundin and Söderholm, projects progress through four stages: action-based entrepreneurship; fragmentation for commitment building; planned isolation; and institutionalized termination.

The process that ties into the current study would be the fragmentation for commitment building. Crookes (2008: 14) cites Lundin and Söderholm: "The fragmentation for commitment building stage occurs when delegation of resources, time and people are determined and diverted from daily affairs towards the realization of the project".

Crookes (2008: 15) goes further to describe a music concert as a project-based work. Her reasoning is that a music concert requires the organizing of a multitude of resources and disciplines to present a concert within a limited timeframe. A network of musicians and support staff has to be organised along with many other resources (hall, instruments, programmes, etc.) to accomplish the desired artistic project. A music concert shares another characteristic with a project-based work: after the concert has been presented the network of musicians and supporting staff disbands and has no further importance to the project. The musicians are then free to continue with previous commitments or seek the next artistic venture. This dynamic implies that musicians may take part, and play various roles, in numerous entrepreneurial projects during their lifetime (Crookes, 2008: 15).

This organizing of a network of artisans and support staff is even greater in the production of an opera. The sheer number of performers that are involved in an opera creates a larger need for strict organisational skills to keep the whole production together. The greater number of participants in the project network will also have greater financial implications, not only for the entrepreneur but also for established production companies. Therefore a need arises for research focused on the production of opera as well as practical guidelines for entrepreneurs.

Ward (2004: 175), in his study *Cognition, creativity, and entrepreneurship*, seeks for greater understanding of the process of creativity that ultimately results in a successful entrepreneurial venture. During his examination of man's creative endeavours he discovered a puzzling paradox. Many creative thoughts are hampered by unnecessarily limited thinking. According to Ward (2004: 175) the greatest limiter of creative thinking can be pre-existing knowledge. Innovation is therefore impeded by the acceptance of existing approaches. Ward suggests that cognitive processes and structures should be examined to use existing knowledge in more creative ways, "to build more bridges and fewer fences" (Ward, 2004: 175).

Ward (2004: 176–181) identifies two main cognitive processes to help the would-be entrepreneur, namely conceptual combination and analogical reasoning.

Conceptual combination, although not the only source of novel ideas, is a great catalyst for innovative thinking. Novel pairings of concepts are everyday occurrences, as is evident in the modern lexicon. It is also a discipline that can be practised, in Ward's opinion, by anyone (Ward, 2004: 176).

Ward (2004: 180) continues by defining analogical reasoning as the application or projection of structured knowledge from a familiar domain to a novel or less familiar one. Leonard Bernstein's musical *West Side Story* is given as an example of analogical reasoning. This adaptation of Shakespeare's *Romeo and Juliet* places the story of love and sacrifice within the context of two feuding racial groups in New York City during the 1950s.

These two cognitive processes are supported by the findings of Sarasvathy as cited in Nytch (2012: 594). Sarasvathy asserts that "entrepreneurship is a process borne out of creatively leveraging existing resources to connect with a new market rather than devising a process to deliver a pre-conceived product to an existing market". Nytch then conceptualises Sarasvathy's definition of entrepreneurship within current practice of the performing arts industry. Nytch finds that most of the ventures entered into by the performing arts industry focus on the delivery of existing theatrical "products" to a market, in this case an audience, which is saturated with monotonous entertainment. Nytch (2012: 594) then urges the performing arts industry to bring these new connections between existing resources to the fore when creating new ventures to better serve the art form as well as the audience.

1.5.1.3 Managing uncertainty in cultural and creative industries

Numerous studies have highlighted the volatile nature of the market for cultural goods, making it hard to predict or measure (Miller & Shamsie, 1999: 100; Lampel, Lant & Shamsie, 2000: 265; Dempster, 2006:225; HKU, 2010: 27). The theatre industry participates in a highly unusual paradigm: that of live entertainment. Uncertainties facing entrepreneurs in the CCI are amplified by the intangible and immediate nature of their product: as the product is viewed it is consumed and cannot be stored for re-sale (Dempster, 2006: 232).

Dempster (2006: 224) therefore emphasises the importance of identifying specific sources of uncertainty faced by entrepreneurs. This will enable participants in the CCI to better manage the risks associated with their creative projects.

Miller and Shamsie (1999: 98–99), expanding on the work by Milliken (1987), identify three main uncertainties confronted by organisations: environmental state uncertainty; organisational effect uncertainty; and decision response uncertainty.

Environmental state uncertainty is associated with universal uncertainties within an industry (Miller & Shamsie, 1999: 98–99). There are many elements to environmental state uncertainty including changing customer tastes; patterns of demand; competitive actions; and socio-cultural trends. These uncertainties add to the complexity of managing change in one's environment. Organisations commonly adapt their product to ensure demand in such an unpredictable market. The duration of desirability and future demand for a particular product therefore remains unpredictable (Miller & Shamsie, 1999: 100).

Organisational effect uncertainty pertains to the knowledge, skills, and resources available to managers when attempting to forecast the possible effects of environmental fluctuations on their organisation (Miller & Shamsie, 1999: 99). The lack of insight into how customers and competitors may mould the development of an organisation leads to effect uncertainty. Effect uncertainty can furthermore be greater in industries where there is limited comprehension of, or control over, the competitive environment. These organisations are obliged to adopt elementary product development strategies stifling diversity and inventiveness (Miller & Shamsie, 1999: 101).

Lastly, decision response uncertainty stems from the unfamiliarity with varied response options and the inability to perceive the consequences of individual decisions made by the manager (Miller & Shamsie, 1999: 99). Miller and Shamsie (1999: 102) assert that “The more costly a potential mistake, the greater the perceived risk, and the higher the level of response uncertainty”. The individual skills or lack thereof, as well as personal attributes of a decision maker greatly affect the prediction of oversights and shortfalls that may result from

strategies implemented. These factors will therefore increase decision response uncertainty (Miller & Shamsie, 1999: 102).

The literature on uncertainty within the CCI and the management thereof has primarily focused on the environmental state uncertainty. Lampel, Lant and Shamsie (2000: 265) postulate that organisations within the CCI are mainly faced with two challenges within environmental state uncertainties, namely production processes that are challenging to supervise, and demand patterns that are governed by dynamic and volatile markets.

Within the CCI, implied knowledge remains the greatest resource for producing cultural and creative goods. Ample amounts of talent, creativity, and innovation are necessary to create a successful organisation. As making a profit remains the main aim of an entrepreneur, a balance between aesthetic value and commercial success needs to be maintained (Lampel et al, 2000: 265). Finding a balance between such opposing values will lead to collaborative management techniques and expansion of accepted models (Lampel et al, 2000: 269). Product variation thus remains an important element of product development within the CCI (Miller & Shamsie, 1999: 97).

The battle for market share is further intensified, as highlighted by the HKU (2010: 27) study, by the great imbalance between major and minor role-players in the CCI market. Small to medium organisations make up the largest part of the CCI, although the large organisations have the greatest market share. Within the CCI “bigger”, in the mind of the consumer, often equals “better”. The advent of the internet and social media has therefore become a great platform for innovative strategies by entrepreneurs to gain more exposure and grow their consumer base. This has enabled a “democratisation” of the market (HKU, 2010: 27).

Peter Drucker asserts that the objective of business should be to create a customer (Payne, 2012: 66). However consumer demand in the CCIs is hard to measure and even more challenging to shape. This is due to consumer demand for creative products being formed by far reaching social and cultural elements over which organisations have no control (Lampel et al, 2000: 265).

Demand is often created through “learning by consuming”. Many potential consumers are unaware of their own tastes and the variety of cultural and creative products available in the market. Prolonged exposure to different products is needed to ensure a lasting audience. Due to the many offerings that make up the CCI market, discovery of new elements to an existing art form, or interest in a new one, can become a perpetual cycle without a foreseeable end. This adds to the complexity of forecasting consumer demand (HKU, 2010: 28).

Dempster (2006: 225) seeks to expand upon the model of consumer demand in order to find a technique to quantify, to a certain extent, this dynamic element. To achieve this, consumer demand uncertainty within the theatre industry can be measured using three determinants: audience composition; critical acclaim; and media coverage.

As many of these strategies are economically inclined, there is a need to investigate the link between repertoire selection and consumer demand. It is foreseen that the three main market uncertainties will greatly influence the repertoire performed.

1.5.2 The enterprise of staging opera

Much like during its infancy in the late Renaissance when opera was funded by wealthy patrons like the De Medici family in Italy, the art form currently relies on entrepreneurs and established institutions for its existence. Many companies rely on state or private funding to survive during times of economic crisis. Daniel Snowman, in his *Social History of Opera* series for the BBC, argued “the history of opera tells the story of who picks up the deficit.” (Payne, 2012: 53). The business model of opera companies is therefore not to make a profit but to cover production costs (Payne, 2012: 53).

The working environment of the CCI is not conducive to risk taking. An entrepreneur’s road to growth and sustainability is impeded by many financial obstacles (HKU, 2010: 27). Opera companies are therefore not merely cultural organisations, but enterprises. The Merriam-Webster dictionary defines an enterprise as “a project or undertaking that is especially difficult, complicated, or risky”.

How these enterprises manage funds remains a necessity for survival. Much of the data that can be found on the funding of operas is provided in primary accounting sources like budgets and annual reports. These documents have been scrutinised by journalists, many of whom seek to highlight the excessive funds needed to finance opera companies versus that spent on other art forms.

Due to the current global financial crisis these budget constraints are not unique to entrepreneurs but also a reality to established performing arts organisations. Cornwell (2004) investigated the spending of the Scottish Opera during their improved production of Puccini's opera *La Bohème*. During this investigation it was found that the Scottish Opera would lose an estimated £35,000 during the run of the production even after receiving £7.5 million of government funding through the Scottish Arts Council. This amount was awarded for their activities for the entire year of 2004. Cornwell questioned the validity of an art form that required such exorbitant amounts of money when it only serves a very small and elite group. Cornwell further revealed that many opera companies do not readily reveal their accounts, which makes study and comparison of budgets difficult.

Both Luraghi (2011) and Ross (2011) studied the modern plight of opera in Italy. Spending on cultural goods was drastically cut under the administration of president Berlusconi's government (Luraghi, 2011: 16; Ross, 2011: 88). Performing arts spending alone was decreased by 40 percent. Both large and small organisations were forced to implement austerity measures and endeavour to curb spending (Luraghi, 2011: 16). Included in the fourteen *Fondazioni Lirico-Sinfoniche*, opera companies with dedicated orchestras and choruses that had to pull the purse strings tighter, were historic institutions like the La Fenice theatre in Venice (opened 1792), Teatro Carlo Felice (1828) in Genoa, Rome Opera (1880) and the famous La Scala in Milan (1778). Luraghi (2011: 17) argues that this has led to a cultural degeneration propagated by president Berlusconi's Lega Nord party.

Ross (2011: 88) observed performances in Naples, Florence, Venice, and Rome during June 2011. In addition to other studies, he noted the effects of the curtailed government funding on the respective opera companies. In Venice a newly designed staging of *Das Rheingold*, the first opera in Wagner's monumental *Der Ring des Niebelungen*, was replaced with an inexpensive concert version (no sets, costumes, props or lighting). In Rome the artistic

director Alessio Vlad cancelled a lavish production of Puccini's *La Bohème* directed by the famous Italian film director Franco Zeffirelli. It was replaced with a "re-cycled" production of Pierluigi Samaritani's 1988 adaptation of the opera. Acting as advocate for the "the culture on which the history of Italy is founded" the famous Italian conductor Riccardo Muti spoke out against the government: "If you kill the culture, you kill the country" (Ross, 2011: 89–91).

These trying times faced by opera companies are not only applicable to the British Isles and Italy. Ghosh (2012) reported on the Austrian government instructing the Wiener Staatsoper, opened in 1869, to reduce spending and generate €10 million through savings to contribute to economic alleviation. The Staatsoper receives €56.4 million in government funding per annum notwithstanding it being one of the most successful opera companies in the world. The company, compared internationally, has the highest box office takings with 99 percent utilisation capacity, according to its musical director Franz Welser-Moest. This makes increasing revenue improbable and cutting costs a necessity.

Belcher (2010: 46) conversely investigated strategies implemented by five medium-sized American opera companies to survive with less funding. The five opera companies observed were the Opera Theatre of Saint Louis, Opera Memphis, Cincinnati Opera, San Diego Opera and Tulsa Opera. Notably, many companies were not concerned with closure but with complacency. Keeping audiences content, but at the same time introducing new repertoire and novel stagings to entice new audiences ultimately became their aim. Developing the effectiveness of the product already presented yielded greater returns than trying to change to a new product. Each of the companies modernised and adapted their operas instead of changing to more contemporary music styles like musicals or crossover music. World premieres of newly commissioned compositions as well as the performance of unusual repertoire were also undertaken to promote the development of the opera industry (Belcher, 2010: 46).

Finally, in his recommendations for further studies in the opera industry, Payne (2012: 68) inquires whether the future of opera lies in the small to medium enterprises. Seasonal festivals and small-scale touring troupes have become the vehicles through which many participants in operatic ventures have chosen to develop both their artistic and management

skills. Freedom of expression and risk-taking is easier to achieve within these enterprises than in larger and more rigidly structured institutions (Payne, 2012: 68).

1.5.3 The South African perspective

Research into the CCI in South Africa is hampered by the scarcity of quantitative and qualitative data. This is mainly due to the lack of a central body that officially undertakes such research. Data into the nature of the CCI in South Africa is needed in order to measure cultural diversity along with the development of each of the sub-sectors of the industry.

Shaw's (2010) *The South African Music Business* is the definitive source of information on the business of music in South Africa. Although extensive, it makes no mention of the contribution of the performing arts to the CCI. Classical music in general as well as opera are briefly discussed as genres, but the stakeholders in the industries and their inner workings are not surveyed. The main focus of the book is the recording, performance and management of contemporary music artists. Entrepreneurship and uncertainty within the CCI is also not included in this source.

As the importance of the CCI and its contribution towards the national gross domestic product (GDP) becomes more evident, it is imperative for developing countries, like South Africa, to become a leader on the African continent in this field of study. Furthermore, due to the lack of information, comparative analysis with international data remains limited (Human Sciences Research Council, 2008: 3–6).

The current annual economic contribution of the CCI roughly amounts to R2 billion. This is representative of 0.14% of South Africa's national GDP (HSRC, 2008: 52). In addition, the CCI and its sub-sectors provide jobs and income to an estimated 38 000 people employed by 7 000 small to medium enterprises (Ramdhani, 2012: 2–3).

Mahomed (2009, para. 17) cautions that the current economic climate necessitates that entrepreneurs in the CCI focus on the quality of their product. In order to retain their patronage, consumers of creative and cultural products should feel satisfied both emotionally and economically. This corresponds with the aims of the five opera companies researched by

Belcher (see p.20). A balance should therefore be found between exceptional quality and affordability of the product.

Tourism is one of the largest industries in South Africa. Collaboration between tourism and the CCI has benefitted both industries (Ramdhani, 2012: 2). Research into the current trends of tourism indicates that tourists will more readily spend their money on *experiences* than on *products*. This shift from *product* to *creative and cultural experience* has not been embraced by all sectors of the CCI and leaves room for development (Mahomed, 2009, para. 14).

This bodes well for the performing arts because they present an *experience* as their product. The performing arts accounts for approximately 19% of the CCI. Further development and support for entrepreneurs in this sub-sector still requires improvement (Ramdhani, 2012: 3). In the competitive economic environment it is imperative to train creative and cultural entrepreneurs in the rudimentary skills of business if they are to survive. Increasingly, funding agencies require entrepreneurs to equip themselves with financial expertise before any funding is granted. In this way funders try to ensure that risk is minimized (Mahomed, 2009, para. 22).

Opera companies in South Africa have historically been heavily dependent on state funding. During the apartheid regime this was achieved through the four Performing Arts Councils: Cape Performing Arts Board (CAPAB), Natal Performing Arts Council (NAPAC), Performing Arts Council of the Orange Free State (PACOFs) and Performing Arts Council of Transvaal (PACT) (Van Heerden, 2008: 20). State funding was readily available as the state used opera as part of its propaganda campaign. Opera was to be a “cultural façade” to showcase a nation with refined culture to the world and its white citizens (Allison, 2010: 35).

This system was changed in 1996 by the *White Paper on Arts, Culture and Heritage* (1996). The four performing arts councils were disbanded due to their misrepresented distribution of financial resources, infrastructure and racially-biased skills development (Van Heerden, 2008: 20).

Presently, opera enterprises receive no government funding and rely on financial aid provided by the National Arts Council, Business and Arts South Africa (BASA), National Lottery

Fund or corporate and private donors (Van Graan, 2005: 45). Along with the changes in legislation came transformation of the industry. Opera now employs a mainly black workforce, employing a diversity of artists from the humble community choir to trained professionals (Van Graan, 2005: 46).

South Africa has over the last few decades also produced a steady string of opera singers that have graced the largest opera stages in the world. Artists like Johan Botha, Michelle Breedt, Kobie van Rensburg, Amanda Echalaz, Pumeza Matshikiza, Vuyani Munde, Elza van den Heever, Bronwen Forbay and Pretty Yende, to name but a few, are part of this illustrious contingent. The famed South African artist, and now successful operatic director and designer, William Kentridge, has also made his mark on the international operatic stage with his rendition of Mozart's *Die Zauberflöte* and directing Shostakovich's *The Nose* at the Metropolitan Opera in New York City (Allison, 2010: 36).

Although the industry has diversified its labour force, transforming the audience and shedding its tainted past still remains its greatest challenge. Matters are further complicated due to operas being performed in their original European languages, languages that very few in the audience can understand. Attempts have therefore been made to *indigenise* the art form.

The first Zulu opera *Princess Magogo kaDinuzulu*, commissioned by Opera Africa, was completed in 2002 with music by Mzilikazi Khumalo and orchestration by Michael Hankinson. The opera celebrates the life of Princess Magogo, an early Zulu female songwriter and mother of Chief Mangosuthu Buthelezi, Inkatha Freedom Party leader. (Mughovani, 2008: 159–160). It has since had performances in South Africa as well as abroad.

Another acclaimed indigenised opera is *Impempe Yomlingo*, Isango Portabello Productions' version of W.A. Mozart's opera *Die Zauberflöte*. The original libretto was adapted to include lyrics in English, isiXhosa and Setswana. Instead of orchestra or piano accompaniment the production makes use of traditional African instruments. The score was arranged for custom-

built marimbas, township percussion (glass bottles filled with water, large metal oil barrels, hand clapping) and ululation along with djembes (Olsen, 2012: 67).

As part of the 10th anniversary celebrations of democracy in 2004 an opera from the European repertoire was selected to symbolise the nation's struggle for freedom. Cape Town Opera decided to stage Beethoven's only opera *Fidelio* on Robben Island. This is the notorious prison island where many political prisoners, including Nelson Mandela, were held captive during the apartheid regime. The liberation of the principal male character, Florestan, from unjust incarceration embodied the shattering of the political chains that had bound South Africa's people for centuries. Judge Albie Sachs, once a prisoner of apartheid, wrote after the performance: "When the prisoners emerged from their cages my whole body trembled. This had been the experience of our generation. We had survived jail, life in the underground, banishment, exile. Our ideas had triumphed. Beethoven was speaking for us in glorious, unashamed voice." (Allison, 2010: 20).

Opera therefore has a role to play as a musical vehicle through which to tell the history of South Africa. The successful mounting of productions like *Impempe Yomlingo* and *Princess Magogo* further aid in indigenising the art form.

CHAPTER 2

Research methodology, results and analysis

2.1 Research methodology

The main methodology for this study will be a case study. Case studies are empirical ethnographic studies that follow a qualitative approach (Mouton, 2001: 149). In the CCI sector, which also has to investigate the relationship between the object and the society in which it operates, additional information will be required.

Consequently the type of case study will be refined to become an explanatory one. An explanatory case study seeks to determine the interrelationship between the implementation and perceived effect of interventions within a real-world paradigm (Baxter & Jack, 2008: 547). These studies also favour tracing operational links that occurred over a period of time (Yin, 2009: 9).

2.1.1 Rationale for the use of a case study

The primary purpose of a case study is to highlight that which is unique to the chosen case. Due to the distinctive attributes of chosen cases, sample sizes are small and may be based on one specific case. The defining features and the differences that the case exhibits from other individuals or events within its scope of operation, remains the focus of inquiry. This may arise where the case is extreme, unique, or has something novel to explore (Guest, Mitchell & Namey, 2012: 14; Rowley, 2002: 21).

Case studies can be grouped into two distinct categories evaluating either a single case or multiple cases. Each of these categories can also include sub-units or embedded units. Investigating these sub-units, which are found within a larger case, are more beneficial as the data can be analysed within the sub-units separately, between the different sub-units, or across all of the sub-units. This will ensure that analysis of these phenomena will result in a richer, more holistic view of the larger case being evaluated (Baxter & Jack, 2008: 549-551).

Yin (2009: 47-49) identifies five motivations for the use of a single case study. One rationale for a single case is when it represents the *critical case* in testing a well-formulated theory. The theory has specified a clear set of propositions as well as the circumstances within which the propositions are believed to be true. A single case, meeting all of the conditions for testing the theory, can confirm, challenge, or extend the theory. The single case can then be used to determine whether a theory's propositions are correct or whether some alternative set of explanations might be more relevant. A second rationale for a single case is where the case represents an *extreme case* or a *unique case*. Conversely, a third rationale for a single case is the *representative* or *typical case*. Here, the objective is to capture the circumstances and conditions of an everyday or commonplace situation. The case study may represent a typical "project" among many different projects. The lessons learned from these cases are assumed to be informative about the experiences of the average person or institution. A fourth rationale for a single-case study is the *revelatory case*. This situation exists when an investigator has an opportunity to observe and analyse a phenomenon previously inaccessible to social science inquiry. A fifth rationale for a single-case study is the *longitudinal case*: studying the same single case at two or more different points in time. The theory of interest would likely specify how certain conditions change over time, and the desired time intervals would presumably reflect the anticipated stages at which the changes should reveal themselves.

Dempster (2006: 12) demonstrated the advantage of employing case study methodology to study uncertainty management strategies within the Cultural and Creative Industry (CCI) sector. In his study the controversial production *Jerry Springer: The Opera* (Lee & Thomas) was used to deliberate the impact of uncertainty on entrepreneurial performance in the UK theatre industry. For the purpose of this study an in-depth historical case study analysed performances of this opera in the United Kingdom during 2001 to 2005. Dempster (2006: 232) further called for the development of complementary case studies, in other industries and countries, which could permit replication and cross-case corroboration of specific propositions.

2.1.2 Sampling

The chosen period for the current study is 1994-2014, representing the 20 years of democratic government in South Africa. This period was chosen due to the significant increase in

entrepreneurial activity within the Performing Arts Industry as a result of the closure of the Provincial Arts Councils in 1996 (as outlined in the Literature Review in Chapter 1). The geographical focus of this study is the Gauteng Province (formerly a part of the Transvaal Province) which comprises the largest city and economic hub of South Africa, Johannesburg, as well the administrative capital of the country and one of the largest metropolitan cities in the world, Pretoria. This province also accounts for the highest number of attendees of opera performances according to the latest figures provided by the All Media and Products Study (AMPS) compiled during January to July 2014. The Gauteng Province will therefore be the most conducive cultural and economic market within in which to observe performing arts entrepreneurship undertakings.

During the selected time period opera performances in the Gauteng Province were presented by three main role-players: Opera Africa; Gauteng Opera (previously known as the Black Tie Ensemble and then as BTE VO1SS); and Salon Music. They target clearly-defined audiences. Opera Africa staged performances in both Johannesburg and Pretoria at various venues. Opera Africa received international acclaim after commissioning the first African opera, *Princess Magogo kaDinuzulu* (Khumalo; 2002), and continued their support for locally produced opera with *Ziyankomo and the Forbidden Fruit* (Mnomiya; 2012). Since 2011, however, Opera Africa has not staged operas. Gauteng Opera staged performances in Pretoria only, using different venues, but with the State Theatre as their home base. Due to economic constraints and a cut in funding Gauteng Opera announced in October 2014 the closure of their educational programme. In 2015 they relocated to Johannesburg and had to drastically reduce their studio and operations. Salon Music also stages performances in Pretoria only, but it uses its own venue, the Brooklyn Theatre.

There are also four minor role players in Gauteng. Since 2012 The Reakopana Opera Festival has also contributed to operatic performances in both Johannesburg and Pretoria, while three other companies, Opera South Africa (2009), Sempre Opera (2011) and Big Wig Opera (2014) have been especially established to stage opera.

Out of these enterprises the chosen sample for this case study is Salon Music. The company was founded in 1994 and presented their first staged opera performance in 2004. During the past 10 years (2004-2014) Salon Music has been the only performing arts entrepreneur in

Gauteng to feature an annual opera and operetta season without a break. Salon Music receives no funding from government or any government subsidiaries which is unique within the South African performing arts industry. They are currently the only production company in Gauteng to have their own theatre, The Brooklyn Theatre. Although they are not an exclusively operatic production company, the annual performance of opera and operetta remains one of their core activities. These features make Salon Music a remarkable sample within the industry warranting a study of their entrepreneurial contribution to the CCI in Gauteng.

2.2 Data sources

Case studies are characterised by the use of multiple data sources and collecting strategies so that a mixed methodology, involving both qualitative and quantitative data, is invariably applied. This is conducive to data credibility. Baxter and Jack (2008: 554) name potential data sources as including (but not being limited to) documentation, archival records, interviews, physical artefacts, direct observations and participant-observation. For the purpose of this study data was acquired through interviews, documentation and archival records.

Semi-structured interviews constituted the largest source of data. Face to face in-depth interviews were conducted with the artistic director as well as the financial director of the company.

A separate interview guide, which focused on their individual positions and spheres of operation within the company, was compiled for each of these interviewees. Copies of these interview guides are provided in Appendixes B and C. Interviews were recorded digitally on a portable personal computer with recording capabilities and stored in the “mp3” format. The recordings were reviewed and the interviews were transcribed verbatim and translated into English. Print copies of the transcriptions were presented and added to the Case Study Database for future retrieval.

In addition to the interviews, the researcher was furnished with archival records of audience attendance for the period in which Salon Music staged opera and operetta productions in their own theatre building (2010-2014). Newspaper reviews and publicity of performed

productions, where available, were also gathered and included in the study to provide an external observation on the activities of Salon Music.

2.3 Data analysis

The data gathered from the interviews were coded. A categorical aggregation strategy was utilised to condense the data into meaningful segments and assigning labels to these segments. These segments were then grouped into corresponding themes derived from the collection of the gathered data.

Each one of these emergent themes was labelled and discussed. These themes were also triangulated with the literature review in order to demonstrate the similarities and variances of the collected data and findings in prior research.

CHAPTER 3

Presentation of data

3.1 Introduction

As relationships within the CCI are so complex, I have decided to focus on the main elements contributing to producing an opera performance. Although each of these elements might at first glance seem to face the same uncertainties, the solution to their difficulties, or even the nature thereof, have different origins and a multitude of approaches to their perceived solutions. Four main themes (elements) have been identified, namely:

- the company, its subsidiaries and their various duties;
- the artists, other technical staff and other elements that contribute to an opera production;
- the audience;
- the industry.

All of these elements have favourable as well as adverse effects on each other. Their interdependent nature warrants that all five should be thoroughly expanded upon to understand fully their influence on each other.

Each superordinate theme has been divided into subordinate themes. In order to answer the research questions, subordinate themes will, where applicable, be divided into sub-sections which firstly highlight the challenges and secondly the strategies applied by the participants to curb these.

3.2 Presentation of data

The data presented below is based on the semi-structured interviews held between 10 and 24 February 2015 with the owners of the company Salon Music, artistic director Willem Vogel and financial director Daniel Vos. In the presentation below “W” refers to Willem Vogel and “D” refers to Daniel Vos.

3.2.1 The Company

With opera productions one rarely finds that the producing company and the actual production are separated. However, those who are in charge of managing the company are not necessarily a part of the production. In cases where they are part of the production team, they function in different capacities than when managing their departments within the company. This section deals with uncertainties that arise from the day to day management of the opera company.

3.2.1.1 Salon Music

Salon Music has been a major role player in the presentation of live performances of classical music, operas and operettas in Gauteng for the past 20 years. Salon Music is a registered private company that was formed as an entrepreneurial venture. The company receives no funding from Government to aid them to produce live entertainment. As a private company it is also not listed as a Not for Profit Organisation (NPO).

D: Salon Music is a private profit-making company that has been trading for the past 20 years. [*Salon Musiek is 'n private maatskappy met wins bejag wat vir 20 jaar bestaan.*]

W: ...when we've chosen a well-known opera or operetta we have actually managed to make money, despite the fact that... uh... there are many things that count against us considering that we have never been funded by the lottery or whatever else.

Although the company presents a wide variety of concerts which includes presenting popular opera galas as well as other vocal recitals, staging opera and operetta forms a large part of their performance roster for any given year. Along with staging these productions the company also manages the Brooklyn Theatre and founded the Gauteng Philharmonic Orchestra (GPO) in 2014.

W: We manage to stage an average of one opera and one operetta per year. These are of course salon versions. In addition we stage opera gala concerts and similar recitals normally with a theme in order to sell this kind of product. Since we've moved into Brooklyn Theatre we have managed to stage complete operas but still with a salon ensemble accompaniment. Uh... for which of course I do all the musical arrangements for. I think I have done... uh... about 9 operas and 11 different operettas. Uhm... this year 2014 marks our first opera gala with full a [sic] orchestra since we now have the GPO hosted in Brooklyn Theatre.

The company also participated in the televised production of South Africa's first indigenous opera, *Princess Magogo kaDinuzulu* (Khumalo), which aired Sunday 27 September 2009 on SABC 2.

W: Salon Productions have been involved, as you know, in the television production of *Princess Magogo*, uhm... which was actually broadcast on SABC 3 [sic] and I was the director.

The company has been structured in such a way that all products can support each other. This cross-subsidisation guarantees that even less profitable productions (which tend to have greater artistic than entertainment value) are able to be staged. Furthermore, cross-subsidising ensures that there are funds on hand to finance new productions, rather than having to recoup expenditure only at the end of a production.

D: All the products in the Salon Music group... I have structured the business so that we are never only reliant on ticket sales. All the products in the Salon Music group help each other. The shop, the cds, the dvds, the television productions... uhm... inherently all our products... if it did not work in this way, we would never have been a profitable business.

[Al die produkte in die Salon Musiek groep... ek het die besigheid so gestruktureer dat ons nooit net afhanklik is van kaartjieverkope nie. Al die produkte in die Salon Musiek groep help mekaar. Die winkel, die cds, dvds, die televisie produksies... uhm... inherent word al ons produkte... op die einde sou ons nooit 'n winsgewende besigheid kon wees as dit nie so gewerk het nie.]

Salon Music is in the fortunate position of having a unique public forum from which to engage with their clients, namely a music shop located in the popular Brooklyn Mall Shopping Centre, Pretoria, South Africa. This gives them a rare interaction with their existing audience members as well as possible new audience members. Insight into the public's tastes can be gauged on a daily bases. It further provides an opportunity to educate patrons on a wide range of classical music products.

W: People come in and they ask you, you inform them, either on the production or on the cd they are purchasing or on the opera that they are interested in or whatever... I feel we are a source of information to the public who do not have the knowledge [of music] they might wish to have.

[...mense kom in hulle vra jou, jy vertel vir hulle, en hetsy oor die produksies of oor die cd wat hulle koop of die opera waarin hulle belangstel of wat ookal... uh... voel ek ons is 'n bron van informasie vir mense wat daar buite is wat nie die kennis het wat hulle graag sou wou hê nie.]

D: I feel... someone once said... uhm... we are not only a cd shop or opera company but we are a lifestyle organisation. And I think it is... uhm... important, I think it is... we have moved the business in the direction of being a lifestyle organisation. We know when times are hard and when our customers are doing well... uhm... we know... uhm... what is important to them and what is not.

[Ek voel... iemand het eendag gesê... uhm... ons is nie 'n cd winkel of 'n opera maatskappy nie, ons is 'n lewensstyl organisasie. En ek dink dit is... uhm... belangrik, ek dink dit is... ons het die besigheid geskuif na 'n lewensstyl organisasie toe. Ons weet hoe sleg dit met die mense gaan, ons weet hoe goed dit met hulle gaan... uhm... ons weet... uhm... wat vir hulle belangrik is en nie belangrik is nie.]

The shop acts as a channel to guide the public to the theatre, and this public may not have been exposed to the marketing of the theatre itself. The shop retails various CDs and DVDs ranging from classical music, world music, jazz, operas and ballets to art films. Also on sale are the 28 titles on their Salon Music label. These recordings of past concerts provide a reflection on their artistic achievements. They also stock recordings by performers who appear at the theatre. In so doing they indirectly market their artists and works that may be performed in future. This is a novelty that clearly produces positive results, and it could, in some way or form, be replicated by other institutions that struggle to reach a wider audience.

W: Ok we have the fortunate situation that we can do word of mouth marketing in our shop, in Brooklyn Mall, to inform and encourage patrons to attend operas, so that's an unusual situation. We had a girl here from Wales, and... uh... the Welsh National Theatre is situated... in a city in Wales... where... where... whatever city it is... they're just outside the city, and then she looked at our whole setup and when she saw the situation with the shop she said she thought it was a very good idea that they have a little shop in the centre town so they can draw people out to the theatre which is on the outskirts of the town. So I think we've always had that... uh... wonderful... I think it's one of the reasons we've probably been able to survive.

Not receiving any funding has meant that Salon Music, from the start, has had to be innovative when presenting operas. Instead of employing a costly orchestra, for example, it was decided to reduce the orchestration and arrange the score for a smaller, more affordable ensemble. This unique approach to staging a production in what might be termed a 'minimalist' way has made it possible for Salon Music to survive financially.

D: We realised that we would not be able to stage a full opera. I think the question we posed ourselves was: "How are we going to, for those who want to attend opera... how are we going to present opera to them?" When we found the answer, we started staging salon operas. No one else did that before us.
[... ons het besef ons sal nie 'n volledige opera kan doen nie. Ek dink die vraag wat ons onself afgevra het was: "Hoe gaan ons vir mense wat opera wil bywoon... hoe gaan ons vir hulle opera gee?" En toe ons die antwoord gekry het, toe het ons begin salon operas doen. Dit was... niemand het dit voor ons gedoen nie.]

Though the use of ensembles reduces costs it can also influence the repertoire that can be performed. The artistic director explains that to ensure the artistic integrity of the music one has to keep the original composer's aesthetic in mind. If part of an opera's success is the use of heavy orchestration, it would not suit a smaller ensemble.

W: So... otherwise I could have told someone *La Bohème*, but as artistic... arranger of the opera, of the orchestration, I never attempt Puccini. Puccini does not lend himself to salon opera, in the same way that Wagner would also not allow such an approach [*.So... uhm... anderste sou ek vir 'n persoon kon sê La Bohème, maar as artistieke... uh... verwerker van die opera, of die orkestrasie as sulks, pak ek nooit Puccini aan nie. Puccini leen homself glad nie tot salon opera, net soos wat Wagner dit ook nie sou toelaat nie.*]

3.2.1.2 Finances

During the interviews one dominant theme emerged from the answers given by both managers, namely the financial aspect. The arts, noble though they may be, are still a part of a capitalist economy where financial survival is a stark reality. Generating finances, whether through sales, funding or other forms of revenue, remains the main objective of any company or enterprise.

W: Financing, is my second heading... private funding verses sponsorship... from Salon Music... we have certainly tried to do this on a profitable basis.

Acquiring funding requires diligent research into one's product and one's prospective sponsor. Sponsorship rarely comes without conditions. In order for a sponsor to find the motivation to invest, one has to prove that one's product offers some value to the sponsor. Only when a mutually beneficial agreement is reached can sponsorship take place. One should therefore ensure that the requirements of the potential sponsor are met before engaging with them.

W: I personally went to FNB [First National Bank] whilst they were still here in Lynnwood Road, and I went and saw the bank manager, and asked for a sponsorship for a Traviata or a Lucia or something we were staging, and he said to me... he agreed to see me and looked through our proposal and took me seriously and asked me: "How big will the audience be which you will reach?" And I told him "Two evenings of four or five hundred people" and he answered that the numbers are hopelessly too low for such a program.

[*Ek het persoonlik gegaan na FNB toe hulle nog hierso op Lynnwood weg was, en ek het die bestuurder gaan sien, en gevra vir 'n borgskap vir 'n Traviata of 'n Lucia of vir 'n iets wat ons aangebied het, en toe sê hy vir my... hy het my gesien, en hy het na my aansoek gekyk en my ernstig opgeneem en vir my gesê: "Hoe groot is die audience wat jy gaan bereik?" En toe sê ek: "Twee aande van vier honderd of vyf honderd mense" en toe sê hy vir my dit is hopeloos te min jy weet vir so 'n program.*]

The question also arises whether there is an ideal percentage of sponsorship. Whilst gaining more financial freedom, one may relinquish artistic control of the final product.

D: ...and impose conditions. They want to use this person, you have to perform that piece, you have to... So as long as there are no conditions we are open to it. [*... en voorwaardes sit. Hulle wil die persoon gebruik, jy moet daai werk doen, jy moet... So die oomblik wanneer daar nie voorwaardes is nie dan is ons oop.*]

Funding should therefore only decrease the financial risk and not affect the product. To ensure that you stay in control of your product, the financial director implies that the greater financial responsibility will still lie with the company itself.

D: I will take 70% they only have to give 30%. Even if they only provide 30%, I would be happy.

[Ek sal 70% vat hulle moet net 30% gee. Al gee hulle net 30% sal ek gelukkig wees.]

Strategies need to be implemented to search for alternative ways of financial support for staging operas. When combining two major audiences in the live classical music market, namely opera and orchestra, it could increase the number of audience members. If the staging of the opera can further be combined with an already sponsored entity then it further reduces the financial risk of the endeavour.

D: Staging a large project, once or twice a year, by performing a semi-staged version together with the orchestra over two weeks, then you will definitely generate the most money.

[...as 'n mens een of twee keer 'n jaar so 'n groot projek doen en deur 'n semi-staged version saam die orkes doen oor 2 weke dan gaan jy definitief die meeste geld genereer.]

To find strategies to keep costs down requires creative thinking from a financial point of view. It also requires real determination to achieve a balance between cost and the aesthetics of the product being produced. Not receiving funding puts a strain on any business to recover expenditure. The lack of funding, however, can be a positive motivation for entrepreneurs, driving the desire to seek intuitive ways of generating funds.

D: I also think it is very hard work. I don't think people realise how hard you have to work to keep it as cheap as possible. Besides management, it takes unbelievably hard work. It is hours and hours... when others are asleep you are still working. So I think one... I think two... uhm... to not receive any money is very positive, because then you stand with your back against the wall and that forces you to be creative. So I think... it is an advantage, but it... I would also appreciate someone who could help me. It would take the standard of the product to a higher level so much more easily.

[Ek dink dit is baie harde werk ook. Ek dink nie mense beseef hoe hard jy moet werk om al die goed te moet doen om dit so goedkoop as moontlik te laat werk. Behalwe bestuur is dit ongelooflike harde werk. Dit is ure en ure... as ander mense slaap moet jy werk. So ek dink een... ek dink twee... uhm... om nie geld te ontvang nie is baie positief, want dan staan jy met jou rug teen die muur en dan word jy gedwing om kreatief te wees. So ek dink... dit is 'n redding, maar dit... ek sou ook graag iemand wou gehad het wat my 'n bietjie kon help. Dit sou net die standaard van die produk... soveel makliker op 'n hoër vlak gebring het.]

Planning and budgeting is imperative for the financial success of a production. For the budgeting of an opera at Salon Music, the financial director starts with a percentage of the total sales that could be accrued during the performances. It is however important to note that

one should not be too optimistic. The manager recommends using only 60 percent of the number of seats in the theatre as a point of departure when calculating the estimated funds to be raised. It is also important to compare your figures with historical sales of previous performances of an opera, before finalising the budget.

D: Uhm... planning of products in accordance with historical statistics, and my calculations are based on 60% of sales... uh... of a theatre... so I say 360... the theatre houses 370 people, we should sell 60% thereof, and then from the amount calculated you then work back to your final calculation.

[Uhm... beplanning van produkte na gelang van historiese syfers, en my berekeninge word gebaseer op 60% van verkope... uh... van 'n teater... so ek sê 360... die teater is 370 mense, 60% daarvan behoort ons uit te verkoop en dan van daai bedrag af wat jy kry werk ons dan die berekening na terug.]

It is essential that once a budget has been drafted, that all managers adhere to the funds allocated to their department. When an outside professional is then contracted to work with the company they may have aesthetic expectations that cannot be met financially by the company.

W: Well... I keep to it [a production budget] as much as possible, but the problem is when one hires in a director who makes different demands... makes it very... makes it financially problematic. Do you understand? Then it may be someone who has the expectation... who normally does not work in a situation like ours, so then it becomes problematic.

[Wel... ek hou so veel as moontlik daarby, maar die probleem is wanneer 'n mens 'n buite regisseur inkry wat ander demands maak... maak dit baie... maak dit finansieël problematies. Verstaan jy? Dan is dit iemand wat miskien die verwagting het... wat nie altyd in die situasie werk wat ons doen nie, so dan raak dit 'n probleem.]

After the discussion on the financial challenges of producing opera, the question arises: is there any monetary value in staging operas? The financial director revealed that the most profitable productions staged by the company, over the last two years, have been their operas.

D: The... uhm... products that earned the most money... uh... the last 2 years have been our full operas. So I think people are only now starting to take us seriously. Uhm... so our opera at the beginning of the year [*Die Zauberflöte* by W.A. Mozart] did very well, and our Lucia [*Lucia di Lammermoor* by G. Donizetti] did... did... did well financially. It does much better than a normal song recital.

[Die... uhm... produkte wat die meeste geld gemaak het... uh... die afgelope 2 jaar was ons volledige operas gewees. So ek dink mense begin ons nou eers ernstig opneem. Uhm... so aan die begin van die jaar het ons opera [W.A. Mozart, Die Zauberflöte] goed gedoen, en ons Lucia [G. Donizetti, Lucia di Lammermoor] het... het... het finansieël goed gedoen. Dit doen baie beter as net 'n sangkonsert.]

3.2.1.3 Effective management

Both the artistic and financial directors were asked their point of view on the skills required to be an effective manager.

For the artistic director a well-rounded and experienced individual makes for a good artistic manager. Experience and the drive to succeed and innovate are shared skills between artistic excellence and the entrepreneurial acumen.

W: Uhm... passion, extensive knowledge, experience, perseverance, commitment, organisational abilities, reliability, integrity, honesty, an inspiring demeanour, enthusiasm, diplomacy, aural and visual sense, the kind of imagination that allows you to stage something exciting which is affordable.

Opera as an art form sets further challenges to an artistic manager. Although on the surface the repertoire to be presented appears to be a homogeneous group of compositions, each style within the greater genre of opera has its own traditions and stylised conventions that need to be adhered to. The aspiring artistic manager has to delve deep through studying and gaining practical experience in the art of staging, design, and managing over and above a thorough knowledge of the repertoire and performance of the music. These are all disciplines in their own right that take years to perfect, but basic knowledge of each is essential before even attempting to enter an entrepreneurial operatic venture.

W: Opera is a very complicated stylised art form that can only be grasped fully with years of experience. Repertoire knowledge and knowledge of tradition is very necessary.

Besides having a keen creative and artistic mind, the artistic manager should at the same time be able to appeal to the audience while also engaging them in an innovative approach to presenting the opera.

W: Getting in to the mind of the public and giving them what they want, or what grabs their attention. It's one of the bigger secrets.

In agreement with the artistic director, the financial director asserts that experience is to be prized above all. In addition he is of the opinion that experience outside the performing arts is also required. The rudimentary financial skills acquired through normal business practice should then be applied to the management of an opera company.

D: A good financial director should at least have an accountancy background. He should have at least ten years of practical experience preferably not in the field of the arts. Uhm... normal business practice should be implemented in order to ensure the longevity of an opera company.

['n Goeie finansiële direkteur moet ten minste 'n rekenkundige agtergrond hê. Hy moet ten minste tien jaar se ondervinding in die praktyk hê verkieslik glad nie iets te doen met die kunste nie. Uhm... normale besigheidspraktyk behoort toegepas te word in 'n opera maatskappy om die voortbestaan te verseker.]

Other than experience, striving to present a product of standard, whilst keeping expenditure low, should be guiding a novice financial manager in his duties.

D: I think that offering a product of standard at a reasonable and market related price is the secret. This is the ideal that I am working towards.
[En ek dink dat die standaard van 'n produk wat jy lewer teen 'n redelike markverwante prys, is die geheim. Dit is die ideaal waarna ek werk.]

Both managers were also asked if they had ever received any training in the other's discipline. Although the artistic director had received no prior financial training he stresses the need for a colleague that can take care of the monetary affairs.

W: No I've had no financial training. This would have probably assisted me, but I have a very capable partner in this respect. I have however learned a lot from Daniël. I try to be as careful as possible but I do not always succeed.

Correspondingly the financial director has received no training in the performing arts. To him this has both positive and negative aspects. He views being unattached to any opera or the performance thereof as an advantage. Any production is viewed as a product which can then be evaluated based on its financial potential.

D: I have no training in the performing arts. It is a double-edged sword. Sometimes I feel... uh... it would have helped me if I had basic training in the arts. Conversely I am glad I had no training in the arts because I am totally unemotional about a product, or about the artists. I try to look at the artists and product as products on a shelf. And these different products on the shelf have to compete with each other, and depending on what the product looks like and how much it costs taking it off the shelf and I try to look at the product and artist like that.

[Ek het geen opleiding in die uitvoerende kunste nie. Dit is 'n twee snyende swaard. Soms voel ek... uh... dit sou my baie gehelp het indien ek basiese opleiding in die kunste gehad het. In ander gevalle is ek baie bly dat ek geen opleiding het in die kunste nie want ek is toetaal en al onimmisioneel oor 'n produk, of oor die kunstenaars. Ek probeer om die kunstenaars en die produk te sien soos produkte op die rak. En hierdie klomp produkte op die rak moet met mekaar kompeteer, en afhangende van hoe die produk lyk en hoeveel dit kos van die rak afhaal en ek probeer so na die produk en die kunstenaar kyk.]

3.2.1.4 Duties

Before engaging in the start of a business it is advisable to know which duties should be fulfilled in order for a company to be managed effectively.

Having a big team, both artistically and managerial, would be advantageous to any company. Nevertheless, to a small to medium entrepreneurial operative venture this is not financially viable.

D: There is too little money. If we had to employ 10 people to work under us, then we would not be able to make it [financially]. At all.

[Daar is te min geld. As ons tien mense moes aanstel onder ons, dan sou ons dit nie kon maak nie. Glad nie.]

To gain insight into the actual duties to be fulfilled by managers of an opera company, both artistic and financial directors were asked to describe their day-to-day duties.

As artistic manager it is important to plan the presentation of operas and not only the conceptualisation of the actual product. Being a part of the preparation and performance of operas will also be essential. This is done to reduce the unnecessary employment of outside assistance which would be too costly. Planning of the opera season is therefore a continuous and integral part of an artistic manager's duties.

W: Ok, uhm... I am the artistic director of Brooklyn Theatre, Salon Music, iSalon... uhm... I'm responsible for conceptualising products presented on the Brooklyn Theatre stage. This includes Salon Music concerts, recitals, orchestral concerts, operas, operettas etc. I compile programs, audition artists, approve productions from outside performing companies. I also arrange music and work as a musical director and conductor for in-house productions.

The largest contributions of the financial director to the company are budgeting for the different productions; all issues arising from the management of human resources; and assuring the soundness of the company's accounting.

D: My tasks are... I am responsible for the accounting duties to the statements level... financial statements. I have to do the report... of the figures, I have to compile the budgets. I have to positively motivate sales... if there is such a word. I also have to restrict expenditure to the minimum. I do the contacts with the artists. I am responsible for all the taxes of the company and individuals... for the cashflow management, for the audit of the statements... uhm... personnel duties... uhm... payslips, deductions, leave applications, sickness applications, pay-as-you-earn calculations. Uh... reconciliation of the receiver, VAT calculations, monthly management statements... analysing figures... and guiding Willem to where the company should go after analysing the figures. Uhm...

planning of products in accordance with historical statistics, and my calculations are based on 60% of sales...uh... of a theatre... so I say 360... the theatre houses 370 people, we should sell 60% thereof, and then from the amount calculated you then work back to your final calculation. Uhm... I am also responsible for all the revenues... it is like the banking, revenue of payments. I am responsible for all the... systems of the company, from the point-of-sale to the creditors. All the way through to sales. Then I am responsible for all the marketing of the company as well as the design of the posters, market research... uhm... ticket sales... cleaning the theatre...

[My funksies is... ek is verantwoordelik vir die rekenkundige pligte tot die state vlak... finansiële state. Ek moet die verslag doen... van die syfers doen, ek moet die opstel van begrotings doen. Ek moet inkomstes optimaal bemoedig as mens... as daar so 'n woord is. En ek moet uitgawes beperk tot op die minimum. Uhm... ek doen die kontrake met die kunstenaars. Ek is verantwoordelik vir al die belasting van die maatskappy en individue... vir die kontantvloeï bestuur, vir die oudit van die state... uhm... personeel funksies... uhm... salaris strokies, aftrekkings, verlof vorms, siekte vorms, pay-as-you-earn berekening. Uh... rekonsiliasie van die ontvanger, BTW-berekening, maandelikse bestuurstade... syfers analiseer... en uit die analise van syfers uit vir Willem kan adviseer waarheen om te gaan met die maatskappy. Uh... finansiële beplanning vir die jaar. Uhm... beplanning van produkte na gelang van historiese syfers, en my berekening word gebaseer op 60% van verkope... uh... van 'n teater... so ek sê 360... die teater is 370 mense, 60% daarvan behoort ons uit te verkoop en dan van daai bedrag af wat jy kry werk ons dan die berekening na terug. Uhm... ek is ook verantwoordelik vir al die ontvangstes [sic]... dit is soos die banking, ontvangstes van betaling. Ek is verantwoordelik vir al die... stelsel van die maatskappy van die point of sales tot by die krediteure. All the way through to verkope. Dan is ek verantwoordelik vir al die bemerking van die maatskappy asook die ontwerp van die posters, marknavorsing... uhm... kaartjie verkope, teater skoonmaak...]

3.2.2 Elements of staging an opera

Opera is a collaborative art form. It relies on the coming together of many elements which are artistic, financial and practical in nature. The performance of the music is the final result of all these disciplines working in synergy. Many preparations, however, need to be executed and funded before a performance can take place. It is therefore, other than funding, the main area where challenges are experienced by any opera company.

3.2.2.1 Singers

As the main attraction for any opera, sourcing singers to star in performances is the start of putting together any production. However, certain voice types that are scarcer are in greater demand than others. The tenor voice, one of the rarest male voices, is especially in short supply. The allure of state-sponsored opera houses in Europe, America and the United Kingdom, promising bigger salaries and opportunities, have lured many singers from South Africa. Those who are brave enough to stay behind end up finding other ways to support

themselves financially in order to remain a part of the opera scene. This results in singing becoming a hobby instead of a profession.

W: And then... one of the other problems are [sic] sourcing singers. Solo singers, choral singers and of course the huge shortage of tenors. Which is always a major problem, as you can't do an opera production without a decent tenor. Uhm... sourcing singers is a problem because so many good singers leave the country. There are people who stay behind, and of course a whole lot of them have other jobs... they can't spend that much time on their singing... so... uh... you always have to compromise on the standard, because... you know... it is a problem... you do understand that it... uh... you know they have other commitments.

The question then arises whether to only use the local singers or import singers from outside the borders of South Africa. This however is a very costly venture and could be unattainable for young entrepreneurs.

W: Then of course there is the huge expense of bringing artists in from abroad. Although we have really serious contacts abroad, uhm... with South African expats, uhm... you have to bring them in, you have to accommodate them, you have to feed them, and even if they do the work pro bono it still costs one money to have them here. Uhm... and some will not do it pro bono, they do need a fee.

Soloists are not the only ones who are in short demand but chorus members as well.

W: Uhm... and then of course choral singers is [sic] really a problem.

Although there are choirs able to sing in opera productions they seem to be biased against the art form. The opera repertoire being performed may not appeal to the chorus who find other works more suitable to their performance aesthetic.

D: Negativity of choruses towards opera. The fashion under choirs is to only perform Norwegian [Scandinavian] music, the moment you mention opera they become anxious. [*Negatiwiteit van kore teenoor opera. Die mode onder kore is om net Noorwegse musiek te sing, die oomblik wat hulle die woord opera hoor dan word hulle benoud.*]

3.2.2.2 Instrumentalists

As with the case of choirs, many instrumentalists are prejudiced against opera. This may be due to a genuine dislike of the art form or ignorance, as many young musicians are not exposed to live opera performance in South Africa.

D: Two, negativity of musicians against opera, again this is due to exposure, because an instrumentalist has never been exposed to opera. [*Twee, negatiwiteit van musikante teenoor opera, dit is dan weereens blootstelling, want 'n instrumentalis is nooit blootgestel aan opera nie.*]

Finding ways to engage many different instrumentalists can alleviate the problem of under exposure to opera. Salon Music has therefore undertaken to include novice musicians in their

opera ensembles. This has had a positive effect, firstly by introducing young instrumentalists to the performance of the operatic repertoire and secondly to change preconceived aversions to the art form.

D: We engage many instrumentalist for different opera productions in so to introduce many different musicians to opera, and if they played in the ensemble they are crazy about opera.

[Ons betrek verskriklik instrumentaliste vir verskillende opera produksies sodat verskillende musikante beloodgestel word aan opera, en as hulle gespeel het in die ensemble is hulle mal oor die opera.]

3.2.2.3 Technical Staff

The third group of artisans concerned with the producing of an opera consist of the director and the technical staff who work in collaboration to produce the overall artistic vision. As with singers these highly accomplished personnel are scarce. Remuneration to lure creative individuals to opera isn't always achievable. A solution therefore may be to undertake these responsibilities oneself.

W: ...sourcing directors and technical staff... uhm... I really have tried so often to find decent opera directors, there aren't really any around... uhm... and there also aren't any around who will work for the fees we are prepared to pay... uhm... and I have offered this to various people and have very often just done it myself because there was nobody else.

3.2.2.4 Venue

Another uncertainty to be faced by entrepreneurs is finding a venue to perform in. The State Theatre, located in Pretoria, houses the cities only official opera house. Crime has affected many aspects of daily life in South Africa, and live theatre has not escaped these effects. No patron wants to sit in a performance and be anxious about their and their family's safety. Alternative theatres are available. One should, however, be cautious when selecting a theatre and ensure that it can accommodate the ensemble or orchestra being used along with any sets or décor to be used during the performances.

W: Suitable venues. Patrons actually refuse to go to the State Theatre. So that's the official opera house in town. And we have it from first-hand information from our clients through the years that they will not go to centre town to attend something. So that poses a problem. Uhm... it leaves very few venues where one can actually present opera. Uhm... Brooklyn Theatre being virtually the only one because at Atterbury Theatre you can't really do sets, you know, I mean it is limited to what can actually be done there. Uhm... then I don't know... there might be other places, but we have certainly tried them all. We don't have an orchestral pit so we will never be able to do a full opera here, we would certainly be able to do a concert version with orchestra.

There are venues that will lend themselves to operatic performances. In order to transform a normal concert stage one only needs to use ingenuity to transform it into something that can be visually appealing.

W: The two definitely go hand in hand... uhm... some... I really think opera should be visual and I mean, when we did those... it was... we tried our very best, but I mean to do something in the Musaion [at the University of Pretoria] or at the Z K Matthews [at the University of South Africa] where we also did an opera... uhm... it is very difficult to create the illusion of... of... of... of a stage.

3.2.2.5 Production Costs

All the above elements of opera performance will incur expenses. As the income for any specific performance is uncertain, one has to endeavour at least to find strategies to curb expenditure.

In order to secure a venue and reducing the otherwise unsurmountable cost, the financial director proposes that the entrepreneur find ways to sign agreements with venues by collaborating with them.

D: It becomes very costly, it is what I said earlier if you close the theatre for 2 weeks, at R11 000,00 per day, and you have to give that budget to an outside company it will be impossible for them to afford it. So one will have to sign collaboration agreements with them.

[Dit word baie duur, dit is wat ek nounou gesê het as jy die teater toemaak vir 2 weke, teen R11000,00 'n dag, en jy moet daai begroting vir 'n buite maatskappy gee dan is dit onmoontlik om dit te bekostig. So 'n mens sal moet 'n samewerkings ooreenkoms met hulle teken.]

The artistic director similarly recommends that strategies be found to reduce production costs concerning staging. This phenomenon is not unique to South Africa but affects all opera companies the world over.

W: I think it is a world-wide trend. I think opera is in dire straits all over the world, relatively spoken. So I think everyone thinks up easier ways to bring down the cost on staging and décor, and we are following that same path.

[Ek dink dit is maar 'n trend wat oor die hele wêreld plaasvind. Ek dink opera kry eintlik maar oor die hele wêreld swaar net relatief gesproke. So ek dink almal dink makliker maniere op om 'n goedkoper staging of décor daar te stel en ons volg nou maar net die paadjie.]

Strategies that could be implemented during the design and constructing of the stage designs include:

1. building of multi-use stage flats that act as a three-dimensional canvas ready to be repainted for every production;
2. the use of effective lighting to assist in creating the right mood and “picture” on stage; and
3. making use of modern digital technology through projecting backdrops on stage which can be changed by the touch of a button.

W: Ok... We think up affordable ways of designing basic décor which can be used over and over again. Like rostra and flats and things like that. We have been very successful with this. So things can be reused in a different way and painted differently. So from that point of view we've got quite a stock of décor which we can apply in different ways. Uhm... the cast normally assist us by using their own make-up, which is not something that we rely on, but that is unfortunately what happens. We do things like paint the stage floor instead of building a fancy set, or clever lighting. Uhm... we use projections.

The acquisition and distribution of funds underlie the potential of staging an operatic production. But even more than finances, the biggest commodities in the performing arts are expertise and skills.

D: And we had come to a point where we said, fine either we don't have any posters, or I do the posters. And we are at a point where... we are... we are either going to have opera where Willem does the projections, or we are not going to have opera. So it is not money out of our pockets, it is hours out of our pockets. And... uh... time, specialised knowledge that we put into a product without being paid for it.

[En ons het gekom tot op 'n punt waar ons gesê het, fine of ons het nie posters nie, of ek doen die posters. En ons is op 'n punt waar... ons is... ons gaan of 'n opera hê met Willem wat die projeksies gaan doen, of ons gaan nie opera hê nie. So dis nie geld uit ons sakke uit nie, dit is ure uit ons sakke uit. En... uh... tyd, gespesialiseerde kennis wat ons in 'n produk insit sonder om daarvoor betaal te word.]

3.2.3 The audience

Equally important to the management of the company and the artistic and practical elements that make up an operatic performance is the audience that attends it. Without an audience there would be no income and ultimately no reason for the performance of the music.

3.2.3.1 Public Ignorance

More importantly than finances, both the artistic and financial directors agreed the toughest uncertainty to face is the public. No matter how artistically sound your performance may be, if the audience will not attend, it will fail financially.

W: Public ignorance, at the top of the list. This limits the works that can be staged...

Many operas are only famous for an impressive aria or orchestral work found in the opera, while its title and the name of the composer remain unknown. *Gräfin Mariza* by Emmerich Kàlmànn is one such work. If the public is not familiar with the opera, or operetta, they will not attend although they may enjoy it.

W: Now... many, many of the opera lovers and operetta lovers have asked me: “why do you not present *Gräfin Mariza*?” because I know that it has the best known tunes possible in the repertoire and everyone will recognise the tunes but nobody actually knows the name of the operetta. So, they will not actually buy tickets when they see *Gräfin Mariza* on a poster. If they see the production, or miss the production, they will hate themselves because they have actually missed something wonderful. So that is the kind of ignorance we are working with.

Another example is the two arias by the Italian composer Giacomo Puccini. The tenor aria *Nessun dorma*, perhaps the best-known aria out of the whole opera repertoire, from the opera *Turandot*, and the soprano aria *O mio babino caro* from the opera *Gianni Schicchi*. *Gianni Schicchi* is part of a series of three one act operas entitled *Il trittico*. Although the aria is performed by renowned opera singers and even crossover artists the aria stays more famous than the actual opera.

D: So now you have Paul Potts who sings *Nessun dorma*, or the new little girl Amira seen by 5 million people on youtube singing *O mio babino caro* and it does lead people to it. Not that they would know, if I suddenly have a poster saying *Gianni Schicchi* is being performed, that they will know that *O mio babino caro* is in it.
 [So nou het jy Paul Potts wat *Nessun dorma* sing, of die nuwe dogtertjie Amira wat 5 miljoen mense op youtube gesien het wat *O mio babino caro* sing en dit bring die mense wel daar by uit. Nie dat hulle gaan weet, as ek ewe skielik op die poster sit Gianni Schicchi word opgevoer, dat hulle gaan weet *O mio babino caro* is daarin nie.]

There is a *definite* advantage in selling tickets to a production that the public will be more familiar with. It is evident that public taste has a measurable effect on an opera company's repertoire selection.

D: ... the familiarity of the piece, if a piece is well-known then... then we definitely sell it more easily.

[...die bekendheid van die werk, as 'n werk bekend is dan... dan definitief verkoop ons hom makliker.]

But the audience's familiarity with an opera is not the only prerequisite. One should also be attentive to trends within the market. It is suggested that the current audience favours comedy above high drama, and appealing to this plays to the advantage of the entrepreneur. The audience, therefore, has a disproportionately high influence on the repertoire selection and its importance should not be underestimated.

W: We stage well-known works, we do not do otherwise, even so, the risk remains huge. Uhm... and... uh... I'm referring here especially to Faust, where the poster is... was the devil... uhm... where people say: "Yes, I do know the opera, but it is such a sad and terrible story, I'd rather have something joyous. [laughs] So... they... they don't come to that... so... we have to be very careful. You can say *La Traviata*, and everybody will come.

Both managers remarked that audience members do not always appreciate the amount of finances required to stage an opera. Spectacle requires sufficient investment into all the elements that together create an aesthetically appealing production.

W: And.. uhm.. what we have is people complaining about that you actually have no idea what it is and what it costs to stage an opera with costumes, with make-up, with décor, with lighting, with everything else that is needed. So that.. that's quite a big problem.

D: Yesterday a man inquired in the shop: "This orchestra, do you pay them?"
 [Daar was gister 'n man in die winkel by my, en toe sê hy: "Hierdie orkes, betaal julle hulle?"]

Opera as an art form has historically been subsidised when elaborate productions are staged. When a production is subsidised it allows ticket prices to be sold at a reduced rate. This concession draws many patrons. When, however, a production is not subsidised, patrons may not be willing to bear the cost. The perception also exists that European productions are more worthy of higher ticket prices than South African productions.

D: Uhm... and then I said the cost of the ticket versus the standard of the product. The older audience members are used to subsidised performances so they want to see a complete opera, with full orchestra for R25,00. Then younger members go to Europe and they see a complete opera for R1200,00 and then they are upset because they did not see a full production for R350,00. So this is the... one of our problems.
 [Uhm... en dan het ek gesê die koste van die kaartjie versus die standaard van die produk. Die oumense is gewoon aan gesubsidieerde konserte so hulle wil 'n volle opera, met 'n volle orkes sien vir R25,00. En die jong mense gaan Europa toe en hulle sien 'n volle opera vir R1200,00 en dan is hulle ontsteld want hulle het nie 'n volle produksie gesien vir R350,00 nie. So dit is die... een van ons probleme.]

The language barrier faced by opera goers also needs to be addressed. Strategies implemented, by Salon Music, to address this dilemma are:

W: We use subtitles, narration, voice-over to educate the audience.

Marketing plays a pivotal role in engaging with the prospective audience of any production. In a virtual marketplace dominated by digital information it can be challenging to attract attention to your production. One does not only have to compete with other participants in your own field but with all other forms of entertainment. As there is no official platform for opera entrepreneurs to advertise in, it is simply thrust along with everything else into a public forum.

D: I think it is very difficult in the information technology world of today to get any message across. Today, in my opinion, to reach the public is a lot more difficult than 20 years ago. 20 years ago I got an article in a newspaper, it would be the only article, and 30000 people read it. Today, I have to compete with facebook, with twitter, with... with the American television, with European television.
[Ek dink dit is so moeilik in die inligtings tegnologie wêreld vandag om enige boodskap deur te gee. Uhm... vandag, vir my, om die publiek te bereik is baie moeiliker as 20 jaar terug. 20 jaar terug het ek 'n artikel gekry in 'n koerant, en dit was die enigste artikel, en 30000 mense het dit gelees. Vandag kompteer ek met facebook, met twitter, met... uhm... met die Amerikaanse televisie met Europese televisie.]

3.2.3.2 Musical education and exposure

Exposure to classical music and opera is important in educating and winning a new audience. Being introduced to opera requires a holistic approach. Schools, in the past, have played an integral role in cultivating appreciation for the fine arts under learners. However, as time has passed, the role of music in the well-rounded education of learners has faded to a minimum.

D: This is one of the things that I mentioned when earlier you spoke of... uhm... you spoke of all we... what the uncertainties are, I added that there is no [musical] training in schools, there is no music in schools anymore.
[Dit is een van die goed wat ek genoem het toe jy nounou gepraat het van... uhm... jy het gepraat wat ons alles... wat is die uncertainties, toe sê ek daar is geen opleiding in skole nie, daar is geen meer musiek in skole nie.]

The school alone cannot be responsible for informing learners; reinforcement needs to come from the home. It is therefore a disappointment that many parents themselves were not exposed to opera, not just as a style of music but as an art form. The theatre also has a role to play by being the vehicle through which opera performance should take place in order to provide a platform where others can be introduced to the art.

W: So... uhm... music that is not taught in schools anymore just causes great ignorance about something like opera. We are now in an age where parents in their thirties and forties also don't know what opera is, so how can the poor children know what opera is. There are young people who land up at operas in Brooklyn Theatre and it is their very first live opera that they are experiencing. Luckily many of these people are impressed and strive to attend more operas, which is a good thing.

In order to be a part of the solution Salon Music regularly invites learners and music students to their rehearsals and performances.

D: Our... schools are invited to bring learners to final dress rehearsals at a minimal cost.
[Uh...ons... skole word uitgenooi om studente na kleeedrepetisies toe te bring teen minimale koste.]

Salon Music also introduced weekly “Kollig Konserte” (Highlight Concerts), concerts in which they highlight young talent as well as upcoming performances.

D: And then we also have on Saturday mornings... we have the Highlight Concert where we open the whole theatre to all children... the operas are always in a Highlight Concert and then we always have 30, 40 people in the audience.
[En dan het ons ook op Saterdag oggende... het ons die Kollig Konsert waar ons die hele teater oopstel vir alle kinders...die operas is altyd op 'n Kollig en dan kry ons altyd so 30, 40 mense.]

3.2.3.3 Audience preference

As discussed earlier, audience preference changes with time. It is up to the entrepreneur to research what is in vogue and what is seen as old-fashioned. In days past the glamour of opera, and the larger than life personages that appear in them, has attracted attention to the art form. The artistic director is of the opinion that this is still the case. There are still people introduced to opera by being familiar with the performance of an operatic star.

W: ... then I also think that there's the new glamour of singers like Anna Netrebko... Jonas Kaufmann... Juan Diego Flórez, people that start to follow the persona, being suddenly dragged along, in... the possibility to watch a *La fille du régiment*, or watch or listen to a *Traviata*.
[...dan dink ek ook dat daar die nuwe glamour van sangers soos Anna Netrebko... uhm... Jonas Kaufmann... uhm... Juan Diego Flórez, mense wat die “persona” begin aanhang en dan ewe skielik saam gevat word, in... die moontlikheid om 'n La fille du régiment te kyk, of om 'n Traviata te kyk of te luister.]

It is not only the persona of these new generation opera divas and divos that attracts new audiences, but also their physical appeal.

W: ...opera needs to be marketed like pop-music. Beautiful and sexy singers help a lot with that.

The financial director also notes that this is a strategy that they have adopted in order to remain relevant to younger audience members:

D: And then we use young and very sexy singers on the stage. And the people [singers] have to be slim and appealing otherwise we are not interested. The Americans have made opera and entertainment... uhm... they made it... uh... one has to... compete with other art forms... yes... so we... this is something we actively do to attract younger people. [*En dan gebruik ons jong en baie seksie kustenaars op die verhoog. En die mense moet maer en oulik wees anders stel ons glad nie belang nie. Die Amerikaners het opera en entertainment... uhm... gemaak dat... uh... 'n mens moet... kompeteer met ander kunsvorms... ja... so ons... dit is iets wat ons daadwerklik doen om jonger mense te trek.*]

There are also audience members whose tastes are at odds with each other. The purist is in one corner and the novice diametrically opposite. It is up to the entrepreneur to address this dichotomy and find ways to appeal to both groups, and that may not be possible when staging a single production.

W: My next point is the purists who refuse to attend salon versions of operas and the non-purists who are reluctant to attend full productions [laughs] so you got this absolute dichotomy between two people... two groups of people... who will actually... uhm... fight for their rights. Uhm.. “why have you been giving us salon versions all these years, must you now make it more difficult for us” and then other people who are just snooty and say we don’t attend salon versions... they literally ask you how big is the orchestra if you don’t... if you don’t say it is a full orchestra they aren’t interested in coming.

Not only is the entrepreneur challenged by local companies but also by large-scale productions from overseas. Multimillion dollar productions from the Metropolitan Opera House in New York City, United States of America, are brought every year to audiences all around the globe through the presentations of their operas, filmed live, in cinemas. In South Africa these operas are presented in the Ster-Kinekor Cinema Nouveau movie theatres in the bigger cities across the country. These operas play to the already select group of viewers of art films that frequent these cinemas. Although it may bring the spectacle of extravagant productions to a larger audience, in South Africa it makes no contribution to local opera. It is, however, an indication of whether opera is still in the taste of an audience if it is adopted by another form of audio-visual entertainment presentation.

W: Then, observations about live broadcasts of The Metropolitan operas at the Cinema Nouveau, the purists: the mean purists. There are a lot of supporters of the [Radio program] who will never set a foot outside their houses to help support local opera. Now, we see these purists at the Cinema Nouveau because our shop is right next to them... and... they come into the shop to browse through our stuff, but some of them buy... some of them do attend our operas, but some will not be seen dead at Brooklyn Theatre watching a salon opera because they are just far too snobbish about that, but they will not miss one single Met performance. But then again, some of the Met performances, you might know, are empty...

It is, however, important to note that, notwithstanding the challenges faced towards attracting an audience, vocal performances still draw the largest audience. This might not be the case with the sales of recorded music, it is but certainly the case with Salon Music's live performances. Although opera is not named specifically, if they are the productions that generate the most profit, evidently they attract the largest number of patrons.

D: And then, it is also interesting that the biggest audiences are people who come for singing. The biggest sales in the shop are instrumental, not necessarily singing, but for the live concerts, singing has the larger audience.

[En dan is dit ook interessant laat die... die grootste gehoor is mense wat kom vir sang. Die grootste verkope in die winkel is instrumentaal, nie noodwendig sang nie, maar vir die lewendige konserte is sang 'n groter gehoor.]

3.2.3.4 Audience Attendance

The following audience attendance figures were supplied by the directors of Salon Music for the productions between 2010 and 2014. For these 5 years the total attendance of all the opera performances was 7542 patrons attending performances of 5 operas and 5 operettas.

Salon Music attendance per opera performance 2010-2014

Opera	Year	Total audience attendance
La Traviata (G Verdi)	2010	875
Der Zigeuner Baron (J Strauss Jr.)	2011	480
Le nozze di Figaro (WA Mozart)	2011	494
The Merry Widow (F Lehár)	2012	288
Die Fledermaus (J Strauss Jr.)	2012	807
Wiener Blut (J Strauss Jr.)	2013	625
Rigoletto (G Verdi)	2013	1001
Die Zauberflöte (WA Mozart)	2014	1329
Lucia di Lammermoor (G Donizetti)	2014	788
A Night in Venice (J Strauss Jr.)	2014	855
TOTAL attendance at 10 operas		7542

Table 3.1: Salon Music audience attendance per opera performance for the years 2010-2014. (Source: Salon Music)

3.2.4 The Industry

Since 1994 the CCI in South Africa has developed from a state-controlled and funded clique into a self-motivated, funded and governed industry. The artistic director provides advantages to the change in how the CCI is structured. The free-market system has seen the rise of many who would otherwise not have been given a place under the old regime.

W: With that closing down a lot has happened. I think... uhm... the arts councils are... uh... sort of in the past and how they controlled everything... I think things now work differently and... uh... I think a lot more people get a chance now. I think a lot more people can market themselves... I think... there was another way of doing things, if you talk of the arts councils where everything was under absolute state control and if you were not in there you actually had no career.
[Met daai toemaak het baie goed gebeur. Ek dink... uhm... die kunsterade is... uh... soort van in die verlede en hoe hulle alles beheer het... ek dink dinge werk nou heeltemal anders en... uh... ek dink baie meer mense kry kans. Ek dink baie meer mense kan hulle self bemark... ek dink... daar was 'n ander manier van doen, as jy praat van die kunsterade waar alles absoluut staatsbeheer was en as jy nie daar in was nie het jy eintlik nie 'n loopbaan gehad nie.]

However, the financial director asserts that not enough is done to educate young musicians to engage the modern CCI. Musical education on tertiary level should include and encourage the study of entrepreneurial skills in order to prepare the musicians for the market.

D: I don't know what they teach their musicians... or musicians... or musicians at university today, but there can always... you can always do more to teach people to be entrepreneurs.
[Ek weet nie wat leer hulle vandag vir hulle musikante... of musici... of musici op universiteit nie, maar daar kan altyd... jy kan altyd meer doen om mense te leer om entrepreneurs te wees.]

The artistic director correspondingly highlights a shortfall in the industry. In his opinion the press do not do enough to promote opera, the companies that perform them and neither does it support new entrants to the market.

W: Now... we get to the press... In my experience the press is patronising about what we do. They all think it is very sweet and very wonderful but they don't take us terribly seriously... uhm... I think they are ill informed about how important it is to really keep opera going in wherever. And I think they would be more positive if... if they... if they forget about the fact that there are so... or at least... if they remember that there are so few full productions... that there are so few... uh... opera companies... that the opera industry is so small... uhm... I think the press can do a hell of a lot to promote the younger groups who are trying to do something and keep opera alive.

3.3 Summary

The data collected points to challenges as well as strategies to curb uncertainties found in all four sectors of the opera market. The guiding force remains to determine and implement strategies creatively, in both the artistic and financial elements of opera.

The greatest challenges are found in the exposure to, and education of, the actual staging of opera as an art form. Many entrepreneurs wrongly perceive opera to consist of only the musical element and focus their approach on its performance while the *business* of opera is neglected.

Both the artistic and financial directors of Salon Music highlight the importance of cultivating entrepreneurial skills in young musicians. This will not only ensure the financial well-being of these individuals and their companies but also ensure the future performance of opera in South Africa.

CHAPTER 4

Discussion

4.1 Introduction

In this section I will discuss the data presented in Chapter 3. I will relate the data to the literature as well as other sources not mentioned in the literature review.

4.2 Data analysis

4.2.1 The company

The chosen structure of an organisation coupled with the qualities that ensure effective management will greatly affect the success of an operative enterprise. It is therefore imperative to study cultural and creative entrepreneurs in South Africa to conceptualise a true African model of arts entrepreneurship. Salon Music as a case study allows the testing of the actual performance of opera and other performances of classical music by the same company in the same venue to the same audience, which is unique.

4.2.1.1 Salon Music

The company structure and corporate philosophy of Salon Music aligns with the description of a creative entrepreneur as set out by the HKU (2010) as discussed in the literature review (Section 1.5.1 page 6). There is no more volatile market than that of opera, especially in South Africa. All their products, including recordings on CDs and DVDs and live concerts, are cultural products. As budgets for the performance of operas are kept conservative in order to diminish financial risk, artists who perform in these productions generally do so to gain performance experience and not for financial gain. These artists are therefore more content-driven than commercially orientated. The company also employs a permanent operational staff of eight people, classifying the company as a small to medium enterprise (SME).

The CD shop and public forum which it creates contributes significantly to the management of the dynamic and volatile market. Both directors spend time working in the shop as well as in the front of house of the theatre. Their interaction with audience members allows them the

rare opportunity of personal and instant reviews of their product by the consumer. This reduces lead time allowing them to intervene speedily when a change in desirability of their product is identified. Other larger companies would have to rely on time-consuming market research to plan turnaround strategies which may take months to implement. It is a great compliment for a resident theatre to be classified as a lifestyle organisation by its patrons, as it shows that the company is viewed as an active member of the community in which it operates.

Complacency can be the greatest cause of failure in the opera market as illustrated by Belcher (2010:46). His findings are significant as he ascertained that developing and modernising opera was of more value to the opera companies that he studied than presenting more modern styles of music. Salon Music has also not wavered from presenting opera and classical instrumental works since their inception. Mundy (2002: 23) demonstrates that a company's chosen programming of works should be consistent to avoid confusing the public.

The decision to stage opera has, from the start, necessitated that the directors of Salon Music had to find ways of staging opera despite severe financial constraints. Opera companies in general cut back spending on the theatrical element of opera. It is interesting to note that Salon Music decided to perform "salon operas" in which not only staging is minimalized but so too the orchestra. How this impacts on the musical integrity of the composition has to be investigated. The artistic director, however, is cognizant of the fact that the need to re-orchestrate works does limit their choice of repertoire. In the directors' view the only other option currently open to the company is to forgo the theatrical element entirely and perform all operas in concert versions with a full orchestra on stage with the singers. As revealed in the research of Ross (2011: 88) this seems to be the preferred solution as it is also employed by larger opera companies such as the Venice opera house on which his case of study is based.

4.2.1.2 Finances

Finance is surely the greatest dilemma of any economic venture. It is therefore no surprise that it is one of the greatest problems facing opera entrepreneurs. This is not just a local phenomenon but has global implications.

The apparent source for recuperating income for opera companies is the audience that consumes its product. Relying on only one source of funding has, however, not been found to be conducive to the sustaining of a creative enterprise. Opera companies have historically relied on more than one source of income. This unique feature of the operatic entertainment market has led to the diversification of strategies to incur financial gain. Auvinen (2001:271) postulates that there are two dichotomies that contribute to the income of opera companies: the division between one source and multiple sources of income and the division between private and institutional sources.

Traditionally companies have followed two general schools of thought concerning funding solutions. Firstly there is the German model, in which there is almost complete reliance on funding by state and municipal authorities. Secondly there is the American model, where private funding is the main source of raising capital (Auvinen, 2001: 270). Auvinen (2001:270) further explains that the decision is not merely in the hands of the company management, but that the chosen system is heavily dependent on the socio-economic environment in which the company operates.

In South Africa there has been no funding on a provincial level since the disbandment of the provincial arts councils. Opera companies can also not rely on government funding as there is currently no institutional assistance as revealed in the literature review. In the past the National Lottery has supported companies but in recent years this parastatal has faced its own internal challenges. Companies can therefore not rely on their support.

As institutional support is not a viable source of funding, opera companies have to, out of necessity, rely on private funding. Although there have been corporate companies investing in opera productions, there have been no lasting or significant partnerships formed with opera entrepreneurs themselves. This investment in the “product” but not the “producer” has had catastrophic effects on production companies.

Salon Music has therefore endeavoured to find an innovative system for structuring their income that is better suited to the South African economy. Because of the small profit margins, it is impossible to sustain performances of only one classical art form. The directors

comment that many have frowned on their dependence on cross-subsidising, but it is inconceivable that any other system could make it function. Cross-subsidising is also more loyal to entrepreneurship ideals than receiving funding. The general sentiment is that opera will have to rely on the performance of other forms of classical music, but, as highlighted by the financial manager, this is not the case. The performance of lesser known and therefore less commercial classical works has been subsidised through profits generated by their operas productions.

Besides diversifying the sources of income, another possible solution could be to spread the financial burden. This was discussed in a recent post on *The Economist* magazine's arts and entertainment blog, *Prospero*. In the article *Opera co-productions: It's good to share* the recent success of co-productions is discussed ("Opera co-productions", 2015). The English National Opera (ENO) has recently started co-producing operas, collaborating with about 40 other companies including New York's mighty Metropolitan Opera, Madrid's Teatro Real, the Welsh National Opera, Opera Graz in Austria, Opera Bonn in Germany and the Perm Opera and Ballet Theatre in Russia. After funding from the Arts Council England to the ENO was reduced by 29%, it compelled the company to find alternative ways to fund larger, as well as newly-composed, productions. The same system has also been explored on the other side of the Atlantic, with the Philadelphia Opera also noting the advantages of co-productions.

These co-productions can exist between, in some instances, four opera companies. Each company is responsible for providing the resources needed to stage the production and it jointly owns the overall interpretation of the opera. This collaborative business model ensures that overheads are shared by the participants. It further improves the artistic quality of the production as it is not merely a one-dimensional interpretation but an eclectic fusion of several creative points of view. It also promotes the globalisation of operatic performance ("Opera co-productions", 2015).

4.2.1.3 Effective management

Auvinen (2001) examined the management structures of five prominent opera houses. They included the Deutsche Oper Berlin (DOB), English National Opera (ENO), Finnish National

Opera (FNO), Glyndebourne Festival Opera (GFO) and the Opéra Nationale de Paris (ONP). During his study two main management structures emerged. The first can be found in the management of the DOB. The company has two equal directors, the one acting as the artistic director and the other as the managerial director. This structure was adopted after various difficulties with only employing a *Generalintendant*, a single director that manages both artistic and administrative sections of the company. The second proposed structure is to have one artistic director as the head of the organisation being supported by a general manager. This has been the adopted managerial structure at the Royal Opera House Covent Garden in London. Both these systems have been found to have both positive and negative results. The main factor that ensures success remains the competency of the top management to predict and balance the value and quality expectations of the forces influencing their organisation (Auvinen, 2001: 280).

Miller and Shamsie (1999: 98–100) concur that organizational success lies in how managers deal with the three categories of uncertainty: environmental state uncertainty; organisational effect uncertainty; and decision response uncertainty.

It is clear from the interviews that both directors of Salon Music are of the opinion that experience in the industry is needed for effective management. As there are limited opportunities in South Africa, young entrepreneurs have little prospect of gaining the necessary experience. This highlights the demand for training in organisational management at conservatoires. Very little is done at tertiary level to insure graduates' success in the South African CCI. Those talented enough are sent overseas to continue their studies, the other students who are not so fortunate have to find other ways of surviving in the CCI. Conservatoires should therefore not only be incubators for foreign institutions, but have to address the economic reality of their alumni. The development of multidisciplinary training programmes during tertiary music studies is therefore imperative. Tuition should include development of entrepreneurial skills along with training in interpersonal relationships, with the emphasis on specialised knowledge of the artistic temperament. Both directors also commented that if they were exposed to the others' discipline they would have benefited positively from it.

4.2.1.4 Duties

The different duties for each director are closely related to all the departments needed for the efficient organisation of an opera house. At the top of the organisation is either one general director or dual directorships as discussed above. In the opera houses studied by Auvinen (2001: 277), five basic functions are overseen by the general director:

- i. The managing director responsible for financial and organisational issues.
- ii. The planning and production department or artistic administration, in control of production planning and the season's programming.
- iii. The music department encompassing the orchestra and chorus.
- iv. The technical department which is in charge of the workshops and stage.
- v. The ballet department, which may not be present in all companies.

In larger companies there can be more subdivisions in each basic department. This could include departments for human resources, public relations, and broadcasting and recording.

In the light of this it is easy to see why in the case of Salon Music, the two directors have so many shared responsibilities. In small organisations, with small budgets for general operations, all of these duties have to be undertaken by a limited number of staff.

4.2.2 Elements of staging an opera

Gray and Heilbrun (2004: 336) explicate that art and culture is a societal activity. The economics of live performance dictate that the performing arts will most often be seen in cities. The company is therefore dependant on the society it seeks to serve for the audience as well as the artists needed to stage the operas. The national as well as regional market in which the company operates will determine the challenges faced in procuring the elements for the production.

In general both directors of Salon Music highlighted that sourcing artists, whether singers, instrumentalists or technical staff, is one of their greatest challenges. These uncertainties can have an effect on the choice of repertoire. One either has to decide on the opera first and then try to source singers, or choose repertoire around singers that are available.

Moravcsik (2011: 574) addresses this challenge in his research *Opera's search for transcendence*. In recent years opera critics and administrators have identified a shortage of great singers in *spinto* or dramatic roles. These voices are often needed to perform operas by Verdi, Puccini, Wagner and other composers in the *verismo* and romantic styles. The most popular operas performed were composed by these composers. If a company then includes operas by these composers in their programming difficulties will be faced in sourcing singers. If singers are brought from the outside there may be a novelty factor, especially if they are from overseas or have an illustrious career. This will, however, affect the budget of the production negatively. If singers are cast from within the community it will have the added bonus that their family and acquaintances will attend their performances. One therefore has to balance what one *wants* to stage, *can* stage and *should* stage.

The opera audiences in Gauteng are relatively small, and this impacts negatively on the popularity of the art form. Artists may also be less inclined to participate in forms of artistic expression for which they have no affinity.

4.2.3 The audience

The audience is a multi-dimensional contributor to the artistic entrepreneurial enterprise. It is the main source of income, whether it consumes the live performance or recordings of a performance. In addition to financial management, it is the management of the audience that will ensure the success of an opera company.

4.2.3.1 Public ignorance, musical education and exposure

The public ignorance towards opera is part of a cycle. Audience members are influenced by many external factors that form their preconceived notions of what opera performance is, or should be. Little of what opera really embodies forms part of the propagated stereo types. “It’s not over till the fat lady sings...” and “The soprano wears the tenor as a brooch...” are examples of slurs associated with the art form. It is often people who have never attended an opera performance that spread these views. Regarding opera as an art form that in the past was used to widen the divide between social classes has not done much to alleviate the prejudice.

Previous attempts to introduce opera to a larger part of the population have mainly focused on the singing of arias, usually in a recital performance format. However, listening to a “modernised” rendition of *Nessun dorma* by adding electric guitar riffs at a corporate function is not the same as sitting through a monumental performance of Puccini’s *Turandot*.

Kotnik (2013: 321) suggests that opera, being a social activity, has, through its performative acts, contributed to the social performance of a particular theatre, its audience and the environment in which it operates. These acts further shape and define the opera house and influence its reception and reputation. But it is also this social nature of opera that is the catalyst to its adaptability to whatever historical contexts, social conditions, economic situations, and political regimes may influence it. This is the element that has allowed the art form to survive for so long.

If perceptions of opera are skewed it is partially to be blamed on the inadequacies of its conventions, traditions and those who are at the helm of the art form. It should be the objective of every opera house, opera company, and artist to assure that the art form is viewed in a favourable light by the community it serves.

The strategy proposed by the HKU (2010: 28) of “learning by consuming” to create demand for the art form is paramount. Salon Music is in an optimal position to introduce opera to the audiences of all the other classical music performances they present as well as other patrons who visit the Brooklyn Theatre and the CD shop. Furthermore, targeting schools as part of their audience development strategies has been positively received. Andreasen (1991: 17) demonstrated that individuals, who were introduced to the performing arts during childhood, whether it was through taking lessons or attending performances, would participate more readily in the attendance of two or more arts events.

Both managers further expressed concern about the audience’s general ignorance when it comes to repertoire. Limitations that prescribe the repertoire that can be staged during a season compromise the inclusion of works with which the audience is unfamiliar. The directors therefore fear that the personal taste of individuals is not founded on exhaustive knowledge and experiences of the operatic oeuvre but on mere perception of what would be

deemed as enjoyable entertainment. This is corroborated by the findings of Boerner and Renz (2008: 24) who concluded that, other than an individual's education and experience in the arts, personal taste remains a guiding force in how an individual views and consumes art.

4.2.3.2 Audience preference

Audience preference is not relegated to only one element of opera performance. Audience members have opinions regarding singers' voices, their appearance, the orchestra, the directing, and the overall artistic aesthetic.

Stephenson (2012) examined opera's new focus on physical image and how it impacts on audiences, the casting of productions, and singers. Although the focus on casting according to image has become an important phenomenon of the present-day opera scene and general visual entertainment, there are many historical examples of a singer's physical appearance creating a positive or negative bias. In the writings of Metastasio, an eminent opera librettist during the Baroque era, there is evidence of a distinct predilection to the physical attractiveness of singers. The poor reception of Verdi's *La Traviata* in Paris was ascribed to the soprano Fanny Salvini-Donatelli who portrayed the character of Violetta. The composer himself commented afterwards that he felt that she was too advanced in years and corpulent to accurately portray a courtesan dying of consumption. Another important example is that of Maria Callas and her dramatic weight loss to enhance her image (Stephenson, 2012: 26-27). More recently, the soprano Deborah Voigt was fired by Covent Garden, London, in 2004 for being "too fat" to fit into the "little black dress" designed for her role in Strauss's *Ariadne auf Naxos*. She has documented her fall from, and her subsequent rise to, fame after losing more than half of her body weight in her book *Call me Debbie: True confessions of a down-to-earth diva* (2015).

Opera companies are under constant pressure to conform to standards forced on them by other forms of visual entertainment. With opera productions becoming more readily available on DVDs, at film cinemas and over online entertainment services, the preference for physical attractiveness filters down to the audience. The noticeable effect on the audience is noted by both directors of the company. In their own productions they cast singers who will, in their opinion, appeal to a younger audience. Opera is therefore no stranger to the maxim that "sex

sells”. This may not be a strategy that will assure artistic integrity and it is aimed only at staying relevant to a perceived demographic. But this also highlights the influence of a visually-stimulated society to rate the visual element of opera above that of the music or the drama.

Stephenson (2012: 88) however notes that it is not just the influence of audience members and casting directors of opera that motivates these Western standards of conventional attractiveness, but also the abundance of singers who are willing to adapt to new standards, as well as the growing absence of singers who are not willing to comply.

Imamura (2015), however, recently reviewed a performance of *Lucia di Lammermoor* at the Deutsche Oper Berlin. The international cast included the South African soprano Pretty Yende. He noted that the production, that has largely remained unchanged for the past 35 years, was marred by limited stage direction and character development. He noted that the cast were engaged in the conventional “stand and bark” practice. Although the conventional staging did not conform to modern visual standards the performance was still deemed a success. This was only due to the exemplary singing and focus on the quality of the musical performance above the staging aesthetics.

Although there is growing interest in the visual element of opera it has not completely overshadowed audience preference towards works or genres being presented. According to both the artistic and financial managers of Salon Music, audience preference in programming veers towards the conventional repertoire. It also has a negative impact on the box office sales. Jensen and Kim (2011: 241) found that opera season-ticket holders tend to prefer stagings of conventional operas. Unconventional operas are more important to opera critics. The fine balance of interspersing conventional and unconventional operas in the opera company’s programming greatly increases the likelihood that audiences will not view the entire season’s representation as unconventional. In their opinion this is the safest way in which to introduce new operas or avant-garde performances as audience development strategies.

Nytsch (2013), contrariwise, argues that mere focus on conventional repertoire is a precursor to a cycle of irrelevance. The noticeable decline in attendance or unexpected cuts in funding generally leads to curtailing of the artistic product. The diluting of the artistic product's quality affects the programming. Programming changes from being robust to including only audience favourites, avoiding challenging repertoire and excluding obscure or modern works. By programming only operatic "war horses" as a programming strategy may attract audiences in the short term, but curtails audience development. If the remaining audience then shrinks, also leading to further cuts in funding, the programming is the next to be reduced by cancelling concerts, shortening seasons, commissioning fewer works. This further leads to the inevitable diminishing in salaries of the artistic and supporting staff or even dispersing with staff entirely (Nytsch, 2013: 88).

**Statistics: Operabase.com Top 10
Worldwide performances of operas
Season 2013/2014**

No	Opera	Composer	Total number of productions	Total number of performances
1	La traviata	Verdi	749	3561
2	Carmen	Bizet	668	3151
3	La bohème	Puccini	599	2921
4	Die Zauberflöte	Mozart	570	3354
5	Tosca	Puccini	540	2501
6	Madama Butterfly	Puccini	533	2413
7	Le nozze di Figaro	Mozart	527	2454
8	Il barbiere di Siviglia	Rossini	514	2366
9	Rigoletto	Verdi	487	2208
10	Don Giovanni	Mozart	432	2259

Table 4.1 Operabase.com Top 10 Opera

It is, however, startling that in the study *Performance Measurement in Opera Companies: Comparing the Subjective Quality Judgements of Experts and Non-experts* Boerner and Renz (2008: 33) established that there is no significant difference in how experts and non-experts assess the quality of an opera performance. It is always thought that experts would rate the quality of a performance lower than non-experts. Although there is a difference in how the

two groups perceive performances and adopt criteria for evaluating the opera, this does not affect their overall approval of an opera performance.

When examining the season programming of Salon Music for the years 2010 through to 2014 (Table 3.1, found on page 44) there is an apparent reliance on conventional repertory. When compared with a list of the top ten operas performed internationally in the 2013/2014 season, all but four productions feature on the list (Table 4.1). *Die Fledermaus* and *Lucia di Lammermoor* ranked 12th and 21st respectively. Although *Der Zigeuner Baron* and *Wiener Blut* are not deemed as conservative choices it is worth mentioning that they were both composed by Johan Strauss Jr. who is ranked number eleven under the top 20 composers for the 2013/2014 season. These rankings by operabase.com are compiled through the collecting of data on over 375,000 performances in over 900 theatres worldwide, of seasons during the last 19 years (1996-2015), which currently is the biggest database on statistics of opera performance. Salon Music's choices therefore reflect international trends.

4.2.3.3 Audience attendance

Currently there is no official record for the attendance of opera performances in South Africa. The figures provided by Salon Music's financial director are therefore a rare glimpse into the audience attendance at operas. These numbers are also important to evaluate if there are certain trends in the market, albeit of one company and a specified audience. It is however worth noting again that opera performance in Gauteng is sporadic with no set season or number of performances, except for the operas presented by Salon Music. They therefore make the biggest contribution towards the art form in Gauteng. They are also decidedly influential in the market even if only through their consistency.

If "learning by consuming" (HKU, 2010: 28) is the prescribed strategy through which to develop audiences, there has to be at least a continuous presentation of operas in a central place that can be associated by the public to be the principal theatre of opera performance in the area. This can be the explanation for the growth in audience attendance from 2010 to 2014.

In 2010 the total audience attendance was 875. This was for 4 performances of Verdi's *La Traviata*. Audience attendance for 2011 was 974. Although this reflects an 11% increase, this figure was for 2 productions with a total of 7 performances. 2012 saw a 12% increase on 2011 with a total of 1095 patrons. However, there were now 11 performances of 2 productions. The number of performances therefore increased from 7 to 11. The 2013 season had 10 performances of 2 productions. The total attendance again increased, this time by 48%. Attendance increased with 82% for 2014, but there was also an increase in performances from 10 to 14. With an increase in the number of productions and performances of each, there is a steady increase in audience attendance. This is a natural process; however, to fully understand how an increase in the number of productions and performances affects audience attendance, the sold capacity of every production needs to be analysed.

For this purpose I have modified Table 3.1 to now include the number of performances and sold capacity for each production.

Salon Music attendance per opera performance 2010-2014

Opera	Year	Number of performances	Total audience attendance	Sold capacity per production
La Traviata (G Verdi)	2010	4	875	59%
Der Zigeuner Baron (J Strauss Jr.)	2011	3	480	43%
Le nozze di Figaro (WA Mozart)	2011	4	494	33%
The Merry Widow (F Lehár)	2012	5	288	15%
Die Fledermaus (J Strauss Jr.)	2012	6	807	36%
Wiener Blut (J Strauss Jr.)	2013	5	625	33%
Rigoletto (G Verdi)	2013	5	1001	54%
Die Zauberflöte (WA Mozart)	2014	6	1329	59%
Lucia di Lammermoor (G Donizetti)	2014	5	788	42%
A Night in Venice (J Strauss Jr.)	2014	3	855	77%
TOTAL	10	46	7542	50%

Table 4.2 Salon Music audience attendance and sold capacity per opera performance for the years 2010-2014.

The sold capacity for each production was calculated by multiplying the number of performances by the total number of seats in the theatre, 370. The total attendance was then calculated as a percentage of this total number.

It now becomes evident that although there was an increase in audience attendance for every new season and increase in performances, the real effect of increasing performances was only realised in the 2014 season. The only opera for 2010 started out with 59% sold capacity. For 2011 the percentages were 43% and 33% respectively. The total attendance showed an 11% increase, but showed almost an equal decrease in sold capacity from 2010 to 2011. The high sold capacity for 2010 can be ascribed to 2 elements. Firstly, *La Traviata* ranks first in the opera popularity list, and secondly, the novelty factor of the opening of the Brooklyn Theatre in 2010 played a significant role. The initial sold capacity of 59% was only equalled by the first production of 2014, and was exceeded by the last production for 2014 (*A Night in Venice*) with a sold capacity of 77%. *Die Zauberflöte* by WA Mozart is the top-rated Mozart opera according to the Operabase top 10 list, but further novelty was provided by the innovative Star Wars styled production by the director, famed opera singer and director Kobie van Rensburg. The *A Night in Venice* performance, however, does not appear on the popularity list and had no special novelty. These increases can therefore only be attributed to that fact that if the products on offer are increased, instead of causing the audience to be divided across the number of productions, with time it will positively affect the total attendance through an increase in sold capacity.

When compared to the sold capacity statistics as observed by Auvinen (2000) in Table 4.3, a 50% overall average sold capacity is still below that of other opera houses.

**Opera Companies Sold Capacities Operas
1998/1999 Season**

Opera House		Sold Capacity	Total Income
DOB		70%	€ 51 142 000
ENO		75%	€ 38 530 000
FNO		91%	€ 34 365 000
GFO		Not available	€ 15 130 000
ONP	Bastille	96%	€ 133 378 000
	Garnier	99%	

Table 4.3 Opera Companies Sold Capacities (Auvinen, 2000: 223)

4.2.4 The industry

The landscape of the industry has changed considerably since 1994. Along with the dissolution of the Arts Councils, the funding that was allocated by these institutions also disappeared. The industry has now moved from a subsidiary of the state to having to adopt an entrepreneurial model.

As suggested by Allison (2010: 36), many opera singers and other artists leave the shores of South Africa in order to find opportunities and training overseas. Unfortunately not all artists have this opportunity. They remain in the country but receive no support to practice their chosen form of artistic expression.

Not enough research has been done into strategies for audience development or the management of uncertainties in the South African CCI as already discussed. Artists are left to make expensive mistakes and learn from experiences without any safeguard against financial ruin. As long as conservatories regard entrepreneurial skills as unimportant, the target group of students are the ones that bear the brunt and not those who control the curriculum that they are taught. Few will persevere and many will lose interest and change profession. This leads to a degradation of the art form.

4.3 Summary

There are many elements to staging an opera. There are many dynamic and complex systems that influence the art form and the artists that practice it. The rare opportunity to study a company like Salon Music has illustrated many shortfalls of the industry. Observations made by the artistic and financial directors have shown that the CCI is cyclical. All the elements simultaneously affect each other but are also affected by each other in turn.

The company is the central point. Without companies there would be no industry. How these companies are structured will affect how they are to be managed. Management will determine the programming to be performed. The elements of staging opera along with the audience preferences will be determining factors that will inform the managers' decisions. The audience in turn can only be educated, developed and maintained as a result of the decisions made by the managers. In this dichotomous system the market creates the demand and the

demand develops the market. It is for this reason that the study of managing uncertainties within the industry is pivotal for the survival of the art form.

CHAPTER 5

Conclusions and recommendations

5.1 Introduction

This study contributed to the development of complementary case studies such as those of Dempster (2006) to highlight uncertainties faced by entrepreneurs in the live performing arts market. Salon Music, based in Pretoria, Gauteng, South Africa, was selected to act as an exploratory case study. Semi-structured interviews were conducted with both the artistic and financial directors of the company.

Chapter 1 served as an introduction to the study. It included the research questions and sub-questions and outlined the purpose and objectives of the study. The chapter closed with a literature review that discussed entrepreneurship in the cultural and creative industries, examined the enterprise of staging operas and provided a perspective on the elements of staging opera in South Africa. Chapter 2 delineated the methodology to be followed in the study. Chapter 3 presented the data gathered during the semi-structured interviews. It focused on four main themes:

- i. the company;
- ii. elements of staging an opera;
- iii. the audience; and
- iv. the industry.

Each theme was discussed and supporting quotations from the interviews were included. Chapter 4 served as a discussion of the presented data in relation to existing literature on each theme. Chapter 5 concludes the study. In this chapter the research questions are answered, shortcomings to the study are discussed and recommendations for further studies are provided.

5.2 Conclusions and answering of research questions

The following research questions guided the study:

The main research question:

What strategies can an entrepreneur use to ensure success in staging operas?

The sub-questions posed:

- How do financial and uncertainty management strategies impact on repertoire selection when staging operas?
- How does an entrepreneur balance artistic integrity and financial gain?
- How could other strategies (for example concert performances) form part of the solution?

The research questions will now be answered in the sections below. The sub-questions will be addressed first followed by the main research question.

5.2.1 How do financial and uncertainty management strategies impact on repertoire selection when staging operas?

Financial management is achieved through budgeting. The budget of the company will dictate the programming for the season. Repertoire that relies heavily on spectacle, sporting a large chorus, elaborate sets and costumes, a large orchestra and big name singers, will require a budget that well may amount to millions. For young entrepreneurs staging these operas is not possible.

The challenge is further exacerbated by audience preference. An entrepreneur may stage a lesser known opera, with a smaller cast and fewer stage elements to save on spending, but the opera may not attract enough patrons. This highlights a dichotomist relationship between financial income and repertoire. A small budget will necessitate the staging of a less expensive opera, but this may in turn affect the audience attendance thereby decreasing the anticipated income.

The development of strategies to curb uncertainty in how the audience will relate to a production is therefore imperative. Programming should have a twofold objective: firstly to ensure that the entertainment needs of the current audience are met, and secondly to develop a future audience through the current repertoire presented. Only staging well known operas may be a short term solution but will, however, in time affect the audience and artistic product negatively as discussed in chapter 4. To achieve a lasting strategy for programming unconventional repertoire should be dispersed in between more conventional works.

An entrepreneur, however, will not start with the programming of an entire season, but rather focus on a single production. The question will then be on which demographic the entrepreneur would like to focus. If the aim of the company is to merely stage opera and attract an audience, then an opera from the conventional repertoire should be chosen. If, however, the aim of the company is to attract critics, and with it write-ups in their respective publications, then one should focus on the unconventional repertoire or at least an innovative staging of a conventional opera.

5.2.2 How does an entrepreneur balance artistic integrity and financial gain?

As discussed above the choice of repertoire will greatly affect both the financial and artistic value of a production. It is, however, possible to create a balance between the two. It is easy to calculate whether an opera was successful financially but it is not as easy to prove that it had artistic value. The artistic value is largely derived by other participants in the market, whether singers, directors or other entrepreneurs, as well as opera critics.

In chapter 4 it was postulated that complacency is the greatest cause of failure for an opera company. Complacency will lead to a decrease in audience attendance, which will decrease the possible earnings. Once the income of the company decreases the first aspect to suffer is the quality of the product. There is further proof that unconventional works, even if deemed to be higher in artistic value, are not as profitable as more conventional works.

In the current economic market and decline in theatre tradition there is no simple solution to ensure artistic integrity and financial gain. If artistic integrity is to be the main focus financial survival, at best, may be achieved but certainly not financial gain. In order to facilitate financial gain one has to rely less on artistic value and focus on entertainment appeal.

The only way then to ensure that an opera company does not sacrifice artistic integrity is through external funding. This may come in the form of institutional subsidies or, as in the case of Salon Music, through cross-subsidising. Cross-subsidising allows the opportunity for financial gain while keeping the company's artistic integrity intact. This aligns with Nytsch's premise that opera season programming should not just include conventional opera since this

will harm the company in the long run. Consequently directors should rather allow for more balanced programming.

5.2.3 How could other strategies form part of the solution?

Other strategies than can be implemented also allow for development either economically or artistically.

The performance of concert versions of operas allows for less initial capital outlay during the product building phase of an opera. Budgeting for a production can only be based on past experience as income is never guaranteed. If costs are then minimised it lightens the burden on the entrepreneur. But this should not merely be a way to evade monetary expense. As concert versions cannot rely on the visual spectacle of traditionally staged operas, a company that would like to explore this avenue should still ensure the dramatic integrity of the opera.

In the case of Salon Music the focus has been on the performance of salon versions based loosely on the practice of chamber operas. In this style of opera performance there is a smaller orchestra, and less focus on visual spectacle without disposing of it completely. This allows for a more aesthetically pleasing performance above that of concert versions in which one element of opera performance is completely compromised. The reduced expenses on décor and costumes have made it possible for the company to stage new productions with each new season. In other words, although *La Traviata* may be repeated the production will never look the same. The other option is to recycle whole productions like those staged at the Metropolitan Opera. Since the economic investment in these are great, the same production may be recycled indefinitely.

Entrepreneurs have to find ways in which to bridge the inexperience of the audience. Not all audience members have been schooled in all the conventions and performance practices of opera. Furthermore, the performance of opera in foreign languages makes it less accessible to an unexposed audience. Salon Music has therefore at times employed actors to narrate the storyline instead of including lengthy recitatives. Where operas have been performed with recitative, surtitles (titles displayed above the stage), which are now commonplace in theatres around the world, have been displayed.

5.2.4 What strategies can an entrepreneur use to ensure success in staging operas?

In order to explore strategies for success it is imperative to match them with the uncertainties they should address. I will now discuss the main area of uncertainty as described in the categories as proposed by Miller and Shamsie (1999: 98–99), namely environmental state uncertainty. I will also provide strategies that could be implemented to curb these uncertainties.

The elements that lead to environmental state uncertainty in the opera industry are finances and the audience. The CCI as an industry is still underdeveloped in South Africa. Institutional subsidies and funding by public institutions are limited. Each entrepreneur should therefore ensure that financial planning and due diligence is a top priority. Funds either have to be sourced from outside funders or the expected ticket sales should be the point of departure when creating a budget. There is no strategy that can assure financial success in a market as volatile as live entertainment, but strategies should be in place to at least alleviate financial pressure. Further strategies that could be implemented are collaborative productions and cross-subsidising. Collaborative productions divide financial responsibility between numbers of groups. This strategy diminishes financial risk while still incurring the same expected income. Cross-subsidising is a form of funding more aligned to the entrepreneurial character. It ensures the funding of less financially viable productions with funds raised by a more economically successful production.

Collaborative ventures have proved to be a valuable strategy for financial survival by opera companies all over the world. Salon Music has in recent years started to collaborate with individuals, most notably director Kobie van Rensburg from the Passau theatre in Germany. These collaborative artists have shared their talents and expertise as well as creative projects. Although this has greatly contributed to the standard of productions, there have been no joint financial liability agreements. Salon Music has therefore not fully explored how collaborative ventures may affect the funding on the performance of their operas. This may be due to the fact that there is no centralised body that oversees the performing arts and there is little to no cooperation between the different production companies in South Africa.

The entertainment value, linked to socio-cultural trends in audience preference, will also affect the financial success of productions. The more conventional the production the more audience members it will attract. Box office sales are therefore higher than that of more unconventional or newly-composed productions. The preferences of the audience are also related to their level of exposure to different genres and opera productions. Opera is not a popular art form in modern society and will always have a smaller group that is interested in attending performances. It is therefore important for entrepreneurs to know their market very well. Along with allowing market trends to inform the programming for the company, exposing the audience to the full extent of the art form's aesthetic potential should not be neglected. As audience preference is impossible to predict, the entrepreneur has to continuously ensure that his product still appeals to the audience.

In South Africa opera has not yet shed its elite façade. Although there has been transformation it has been more inclined towards the performers that are involved than to the audience that is generated.

As opera deals with stories that convey universal truths, the creative entrepreneur should also find ways of retelling these stories in a more modern narrative to reflect the society in which it operates.

The entrepreneur should also be mindful that opera is a collaborative art form and that is not reliant on the artistic spirit and creative input of only one person.

The venues that are available as well as fellow artisans will also greatly affect the opera that will be presented. It is therefore essential for the entrepreneur to have good relations with other artists. Individuals that are united in a creative endeavour are more likely to take part in such an endeavour for artistic reasons and not necessarily for financial gain.

As the market is dynamic, strategies need continuous adjustment and may change several times during the lifetime of the company. The entrepreneur should therefore at all cost avoid becoming complacent about the product on offer.

5.3 Recommendations

This study is limited in scope as it only focused on the operations of one company and may not be replicable. Further studies into the identifying and management of uncertainties faced by opera companies should focus on other opera entrepreneurs within the Gauteng market to create a more complete picture.

As the field of study matures in South Africa studies should also be done on the artistic success of companies. The point of departure has been finances but surviving financially, although aligned with the ideas of entrepreneurship, cannot be seen as the only measure for the success of an artistic company.

The study has further highlighted the need of interdisciplinary studies for music students. Tertiary institutions have the responsibility to prepare and empower students to become active members in the CCI within South Africa.

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Appendix A - Participant Informed Consent Form

FACULTY OF HUMANITIES
DEPARTMENT of MUSIC

TEL (012) 420-3747 (*Secretary*)
FAX (012) 420-2248



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

PRETORIA, 0002, SOUTH AFRICA

May 2014

Participant Informed Consent Form

I would like to invite you to take part in my study entitled *Determining strategies for success in the opera industry: a case study from Gauteng* for my MMus degree. This research seeks to investigate strategies for success in staging opera and hence to provide practical guidelines for young musicians seeking to start their own entrepreneurial enterprises in our current economic climate. Should you agree, data will be collected by in-depth semi-structured interviews which will be recorded and transcribed for analysis. These interviews may be conducted over a period of time but will not last longer than an hour at a time. These interviews will also be scheduled during office hours and when convenient for the participant.

There are no risks or discomfort foreseen. There are no direct benefits to you, although the research will benefit existing companies and young entrepreneurs in the South African performing arts industry. You have the right to withdraw from the study at any stage, without negative consequences to you.

All information will be treated as confidential and participation will be completely anonymous, unless otherwise agreed. The name of the intended company of study may also be disguised if requested. The data gathered will be used for the purposes of the study, which will be in agreement with the research goals. The study may culminate in an article which could be published in a scientific journal. All data will be stored in electronic format at the premises of the University of Pretoria for a period of 15 years. Only the researcher and his supervisor will have access to this information.

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UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA

PRETORIA, 0002, SOUTH AFRICA

Participant Informed Consent Form

Researcher: Mr Tinus Spies

Research Title: *Determining strategies for success in the opera industry: a case study from Gauteng.*

I have read the contents of the information sheet. I fully understand the contents of the letter, and understand that I have been invited to participate and that my participation is voluntary.

With full knowledge of all foregoing, I agree to participate in this study on this _____ day of this _____ month in the year _____

Participant Details:

Participant Name: _____ Signature: _____

Participant Contact Number: _____ Date: _____

Researcher and Supervisor Signatures:

Researcher Signature: _____ Date: _____

Supervisor Signature: _____

Date: _____

Appendix B - Questionnaires

Interview Guide – Artistic Director

Question 1: What is your main function within the company?

Question 2: In your experience, what are uncertainties faced by entrepreneurs in the opera industry, particularly in Gauteng?

Question 3: What strategies are implemented by your company to curb these uncertainties?

Question 4: In what way do these uncertainties or strategies influence your repertoire selection?

Question 5: Please elaborate on how you balance artistic integrity and financial gain.

Question 6: What are the strategies that you implement to: a) satisfy your current audience, and b) attract new audience members?

Question 7a: In your opinion, which artistic skills are needed to become a good manager in an opera company?

7b: Have you ever received any financial training? If so, please elaborate on how, or if, it has helped you to function better as a manager in an opera company.

Question 8: How do you attempt to restrict expenditure? Please comment on aspects such as: costumes / stage décor / musicians and soloists / other aspects.

Is there anything else you would like to add?

Interview Guide – Financial Director

Question 1: What is your main function within the organisation?

Question 2: In your experience, what are uncertainties faced by entrepreneurs in the opera industry, particularly in Gauteng?

Question 3: What strategies are implemented by your company to curb these uncertainties?

Question 4: Do you provide the artistic team with financial guidelines/restrictions when it comes to repertoire selection? If so please elaborate.

Question 5: Please elaborate on how you balance artistic integrity and financial gain.

Question 6: What are the strategies that you implement to attract new audience members?

Question 7a: In your opinion, which financial skills are needed to become a good manager in an opera company?

7b: Have you ever received any artistic training? If so, please elaborate on how, or if, it has helped you to function better as a manager in an opera company.

Question 8: Besides box office takings, what avenues are open to you to access funds?

Question 9: Do you employ cross-financing (cross-subsidising) within your company?

Is there anything else you would like to add?