

ACROSS THE BOARD

A Publication of OPERA America for Opera Company Trustees



From the President and CEO

I'm still amazed by the perseverance and innovation of our industry through the pandemic. While it feels like we've turned a corner as a society, the challenges of producing opera have only shifted.

At our Opera Conference in Pittsburgh this spring, we looked at those challenges — and opportunities! — through the lens of the people who work in our industry. If you haven't watched the session videos, I encourage you to view them at operaamerica.org/ConferenceVideos.

At our upcoming National Trustee Forum in January and at Opera Conference 2024 in Los Angeles, we'll continue to make sense of the lingering uncertainty in our field. Our LA meeting will take a global focus, too, as we convene the second World Opera Forum with delegates from around the world.

The best thing you can do right now as a trustee is to stay informed. I hope you'll join us for one or more of these upcoming events.

Marc A. Scorsca

MARC A. SCORCA
OPERA AMERICA

Progress Amidst Uncertainty

By Marc A. Scorsca

As we enter new seasons this fall, there is encouraging news about the state of opera. But it's hard to overlook the financial challenges and disturbing announcements in recent months from across the arts sector.

In theater, we read about Los Angeles' Center Theatre Group's indefinite closure of the Mark Taper Forum. The Center Theatre Group is L.A.'s leading nonprofit theater, and the Taper is one of the landmark buildings of the Los Angeles Music Center. In New York, The Public Theater, one of the nation's most successful nonprofit theaters, recently laid off about 50 people. The Public produced *A Chorus Line* and *Hamilton* and started Free Shakespeare in the Park. Artistic Director Oskar Eustis said in an interview, "The economic headwinds that are attacking the American theater are attacking us, too. Our audience is down by about 30 percent, we have expenses up anywhere from 30 to 45 percent, and we have kept our donor base, but it's static. Put that all together, and you get budget shortfalls — big budget shortfalls." The Public will feature five shows this season, down from 11 in the last full year before COVID.

A recent article in *The New York Times* reported on attendance at museums: "At the famed Guggenheim Museum, attendance is down by 16 percent since before the pandemic. What has increased is the cost of running the institution. ... In addition to salaries, inflation is driving up the cost of everything from heating to shipping artworks." A recent survey by the American Alliance of Museums (AAM) found that only one-third of museums have rebounded to pre-pandemic attendance levels, with two-thirds experiencing attendance closer to 70 percent. AAM's chief of staff predicted, "It will take years to fully rebound to pre-pandemic levels of staffing,



El Último Sueño de Frida y Diego at San Diego Opera, with Guadalupe Paz and Alfredo Daza

Karl Gadel

revenue, and attendance."

The opera field is facing the same challenges. Opera Philadelphia, a company that has transformed its programming over the past decade and remade its position in our industry, announced significant cutbacks in August. On the same day, the Metropolitan Opera Guild, the storied support organization for the Metropolitan Opera that was founded in 1935 by Eleanor Robson Belmont in the depths of the Great Depression, announced it will wind down its operation and stop publishing *Opera News* as a standalone magazine.

Data collected by OPERA America underscore the challenges our opera companies are facing. We conducted a survey this summer to compare ticket sales from the just-completed 2022–2023 season with 2018–2019, the last complete year before COVID. Subscription sales and overall ticket sales were down for most of our companies with budgets over \$1 million. Smaller companies revealed a counter-trend with increased sales. (See chart on next

page.) Across all 68 companies that participated in the survey, the total ticket count between FY2019 and FY2023 declined by 21%. Ticket revenue over the same period decreased by 22%.

And ticket sales patterns have become unpredictable. At some companies, a new work may sell out while a work from the inherited repertoire languishes at the box office. At other companies, it may be just the opposite. Ticket sales may be strong early in the sales cycle and then drop off closer to opening night while elsewhere, sales can be negligible until just days before the curtain goes up and then skyrocket. Sadly, it forces company staff to operate without their usual guideposts. Promoting a season is like guiding a boat through a dark and foggy night; it's hard to know where you are.

Here's the encouraging news, though: Attendance among first-time ticket buyers set new records last season! At companies with budgets over \$1 million, 35% of their ticket buyers were new to file. Across all our companies,

continued >

the average was 31%. Several companies even reported first-time attendance of over 50%. This represents a tremendous inflow of new audience members and augurs well for the future. Retention strategies must be at the top of our agenda. How do we induce first-timers to return, and return often? How do we introduce them to the idea of making a contribution — even a small one — to begin the habit of supporting their local opera company? And most important: The work we put on stage must be compellingly good. It has to inspire people to leave their homes and, perhaps, to travel downtown on a day when they are otherwise working remotely.

We continue to convene our members in regular Zoom meetings and have heard exactly what Oskar Eustis of The Public Theater said: Ticket sales have decreased, contributions are stable or not increasing, and costs have escalated everywhere. The federal funds that came through the Payroll Protection Program, Shuttered Venue Operators Grants, and Employee Retention Tax Credits are fully expended at most companies.

UrbanArias, a noteworthy company outside Washington, D.C., is appreciated for its productions of new and existing American operas. It announced on its website this summer: "We are suspending productions as we search for a new model for our company. We still believe in our mission of telling the stories of our lives through opera. We still believe that no other medium has the same power to tell these stories. We still believe in the composers and performers that share our dream. But modern life has not made our mission easy. ... We want to take some time to try to find solutions to some of these practical challenges, and then to come back stronger." That statement summarizes

the situation very well.

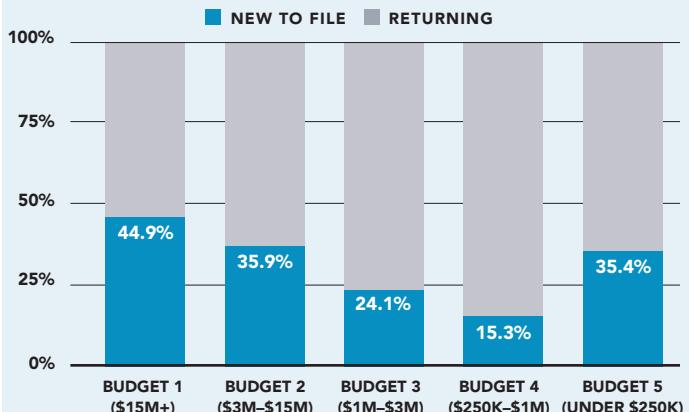
How are other companies adjusting? Some are reducing the number of productions next season. Lyric Opera of Chicago is offering six plus the Mozart Requiem, down from eight. The Met has reduced its season from 24 titles last year to 18. Other companies are reducing the number of performances of each opera to optimize seating capacities and reduce costs. Some companies are mounting a few of their productions in smaller venues to lower expenses.

But please don't confuse reduced productivity with reduced creativity. The production of new and recent American works continues without pause. *Omar*, *El Último Sueño de Frida y Diego*, *Champion*, *Florencia en el Amazonas*, *The (R)evolution of Steve Jobs*, and *X: The Life and Times of Malcolm X* will be seen at the Met, LA Opera, Lyric Opera of Chicago, and San Francisco Opera. We're anticipating premieres of Jake Heggie and Gene Scheer's new opera *Intelligence* at Houston Grand Opera, *The Righteous* by Gregory Spears and Tracy K. Smith at the Santa Fe Opera, Carla Lucero's and Marianna Mott Newirth's *Touch* at Opera Birmingham, and Finger Lakes Opera's *Two Corners*, composed by B.E. Boykin with a libretto by Jarrod Lee.

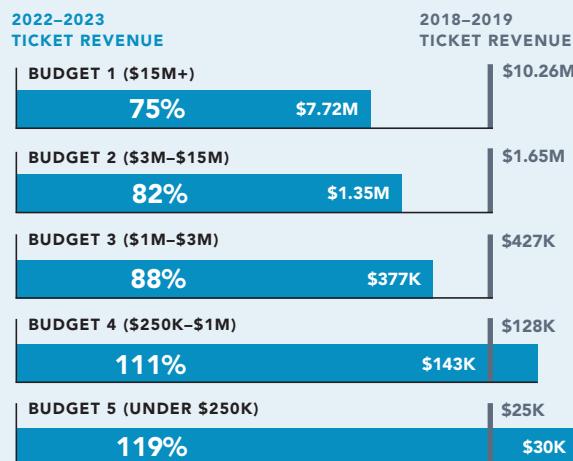
Progress is unsteady. An American opera repertoire continues to expand with stories of today, and we're still living with the impact of the pandemic. Opera leaders cannot expect activity to return to "normal" while we're still trying to figure out new audience and donor attitudes and behaviors. We have to keep adjusting, improvising, and experimenting as the circumstances around us change.

When SpaceX's rocket exploded just four minutes into flight last April in Texas, Bill Nelson of NASA

Average First-Time Ticket Buyers in 2022–2023



Average 2022–2023 Ticket Revenue as a Percentage of Average 2018–2019 Ticket Revenue



Average production activity remained the same from 2018–2019 to 2022–2023; average performance activity increased by 10%.

commended the company by saying, "Every great achievement throughout history has demanded some level of calculated risk, because with great risk comes great reward." SpaceX's mantra, in fact, is "Fail fast, but learn faster." We at OPERA America don't endorse failure as an operating

strategy, but don't we in the arts deserve the same leeway to try new ideas? It's the process of testing and learning — supported by the people who care most about our companies — that will get us through the current period of uncertainty to a new era of sustainable success. ■

Adapted from OPERA America's Report from the Field, which aired on September 29, 2023.

Essentials of Opera Governance

A SNAPSHOT WEBINAR SERIES LED BY MARC A. SCORCA

THURSDAYS, 4:30 P.M. – 5:15 P.M. ET

OCTOBER 5 Organizational KPIs

OCTOBER 19 Working Boards and Governing Boards

NOVEMBER 9 The Effectiveness of Board Retreats

Register at operaamerica.org/Essentials. Free to OA Trustee Members.

OA Trustee Resources

TRUSTEE RESOURCE PAGE

For a listing of the resources available to you as a company trustee, visit operaamerica.org/Trustees or download the 2023–2024 Trustee Quick Guide at operaamerica.org/TrusteeQuickGuide.

COMPANY WORKSHOPS

OA's Marc A. Scorca is available to lead virtual and in-person workshops on topics including governance, civic practice, and financial health. Consult your general director and call 212.796.8623 for details.



Oral History Project: Composer Anthony Davis

The Pulitzer Prize-winning composer Anthony Davis of *The Central Park Five* and *X: The Life and Times of Malcolm X* reflects on his relationship to music, politics, and identity.

“I started playing piano when I was in first grade. And music was always my refuge. But I didn’t think of it as a career option really until much later, when I was in college and very interested in politics.

When I first started in opera, I felt as if I was a guerilla. I always thought about being subversive: I thought of opera institutions

as being part of the elite, the establishment. To go into that space and present things that speak about the power structure, about inequities, and about the political world was kind of a subversive act. And that was always exciting to me because I was always looking for ways to be an activist with art: that art could provoke and be provocative.

In 1983, Mary McArthur at The Kitchen asked me, “Do you have an idea for an opera?” And I said yes. And it was *X*. My brother was an actor performing the role of Malcolm X at Yale Drama. When I went to the

play, my brother came backstage and said, “You know, you should write a musical about Malcolm X.” And I said, “No, that’s an opera. He’s a tragic hero. That’s an opera.”

It was interesting for me to look at these political moments: moments in American history, very important cultural moments, where music changed and our American culture was transformed. History to me is an active thing; it’s what creates us every moment. And our engagement with history allows us to understand who we are — that forms our identity.” ■

Adapted from Anthony Davis’s Oral History Project conversation recorded on June 22, 2022. Explore the full story and others at operaamerica.org/OralHistory.

Listen to a live conversation with Anthony Davis on Thursday, October 19, 7:00 p.m. – 8:00 p.m. ET (live in NYC and streamed) as part of OPERA America Onstage. Register at operaamerica.org/Onstage.

2024 OPERA CONFERENCE ‘WORLD OPERA FORUM’ JUNE 3–8 LOS ANGELES, CA

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Mark your calendar for an international gathering of opera administrators, artists, trustees, and advocates!

JUNE 5–8

OPERA CONFERENCE 2024

Four days of networking, discussions, and a mini-festival of performances around Los Angeles

JUNE 3–5

WORLD OPERA FORUM

The second-ever convening of the global opera community — addressing today’s key issues

REGISTRATION OPENS NOVEMBER 1
[OPERAAMERICA.ORG/CONFERENCE](http://operaamerica.org/conference)

Opera America Magazine

OPERA America’s quarterly magazine addresses the issues most important to industry professionals, from marketing strategies and governance practices to exciting new repertoire.



IN THE FALL 2023 EDITION:

- Reengaging Downtown Communities
- The Art of the Librettist
- Staff Retention Strategies
- New Operas Drawn from Myths
- “My First Opera” with Monét X Change

You can subscribe to *Opera America Magazine* by joining OPERA America as a trustee member for \$75 at operaamerica.org/Join.

NATIONAL TRUSTEE WEEKEND

NEW YORK, NY | JANUARY 24-27, 2024



REGISTER BY JANUARY 5



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FORUM



OPERA AMERICA SALUTES
AWARDS DINNER



OUTINGS AND
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OPERA America invites trustees from across the country to New York City for four days of seminars, performances, and celebration — including the induction of the Opera Hall of Fame and bestowal of the National Opera Trustee Recognition Awards.

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OPERA AMERICA

MOVING OPERA FORWARD

NATIONAL OPERA CENTER
330 SEVENTH AVENUE
NEW YORK, NY 10001

OPERA America is the national advocate for opera, dedicated to supporting the creation, presentation, and enjoyment of the art form for artists, administrators, trustees, and audiences since 1970.

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Fall/Winter 2023

[Letter from the President/CEO](#)

[The State of the Opera Field](#)

[Recent Ticket Sales Trends](#)

[Oral History Project: Anthony Davis](#)

Future Trustee Meetings

[ESSENTIALS OF OPERA GOVERNANCE | OCTOBER 5 & 19, NOVEMBER 9, 2023 | Online](#)

[NATIONAL TRUSTEE FORUM 2024 | JANUARY 24-26, 2024 | New York City](#)

[OPERA CONFERENCE 2024 & WORLD OPERA FORUM | JUNE 3-8, 2024 | Los Angeles](#)

20
24 | OPERA CONFERENCE
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Registration opens November 1 | operaamerica.org/Conference

