

Annual Field Report

+

OPERA America
Year in Review

2024

OPERA
AMERICA

operaamerica.org/AFR

From the President and CEO



The world around us presents a shifting landscape for opera. Global socio-political tensions, climate change, and war are of profound concern at the same time that new technologies are revolutionizing the way we work and live our lives. Planning future opera seasons and related marketing and fundraising strategies is more difficult than ever.

The same challenges for opera today are being examined around the world, as we learned at the World Opera Forum in June in Los Angeles. The immediate disruption of COVID may have passed, but many issues explored in LA linger in the wake of rising costs and changed audience behaviors.

- How do we make a compelling case for opera and make theaters welcoming to new and more diverse audiences?
- How can the intersection of works from the inherited repertoire and new operas enrich the entire opera experience?
- How do we provide sustainable careers for artists and arts workers?
- How can the demands of producing opera be integrated with a parallel commitment to address changing civic priorities?

This year's *Annual Field Report* presents a data-rich lens on some of these dynamics in the United States and Canada. As you will read, the number of productions and performances offered by companies in North America remains below pre-pandemic levels. This is due, in part, to efforts to adjust for lower overall levels of attendance and offset rising costs.

Concurrently, exciting potential for audience growth is revealed in record levels of first-time attendance at most companies.

This notable development warranted further exploration, so we undertook a national study to learn more about the motivation of these first-time attendees, how they enjoyed their experiences, and what it will take to retain them as part of the opera family. The results of this study are summarized in this *Annual Field Report*, but this is only the first installment. Thanks to a new grant from the Dr. M. Lee Pearce Foundation, this study will continue with grants to opera companies ready to test new retention strategies.

The most recent year demonstrated once again that vibrant art underlies our work. The diversification of the repertoire continues with a proliferation of new works and productions from a growing American opera canon created by experienced composers and librettists as well as artists who are new to opera and bring fresh stories to the stage. Along with thoughtful productions of masterpieces from the inherited repertoire, these new works are a driver of new audiences and a key to redefining opera as a thriving aspect of contemporary American culture.

We describe OPERA America as an action-oriented think tank. We learn from our members through engaged discourse, research, and observation of their work. Their collective expertise informs our programs and services, many of which are described in this report. We remain grateful to them for their engagement in our work and to the many donors who make this work possible. OPERA America thanks you.

MARC A. SCORCA

About OPERA America

OPERA America is the national membership organization for artists, administrators, trustees, and audiences, dedicated to supporting the creation, presentation, and enjoyment of opera. It is committed to developing new work and new audiences, civic practice, artist and leadership development, research, national advocacy, and promoting inclusivity that moves opera forward across America.

Copyright © 2025 by OPERA America. All rights reserved. This publication may not be reproduced in whole or in part without written permission.

Research Manager

Irene Fitzgerald-Cherry

Senior Manager, Marketing and Publications

Nicholas Wise

Graphic Designer

Alisha Neumaier

Chief Information Officer

Kevin Sobczyk

Chief Advancement Officer

Dan Cooperman

The 2024 *Annual Field Report* and OPERA America Year in Review are made possible with member support, a grant from the Wallace Foundation, and generous special contributions from opera company trustees Tania Beasley-Jolly (Opera Theatre of Saint Louis), Alexander D. Crary (Washington Concert Opera), Janet Farrell (IN Series), Sharon Gaudino (OperaDelaware), Susan Geyer (The Dallas Opera), Annette W. Jarvis (Utah Symphony | Utah Opera), Richard Koseff (Opera Colorado), Mary Kramer (Detroit Opera), Brian H. Powell (Austin Opera), Jerry Roth (Opera Parallèle), Arlene Palmer Schwind (Opera Maine), Chris Uzelac (Lamplighters Music Theatre), and anonymous donors.

Opposite: Lyric Opera of Chicago's "Sunday in the Park with Lyric" concert (photo: Kyle Flubacker)

Introduction

OPERA America's *Annual Field Report* is designed to provide leaders in the field with a comprehensive overview of the financial health and productivity of opera companies in North America.

The report is a tool for those working at and supporting opera companies: to understand recent trends in the industry that underpin the operating landscape and to have benchmarks for comparing local progress. The structure of this 2024 report has been reworked extensively to improve its readability and usefulness to company staff and trustees. The core findings are presented now around "key performance indicators" — with explanations of each metric, insights into historical trends, and analysis of the recent data on which the report is based. (The full data tables found in prior years' reports can be downloaded online.)

While this is the "2024" report, it is important to remember that findings are based on opera companies' 2023 fiscal year

data. This publication is only possible thanks to the intensive work of OPERA America's company members that complete the annual Professional Opera Survey (POS) administered by SMU Data Arts.

Key findings of this year's report are preceded by a "Field at a Glance in 2023" and a special report. The "Field at a Glance" offers a snapshot of the economic impact and performance activity of North American opera companies. The special report highlights key findings from OPERA America's *Understanding Opera's New Audiences*, a national study published in 2024 on the motivations, experiences, and barriers of new operagoers.

The final portion of this publication is OPERA America's 2024 Year in Review. These pages highlight achievements from the past year across the organization's grantmaking, advocacy, research, convenings, and programming. They also provide a financial summary of its operations.

Table of Contents

The Field at a Glance in 2023	2
Understanding Opera's New Audiences	4
FY2023 KEY FINDINGS	
Introduction	5
Findings & Charts	6–13
Professional Company Members	14–15
OPERA AMERICA YEAR IN REVIEW 2024	
Services & Impact	16–21
Financial Report	22–23
Board & Staff	24

LEARN MORE ONLINE

Read this report online and download the full data tables at operaamerica.org/AFR2024.

Access previous publications of the report since 2006 at operaamerica.org/AFR.

For questions about the findings of the report or to request custom benchmarking, contact Irene Fitzgerald-Cherry, research manager, at IFCherry@operaamerica.org.

The Field at a Glance

2022–2023 (WITH COMPARISON TO PRIOR YEAR)

Across the United States and Canada, opera is a vital part of communities of all sizes. Opera companies large and small are deeply rooted in their cities, strengthening their communities by forging partnerships that bridge divides and create positive change.

ECONOMIC IMPACT

Opera companies played an important role in their local economies during the 2022–2023 season. They employed and engaged over 40,000 administrators, artists, and trustees in their artistic and civic work. These companies invested over one billion dollars in the economy — a number that grew by 15% from the season prior.

\$1.18 billion +15%
Invested in the Economy

2.09 million +23%
Total Attendance

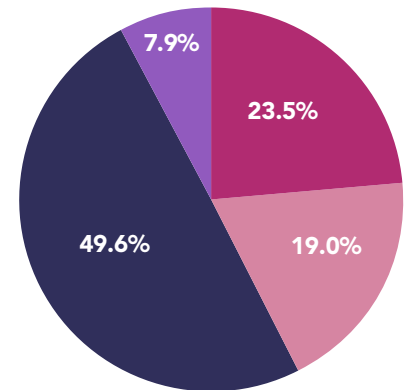
15,900 +12%
Administrators Employed*

23,700 +14%
Artists Employed

4,000 -6%
Board Members/Trustees Engaged

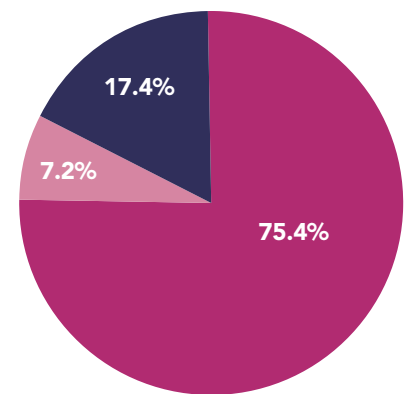


Revenue Breakdown



- Box Office Revenue
- Other Earned Revenue
- Private Support
- Government Support†

Expense Breakdown



- Program ‡
- Development
- General/Administrative

125 U.S. cities with opera companies**

13 Canadian cities with opera companies**

Cincinnati Opera



* Administrators include full-time, part-time, and contract positions.

**Opera companies in OPERA America's Professional Company Membership

† The higher-than-average level of government support in fiscal year 2023 reflects the continued influx of pandemic relief through federal programs, awarded directly and through state and local arts agencies. Pre-pandemic, government support accounted for less than 5% of all revenue.

‡ For the purposes of this report, marketing expenses are included in program expenses.

PERFORMANCE ACTIVITY

Entrepreneurial artists and innovative producers are expanding the definition of opera and infusing the art form with a diversity of stories, perspectives, and artistic styles. In 2022–2023, companies increased the number of productions and performances in their seasons over previous years. They offered fewer distinct titles, but new work still comprised nearly half of the titles offered; works written after 1970 made up just over a quarter of all productions.

237 -8%
**Distinct
Titles**

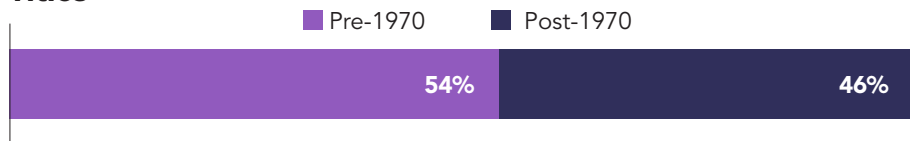
468 +4%
Productions

1,726 +8%
Performances

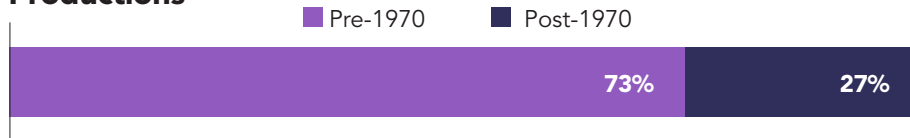
277 -9%
**Different
Venues**



Titles



Productions



Top 5 Most-Produced Works



1. *Tosca* (Puccini/Giacosa/Illica)
2. *La traviata* (Verdi/Piave)
3. *La bohème* (Puccini/Giacosa/Illica)
4. *The Marriage of Figaro* (Mozart/Da Ponte)
5. *Carmen* (Bizet/Meilhac/Halévy)

Top 5 Most-Produced North American Works



1. *Susannah* (Floyd)
2. *Amahl and the Night Visitors* (Menotti)
3. *The Medium* (Menotti)
4. *Bon Appétit!* (Hoiby/Child/Shulgasser)
- 5a. *The Falling and the Rising* (Redler/Dye)
- 5b. *Highway 1, U.S.A.* (Still/Arvey)

Data are drawn from the FY2023 Professional Opera Survey, extrapolating for OPERA America's full Professional Company Membership and the most up-to-date information from OPERA America's Performance Database. This summary does not include the extensive activity of OPERA America's Associate Members and Educational Producing Associate Members, or the very few North American companies outside of the membership — nor the secondary economic impact of activity related to attendance.

Understanding Opera's New Audiences

In recent seasons, surveys of opera companies of all sizes documented record-breaking levels of first-time attendance.

This is excellent news, as well-attended houses are central to the artistic and financial health of opera companies. But essential follow-up questions quickly emerged: How can opera companies retain these newcomers and engage them as fully as possible in the life of opera companies?

Over the past year, OPERA America undertook a national research project in partnership with the cultural research firm Slover Linett at NORC, based at the University of Chicago. Published in November, the report, *Understanding Opera's New Audiences*,

offers key findings and detailed analyses derived from over 11,000 survey responses across 36 opera companies of all budget sizes, geographies, and formats. The report is available at operaamerica.org/NewAudiences.

This report does not offer a universal solution for attracting and retaining new audiences but points to numerous avenues for additional analysis and experimentation. The study invites opera companies to think creatively about confronting the barriers and seizing the opportunities revealed by respondents — in ways that can advance the collective understanding of new-to-opera audiences and their experiences.

Key Findings

- 1** Most New-to-Opera attenders initially come for a new "experience," and they tend to stick to the classics.
- 2** Many New-to-Opera attenders listen to and watch opera recordings before they attend in person.
- 3** New-to-Opera attenders have positive experiences and are eager to recommend opera to others.
- 4** Ticket cost prevents audiences from returning more frequently — especially those who are New to Opera.
- 5** New-to-Opera attenders differ notably from Ongoing audiences — both demographically and behaviorally.
- 6** New-to-Opera attenders who return tend to be more engaged with the performing arts generally.
- 7** Different types of opera companies play different but crucial roles in sustaining local audiences.

New work or classics?

A majority of recent newcomers attended a "famous or well-known" work on their first visit, and 82% expressed interest in seeing more of the classics. But new work is still important: 41% are interested in premieres and 31% in works that deal with issues relevant to today. Adjacent studies also suggest that newcomers want to attend organizations with artistic brands that incorporate a range of work, even if their first visit is to something more traditional.

What do we know about New-to-Opera attenders?



50% first experience opera through recordings

59% come to opera to try something new

34% listen to music from the opera before they come

52% think opera tickets are too expensive

Understanding Opera's New Audiences was supported, in part, by an award from the Research Grants in the Arts program at the National Endowment for the Arts, with additional, generous leadership support by Bob Ellis, John Nesholm, and The Heinz Endowments.

KEY FINDINGS

Introduction to the FY2023 Key Findings

The key findings of the *Annual Field Report* are drawn from the fiscal year 2023 (FY2023) data submitted by OPERA America's member opera companies in the annual Professional Opera Survey (POS) administered by SMU Data Arts.

Participating Companies

This year, 148 of OPERA America's 204 Professional Company Members in the United States and Canada completed the POS. Of those companies, 97 qualified for the Constant Sample Group by reporting their data annually for the most recent five-year period. (See pages 14–15 for the listing of companies.)

In this report, OPERA America's Professional Company Members are aggregated into five groups based on the size of their operating budgets:

- Budget 1 (B1) — \$15 million or more
- Budget 2 (B2) — \$3 million to \$15 million
- Budget 3 (B3) — \$1 million to \$3 million
- Budget 4 (B4) — \$250,000 to \$1 million
- Budget 5 (B5) — Under \$250,000

While the majority of the Constant Sample Group is composed of American opera companies, it includes five Canadian companies. These companies are included with their U.S. peers throughout the report, with the exception of the analysis of company revenue: The three Budget 2 Canadian companies in the Constant Sample Group are separated to highlight how their income streams vary from American companies. (Full data tables of the Canadian-only analysis are available online.)

New KPI Format

Readers familiar with OPERA America's past *Annual Field Reports* will notice a new format this year. Findings are presented around "key performance indicators" (KPIs) that focus on the most pertinent takeaways. Charts highlight trends

over the past five fiscal years — FY2019 to FY2023. Since FY2019 was the last full year before the pandemic, these multiyear snapshots provide a window into the impact of COVID and the industry's recovery since then.

Adjoining tables summarize key reference points for readers, often presented as:

- One-Year Change (1-Yr. Δ) — The percent change from FY2022 to FY2023.
- Four-Year Change (4-Yr. Δ) — The percent change from FY2019 to FY2023.
- Five-Year Average (5-Yr. Avg.) — The average value from FY2019 to FY2023.
- Five-Year Adjusted Value (5-Yr. Avg. w/o FY21) — The average value from FY2019 to FY2023 without including FY2021, the year most severely impacted by the pandemic.

Full data tables are available for download at operaamerica.org/AFR2024.

How to Use the Report

The report is a tool for opera company staff and trustees, among others, to understand recent trends in the industry that underpin the operating landscape and to have general benchmarks by company size for comparing local progress. Companies that participated in the POS can contact OPERA America to request customized benchmarking reports of their data against those of peer companies.

It is important to remember that the benchmarks provided here are averages, based on self-reported data in the POS, and are not intended as recommendations or goals. This information should serve as a reference to make decisions that are appropriate for each company and its community.

Note: For the purposes of consistent reporting with the other years in the five-year period covered by this report, production and performance counts continue to track only main season staged performances of operas and musicals. Digital performances were counted only if they were presented live and not pre-recorded.

KEY FINDINGS

Revenue Breakdown

Opera companies rely on a combination of earned revenue and contributed revenue. The former includes box office receipts, investment income, and other sources of revenue such as program enrollment fees and production rentals fees. Contributed revenue includes gifts from individuals, special events, institutions, and other sources. In practice, this nomenclature is misleading, as both types of revenue must be “earned.” Both are legitimate and fundamental sources of income that rely on considerable effort of the marketing and development teams, with full cooperation of their board and staff colleagues.

In FY2023, earned revenue accounted for only 21–33% for most Budget 2–5 companies with ticket sales representing the largest portion. Budget 1 companies reached nearly 50% earned revenue but only half was derived from ticket sales; the rest was earned from their more substantial endowments. (The four-year change in investment income fluctuated across budget groups due to varying internal decisions governing endowment draws.)

Across nearly all companies, box office revenue remained below pre-pandemic levels, reflecting the slow return of audiences. The one exception is among Budget 4 companies: These companies are generally younger and are only recently establishing effective systems that generate increases from select earned and contributed sources.

FY2023 contributed revenue made up the other 67–79% of income for Budget 2–5 companies (and the other 50% for Budget 1 companies). The largest part of contributed revenue continues to come from individuals and board members. The change in these values vary across budget groups (often due to variations in how they are reported in the POS); yet with only a few exceptions, these lines remained below pre-pandemic levels.

It is worth noting that government support in FY2023 was still significantly buoyed over pre-pandemic levels thanks to various government programs, including Payroll Protection Program loans, Shuttered Venue Operators Grants, Employee Retention Tax Credits, and special state and local grants.



CHART: AVERAGE REVENUE FOR BUDGET 2 COMPANIES, FY2023 (FEATURED EXAMPLE)

Earned (32.6%)

- I Box Office (21.3%)
- II Investment (1.9%)
- III Other Earned (9.4%)

Contributed (67.4%)

- IV Board (11.9%)
- V Individual (23.7%)
- VI Special Events* (7.1%)
- VII Corporate (1.6%)
- VIII Foundation (10.8%)
- IX In-Kind (0.5%)
- X Government (9.9%)
- XI Other Contrib. (1.9%)

Chart with visualization of Budget 2 averages provided as an example.

	Budget 1		Budget 2		Budget 3		Budget 4		Budget 5		Canadian Budget 2	
	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ
Earned Revenue	47.0%	-3.7%	32.6%	-12.9%	24.5%	-16.5%	25.1%	-2.0%	20.7%	-16.7%	25.0%	-11.6%
Box Office	25.8%	-19.4%	21.3%	-21.0%	17.0%	-5.8%	17.9%	+8.5%	6.9%	-35.0%	21.9%	-13.7%
Investment	10.4%	+28.8%	1.9%	-43.7%	2.4%	+238.7%	1.3%	+155.0%	0.0%	-99.8%	0.2%	+94.5%
Other Earned	10.9%	+23.6%	9.4%	+33.1%	5.1%	-52.0%	5.8%	-31.6%	13.8%	+7.1%	2.9%	+2.6%
Contributed Revenue	53.0%	+9.2%	67.4%	-4.9%	75.5%	+5.0%	74.9%	+28.9%	79.3%	+26.5%	75.0%	+7.9%
Board	12.8%	-31.0%	11.9%	-24.8%	11.2%	-9.5%	8.4%	-5.1%	6.2%	+50.0%	--	--
Individual	18.6%	+25.1%	23.7%	-16.6%	20.5%	+1.9%	18.1%	-17.1%	17.8%	-38.5%	15.7%	+17.9%
Special Events*	2.4%	--	7.1%	--	9.3%	--	5.7%	--	2.6%	--	6.6%	--
Corporate	1.4%	-46.6%	1.6%	-16.2%	3.1%	-22.1%	6.1%	+45.7%	0.8%	+8.8%	3.0%	-20.8%
Foundation	9.2%	+0.7%	10.8%	-31.2%	12.7%	-41.6%	20.0%	+49.2%	32.5%	+42.7%	13.3%	-21.5%
In-Kind	0.8%	-20.5%	0.5%	-42.7%	2.3%	-25.5%	2.9%	-1.3%	0.7%	-3.7%	0.6%	-35.5%
Government	4.2%	+356.6%	9.9%	+172.5%	13.8%	+190.3%	12.8%	+190.0%	18.6%	+263.8%	34.3%	+27.5%
Other Contrib.	3.6%	+160.7%	1.9%	-58.0%	2.6%	-55.9%	1.1%	-58.7%	0.1%	-40.3%	1.4%	-80.8%

*The Professional Opera Survey began tracking special events support in FY2020. Prior to FY2020, special events support was split across private support categories. Since special events revenue was not broken out in FY2019 reporting, the four-year change is not available.

KEY FINDINGS

Expense Breakdown

The expenses of an opera company can be compared at the highest level across three categories:

- (1) program expenses, including all costs related to an organization’s programs and services, as well as marketing, box office, education, community programs, and other expenses associated with producing and promoting staged performances;
- (2) development expenses, including all costs related to raising contributed revenue; and
- (3) general/administrative expenses, including all other operating costs.

Across the industry, program expenses encompass the

majority of operating budgets with development and general/administrative expenses in the 10–15% range. Additionally, because opera companies rely so heavily on personnel, comparing these three types of expenses across personnel and non-personnel categories is another helpful lens.

With few exceptions, FY2023 expenses increased substantially over pre-pandemic levels. This reveals the impact of inflation on the field and, in the case of personnel, the consequence of strategic investments in recruitment and retention. Nearly all companies spent more on programs, development, and general/administrative expenses than in FY2019. In many cases, personnel expenses increased more than non-personnel expenses.

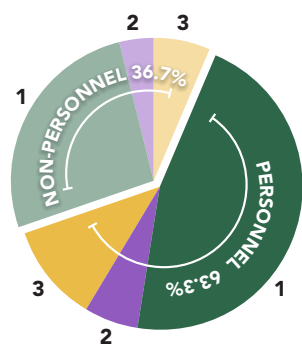


CHART: AVERAGE EXPENSES FOR BUDGET 2 COMPANIES, FY2023 (FEATURED EXAMPLE)

Program (72.4%)

- 1 Personnel (46.1%)
- 1 Non-Personnel (26.3%)

Development (10.0%)

- 2 Personnel (6.2%)
- 2 Non-Personnel (3.8%)

General/Administrative (17.6%)

- 3 Personnel (11.1%)
- 3 Non-Personnel (6.6%)

Chart with visualization of Budget 2 averages provided as an example.

	Budget 1		Budget 2		Budget 3		Budget 4		Budget 5	
	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ	FY23	4-Yr. Δ
Program	77.2%	+12.1%	72.4%	+10.0%	73.9%	+9.5%	64.1%	+22.0%	73.0%	+2.3%
Personnel	57.0%	+11.9%	46.1%	+13.5%	48.0%	+22.3%	39.6%	+13.1%	54.4%	+17.7%
Non-Personnel	20.2%	+12.8%	26.3%	+4.5%	25.8%	-8.3%	24.5%	+39.9%	18.6%	-26.0%
Development	7.6%	+5.0%	10.0%	+11.3%	8.9%	-15.7%	8.9%	+63.4%	5.1%	+315.7%
Personnel	4.6%	-3.7%	6.2%	+9.0%	6.1%	+8.5%	5.5%	+68.8%	3.7%	+587.3%
Non-Personnel	3.0%	+22.5%	3.8%	+15.2%	2.8%	-43.0%	3.3%	+55.1%	1.4%	+107.1%
General/Administrative	15.2%	+29.5%	17.6%	+19.1%	17.2%	+6.0%	27.1%	+71.9%	21.8%	-18.3%
Personnel	7.7%	+26.7%	11.1%	+40.7%	11.1%	+19.2%	18.0%	+79.5%	13.1%	-39.3%
Non-Personnel	7.5%	+32.4%	6.6%	-5.4%	6.1%	-11.6%	9.1%	+58.5%	8.8%	+68.6%

Canadian Comparison

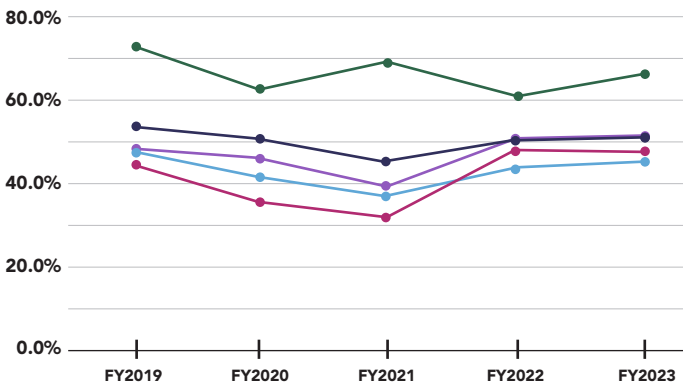
Canadian opera companies differ most from American companies in their sources of revenue. For the Budget 2 Canadian companies in the Constant Sample Group, box office revenue in FY2023 comprised a nearly identical percentage to that of their American cousins. However, they showed less in investments and other earned revenue. In contributed revenue, Canadians received less than half as much from individuals and board members, although their government support comprised three-and-a-half times as much as that of American companies.

KEY FINDINGS

Core Artistic Expense Ratio

The ratio of core artistic expense, as a percentage of total budget, is a measure of how much opera companies dedicate to staging productions. These expenses encompass both personnel and non-personnel artistic expenses, including costs associated with singers (soloists and choristers), instrumentalists, technicians, stage sets and props, artistic administrators, and more.

CHART: CORE ARTISTIC EXPENSE RATIO ACROSS BUDGET GROUPS, FY2019–FY2023



In FY2023, the average core artistic expense ratio remained just above the five-year averages for all budget groups, which, over the past five years, has remained relatively stable. (Note: The ratio dipped for most companies in FY2021 when artistic activity dropped off during the height of the pandemic.)

	FY23	5-Yr. Avg.	5-Yr. Avg. (w/o FY2021)	4-Yr. Δ
Budget 1	52.1%	50.4%	51.7%	-3.0%
Budget 2	45.7%	43.3%	44.9%	-4.9%
Budget 3	52.6%	47.5%	49.4%	+6.9%
Budget 4	47.7%	41.7%	44.1%	+6.0%
Budget 5	66.7%	66.5%	65.9%	-8.5%

Calculation Note: A calculation of the total artistic expenses reported in the Professional Opera Survey divided by total operating expenses.

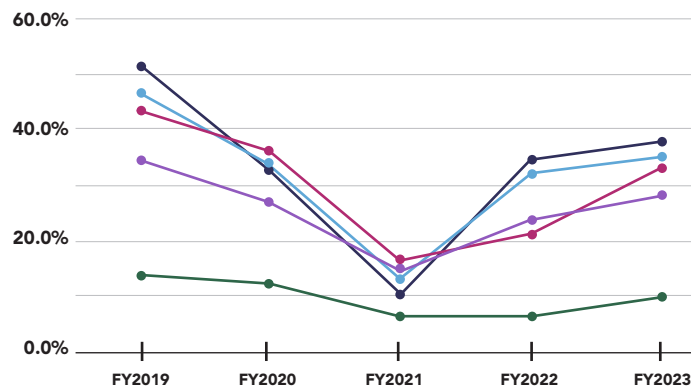
Program Coverage

Program coverage is the percentage of core artistic expenses covered by box office revenue — in other words, how much of the cost of productions is offset by ticket income.

In FY2023, for all but the smallest companies, average program coverage ranged from 28% to 38%. Across all budget groups, the metric increased over the prior year, reflecting incrementally

increased ticket income, predominantly from increases in unit sales. However, the combined impact of inflation on production expenses and smaller audiences meant that program coverage still remained below pre-pandemic levels. (Note: The ratio dropped for most companies in FY2021 when most artistic programming during the pandemic was offered for free.)

CHART: PROGRAM COVERAGE ACROSS BUDGET GROUPS, FY2019–FY2023



	FY23	5-Yr. Avg.	5-Yr. Avg. (w/o FY2021)	1-Yr. Δ	4-Yr. Δ
Budget 1	37.7%	33.3%	39.1%	+9.7%	-27.0%
Budget 2	35.1%	32.1%	36.9%	+8.9%	-24.7%
Budget 3	27.5%	25.4%	28.2%	+14.7%	-19.6%
Budget 4	32.8%	29.9%	33.3%	+54.2%	-24.6%
Budget 5	9.7%	9.7%	10.5%	+48.3%	-29.4%

Calculation Note: The total box office revenue divided by a calculation of the total artistic expenses reported in the Professional Opera Survey.

KEY FINDINGS

Revenue Productivity Ratios

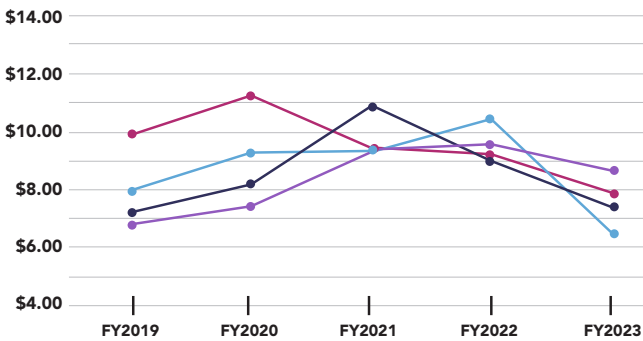
Revenue productivity ratios measure how many dollars are earned for each dollar spent on revenue-generating activities; expenses include personnel and non-personnel costs. These ratios reflect the effectiveness of opera companies at generating revenue.

DEVELOPMENT

Average development productivity is the dollars raised from contributions for every dollar spent on fundraising. Historically, this number has tended to fall between \$7.00 and \$8.00. The ratio is often higher for smaller companies with fewer development expenses because the general director serves as the head fundraiser; or for any company in the midst of an endowment or capital campaign.

In FY2023, average development productivity ranged from \$6.43 to \$15.37 across budget groups. This represented a decrease for all companies from the prior year: In fiscal years 2020 through 2022, the ratio was inflated due to the receipt of sizeable federal pandemic aid. FY2023 numbers mark a trend back toward pre-pandemic rates; however, with relatively static fundraising and increased expenses, some companies were less efficient at raising money than in FY2019.

CHART: DEVELOPMENT PRODUCTIVITY ACROSS BUDGET GROUPS, FY2019–FY2023



Note: Budget 5 is not visualized on the chart due to its broad range and fluctuations over the past five years.

	FY23	5-Yr. Avg.	1-Yr. Δ	4-Yr. Δ
Budget 1 ●	\$7.42	\$8.52	-17.5%	+3.9%
Budget 2 ●	\$6.43	\$8.70	-38.6%	-19.1%
Budget 3 ●	\$8.72	\$8.36	-8.7%	+27.7%
Budget 4 ●	\$7.91	\$9.53	-14.1%	-20.3%
Budget 5 ●	\$15.37	\$26.75	-36.9%	-70.3%

Calculation Note: The total contributed revenue divided by the total fundraising expenses reported in the Professional Opera Survey.

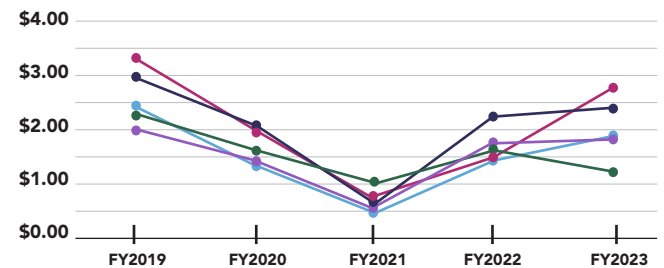
MARKETING

Average marketing productivity is the dollars earned from the box office for every dollar spent on marketing. Historically, this number has tended to fall between \$1.75 and \$2.50. Larger companies, with more seats to sell and higher ticket prices, often see higher values than smaller companies with smaller venues. Festivals typically have the highest levels since many buyers purchase multiple tickets at once for condensed seasons.

In FY2023, average marketing productivity ranged from \$1.27 to \$2.76 across budget groups. This represented an increase for all companies from the prior year, reflecting gradually increasing sales in the recent season. However, productivity still remains below pre-pandemic levels. (Note: Ratios dropped in FY2020–22 when much activity was free.)

Remember, some marketing efforts are focused on institutional reputation, which is critical to fundraising. A lower-than-average ratio is not necessarily a reflection of poor performance.

CHART: MARKETING PRODUCTIVITY ACROSS BUDGET GROUPS, FY2019–FY2023



	FY23	5-Yr. Avg.	1-Yr. Δ	4-Yr. Δ
Budget 1 ●	\$2.46	\$2.08	+8.7%	-17.8%
Budget 2 ●	\$1.88	\$1.52	+28.4%	-21.9%
Budget 3 ●	\$1.82	\$1.52	+4.9%	-9.6%
Budget 4 ●	\$2.76	\$2.07	+85.6%	-17.4%
Budget 5 ●	\$1.27	\$1.58	-21.4%	-45.3%

Calculation Note: The total box office revenue divided by the total marketing expenses reported in the Professional Opera Survey.

KEY FINDINGS

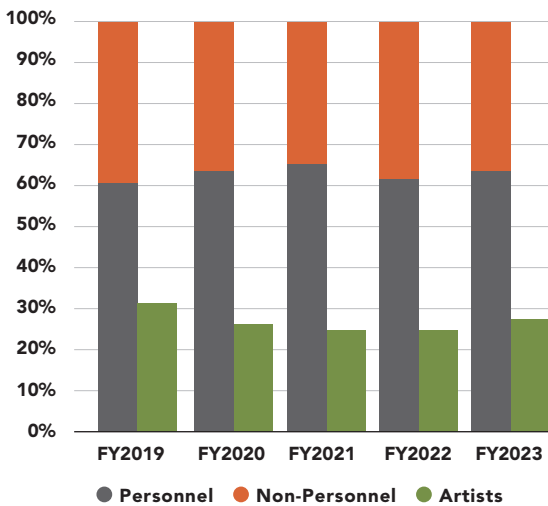
Personnel/Non-Personnel Ratio

The personnel/non-personnel ratio compares the cost of personnel to the cost of everything else. It is one of the most consistent indicators in opera’s business model. Personnel costs include soloists, choruses, orchestra, production staff, administrators, and others — plus employment benefits where they are provided in the POS — while non-personnel costs include sets, costumes, copy machines, computers, and all

the other “stuff” needed to run a company.

Over the 40 years OPERA America has been collecting data, the ratio has remained roughly two-thirds personnel and one-third non-personnel. It requires a lot of people to produce opera, and that hasn’t changed. Approximately half of all personnel expenses go to artists. (Note: The percentage of expenses to artists dipped in FY2021 when operating budgets fell due to canceled productions.)

CHART: PERSONNEL, NON-PERSONNEL & ARTISTS ACROSS BUDGET GROUPS, FY2019–FY2023



	Personnel		Non-Personnel		Artists	
	FY23 Avg.	5-Yr. Avg.	FY23 Avg.	5-Yr. Avg.	FY23 Avg.	5-Yr. Avg.
Budget 1	69.3%	71.2%	30.7%	28.8%	42.3%	41.6%
Budget 2	63.3%	62.5%	36.7%	37.5%	27.5%	27.2%
Budget 3	65.2%	63.6%	34.8%	36.4%	35.4%	31.0%
Budget 4	63.1%	65.4%	36.9%	34.6%	27.3%	26.8%
Budget 5	71.2%	72.7%	28.8%	27.3%	34.5%	42.5%

Calculation Note: The personnel ratio is the total salaries and employment benefits reported in the Professional Opera Survey divided by total operating expenses. The non-personnel ratio is all other expenses divided by total operating expenses.

Other Departmental Investment

Opera companies appropriately spend the majority of their budgets on their artistic product. How they distribute their budgets across other departments is a reflection of their strategy and values. How much should be spent on selling tickets? On raising money from donors? On serving the public through community programs?

In FY2023, companies spent 5–10% each on both marketing and development, reflecting the importance of both functions to generate revenue. Education and community engagement received only 2–5%; this is persistently the least funded departmental area, even as opera companies promote their accomplishments in their community work. Personnel costs exceeded non-personnel costs in all areas other than in marketing, where non-personnel costs included costly direct mail, telemarketing, and advertising.

	Budget 1	Budget 2	Budget 3	Budget 4	Budget 5
Marketing	8.0%	8.6%	7.9%	5.7%	5.1%
Personnel	3.1%	3.8%	3.9%	1.9%	3.4%
Non-Personnel	4.9%	4.8%	4.0%	3.8%	1.7%
Development	7.6%	10.0%	8.9%	8.9%	5.1%
Personnel	4.6%	6.2%	6.1%	5.5%	3.7%
Non-Personnel	3.0%	3.8%	2.8%	3.3%	1.4%
Education/Comm. Engagement	2.5%	4.1%	5.2%	3.9%	--*
Personnel	1.6%	2.8%	3.0%	1.9%	--
Non-Personnel	0.9%	1.3%	2.2%	2.0%	--

*None of the Budget 5 companies in the Constant Sample Group reported specific Education/Community Engagement expenses.

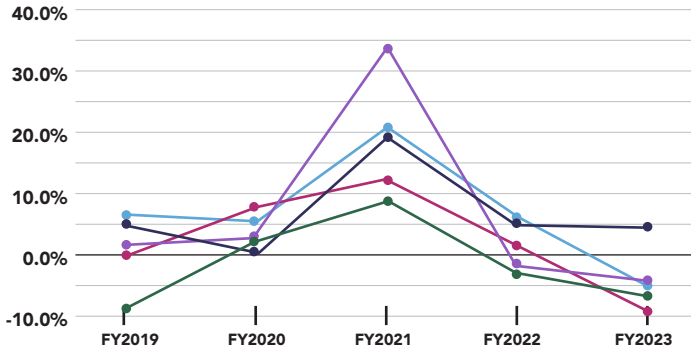
KEY FINDINGS

Surplus/Deficit to Expense Ratio

Financial surpluses and deficits are a frequent measure of operational health — although beware: A company’s financial deficit is often linked to its artistic quality, staff capacity, and civic profile. Bottom lines in FY2023 were on par with or slightly below prior years. While Budget 1 companies

showed a modest average surplus of nearly 5%, all other companies had deficits of 5% to 10%. For all but the smallest companies, the five-year average shows modest surpluses. (Note: The ratio spiked in FY2021 when operating budgets fell due to canceled productions.)

CHART: SURPLUS/DEFICIT TO EXPENSE RATIO ACROSS BUDGET GROUPS, FY2019–FY2023



	FY23	5-Yr. Avg.	5-Yr. Avg. (w/o FY2021)
Budget 1 ●	4.6%	7.0%	3.9%
Budget 2 ●	-5.0%	7.0%	3.4%
Budget 3 ●	-4.5%	6.9%	0.0%
Budget 4 ●	-9.6%	2.9%	0.3%
Budget 5 ●	-5.9%	-1.2%	-3.8%

Calculation Note: Total surplus or deficit divided by total operating expenses.

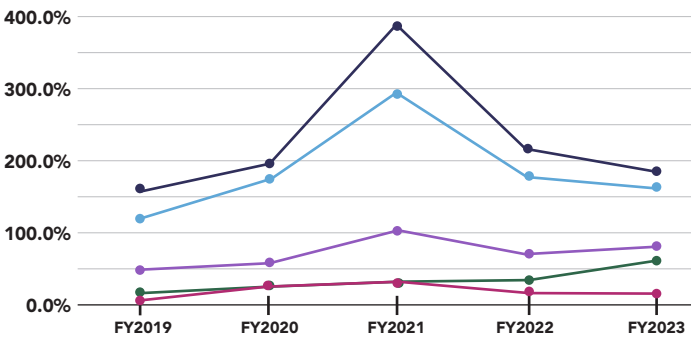
Endowment & Reserves to Expense Ratio

The ratio of endowment and reserves to expenses is a measure of the size of a company’s financial assets against its annual operating budget. An endowment is a restricted income source established to generate revenue for an organization. This includes board-designated, term, and permanently restricted endowments. A reserve fund is a more liquid asset, with an unrestricted principal body. In this report, these funds all have been merged.

Endowments are a healthy sign for opera companies. Many strive to build an endowment that is 100% of the annual

budget; reaching 200% or larger is a distinguishing achievement. In FY2023, Budget 1 and 2 companies neared the 200% mark on average while Budget 3 companies neared the 100% mark; few smaller companies, which are usually younger organizations, had endowments of notable size. Across all companies, the ratio is higher than before the pandemic — reflecting collective progress — due to a combination of strong market gains, endowment campaigns, and in some cases, reduced operating budgets. (Note: The ratio spiked in FY2021 when operating budgets fell due to canceled productions.)

CHART: ENDOWMENT TO EXPENSE RATIO ACROSS BUDGET GROUPS, FY2019–FY2023



	FY23	5-Yr. Avg.	5-Yr. Avg. (w/o FY2021)
Budget 1 ●	187.3%	229.2%	189.2%
Budget 2 ●	159.4%	185.4%	158.4%
Budget 3 ●	80.9%	73.1%	66.1%
Budget 4 ●	18.0%	21.6%	18.6%
Budget 5 ●	61.6%	32.9%	33.1%

Calculation Note: The total of several endowments and reserves reported in the Professional Opera Survey divided by total operating expenses.

KEY FINDINGS

Production & Performance Activity

The number of productions offered by an opera company in its season, along with the number of performances of each production, are measures of a company's output. In FY2023, Budget 1 and 2 companies produced 4–6 works while

Budget 3–5 companies produced 1–3 operas.

While average productivity increased in the FY2023 season compared to the prior season, it did not return to pre-pandemic levels across any of the budget group averages.

	Mainstage Productions			Performances of Mainstage Productions		
	FY23	1-Yr. Δ	4-Yr. Δ	FY23	1-Yr. Δ	4-Yr. Δ
Budget 1	6.1	+14.0%	-9.3%	37	+21.6%	-12.6%
Budget 2	4.0	+18.9%	-9.3%	18	+18.7%	-16.4%
Budget 3	2.7	+1.7%	-20.3%	7.1	+1.3%	-29.3%
Budget 4	2.3	-4.5%	-14.3%	6.5	+1.7%	-11.4%
Budget 5	1.4	+40.0%	-41.7%	4.4	+83.3%	-45.0%

Opera Price Index

OPERA America defines the annualized growth of the average per-production cost at an opera company as the Opera Price Index (OPI). This measure is compared to the Consumer Price Index (CPI) to assess the cost of producing opera in relation to the general cost of living.

The OPI had been at least two times the CPI in pre-pandemic years, reflecting the labor intensity of the

industry. While the CPI can be mitigated by replacing people with technology and relocating production overseas to minimize prices, opera companies cannot replace their local orchestras and choruses. Across the five years covered by this report (FY2019 to FY2023), the OPI increased for all companies other than Budget 2 at an annualized rate higher than the CPI of 4.49%.

CHART: OPERA PRICE INDEX VS. CONSUMER PRICE INDEX, FY2019–FY2023

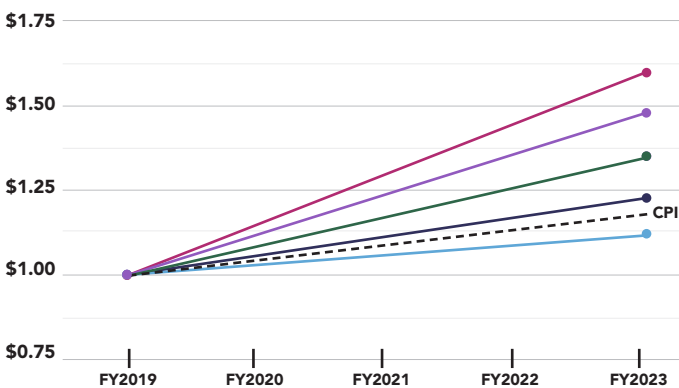


Chart Note: The OPI for each budget group is normalized in the graph above to show the four-year change against that of the national CPI.

	FY19	FY23	4-Yr. Δ	Annualized Δ
CPI - - - -	\$1.00	\$1.19	+19.18%	+4.49%
Budget 1 ●	\$3,082,513	\$3,757,611	+21.90%	+5.08%
Budget 2 ●	\$867,099	\$972,892	+12.20%	+2.92%
Budget 3 ●	\$248,851	\$371,378	+49.24%	+10.53%
Budget 4 ●	\$76,449	\$121,840	+59.37%	+12.36%
Budget 5 ●	\$46,807	\$63,430	+35.51%	+7.89%

KEY FINDINGS

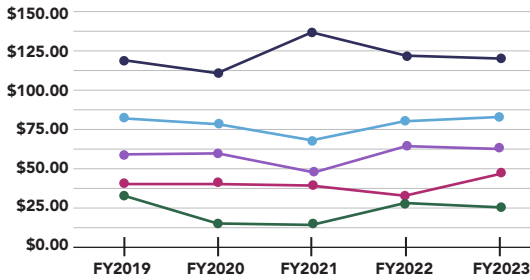
Pricing & Yield per Ticket

How opera companies price their tickets reflects the need to balance maximizing earned revenue and increasing access. While Budget 4 companies saw a sizeable increase in yield from FY2022 to FY2023, other companies remained fairly stable. Against pre-pandemic levels, all companies except for Budget 1 have increased their high ticket price, and all except for

Budgets 2 and 3 have decreased their low ticket price.

The yield per ticket is a measure of the average price paid for a ticket across the entire season. Over the five years covered by this study (FY2019 to FY2023), average yield has remained remarkably stable across all budget groups.

CHART: YIELD PER TICKET ACROSS BUDGET GROUPS, FY2019–FY2023



	High Ticket Price				Low Ticket Price				Yield per Ticket			
	FY23	5-Yr. Avg.	1-Yr. Δ	4-Yr. Δ	FY23	5-Yr. Avg.	1-Yr. Δ	4-Yr. Δ	FY23	5-Yr. Avg.	1-Yr. Δ	4-Yr. Δ
Budget 1 ●	\$343.29	\$306.90	+6.0%	-0.4%	\$19.43	\$22.03	-2.2%	-10.5%	\$119.65	\$121.52	-1.7%	+1.4%
Budget 2 ●	\$200.91	\$169.16	+10.2%	+14.5%	\$20.59	\$21.80	-4.8%	+2.3%	\$83.19	\$78.69	+2.8%	+0.7%
Budget 3 ●	\$135.30	\$132.39	-15.5%	+4.0%	\$24.85	\$23.59	-1.4%	+3.1%	\$62.93	\$59.15	-3.1%	+7.7%
Budget 4 ●	\$90.58	\$80.29	+10.7%	+16.4%	\$18.47	\$17.55	+2.6%	-4.7%	\$47.26	\$39.68	+43.9%	+19.7%
Budget 5 ●	\$49.00	\$43.90	+22.5%	+24.1%	\$13.20	\$16.73	-5.7%	-37.9%	\$26.06	\$23.07	-4.3%	-19.2%

Calculation Note: The total box office revenue divided by the total number of tickets reported in the Professional Opera Survey.

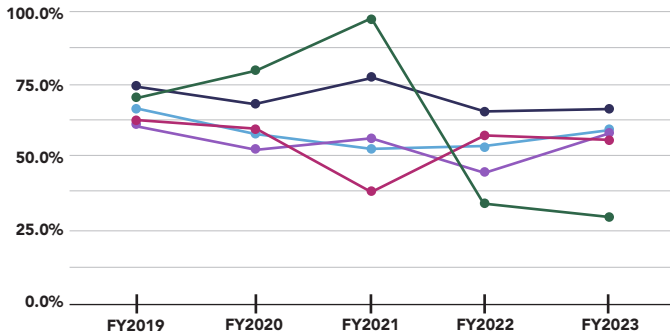
Note: For FY2020, FY2021, and FY2022, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to pre-pandemic seasons.

Audiences & Capacity Sold

Audience growth is a perennial priority for opera companies, especially in the years after the pandemic. For larger companies, audiences in FY2023 remained below pre-pandemic levels by a quarter; smaller companies are closer to returning to prior their audience sizes but are still below FY2019 by 5–13%.

The capacity of theaters sold is a measure of how effective opera companies are at filling their theaters. Over the past five years, average capacity sold has been in the range of roughly 55–70%. In FY2023, all companies except for the smallest were about 10% shy of their pre-pandemic capacity levels. The significant variation among Budget 5 companies is driven by the unique circumstances of one company.

CHART: CAPACITY SOLD ACROSS BUDGET GROUPS, FY2019–FY2023



	Audiences			Capacity	Capacity Sold			
	FY23	1-Yr. Δ	4-Yr. Δ	FY23	FY23	5-Yr. Avg.	5-Yr. Avg. (w/o FY2021)	4-Yr. Δ
Budget 1 ●	67,597	+37.5%	-25.8%	99,482	67.9%	71.3%	69.8%	-9.4%
Budget 2 ●	15,411	+34.4%	-24.2%	25,611	60.2%	58.6%	60.2%	-10.6%
Budget 3 ●	3,691	+30.5%	-27.2%	6,189	59.6%	55.0%	55.1%	-4.6%
Budget 4 ●	2,283	+29.9%	-5.1%	3,956	57.7%	55.0%	59.3%	-8.9%
Budget 5 ●	434	+99.5%	-13.3%	1,389	31.2%	63.1%	54.2%	-56.3%

Calculation Note: The total number of tickets sold (non-complimentary) reported in the Professional Opera Survey divided by the total number of seats available.

Professional Company Members, 2023–2024

OPERA America’s Professional Company Members are asked to complete the Professional Opera Survey annually based on the data of their last completed fiscal year. In 2024, 148 of OPERA America’s 204 Professional Company Members in the United States and Canada completed the survey. Of those companies, 97 qualified for the Constant Sample Group by reporting their data annually for the most recent five-year period.

Against the Grain Theatre ^C	Connecticut Lyric Opera	Kentucky Opera ^{P G3}	Opera 5 ^{P C}
Alliance for New Music-Theatre ^P	The Dallas Opera ^{P G1}	Knoxville Opera ^{P G3}	Opera Baltimore ^{P G4}
Amarillo Opera ^{P G4}	Dayton Performing Arts Alliance ^{P G3}	LA Opera ^{P G1}	Opera Birmingham ^{P G4}
American Baroque Opera Co.	Dell'Arte Opera Ensemble	Lakes Area Music Festival ^P	The Opera Buffs ^N
American Lyric Theater ^{P G4}	Des Moines Metro Opera ^{P G2}	Lamplighters Music Theatre ^{P G3}	Opera Carolina
American Opera Projects ^{P G4}	Detroit Opera ^{P G1}	The Lighthouse Opera Company ^P	Opera Colorado ^{P G2}
Anchorage Opera ^{P G4}	Edmonton Opera ^C	Little Opera Company ^C	Opera Columbus ^{P G3}
Anima Mundi Productions ^P	El Paso Opera ^{P G4}	The Little OPERA Theatre of NY	Opera Company of Middlebury
Annapolis Opera	Encompass New Opera Theatre	Livermore Valley Opera	Opera Cultura ^P
Ardea Arts	Eugene Opera ^{P G4}	Long Beach Opera ^{P G3}	Opéra de Montréal ^{P G2 C}
Arizona Opera ^{P G2}	Experiments in Opera ^{P G5}	Loose Tea Music Theatre ^C	Opéra de Québec ^C
Ars Lyrica Houston ^{P G4}	Fargo-Moorhead Opera	Lyric Opera of Chicago ^{P G1}	Opera Ebony ^P
Ars Minerva	FAWN Chamber Creative ^C	Lyric Opera of Kansas City ^{P G2}	Opera for the Young ^{P G5}
Astrolabe Musik Theatre ^C	Festival Opera ^P	Lyric Opera of Orange County ^{P N}	Opera Fort Collins
The Atlanta Opera ^{P G2}	Finger Lakes Opera ^{P G4}	Lyric Opera of the North	Opera Grand Rapids
Austin Opera ^{P G2}	First Coast Opera ^P	Madison Opera ^{P G3}	Opera Idaho ^P
Beth Morrison Projects ^{P G3}	Richard B. Fisher Center for the Performing Arts ^P	Manitoba Opera ^{P G3 C}	Opera in the Heights
Boston Baroque ^P	Florentine Opera Company ^{P G3}	Marble City Opera ^P	Opera Ithaca
Boston Lyric Opera ^{P G2}	Florida Grand Opera ^{P G2}	Maryland Opera ^P	Opera Kelowna ^C
Boston Opera Collaborative ^{P G5}	Fort Worth Opera ^{P G3}	MassOpera ^P	Opera Lafayette ^P
Boulder Opera	The Glimmerglass Festival ^{P G2}	The Metropolitan Opera	Opera Las Vegas ^P
Buffalo Opera Unlimited ^{P N}	Greensboro Opera ^P	Milwaukee Opera Theatre ^P	Opéra Louisiane ^P
Calgary Opera ^{P C}	Guerilla Opera ^P	Minnesota Opera ^{P G2}	Opera Maine ^{P G4}
Canadian Opera Company ^C	Hawai'i Opera Theatre ^{P G2}	Mission Opera ^{P G5}	Opera Memphis ^{P G3}
Cedar Rapids Opera ^{P G4}	Haymarket Opera	Mobile Opera ^P	Opera Mississippi
Central City Opera ^{P G2}	Heartbeat Opera ^P	Nashville Opera ^{P G2}	Opera Modesto ^{P G4}
Chants Libres ^C	HERE Arts Center	National Sawdust ^P	Opera Montana ^{P G4}
Charlottesville Opera ^P	Hogfish ^{P N}	Nautilus Music-Theater ^P	Opera Naples
Chautauqua Opera ^{P G4}	Holy City Arts & Lyric Opera (HALO) ^N	New Camerata Opera	Opera Omaha ^{P G2}
Chelsea Opera	Houston Grand Opera ^{P G1}	New Music Theatre Project ^P	Opera on Tap ^{P G4}
Chicago Fringe Opera ^P	Hudson Valley International Festival of the Voice	New Orleans Opera	Opera on the Avalon ^{P C}
Chicago Opera Theater ^{P G3}	IN Series ^{P G4}	New Performance Traditions ^P	Opera on the James
Cincinnati Opera ^{P G2}	The Industry ^{P G4}	New Philharmonic Opera ^{P G5}	Opera Orlando ^{P G3}
City Lyric Opera		North Carolina Opera ^{P G3}	Opera Parallèle ^{P G3}
City Opera Vancouver ^{C N}		Odyssey Opera	Opera Philadelphia ^{P G2}
Cleveland Opera ^{P G5}		On Site Opera ^{P G3}	Opera Roanoke ^{P G4}

OPERA San Antonio ^{P G3}	Pensacola Opera ^{P G3}	Seattle Opera ^{P G1}	Tulsa Opera ^{P G3}
Opera San José ^{P G2}	Piedmont Opera ^{P G3}	Shreveport Opera ^P	Union Avenue Opera ^{P G4}
Opera Santa Barbara	Pittsburgh Festival Opera ^P	Solo Opera ^{P G5}	UrbanArias ^{P G5}
Opera Saratoga ^{P G3}	Pittsburgh Opera ^{P G2}	Sound the Alarm: Music/Theatre ^C	Utah Symphony Utah Opera ^{P G2}
Opera Southwest ^{P G3}	Pocket Opera ^{P G4}	Soundstreams Canada ^{P C}	Valley Opera and Performing Arts
Opera Steamboat ^{P G4}	Portland Opera ^{P G2}	Spoletto Festival USA ^{P G3}	Vancouver Cantonese Opera ^{C N}
Opera Tampa	re:Naissance Opera ^{P C}	St. Petersburg Opera Company ^P	Vancouver Opera ^{P G2 C}
Opera Theatre of Saint Louis ^{P G2}	Resonance Works ^P	Synchrony ^P	Victory Hall Opera ^{P G5}
Opera Vermont ^P	Sacramento Philharmonic & Opera ^{P G5}	Tacoma Opera ^P	Virginia Opera ^{P G2}
OperaDelaware	Salt Marsh Opera	Tapestry Opera ^{P C}	VisionIntoArt ^{P N}
Overtone Industries ^P	San Diego Opera ^{P G2}	Teatro Grattacielo ^P	Volcano Non-Profit Productions ^C
Ozarks Lyric Opera ^{P N}	San Francisco Opera ^{P G1}	Teatro Nuovo	Washington Concert Opera
Pacific Opera Project ^{P G4}	The Santa Fe Opera ^{P G1}	Toledo Opera ^P	Washington National Opera ^{P G1}
Pacific Opera Victoria ^{P G2 C}	Sarasota Opera ^{P G2}	Toronto City Opera ^C	White Snake Projects ^P
Painted Sky Opera	Saskatoon Opera ^{P G5 C}	Tri-Cities Opera ^{P G4}	Wilmington Concert Opera ^P
Palm Beach Opera ^{P G2}			Wolf Trap Opera ^{P G3}

P — Submitted FY2023 data to the Professional Opera Survey | G# — Included in the Constant Sample Group for Budget 1–5 companies
C — Professional Company Member of the Association for Opera in Canada | N — Joined as a new Professional Company Member in FY2024



OPERA AMERICA YEAR IN REVIEW 2024

OPERA America serves artists, administrators, trustees, and audience members in supporting the creation, presentation, and enjoyment of opera.

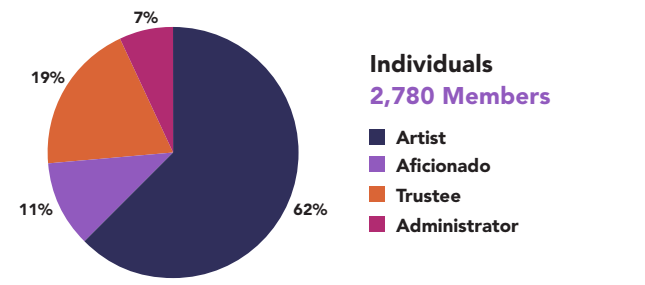
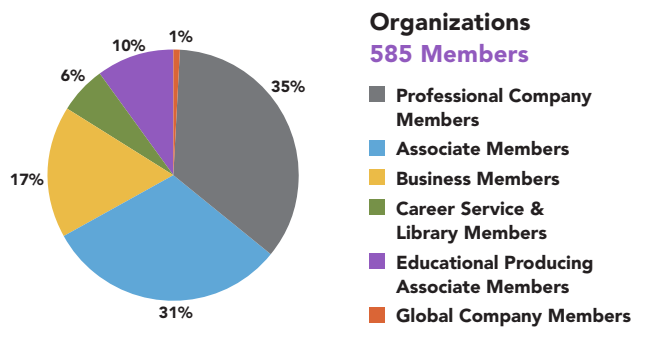
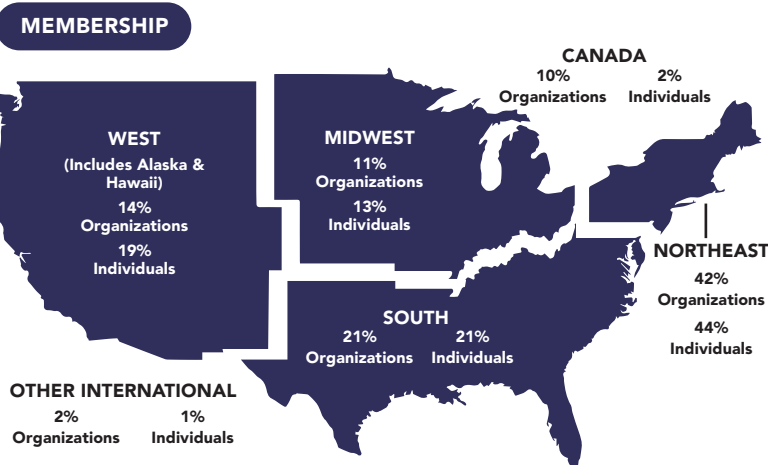
OPERA America is an action-oriented think tank for the field, partnering with members to access the power of collective experience, gather insight, and share successful practices. This was on full display in 2024 — when special projects like the World Opera Forum, a national research study into first-time

operagoers, and the launch of the Opera Passport program demonstrated the collaborative spirit of the industry. Alongside these highlights was a broad portfolio of services and programs to help members strengthen communities across the country, and around the world, through opera.

OPERA AMERICA

The Community

OPERA America has built an extensive membership base of nearly 600 professional opera companies, educational institutions, and opera-related businesses — representing more than 40,000 staff members, artists, and trustees — in addition to nearly 3,000 individuals invested in the vitality and growth of the art form.



The Convener

Collective learning is the heart of OPERA America’s national conference, forums, and network convenings each year. The 2024 Opera Conference took on new proportions in conjunction with the second-ever World Opera Forum, hosted by LA Opera in partnership with Opera Europa, Ópera Latinoamérica, and the Association for Opera in Canada.

OPERA CONFERENCE 2024 & WORLD OPERA FORUM

LEADERSHIP SUPPORT FROM C. GRAHAM BERWIND, III

801 Total Attendees

221 Organizations in Attendance

181 Artists in Attendance

56 World Opera Forum Official Delegates

26 Countries Represented Across 6 Continents

“I had terrific conversations with my counterparts at companies around Oceania and Asia, including New Zealand Opera, Opera Australia, Seoul Arts Center, and the New National Theatre Tokyo — all potential partners with Hawai’i Opera Theatre in future years.”

— **ANDREW MORGAN, GENERAL DIRECTOR, HAWAI’I OPERA THEATRE (FORUM AND CONFERENCE ATTENDEE)**

CONVENINGS

SUPPORTED BY THE NATIONAL ENDOWMENT FOR THE ARTS AND OTHERS



365 Participants in Forums

1,082 Participants in Webinars

3,900 Participants in Network Zoom Meetings

184 Participants in Virtual Regional Meetings



The Counselor

Throughout the year, OPERA America provides career and professional development for administrators, artists, and trustees through webinars, seminars, and mentorship programs.

CAREER SERVICES

634 Artists in Career Advancement Programs

43 Administrators in Professional Development Programs

"I left the Leadership Intensive not only with a strengthened skillset but also with incredible connections and colleagues who have become lifelong friends. It has provided me with an international support network, brought me closer to OPERA America, and empowered me as an administrator in ways I couldn't have imagined."

— ALEXIS PERT, DIRECTOR OF ADMINISTRATION, BETH MORRISON PROJECTS' PRODUCER ACADEMY (LEADERSHIP INTENSIVE 2023 PARTICIPANT)

Mentorship Program for Opera Leaders of Color

SUPPORTED BY BIPOC ARTS, ANNE-MARIE BLANCQUAERT AND WALTER BRUYNINCKX, COREY KINGER, AND AN ANONYMOUS DONOR

Mentee: Jasmine Johnson, Portland Opera

Mentor: Dennis Robinson, Seattle Opera

Mentee: Dione Parker Bennett, Opera Columbus

Mentor: Jennifer Bowman, Houston Grand Opera

Mentee: Zuly Inirio, Afro-Latinx Song and Opera Project

Mentor: Alejandra Valarino Boyer, Ravinia Steans Music Institute

RESEARCH

OPERA America continues to expand its research and databases as resources to provide informed consultations to members with custom benchmarking reports and to represent the field to funders, policymakers, and the media. 2024 research included:

Professional Opera Survey

Salary/HR Survey

Ticket Trends Survey

Understanding Opera's New Audiences



TRUSTEE SERVICES

OPERA America engages opera company trustees in a variety of programs to cultivate good governance, including webinars, forums, and customized on-site consultations.

625 Trustees in Governance Programs

National Opera Trustee Recognition Awards

SUPPORTED BY BANK OF AMERICA

Brian James Dawson, Tapestry Opera

Maria Lagios, Chicago Opera Theater

Claire Liu, Houston Grand Opera

William Miller, Opera Columbus

Leah Solat, Annapolis Opera

Jennifer Suh Whitfield, HERE Arts Center



Understanding Opera's New Audiences

SUPPORTED BY THE NATIONAL ENDOWMENT FOR THE ARTS, BOB ELLIS, JOHN NESHOLM, AND THE HEINZ ENDOWMENTS

OPERA America published a national research study with insights into the motivations, experiences, and barriers faced by new opera audiences in the years following the pandemic. Learn more on page 4 and at operaamerica.org/NewAudiences.

36 Participating Opera Companies

11K Survey Response

7 Key Findings

The Granter

OPERA America's strategic approach to grantmaking has catalyzed important change in the industry. A total of \$24 million awarded in the past four decades has supported the creation and production of new work, audience-building initiatives, innovative business practices, and the discovery of new creative voices. Sixty percent of OPERA America's annual grants support women and BIPOC composers and librettists.

\$622K Total Grants to Companies

248 Grant Applications from Companies

33 Companies Supported by Grants

\$160K Total Grants to Composers & Librettists

170 Grant Applications from Composers & Librettists

13 Composers & Librettists Supported by Grants

"The Discovery Grant has offered my work significant visibility and appreciation within the industry it previously did not enjoy. The continued interest in and development of the piece is truly a product of having received the grant."

— ANNIE GOSFIELD, COMPOSER (2023 DISCOVERY GRANT RECIPIENT)

GRANTS AWARDED



Awards for Digital Excellence in Opera

SUPPORTED BY THE JOSEPH AND ROBERT CORNELL MEMORIAL FOUNDATION

Sweat – a film by The Bicycle Opera Project (Koniuk/Nichols)

A Pocket Magic Flute (Pocket Opera/Lorraine Hansberry Theatre)

Everest: An Immersive Experience (Staufenbiel/Paiement)

Threepenny Submarine Season 1 (Opera 5/Gazelle Automations)

Campbell Opera Librettist Prize

SUPPORTED BY MARK CAMPBELL, WILLIAM MURRAY, BETTE AND JOSEPH HIRSCH, AND AN ANONYMOUS DONOR

Kelley Rourke

IDEA Opera Grants

SUPPORTED BY THE CHARLES AND CERISE JACOBS CHARITABLE FOUNDATION

Nathan Felix and Anita Gonzalez | *Faces in the Flames*

Danielle Olana Jagelski and Rhiana Yazzie | *Little Ones*

Jorge Sosa | *Generación Perdida*



Marineau Opera Grants for Women Stage Directors and Conductors

SUPPORTED BY THE MARINEAU FAMILY FOUNDATION

Beth Morrison Projects | Elizabeth Askren

Detroit Opera | Nataki Garrett
IN Series | Shanara Gabrielle

Kentucky Opera | Kimille Howard

LA Opera | Lina González-Granados

National Sawdust | Kaneza Schaal

Opera Colorado | Chía Patiño

Opera Orlando | Roberta Emerson

Opera Steamboat | Amanda Berg Wilson

Resonance Works | Keturah Stickann

NYC Opera Grants

SUPPORTED BY THE HOWARD GILMAN FOUNDATION

Amanda + James

Association for the Development of Vocal Artistry and Neighborhood Cultural Enrichment

Experiments in Opera
Harlem Opera Theater

International Brazilian Opera Company

The Lighthouse Opera Company

New Music Theatre Project

Opera Ebony

Opera Hispánica

Opera Praktikos

Opera Grants for Women Composers: Commissioning Grants

SUPPORTED BY THE VIRGINIA B. TOULMIN FOUNDATION

American Lyric Theater | *She Who Dared* (Barnes/Mouton)

On Site Opera | *Lucidity* (Kaminsky/Cote)

Opera on Tap | *The Singing Cabinets* (Sankaram/Dye)

Opera Saratoga | *DRIFT* (Weinberg/Barizo)

Spoletto Festival USA | *Not Yet Titled* (Prestini/Lewis)

Opera Grants for Women Composers: Discovery Grants

SUPPORTED BY THE VIRGINIA B. TOULMIN FOUNDATION

Jasmine Arielle Barnes | *She Who Dared*

Sivan Eldar | *Nine Jewelled Deer*

Whitney George | *NO MAN'S LAND*

Rebecca Gray | *BUS Opera*

Elizabeth Hoffman | *On Circe*
Sultana Isham | *Rogue Objects*

Dina Maccabee | *Roses Are Blue*

Repertoire Development Grants

SUPPORTED BY OPERA AMERICA'S FUND

American Lyric Theater | *She Who Dared* (Barnes/Mouton)

Calgary Opera | *Namwayut* (Cusson/Attariwala/Nolan)

Des Moines Metro Opera | *American Apollo* (Geter/Palmer)

Long Beach Opera | *Asunción* (Cha/Cadenas)

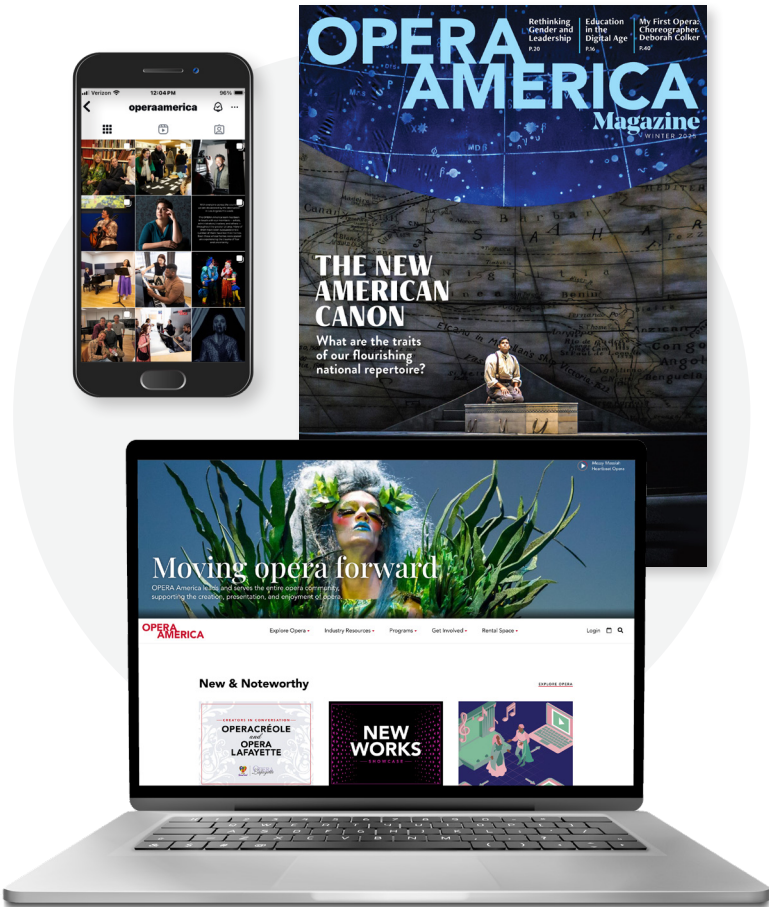
Opera Parallèle | *Hello, Star* (Lucero/Lee)

Pittsburgh Opera | *Time to Act* (Kaminsky/Manich)

The Santa Fe Opera | *Interplanetary Opera* (Nagle)

The Advocate

OPERA America believes that sharing knowledge at all levels of the opera ecosystem is crucial to supporting the industry. The quarterly *Opera America Magazine* and expansive library of video and text resources on the OPERA America website are go-to destinations for learning across the sector.



ADVOCACY

OPERA America leads the field in advocating for national, state, and local policies that strengthen the arts in American life. A new advocacy toolkit, published in 2024 at operaamerica.org/AdvocacyGuides, helps opera companies activate their constituencies.

700 Views of the Advocacy Toolkit

OPERA HALL OF FAME

OPERA America announced the 2024 inductees into the Opera Hall of Fame, elevating their achievements as models for others working in and supporting the art form.

- Adele Addison, soprano and teacher
- Justino Díaz, bass-baritone and teacher
- Jake Heggie, composer and mentor
- Carol F. Henry, founding trustee and philanthropist
- Wayne Sanders, founder, Opera Ebony
- Sarah Billinghamurst Solomon, artistic administrator and philanthropist
- Teresa Stratas, soprano and actress

OPERA PASSPORT BY OPERA AMERICA



Opera Passport launched in 2024 as a reciprocal ticket discount program that extends the benefits of a hometown opera subscription to companies across North America.

108 Participating Companies

100K Operagoers with Access to Discounts

REACH OF SERVICE

202K Visitors to operaamerica.org

2,527 Reads of *Opera America Magazine* online

12,500 Readership of *Opera America Magazine* in print

16,800 E-newsletter Subscribers

52K Followers across Instagram, Facebook, and LinkedIn

The Home



A studio at the National Opera Center

Dean Bristol Photography

OPERA America’s National Opera Center in midtown Manhattan has become the physical heart of a dispersed but inherently collaborative industry. Its custom-built facilities welcomed over 75,000 visitors in 2024 for auditions, rehearsals, recordings, and more. Earlier this year, the Opera Center’s lease was renewed favorably through 2042.

NATIONAL OPERA CENTER

75K Visitors

PROGRAMMING AT THE NATIONAL OPERA CENTER IS MADE POSSIBLE BY THE NEW YORK STATE COUNCIL ON THE ARTS WITH THE SUPPORT OF THE OFFICE OF THE GOVERNOR AND THE NEW YORK STATE LEGISLATURE.



STUDIO HAPPY HOURS

SUPPORTED BY THE NEW YORK STATE COUNCIL ON THE ARTS AND NATIONAL OPERA CENTER BOARD MEMBERS

To amplify its support of individual artists, OPERA America made the Opera Center more accessible than ever before with subsidized rehearsal rates starting at \$5 per hour.

3,647 Hours Used

609 Clients

“Having an affordable space that I could come to numerous times a week changed the game for me, and helped me secure work as a pianist and actor to such a point where I was able to quit my day job and pursue my dreams full-time.”

— STUDIO HAPPY HOURS RENTER

OPERA AMERICA ONSTAGE



Samantha Hankey in conversation with President/CEO Marc A. Scorca

SUPPORTED BY THE NEW YORK CITY DEPARTMENT OF CULTURAL AFFAIRS

OPERA America’s signature public programming — including interviews, recitals, and other events — featured mezzo-soprano Samantha Hankey, librettists Deborah Brevoort and Stephanie Fleischmann, composer Jeanine Tesori, general director and countertenor Anthony Roth Costanzo, OPERA America’s IDEA Opera Resident Artists, and the winners of OPERA America’s Awards for Digital Excellence in Opera.

954 Attendees in Person and Online

Financial Report

OPERA America's finances in FY2024 were very consistent with the prior year's, demonstrating continued strength in both earned and contributed revenue. The year ended with an operating surplus of just over \$100,000 and a positive change in net assets of more than \$400,000. Steady expense control contributed to this favorable outcome, but it would not have been possible without the generous support of the many institutional and individual donors who believe in the unique work of OPERA America and the programs and services that serve artists, administrators, trustees, and informed audience members.

Beginning with earned income, dues from members increased by nearly 10%, reflecting a strong rate of renewal, increases in the operating budgets of Professional Company Members, and a slight adjustment in OPERA America's dues calculation formula. Following the tremendous decline in activity brought about by the pandemic, traffic at the National Opera Center continued to recover in FY2024, rising above FY2023 revenue by almost 15%. The growth in utilization of the facility was accelerated by the introduction of Studio Happy Hours — sharply discounted rental fees for individual artists during select hours — made possible by a new grant from the New York State Council on the Arts and additional deeply appreciated support from members of the National Opera Center Board. Thanks to strong market performance, income from OPERA America's investments increased by more than 50% from FY2023.

In FY2024, overall contributed revenue declined from FY2023, but this is a reflection of the end of several large multi-year grants offset substantially by important individual contributions. A number of generous donors made special gifts to support the New Works Forum, Mentorship Program for Opera Leaders of Color, and several other special projects in FY2024. Government support continued to fluctuate in the wake of the pandemic and related federal programs. Although all Payroll Protection Program (PPP) loan forgiveness had been received in previous years, an employee retention tax credit held in abeyance for nearly two years was finally received in FY2024. From the National Endowment for the Arts, OPERA America was grateful for a generous grant to support member services as well as a special grant from the research division of the NEA that underwrote the national audience research project described in this report.

The impact of the World Opera Forum is documented in a separate report, but it also was successful from a financial

perspective. Combined with the 2024 annual conference, it drew a record-setting 800 participants, leading to an overall increase of 12.5% in the year's meetings and workshops income. A leadership contribution from C. Graham Berwind, III, was supplemented by deeply appreciated gifts from other donors whose generosity totaled nearly \$500,000. With their help, 56 official delegates from 26 countries across 6 continents were welcomed to LA as guests of OPERA America and hosted in a series of dinners and receptions that built strong and lasting relationships among opera leaders from across the globe.

The OPERA America Salutes dinner, introduced in 2022, continued as a bright spot for the industry. Artists, administrators, and trustees from across the U.S. and Canada gathered to celebrate the winners of the National Opera Trustee Recognition Awards and inductees into the Opera Hall of Fame; proceeds from the dinner supported OPERA America's professional development programs. In FY2024, revenue approached \$350,000, netting \$200,000 for the Leadership Launch, Leadership Intensive, New General Director Roundtables, and other programs that prepare future leaders for careers in opera.

Expenses in FY2024 were very comparable to the prior year with slight variations linked to specific projects and grant programs, some of which are awarded in alternating years (such as Repertoire Development Grants in the Artistic Services department). The national audience research project resulted in a significant increase in expenses in the Media Relations and Marketing area. The most dramatic increase from FY2023 to FY2024 was related to the Annual Conference and World Opera Forum, as noted above.

OPERA America is unique in its role as the service organization to the entire field. At the same time, it is a mirror of the field. In that regard, the continued recovery from the tragic interruption of the pandemic is reflected in robust member engagement, increased use of the National Opera Center, and steadfast contributed support. Organizational leaders look to the future, however, with vigilance as the headwinds of rising costs, competing philanthropic priorities, and unpredictable public attention temper opera's innate optimism with caution. OPERA America remains in a strong position to provide the services that may be needed to address challenges and take full advantage of the abundant opportunities to advance opera as the most compelling and relevant of the performing arts.

Statement of Financial Position

As of June 30, 2024

Total Assets	\$	31,406,399
Total Liabilities	\$	15,486,769
TOTAL NET ASSETS	\$	15,919,630
Core Operating	\$	177,909
National Opera Center Fund	\$	163,324
Board-Designated Funds	\$	1,348,721
Funds with Restriction – Purpose	\$	3,236,778
Funds with Restriction – Perpetual	\$	10,962,898

Statement of Activities

As of June 30, 2024

Total Earned	\$	2,737,292	34%
Total Contributed	\$	5,343,984	66%
TOTAL REVENUE	\$	8,081,276	
Program Services	\$	6,183,538	81%
General and Administrative	\$	776,300	10%
Development	\$	697,983	9%
TOTAL EXPENSES	\$	7,657,821	
CHANGE IN NET ASSETS	\$	423,455	

Operating Revenue and Expenses

As of June 30, 2024

OPERATING REVENUE			
Annual Fund/Individual Support	\$	2,740,021	37%
Foundation Grants	\$	1,082,304	14%
Corporate Contributions	\$	80,000	1%
Government Grants	\$	325,992	4%
Membership Fees and Dues	\$	885,365	12%
Annual Conference Revenue	\$	413,233	6%
National Opera Center Rentals	\$	1,137,544	15%
Other Earned Income	\$	292,970	4%
Opera Fund/Opera Center Endowment Draws	\$	543,450	7%
SUBTOTAL	\$	7,500,879	100%

OPERATING EXPENSES

Program Services

Artistic Services	\$	650,187	9%
Annual Conference & World Opera Forum	\$	1,042,966	14%
Learning, Leadership, and Professional Development	\$	284,493	4%
Grants to Members	\$	704,585	10%
Information Services and Publications	\$	576,405	8%
Media Relations and Marketing	\$	459,708	6%
Organizational Membership	\$	385,996	5%
National Opera Center and Occupancy Costs	\$	1,721,795	23%
Public Affairs	\$	92,192	1%

Support Services

General and Administrative	\$	776,300	11%
Development	\$	697,983	9%
SUBTOTAL	\$	7,392,610	100%

NET OPERATING SURPLUS	\$	108,269
------------------------------	-----------	----------------

Board & Staff

BOARD OF DIRECTORS

Officers

Lee Anne Myslewski
*Wolf Trap Foundation for
the Performing Arts*
CHAIR

Carol F. Henry
Trustee, Los Angeles Opera
IMMEDIATE PAST CHAIR

Héctor Armienta
Opera Cultura
VICE CHAIR

Estevan Rael-Gálvez
Trustee, The Santa Fe Opera
VICE CHAIR

Ian Rye
Pacific Opera Victoria
TREASURER

E. Loren Meeker
OPERA San Antonio
SECRETARY

Marc A. Scorca
PRESIDENT/CEO

Members

Ana De Archuleta
National Sawdust & UIA Talent Agency

James M. Barton
Trustee, The Glimmerglass Festival

Afton Battle
Lyric Opera of Chicago

Astrid Baumgardner

Angel Blue

Alejandra Valarino Boyer
Ravinia's Steans Music Institute

Cheryl S. Carr
Belmont University

Antonio C. Cuyler
University of Michigan

Khori Dastoor
Houston Grand Opera

Anthony Davis

Wayne Davis
Trustee, Boston Lyric Opera

Sue Dixon
Portland Opera

Jason Hardy
Knoxville Opera

Jessica Jahn

Barbara Lynne Jamison
Kentucky Opera

Christopher Koelsch
Los Angeles Opera

Karen J. Kubin
Trustee, San Francisco Opera

Virginia Croskery Lauridsen
Trustee, Des Moines Metro Opera

Anh Le
Opera Theatre of Saint Louis

Mont Levy
Trustee, Opera Theatre of Saint Louis

Timothy Long
Eastman School of Music

Shawna Lucey
Opera San José

Susan G. Marineau
Trustee, The Santa Fe Opera

Karen Molleson
Trustee, Long Beach Opera

Andrew Morgan
Hawai'i Opera Theatre

Michael Hidetoshi Mori
Tapestry Opera

Sylvia Neil
Trustee, Lyric Opera of Chicago

Julia Noulín-Mérot
Opera Columbus

Timothy O'Leary
Washington National Opera

Maggey Oplinger
Florentine Opera Company

Kamala Sankaram

Gene Scheer

Nadege Souvenir
Trustee, Minnesota Opera

Barbara Augusta Teichert
*Trustee, Los Angeles Opera and
Opera Philadelphia*

Karen Tiller

Emeritus Members

Wayne S. Brown

Anthony Freud

David Gockley

Frayda B. Lindemann, Ph.D.

Charles MacKay

Susan F. Morris

Ex Officio Members

Christina Loewen
Association for Opera in Canada

Alejandra Martí
Ópera Latinoamérica

Karen Stone
Opera Europa

NATIONAL OPERA CENTER BOARD

Mont Levy, CHAIR

James M. Barton

John E. Baumgardner Jr.

Larry Bomback

Todd Calvin

Margee M. Filstrup

Andrew Gaines

Jeanne Goffi-Fynn, Ed.D.

Carleen Graham

Jane A. Gross

Nicholas King

Alan E. Muraoka

Frederick W. Peters

Anthony Rudel

Jeri Sedlar

Thurmond Smithgall

Shoshana Tancer

Barbara Augusta Teichert

COUNCIL MEMBERS

Jayne Alilaw
Anne-Marie Blancquaert
Jen Benoit-Bryan
Cheryl Blalock
Stacy Brightman
Annie Burridge
Jessica Burton
Patrick Dailey
Kim Eberlein
Randall Eng
Aiden Feltkamp
Sarah Fraser
Damien Geter
Susan Geyer
Barbara Glauber
Carleen Graham
Liz Grubow
Aliana de la Guardia
Piper Gunnarson
Patrick Hansen
Ruth Harper
Rebecca Hass
Julie Grady Heard
Eiki Isomura
Givonna Joseph
Laura Kaminsky
Kathleen Kelly
Sean Kelly
Ryan Krause
Sharon Landis
Steven Lankenau
Peter Leone
Chevalier Lovett
Lucia Lucas
Frank Luzi
Nicole Malcolm
Peggy Kriha Miller
Robert Milne
Beth Morrison
Marion Newman

Kerriann Otaño
Kenneth Overton
David Salerno Owens
Andrea Puente-Catán
Elkhanah Pulitzer
Miguel Rodríguez
Kara C. Sax
Arlene Palmer Schwind
Meaghan Smallwood
Tamara Vallejos
Tracy Galligher Young

STAFF

President's Office

Marc A. Scorca, President/CEO
Todd Porter, Chief of Staff
Quodesia Johnson, Social Justice
Advisor

Programs

Jamelah Rimawi, Chief
Programs Officer
Megan Carpenter, Senior Manager
of Government Affairs and
Civic Practice
Noelle Deutsch, Director of
Production and Operations
Pamela Jones, Senior Artist
Development Manager
Rozime Lindsey, Programs
Coordinator

Learning and Leadership

Vincent Rutter-Covatto, Director
of Learning and Leadership
Jordyn Younger, Learning and
Leadership Coordinator

IT & Research

Kevin M. Sobczyk, CIO
Irene Fitzgerald-Cherry,
Research Manager
Laura Jobin-Acosta, Research
Associate

Advancement

Dan Cooperman, Chief Advancement
Officer
Tim Brock, Individual Membership
Manager
Jenny Fornoff, Senior Manager, Grants
Jennifer Gordon, Organizational
Membership Manager
Sarah K. Ivins, Director of Marketing
and Communications
Alisha Neumaier, Graphic Designer
Rose Anne Rabut, Member Services
Coordinator
Jeremy Reynolds, Editor,
Opera America Magazine
Marcel Sokalski, Digital Marketing
Manager
Clint Walker, Director of Development
and Membership
Nicholas Wise, Senior Manager,
Marketing and Publications

Operations

Thomas Michael Culhane, Director,
National Opera Center
Adrian Benn, Customer Service
Supervisor
Robert Colon, Customer Service
Manager
Kirsten Crockett, Customer Service
Supervisor
Karen Lackey, Senior Accounts
Manager
Andrew McIntyre, Technical Director,
National Opera Center
Susan Schultz, Director of Finance
Customer Service Associates:
Julian Bailey, Nicoletta Berry,
Emilie Bienne, Lina Chung, Alexander
Craven, Noah Grannum, Jordan Hope,
Celeste Morales, Kaileigh Reiss

Access the *Annual Field Report* Online

Download this year's *Annual Field Report* — plus spreadsheets of complete financial data — at operaamerica.org/AFR.

All Annual Field Reports since 2006 available online.

Questions about this report?

Those interested in learning more can contact OPERA America's research manager, Irene Fitzgerald-Cherry, at IFCherry@operaamerica.org. Customized analyses for Professional Company Members available upon request.

