International Business Development Strategy - Opera.ca

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EXECUTIVE SUMMARY

1. Sector Capabilities

Canada's opera sector is a cornerstone of the country's cultural landscape. With 16 major professional companies, well over 20 smaller producers, 11 educational institutions, and a small industry of businesses serving these producers, Canada is in a strong position to begin building international trade.

2. Strengths

Canada in general is seen as a trusted nation - where fair dealing and high quality production are the norm. We are a well connected country, with a well-connected arts sector over-all. Many of our opera companies have strong fundamentals and are capable of producing product of international quality. We also hold unique political, social and geographic perspectives that allow us to create work that stands out for its national flavour.

In addition to the above, our funding system is relatively robust, allowing us to reduce the risk of production, travel and shipping costs, and allowing us to innovate in ways that larger European companies cannot always afford to do.

3. Weaknesses

Canada's opera sector does not yet have strong international reach. We are not well known, nor are we the first to come to mind.

4. Strategic Priorities

Canada's international activity to date has not been extensive. Our priorities right now are to maintain current activity, while incrementally building knowledge relationships and activity in new areas.

We aim to do the above while ensuring that we maintain or increase environmentally aware practices - especially around Climate Change -

Specifically, our priorities are, to

1. Maintain Opera Production Rental (US)
2. Increase Opera and Music Theatre Co-production and Touring (US, UK, EU)

3. Explore Potential for Increased Opera Education and Young Artist Program Collaborations (US, EU)
4. Establish Cultural Diplomacy; Disseminate Canadian Research and Learn from International Research

5. Suggested Tactics

All of our tactics are based on building and maintaining international market relationships.

This is primarily to be achieved through:

- Delegation attendance (both formal and informal) at key market events in the US and Europe
- Continued relationship building with other national and international associations
- Continued research into developing market opportunities.

6. Desired Outcomes (goals and objectives).

Relationships take a long time to build, and production cycles in the arts tend to be 2 to 5 years. In the course of this 3-year International Business Development Plan, the goal has to be to develop and nurture the relationships that will lead to longer term success. In the short term, we hope to flexibly pursue opportunities that arise, for the sharing of knowledge and building of small-scale partnerships that may lead to larger scale commitments in the foreseeable future.

Set Rentals: Will be maintained and somewhat expanded in the US

Co-productions, Touring, and dissemination of Opera Tech Products (eg VR) : Maintained in the US and expanded in the UK and Europe; reciprocal presentation will begin on a modest level in Canada from each of these markets)

Education Collaborations (Opera Education departments and Post-secondary Institutions) : will be further explored

Focus on Canadian Brand (Establish Cultural Diplomacy; Disseminate Canadian Research)
Canada is seen as a leading first world diplomatic nation with a strong focus on social justice. Canada's opera sector is a world leader in Civic Practice. As Canada's current and potential place in the market becomes better understood in Y1 and 2, a coherent Brand will be developed to help draw positive focus among the international market on Canada's opera sector.

Further research: Developing regions and subsectors of opera will be more closely examined.

7. Date(s) of Approval

INSERT DATE(S) HERE

8. Next Scheduled Update

INSERT DATE(S) HERE

SECTOR ANALYSIS

1. Sector Overview

1.1 Opera.ca Vision, Mission, Goals and Objectives

VISION As a result of Opera.ca's work, the art form and business of opera has become the most relevant and artistically and financially vibrant cultural field in Canada.

MISSION Opera.ca is the national association for opera in Canada offering membership to opera companies, businesses, teaching institutions and individuals. With a strategic focus on professional opera companies, it seeks to create and sustain the conditions that will make the art form an integral part of Canadian life.

Opera.ca is committed to:

- Continuously improving its services as a communications hub from Opera.ca to members, the public and stakeholders, and between members;
- Acting as a convening body for the sector to come together
- Advocating at the federal level for and on behalf of the opera sector.
- Delivering an evolving program of member services to the sector that responds the changes in the field;
- Working collaboratively with other arts service organizations to maximize impact.

ABOUT OPERA.CA

Opera.ca is the national association for opera in Canada. Offering membership to opera companies, businesses, teaching institutions and individuals, it seeks to create and sustain an environment that makes opera central to Canadian life. Opera.ca works with members across the country to advance the interests of Canada’s opera community and create greater opportunity for opera audiences and professionals alike.

Opera.ca provides services in advocacy, communications, and support for Canadian opera creation. Working in collaboration with OPERA America, Opera.ca leads members in dialogues relating to artistic quality and creativity, education and audience development, community service, governance, resource development, promising partnership opportunities, international trends in opera production and new technologies.

Opera.ca regularly convenes experts from within and outside the field, conduct research and collect and disseminate information to members and the field’s stakeholders.

1.2 Description of Industry and National Importance

Opera represents one of the cornerstone cultural products in Canada, with significant professional opera companies in most major centres. Our membership includes 16 major professional company members, 9 affiliates, 14 related businesses and 11 educational institutions serving the industry. Opera production is considered a mainstay of Canada’s overall cultural output - our membership includes some of the largest arts organizations in the country. The Canadian Opera Company, for example, is one of the largest arts producers in North America.

Canada’s first operatic performance took place in 1783, and Canada remained a major touring market for US companies throughout the 19th Century. Most of Canada’s current professional companies have been in continuous production for over 50 years, and the majority are deemed Major Canadian Artistic Institutions by the Canada Council for the Arts.

1.3 State of the Sector: Key Trends, Market Outlook

The international opera sector has been in flux since 1597 - responding to new technology, social developments and consumer trends. Though a small number of major Canadian producers have closed over the last decade (eg Opera Hamilton and Opera Lyra Ottawa), we see an increasing number every year of additional small-scale Canadian producers and a corresponding increase in smaller scale, versatile, mobile product across the sector (eg Indie Opera Toronto, Indie Opera West, and a variety of smaller companies in Calgary, Winnipeg, and Montreal).

Producers are looking at reaching current and prospective customers in new ways: focusing on generating deeper community connections and reaching a wider cross-section of the public through community engagement and civic practice initiatives (eg Opera.ca’s extensive Civic Practice Report and online tool (in development), and reaching younger audiences through production of popular musical theatre pieces (West Side Story, Evita) partnerships with the commercial music sector (eg. The Wall), and through digital media (Tapestry Opera / re:Naissance Opera’s co-production Augmented Opera).

1.4 Opera.ca Members by Sub-Grouping

A. Full Professional Company Members (16)

Canada has professional companies across the country, from St John's Newfoundland to Victoria BC. These companies span in budgetary range from $35,000,000 in annual revenues, to just over $300,000 with many falling in the $2,000,000 to $5,000,000 range. These companies produce one to 6 main stage works per year, and often numerous smaller works (Opera for Young Audiences, small-scale experimental works, community-engagement projects). Many of these companies run their own pre-professional training programs, for which they produce or co-produce work, and certain of them have scene and costume shops and storage facilities sufficient to produce and subsequently rent or sell stage scenery and costumes.

B. Affiliate Members (9)

Smaller / Developing Professional Production Companies; Presenting Organizations; Media Organizations with a direct relationship to the sector.

C. Business Members (14)

A variety of businesses that serve and / or intersect with the sector (Consultants, Agents, Costume and Stage Set Production Companies, Shipping companies)

D. Educational Producing Affiliates (11)

Canada's major university credit opera courses and postgraduate pre-professional programs.

E. Other Industry Stakeholders

Opera.ca also serves Canada's two regional associations of small-scale, experimental or emerging (Indie) producers through occasional support of or partnership with Indie Opera Toronto and Indie Opera West.

1.5 Brief Overview: Member Services to International Clients

A. Production / Set Rental

The design, build, storage and rental of theatrical sets, properties and costumes. A reciprocal trade, these are variously built by the Canadian sector and rented elsewhere, or built elsewhere and rented here.

B. Co-production / Collaborative Development of Product

Artistic Collaborations resulting in co-designed, built, and owned productions. Often the physical production (set, props, costumes) will be shipped from one producer's home city to another, with either party holding the option to hire either the same or different stage director, choreographer, musical director, cast and orchestra, depending on their needs. Storage expenses and subsequent touring or rental of the production are often shared among the co-producing partners. Co-producing work reduces production expense for each producing partner, and therefore increases profitability. Co-producing with higher-profile international partners can lend cachet to productions, resulting in higher ticket sales and increased customer interest and loyalty.

C. Touring of Fully Staged Work

The creation, production, and subsequent presentation and soup-to-nuts touring of fully staged work, inclusive of cast and / or musicians. Often creation costs are covered by the initial producer, with touring costs covered either through fee guarantees from presenting partners (season or festival presenters), through box office share or, in the case of the producing company renting halls while on tour, through direct ticket sales. Touring extends the shelflife of new, expensive product, increases scalability, and can improve profit margins. It increases the economic impact of producers by employing more artists and staff over a longer period of time.

D. Education Partnerships YAPs and Educational Affiliates

Numerous Canadian and international opera companies operate Young Artist Programs (YAPs) and Education and Outreach programs. These programs will often create, design and build unique smaller-scale products and services which can be co-produced or toured.

Educational Affiliate organizations and YAPs are generating a high volume of high-quality singers, instrumentalists, conductors, director, designers and other personnel who feed into the international opera sector. They and their students benefit greatly from access to and partnerships with major International YAPs and Production companies.

E. Presentation of International Touring Work

The Canadian Opera sector holds a largely untapped capacity to generate reciprocal market relations through the presentation of international touring productions.

1.6 Brief Overview: Opera.ca Services to International Clients

Opera.ca acts as a convener, knowledge resource, and connector. We undertake research and provide market intelligence to our membership through online publication and in-person meetings and symposia. We network with Canadian and international government bodies, potential clients and partners to better understand opportunities and connect our membership to those opportunities.

1.7 Competitive Position / Value Proposition

A. Geopolitical Advantage

Canada is a trusted, politically stable first world country. We enjoy a basic level of trust in the international marketplace that is not shared by all countries or regions of the world.

Canada shares a friendly border with the United States, and is their second largest trading partner after China.

We also share a significant colonial history and therefore tend to share many overarching cultural values with the UK and other Commonwealth nations, France and the Francophonie.

B. Socio-political Values Evident in Work

There is select international interest in the Canadian socio-political context evidenced in the work produced. For example, the US and European markets tend to see our current prevalent perspectives on multiculturalism and respect for Indigenous practices and partnership with Indigenous creators as relatively advanced.

At the same time, potential partners and clients in South America and parts of Asia have to date expressed reticence to engage with work that is focused on these values.

C. Aesthetic Qualities

Select Canadian work is perceived as being of very high aesthetic value. We are seen as capable of creating work of high quality.

D. Production and Co-production Capacity

Canadian companies have a high capacity to partner internationally in unique or bespoke ways.

Though most of our companies are significantly smaller than the majority of their international counterparts, they tend to have much more freedom to develop new programs, projects and products to partner internationally as they see fit, and to work in new and innovative ways.

Relatively robust and stable revenue patterns among Canadian producers, including multiple levels of government, sponsorship, individual giving, ticket sales, and production rentals, allow unusual flexibility in the generation of product of various scales, and for a variety of audiences.

E. Price Point

The value of the Canadian dollar is lower than that of the US Dollar, the Pound, and the Euro. These regions have a higher purchasing power in Canada than they may have at home or in other regions.

Direct Government subsidisation of production and touring through the Canada Council for the Arts can create favorable conditions for the rental or touring of work.

1.8 International engagement to date

A. United States

Opera.ca was originally developed as a regional forum of its sister organization Opera America, and has enjoyed a close relationship with this organization and its membership since its inception.

Production Rentals make up the majority of current member activity in this region.

B. Other International Engagement

Opera.ca has been attending key international market events for a number of years, including Classical Next and OperaDagen (The Netherlands), the Opera Europa Conference (Held semi-annually at a roving location in Europe) and the World Opera Day 2015 in Madrid, Spain.

Select member companies have built co-production partnerships and touring opportunities in France and Germany.

1.9 Annual conferences with international component

Opera.ca holds an annual symposium bringing together all aspects of the sector on a national level. We have not to date included an international component in this symposium.

1.10 International offices, staff, etc.

Neither Opera.ca nor its members currently hold international offices or staff.

One new music theatre presenter, Le Diamant in Quebec City (not currently a member), has contracted a European programming liaison.

Pacific Opera Victoria have a loose booking agent relationship in Germany.

Companies otherwise tend to rely on a loose network of contacts in international circles for market intelligence, and to aid them in market access. Often these are not market specialists, but individuals who hold peripheral relationships to the purpose of market development.

1.11 Annual Strategic Updates

This space left blank for strategic updates: progress made, accomplishments and lessons learned.

2. Areas of focus (business lines and sub-sectors) and reasons for their selection

2.1 Identified Areas of Focus and Selection Reasoning

Opera.ca undertook a half year of market study, focused on the EU and South America. Supplementary study was offered by the consultant in question, of US and UK markets. South American study was cut short by a popular uprising in Santiago de Chile. Further research will be required before sufficient intelligence is attained regarding South America to decide areas of focus.

Area of Focus	Rationale	US	UK	EU

A. Opera Production Rental	Larger to Medium-Scale Producers: This is an existing and vital sub-market for the sector, especially in the US.	✓		
B. Co-production	Larger to Medium-Scale Producers: Co-production is seen by many Professional Company Member Organizations as the most exciting new avenue of opportunity. Canadian companies are just starting to reap the benefits of vastly increased co-production activity within the company, and are eager to explore the many beneficial opportunities that appear to exist in the chosen target markets.	✓	✓	✓
C. Touring	Medium to Smaller-scale Producers: Certain Professional Company Members and Affiliate members either currently undertake successful touring initiatives, or are planning such initiatives in the near future. With some large-scale exceptions, the majority of these organizations are touring medium to small-scale work.			✓
D. Opera Education and Young Artist Program Collaborations	Organizations with Young Artist Programs and Educational Institutions already maintain certain such partnerships, and are actively seeking expansion both in quality and quantity.	✓		✓
E. Knowledge sharing, and movement and licencing of intellectual property	All sub-sectors: There is a sense that change is happening rapidly in audience needs and tastes across the globe, and overall the sector exhibits a desire to remain abreast of innovations and potential collaborations that can keep us ahead of the game.	✓	✓	✓

2.2 Government Funding Programs Considerations

Individual members or subgrouping of members encouraged to view:

A. Canada Council for the Arts: Arts Abroad

- Travel
- Circulation and Touring
- Residencies
- Representation and Promotion
- Co-production

B. Department of Canadian Heritage Creative Export Funding

C. Federal Economic Agencies
- Atlantic Canada Opportunities Agency
- Federal Economic Development Initiative for Northern Ontario
- Western Economic Diversification
- Economic Development Agency of Canada for the Regions of Quebec

D. Global Affairs
- CanExport
- Individual Embassies / Trade Commissioner Offices

E. Various Provincial and Municipal Funding Agencies

Members are encouraged to contact the Opera.ca office for advice on their specific regional, provincial or municipal funding agencies.

2.3 Notes on Member Consultation

Opera.ca's membership was consulted extensively in person through bespoke meetings, at the Opera.ca symposium, and at the Opera America and Opera Europa conferences. Membership were surveyed on international strategy as part of our annual membership survey.

This strategy is to be reviewed, approved and updated at Executive and Board level.

INTERNATIONAL CONTEXT

3. Economic Forecast & Sector Focus

3.1 Macro trends

A. Climate change

Climate change is beginning to affect how the larger performing arts sector operates around: High-carbon output travel and touring and / or audience travel to and from major events; Choices of building material and scale in the design and production of sets, props and costumes; Generation of higher tech, lower-carbon-footprint product.

B. Increased Uncertainty

International politics and relations; Economic forecast:

Borders are becoming harder and more expensive to cross both for people and goods, border and travel security and relative inconvenience are increasing; international economic trends are causing import / export volatility in regions that have seemed stable in past decades.

C. Social Issues

Economic Inequality; Human Rights; Migration and social issues related to migration:

All regions of the world are seeing increasing economic inequality and receding middle classes; Human rights and migration issues have generated instability and the perceived need for careful choices - both around ethics and around brand, when entering new markets or partnering with various sponsoring corporations or governments.

D. COVID-19 and similar vulnerabilities

At the time of final drafting of this document, numerous regions and borders are closed off due to spread of COVID-19. With about 17 years between this and the last pandemic, we should remain aware of the likelihood of periodic future similar issues generating disruptions in the international movement of people and goods.

3.2 Sector and sub-sector specific trends and developments

A. Network Building and Collaboration

There has been a slow arc of increased collaboration in the international opera sector over the last number of decades, starting with the formation of Opera America, then Opera.ca, Opera Europa, and Opera LatinoAmerica. 2005 saw the world's first World Opera Forum in Madrid, Spain, which brought together the memberships of all of the national and regional opera associations.

B. Seeking audience development innovation

There has been an international call for innovative solutions to an audience that is perceived to be aging out of the form. North America has led in development of community engagement and civic practice initiatives focused on building stronger local connections to communities.

C. Development of alternative, smaller-scale and smaller-cost product

Europe has seen the development of Music Theatre (often focused on aesthetic validity and contemporaneity, developed out of the academic New Music scene); North America has seen a dramatic increase in the number of indie opera companies (a mixture of chamber opera, diverse cultural practices, and diverse musical styles). Opera companies of all sizes in all regions have begun to produce occasional popular American musical theatre pieces alongside their traditional and contemporary opera offerings.

D. Development of Perspectives on Indigeneity

Outside of trends and into long-term developments, special mention should be made of general increased international interest in and respect for Indigeneity and Indigenous art - generating consumption patterns which may or may not be seen as desirable by many Indigenous practitioners, depending on the desire of the arts goers and institutions involved to build a greater understanding of Indigenous world views through their interaction with the work. There is a world-indigenous macro-trend of seeking artist-to-artist connections and building stronger interpersonal and intercultural relations.

E. Regional Trends

United States

Overall the US economy remains strong and US / Canada relations remain stable. Despite a recent nativist tendency in US politics, there is an often-expressed desire in the arts sector to maintain strong ties. Negative trends for the sector include increased border controls and regulatory hurdles, increase of and unpredictability in US tariffs. With the US deeply divided, it is difficult to predict upcoming tides. Much new US work is focused at the current time on social issues such as US-specific racial politics, gender equality, LGBTQ issues, economic inequality, mental health issues and abuse.

Europe and UK

Economies remain strong over the majority of Central and Northern Europe, and in the UK despite Brexit. The most talked about social issues are migration, climate change, inequality, and the rise of nationalism. As the UK lacks current stability due to Brexit, many potential clients find themselves reluctant to engage in international business due to regulatory hurdles and currency fluctuations. The activities of many entities funded by government or by investment fund dividends are currently on hold. Europe itself remains seemingly keen to build connections with Canada and Canadian businesses, with the Nordic countries making this an explicit focus in 2021, and with the Canadian government specifically seeking increased arts and culture ties with Germany through 2020.

South America

Recent years have seen a dramatic increase in instability, with the collapse of once-prosperous Venezuela and violent protests against inequality in Chile. Though the question requires more research, overall the large scale state-sponsored opera sector seems focused mainly on aesthetic questions as opposed to socio-political ones. Though opera houses reportedly operate largely independently or in competition with each other, Opera LatinoAmerica as a central body seems to be experiencing some success bringing the sector together for increased co-production and touring activity, and in connecting the South American opera sector with the world at large.

3.3 Main current business line(s) for members in international markets

A. Set / Production Rentals (As noted above)

B. Co-productions (As noted above)
C. Medium - Scale Touring (As noted above)

3.4 New business lines (new or expanding service offered by members)

A. Digital Products: eg Virtual Reality Opera (Tapestry Opera / re:Naissance Opera *TAP:EX Augmented Opera*)
B. Small-scale touring: eg. Against the Grain Theatre's *#AtGBoheme*; Pacific Opera Victoria / Vancouver Opera's *The Flight of the Hummingbird*
C. Intercultural or interdisciplinary product: eg Pacific Opera Victoria / City Opera Vancouver's *Missing*

3.5 Recent developments / successes / challenges

Canada Featured at OperaDagen Rotterdam 2020: Canada will be the featured country at Rotterdam's major festival of alternative opera. This is a significant industry gathering place.

Success in Germany 2020 and 2021: Both as part of a larger initiative for Canadian artistic producers to be featured in, and independently beyond this 2020 focus, numerous Canadian opera and music theatre producers have made new inroads into the German market.

Key challenges: As Canada and Canadian companies begin to gain a better understanding of and foothold in this international market, growing pains have arisen around coordination of efforts - among government agencies, associations, companies and individuals. We see Opera.ca as having the opportunity to play an important role in the clarification and coordination of future activities.

4 Target Markets

This section aims to outline:

- Target countries and regions
- Selection rationale
- Market size and future growth potential
- Concerns associated with these markets
- Plans to overcome the challenges above

Note: It is assumed that the Association will achieve improved metrics through increased activities of the clients it serves. The targets below are therefore focused primarily on Professional Company Members, Affiliate Members, and Educational Producing Affiliates.

4.1 Target Market by Country or Region

A. United States

Common Working Languages: English
Common Audience Languages: English, Spanish

Market Segments and Product Lines
Professional Company Members; Key Affiliate Members

- Coproduction (collaborative creation of new product)
- Set / production rental (rental of existing product)

Professional Company Members; Key Affiliate Members, Educational Producing Affiliates

- Knowledge Exchange (Sharing of business ideas and strategies)

Rationale: Due to proximity, historical ties and cultural similarities, the US is an existing logical market for Co-production and Rental. The same similarities, the relatively large market size and the existence of robust US networking organizations make the US a logical point for knowledge exchange.

Market Description (Size, Growth Potential, Target Clients): The US is geographically the closest market to Canada, increasing viability for co-production and rentals.

- Market Size: There are major opera companies and presentation organizations across the country, many of which operate on similar financial models to their Canadian counterparts.
- Future Growth Potential: Due to the sheer relative size of the US market, it is felt that we have not nearly achieved saturation of Canadian product.

The American opera sector is served by a number of umbrella organizations, the most significant being:

- Opera America (Annual Conference in a roving city across the US, annual New Works forum in New York)
- National Opera Association (Annual Conference in a roving city across the US)

There are numerous additional conferences or recurring professional gathering places for this sector, primary among which at the current time include:

- Prototype Festival, New York
- New York Opera Alliance, New York
- ISPA International Society for the Performing Arts, New York
- Festival O, Philadelphia

Concerns and Mitigation:

- Though there is a shared background and a largely shared language (English), aesthetic tastes and points of cultural relevance tend to diverge - especially around artistically experimental work or work addressing multiculturalism and racial politics.

- There have been increased difficulties moving people and goods across the border, with new or altered regulatory hurdles appearing at unpredictable intervals. These hurdles have caused increased costs, delays, and occasional cancelation of cross-border sales and products.
- It is unclear what the future of opera and related forms is in America. Companies talk of stagnation in the market. That being said, Canada has already positioned itself through Opera.ca as a leading innovator in the 'hot' area of Civic Engagement. We will do well to remain seen as intelligent innovators.

B. Europe and the UK

(Sub-markets: UK, The Netherlands, France, Germany, and Northern Europe)

Common Working Languages: English (International business); French, German, and other national languages are commonly in use for regional business.

Common Audience Languages: Detailed below by region.

Market Segments and Product Lines:

Professional Company Members; Key Affiliate Members

- Coproduction
- Touring

Professional Company Members; Key Affiliate Members, Educational Producing Affiliates

- YAP and Education program collaborations
- Knowledge Exchange (Sharing of business ideas and strategies)

Rationale: Western opera began in Europe and still enjoys the widest production and distribution there of all the regions of the world.

Famously, there is more professional opera produced in Germany than in the rest of the world combined, and 2020 will see Canada as the country of focus for the Frankfurt Buchmesse, which is one of the world's most significant art fairs.

There are significant cultural and artistic ties between Canada and its colonial founders, France and the UK, both of which hold major international opera and related contemporary theatre market events.

This year marks the 70th anniversary of the Canadian liberation of the Netherlands in World War II.

Canada and the Nordic countries share many cultural and geographical factors, not least of which is the growing relationship between the Sami people and the Indigenous peoples of Turtle Island. As part of the effort towards democratic Northern solidarity, 2021 sees Canada as the host of the annual joint Nordic Initiative.

Market Description (Size, Growth Potential, Target Clients):

Overall: The European and UK opera sector and general performing arts markets are deeply interconnected, and intend to remain so despite imminent plans for Brexit. Product tends to be differentiated into Opera and Music Theatre, with the latter tending to be more experimental and smaller scale. Even within this region, however, terminology is divergent, with the UK further segmenting small-scale product into a variety of specialised categories. The European market tends to be dominated by Germany, which reports to produce more operatic performances annually than the rest of the world combined. As in North America, European producers complain of audience stagnation and / or reduction, and are seeking new ways to improve the appeal of their product and to invigorate their audience base.

The European Opera and Music Theatre sector is served by a number of umbrella organizations, the most significant being:

- Opera Europa: Opera Europa is the leading service organisation for professional opera companies and opera festivals throughout Europe. It currently serves over 200 members from 45 countries. (Fall and Spring Conference, and additional specialised Forum events from time to time)
- RESEO: RESEO is a unique European network for arts education and creative learning with a specific focus on opera, music and dance.
- ENOA: Since 2016, ENOA has been working to train emerging artists and promote their mobility, while encouraging the creation and performance of new operas all over Europe. The ENOA headquarters is hosted by the Festival d’Aix-en-Provence in France.
- Deutscher Bühnenverein: Deutscher Bühnenverein is the primary network for large-scale professional theatres (Including opera and ballet) and orchestras.
- Music Theatre Now!: Dedicated to worldwide exchange in new opera and music theatre.

There are numerous additional conferences or recurring professional gathering places for this sector, primary among which at the current time include:

- Classical:NEXT, Rotterdam, NL: The mission of Classical:NEXT is to unite all professionals who identify with classical and art music, providing them with a place to meet and connect, do business, brainstorm, create and be inspired.
- OperaDagen Rotterdam, NL: OperaDagen Rotterdam is an international opera and music theatre festival with contemporary, innovative and groundbreaking productions from top national and international contemporary creators.
- Festival d’Aix-en-Provence, FR: The Festival International d'Art Lyrique d'Aix-en-Provence is an annual international music festival which takes place each summer in Aix-en-Provence, principally in July. Devoted mainly to opera, it also includes concerts of orchestral, chamber, vocal and solo instrumental music.
- BAM Berliner Festival für Aktuelles Musiktheater, Berlin, DE: Berlin has arguably the largest and most vibrant ‘free music theatre’ scene in Europe. Nowhere is there a larger number of actors, groups and ensembles who are committed to alternative music theatre.
- Tête à Tête Festival, London, UK: Built upon a responsibility to share their experience, infrastructure and access to resources to unlock opportunities for a new generation of opera creators and audiences, Tête à Tête Festival has presented over 1000 performances, involving the world premieres of over 400 new works.

- Grimeborn Festival, London, UK: “This is Grimeborn. Bold new versions of classic operas. Rarely-seen and long-forgotten works. Brand new pieces from the most exciting up-and-coming composers, musicians and companies.”
- International Opera Awards, London, UK: Founded in 2012, the International Opera Awards is an annual celebration of excellence in opera around the world.
- IAMA International Arts Managers Association Conference, Roving locations across Europe: The International Artist Managers' Association (IAMA) - is the only worldwide association for classical music artist managements.

Company structures and scales of production remain fairly uniform across the region, with potential partners and clients for the purpose of this IBD Strategy including:

- State Mandated and Funded Theatres: National, regional, and municipal opera houses, which consist of a central landmark building and annually contracted singers (soloists and chorus), orchestral players and corps de ballet. These theatres are increasing the frequency of their co-production activity, and (with significant exceptions) rarely present the work of other companies on their stages. Many of these theatres have up to hundreds or as many as 1000 employees, and tend to be much larger in scale than Canadian producers. Management and employees at these institutions are public servants.
- Large-Scale Touring Companies: There are several larger-scale touring opera companies, especially in the UK and the Netherlands, and increasingly Nordic state theatres have begun larger scale touring in their respective countries. Heavily subsidised by home governments, financial models for these organizations may include the receipt of presentation guarantees from host theatres, box office splits, or theatre rentals.
- Independent producing artists and organizations: Much as in North America, there is an increasing number of smaller independent companies taking experimental approaches to product development and audience engagement.
- Educational Institutions: European opera education tends to work in a conservatory system, as opposed to the North American liberal arts university system. There are also a number of specialised for-profit programs (pay-to-sings) focused on providing European experience and connections for North American singers.

United Kingdom

Common Audience Languages: English
Major State Companies:

- Royal Opera House, Covent Garden
- Royal Opera House’s Linbury Theatre
- English National Opera
- Scottish Opera
- WNO Welsh National Opera
- Northern Ireland Opera

Major Touring Companies:

- English Touring Opera
- Opera North

Chamber Opera and Music Theatre:

- Chamber Opera: There are dozens of successful chamber opera companies throughout the UK, with the vast majority centred in London. These companies generally produce one to three small-scale classical or new works per season. Several of these companies tour extensively locally, regionally, nationally, and internationally.
- Music Theatre: Small to medium-scale music theatre exists in the UK, though most such producers consider themselves to be properly part of the domestic theatre scene.
- Gig Theatre: Roughly speaking, this is pop or rock-based music theatre, that exists in a concert or ‘gig’ setting.

Festival and Multidisciplinary Presenters:

- Large Scale Opera Festivals: As above
- Chamber Opera and Music Theatre: As above
- Multidisciplinary Presenters: In general, multi-disciplinary presenters have been struggling in the UK due to budget cuts, and guaranteed fees have been giving way to revenue splitting or venue rentals. Nevertheless there do remain major theatre centres throughout the UK that are still presenting with limited capacity.

Consultant Joel Klein has updated Wikipedia’s list of all known UK opera companies and related organizations here:
https://en.wikipedia.org/wiki/List_of_opera_companies_in_Europe#United_Kingdom

Opportunities: The UK remains deeply connected to Canada, and will be building new trade relations with North America now that it has undergone a Hard Brexit.

Concerns and Mitigation: Brexit has generated significant instability in the UK and it will be a number of years before the economic and cultural effects are really understood. It is recommended that we maintain ties while exploring opportunities.

The Netherlands

Common Audience Languages: English, French, Dutch

Major Touring Company:

- Netherlands Touring Opera

Major International Festivals:

- OperaDagen Rotterdam
- Holland Festival

Other Major International Conferences:

- Classical:NEXT

Opportunities: Local presentation, Regional touring, Co-production with local music theatre producers

Concerns and Mitigation: The Netherlands is a small country but well connected. Individual presentations will not suffice as touring opportunities, but they are able to assist with furthering these goals throughout Europe. Co-presentations are only minimally possible with the local opera sector.

France

Common Audience Languages: French
Major Network:

- ENOA

Significant Producers / Presenters / Partners:

- Versailles
- Châtelet
- Opéra de Paris
- Opéra de Lyon
- Opera for Families Festival (Young Audiences) at Opéra-Comique
- Major opera festival at Aix-en-Provence

Opportunities: Much Canadian work is being developed in French and would be an aesthetic and cultural match. There is already significant market reach for Canadian cultural products in France, mostly from Quebec.
Concerns and Mitigation: For most French cultural workers, and for the public, Canada mostly means Quebec. A significant quantity of Canadian work is produced in English. Translation is possible, but it will be difficult for anglophones to access this market.

Germany

Common Audience Languages: German, English (major centres only)
Major Network: Deutscher Bühnenverein
State Theatres: Germany is full of well-funded major and minor state theatres in every city and every region.
Music Theatre Producers and Presenters: Germany is more or less the home of the concept of Musiktheater, and as such has more- and better-funded producers and presenters than much of the rest of the world. The Berlin scene is especially robust, with nearly 100 producers creating a city-wide network, served by the Berliner Festival für Aktuelles Musiktheater.
Specific to Berlin:

- Radialsystem
- Hebel Am Ufer (HAU)
- Neukolln Oper
- Sophiensaele
- Humboldt Forum
- Volksbuehne
- Ufa Fabrik
- Berlin is not Bayreuth
- Komische Oper

Opportunities: As above, more opera takes place in Germany than in the rest of the world combined. This is a massive market that deserves significant attention for the Canadian sector.

Concerns and Mitigation: The number of opera-goers in Germany fell by nearly 1,000,000 seats sold in 2019 over 2018. This may just be a one-year drop as opposed to a trend, but it is causing many opera companies to rethink their business model. This poses an opportunity, as Canadian companies are relatively audience-focused and enjoy flexible business models. However many German companies are becoming more local and introspective, which could make market penetration more difficult to achieve.

Northern Europe

The Nordic countries have their own separate national arts systems, but tend to work together as a unit wherever possible in the international arts market.
Common Audience Languages: English is a fluently spoken second language in major centres, with other national languages (Finnish, Danish, Swedish, Norwegian) taking precedence by nation / region.
Major Theatres and producers:

- Malmö Opera
- Folkoperan, Stockholm
- (This region remains less robustly researched than others; We hope to include more information after attendance at Opera Europa in Helsinki.)

Opportunities: The Nordic countries are currently focused on northern solidarity due to geopolitical pressures. 2021 has been declared the year of Nordic Bridges, and will see extensive focus on development of cultural and political ties between Canada and Northern Europe through the arts.
Concerns and Mitigation: Smaller population leads to fewer opportunities in this region. Nevertheless, resources for artistic co-production and presentation remain robust.

C. Asia (Further Research Needed)

20% of the world classical music market is in Japan, and markets continue to increase in China and Korea, with numerous presenters and festivals reporting massive capacity for opera ticket sales, with limited local opera production capability. Chinese and Japanese delegations have increased in recent years at Opera America, Opera Europa, and related marketplaces such as Classical NEXT, with a focus on technology and large-scale product, and an interest in locally-specific work (eg original Canadian content).

With most evidence regarding the opera market potential in Asia remaining anecdotal, further intelligence is being sought into the opportunities presented.

D. Australia (Further Research Needed)

Due to historical and cultural affinities and lack of language barrier, initial intelligence suggests that there is the opportunity for collaboration with Australia, whether with the larger opera houses or with the major festivals (Sydney and Melbourne)

There is extensive Indigenous to Indigenous collaboration happening already between these two regions.

Further research is required to ascertain actual opportunities.

E. South America (Research Only)

South America is served by the network Opera Latino America (OLA), who facilitate networks for co-productions and other collaborations. Initial intelligence suggests that South American opera companies are functioning very independently of each-other, making coordinated efforts difficult. That being said, OLA has a unified online co-productions and production rental tool.

Initial research was curtailed by civil unrest in Chile, but we hope to continue discussions with OLA and key opera companies and related organizations in 2020, to further our understanding of this market.

F. Markets Excluded at This Time

Middle East, Africa, South Asia, Southeast Asia

- Whereas there is some interesting work coming out of Israel and South Africa, these markets are small and difficult to access.
- There is little to no known activity in this sector in South Asia and Southeast Asia.

4.2 Were organization members consulted during the selection of these markets?

Member organizations have been consulted throughout the IBD planning process, both individually and through survey.

4.3 Best practices have been learned from prior international development activities.

Relationships

This is a very relationship-based marketplace the basic principles are;

- Research: make sure that you know as much as reasonably possible about a market, its key players and their functions in the marketplace, before engaging too heavily.
- Show up consistently over many years, and build slowly: Trust is built slowly, through shared experiences. Similar to principles of fundraising, where you wouldn't make a major individual giving ask on a first encounter, building market relationships (rental, co-production, other collaborations) required building a solid reputation in a variety of avenues (conferences, smaller scale collaborations), and building your perceived place in the community of internationally active companies.
- Build lasting relationships both with agents in Canada, and agents abroad: Market specialists will understand opportunities and best practices in a much deeper way - though they may seem to be a cost centre up front, they can provide and maintain opportunities in a much richer way. Canadia Agents should be encouraged to build working relationships with their counterparts in respective markets. It is not possible for one person to work in depth in every market, in all facets.
- Time and resources will have to be spent to build and maintain relationships, if we are to maximise timely opportunities.

Delegations

- Many regions support delegations to major market events. This is because delegations work. They draw focus to a specific region and open doors for specific companies that would otherwise be closed.

Branding

- Branding is important. It is very difficult for folks working in international markets to keep track of every company. Clear brand identity can really help, both for individual companies, and for collectives or regional or national representative organizations. It gives potential

Tools

- There are tools in general use - eg market platforms that allow potential clients or collaborators to discover or categorize your output. Wherever possible existing tools should be researched and used.

- Some of these are simple marketing tools - like International Arts Manager Magazine or other conference inserts. These tools can be maximised before branching out to create your own

Reciprocal Relationships

- It's a general rule of thumb that what's good for the goose must be good for the gander. If we want to rent sets to a market, we will do well to look for opportunities to also rent sets from that same market. Etc. Reciprocity builds knowledge, trust and goodwill.

5. Target Clients

5.1 International Clients of Opera.ca

Opera.ca itself is primarily targeting relationships with similar industry associations in the given target markets. Our general role is to convene, to connect, to learn, and to pass on information. The similar design of like-minded organizations provides ideal interfacing opportunities.

5.2 International Clients of Member Companies

Our members' target clients are the member organizations of Opera.ca's target clients as described above. They are the individual producing, presenting, and educational organizations who make up the opera sector in each of the target regions.

5.3 Approaches by Client Grouping

Overall, the arts sector is very relationship dependent. Strong interpersonal relationships are developed over years, before sufficient trust has been built for effective business relationships.

A. Industry Associations

- Membership or development of reciprocal agreements;
- Industry Association ED to Industry Association ED networking;
- Attendance at major networking events held by those associations.

B. Opera Producing Companies, Season or Festival Presenters, Educational Institutions (Rentals, Co-Productions, Touring, YAP and Education partnership)

- (Major Opera Companies) GM to GM of (Season or Festival Presenters) AD or Agent to Presenter networking through attendance at specialised networking events.
- Achievement of high visibility at these events through
    - Encouraging Canada Focuses at Key Networking Events
    - Targeted event sponsorship;
    - Panel participation
    - Effective booth strategies where available / warranted;
    - Well organized and highly produced pitches where available / warranted
    - Holding well coordinated and appealing ancillary networking events

    - Effective and timely follow-up
- Development of small scale partnerships
- The effective development of relationships with agents and similar industry liaisons.
- The offering of invitations for major prospective clients to attend your own events

5.4 Strategies for Meeting Target Clients

The primary strategy is attendance at major networking meetings; Secondary being the undertaking of familiarisation tours.

5.5 Strategies for Exploring New Potential Client Groups

The primary strategies are:

- Requesting professional advice from colleagues, agents, and other industry liaisons;
- Attendance at networking meetings that serve new regions or sub-groups; undertaking familiarisation tours
- Continued on the ground research by market specialist(s)

INTERNATIONAL STRATEGY

6. Strategic Objectives and Desired Outcomes

This section explains what Opera.ca are trying to achieve overall, describes the strategic goals by regions and outlines possible tactical actions.

6.1 Overarching Long-term Objective

Objective: to increase relationships and *sustainable* international activity in the following four key areas:

- Production Rentals
- Co-Productions
- Touring / International movement of product
- Education Program and YAP partnerships
- Cultural diplomacy, research and thought leadership through exchange and sharing of ideas, and leading research and development in the realm of opera and arts civic impact.

6.2 Corollary benefits to the broader Canadian sector or to other sectors.

Canada has yet to maximize its potential impact in the international arts sector. For the foreseeable future, more is more. Just in the research phase towards this International Business Development plan, our activities had the ancillary effect of generating bookings for Indigenous artists and companies in a variety of genres, experimental music theatre creators and pop artists. Expansion of activities is anticipated to have a similar, expanded effect.

6.3 Table of specific desired outcomes and timelines

Goals	Timeline	Tactics	Objective	Metrics
Increase Opera Production Rental (US)	Y1 Y2 Y3	Continued informal delegations at Opera America. Research and Participation in co-production tools and platforms; Explore and compare the use of existing platforms such as those offered by OLA, etc etc against developing our own national opera promotional platform. Look at results, Incrementally increase participation TBD pending results Y1 TBD pending results Y2	Continued and expanded rentals	# of rentals
Increase Opera and Music Theatre Co-production and Touring (US, UK, EU)	Y1 Y2 Y3	Informal Delegation at Opera America Formal Delegation at Opera Europa Individual member activity at Operadagen Rotterdam Market Research (Asia) Development of promotional channel for Canadian opera coproductions Continuation of Delegations as above, potential small edelgations elsewhere pending intelligence for new markets gathered Y1. TBD Pending Results Y2	Maintaining base-line 10 participants 7 members and non-members 3 countries; One channel	# of participants (members, other SMEs)
Exploration of Opera Education and	Y1	Research at RESEO, consultation with young artist program and other education stakeholders in Canada;	To learn more in this area, and to	report

Young Artist Program Collaborations (US, EU)	Y2 Y3	TBD Pending Learnings Y1 TBD Pending Activity Y2	better engage this subsector	
Focus on Brand: Establish Cultural Diplomacy; Disseminate Canadian Research	Y1 Y2 Y3	Invitations to speak at international conferences and share Opera.ca research. Partnerships established with research bodies Build connections with Embassies and other Missions while abroad. Work towards achieving a unified agreed, well-thought through and executed branded presence for all delegations Continued, increasingly focused work as above, TBD pending learnings Y1 TBD Pending Y2	To increase market reach by identifying and developing a basic common brand identity; To use all the tools available to us to amplify our message.	# of invitations # of research partnerships Achievement of a brand identity
Continued Research	Y1 Y2 Y3	Fresh research in Asia; Development of knowledge regarding markets for digital products; Continued research Europe, UK, South America TBD Pending Y1 learnings TBD Pending Y2 learnings	Trip Reports Delivered	# of reports

MEASUREMENT OF RESULTS

7 Methods and Strategies for Measuring Results

Success will be measured through annual survey as follows. New or increased:

- Member and affiliate attendance at international events a) as part of Opera.ca delegations; b) separate from Opera.ca delegations

- Co-production partnerships
- Production rentals
- Educational and YAP partnerships
- Relationships with international agents and / or international buyers
- Qualitative information and member suggestions toward future strategy

8. Anticipated challenges in measuring success, and related mitigation strategies.

Qualitative information regarding the development of longer-term relationships is difficult to record.

Surveys will include long-form and verbal input, which will be summarised towards further strategic development.

Delegation attendees will be asked to submit daily short-forms to keep Opera.ca informed on a timely basis, while information is still fresh-to-mind.

9. Member Feedback Planning

Feedback is to be solicited by annual survey, and through key informant interviews.

10. Sharing successes with the industry/sub-sector

Successes are shared through:
- Newsletter update (Contractor newsletter)
- Written annual report
- Annual symposium panel / session
- Website
- Social media

CONCLUSION

11. This IBD Strategy’s Service to Members, and Broader Industry Impact.

This IBD Strategy seeks to serve members by providing access to intelligently chosen and prioritise markets, and continuing to develop and distribute valuable market intelligence. Opera.ca will build relationships with sister associations across the globe, and help its members build valuable relationships through: Research and dissemination of market knowledge; Delegations at key events including targeted One-to-one introductions where possible; participation in and development of shared market access tools.

This IBD serves the broader industry by partnering where possible with other Canadian sector organizations (eg CAPACPA, CINARS), and by deepening the Canadian arts sector's penetration by developing this underdeveloped subsector. We will share information freely with our wider sector colleagues in dance, theatre, music and multidisciplinary presenting.

12 IBD Strategy Update Plan

This strategy will be reexamined annually, with the assistance of a specialist advisor, and as a matter of course as we undertake activities.

Overall, this is an evergreen document. Markets and opportunities shift quickly. We aim to live-update this document as the real on-the-ground reality dictates.

13 IBD Strategy and Update Distribution Plan

Distribution through e-newsletter
Presentation at annual national conference