

OPERA  
AMERICA

# Annual Field Report 2023

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# From the President and CEO



**S**uccess is an elusive quality at any time. For opera companies, one indicator relates to income, expenses, and balanced budgets. Of equal importance is artistic vibrancy, and in this regard, FY2022 was noteworthy. The extended impact of COVID-19, though, continues to make success difficult to measure for the Professional Company Members of OPERA America.

As this report documents, most companies recovered at least some lost ground in FY2022. Many loyal audience members returned to theaters once they felt that COVID was in sufficient retreat, and almost all companies reported record-setting numbers of “new-to-file” ticket buyers — customers who have never before attended a performance at the company of record. This positive trend appears to continue according to current reporting, although at many companies, pre-COVID levels of attendance have not yet been attained.

The generosity of individual donors was more important than ever as corporate support continued to decline from already modest levels and grants from foundations fluctuated as many of them dedicated their resources to other civic priorities. Income from government sources continued at unprecedented levels, thanks to final installments of relief funding from the U.S. Small Business Administration, the National Endowment for the Arts, and state and local arts agencies. This infusion of funds helped sustain companies through the year, but such support will not be available in coming seasons.

The productivity of our member companies decreased slightly to offset increased expenses that were not fully covered by increased revenue. Consolidating performance schedules and moving some productions into smaller venues were strategies employed by a number of companies. While some of these decisions are prudent in light of current financial challenges, reduced productivity makes it more difficult than ever to make a compelling case for increased support among donors. Every decision during these uncertain times must be made with a balance between short-term imperatives and long-term impact.

The considerable artistic achievement of the field in FY2022 is rooted in an effort that has been decades in the making. Forty years ago, leaders of OPERA America wanted to inspire the creation of an America opera repertoire that connects to the world around us. They would be thrilled to see the progress that has been made through grants, symposia, and pitch sessions. New operas that vary in subject, scope, and style are being performed by virtually every company — making opera a truly American art form that attracts new audiences. These works combine with performances from the inherited repertoire to create seasons that expand our understanding and appreciation of our cherished art form.

The *Annual Field Report* reflects only the surface of the data and information available through OPERA America. Readers are encouraged to contact us with questions and requests for customized analysis. Do not hesitate to be in touch!



**Marc A. Scorca**  
President/CEO  
OPERA America

## 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.

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Previous publications of the *Annual Field Report* since 2006 can be accessed at [operaamerica.org/AFR](https://operaamerica.org/AFR).

**O**PERA America's *Annual Field Report* is designed to provide leaders in the field with a comprehensive overview of the financial positions of its members. Information for this report, based on the 2022 fiscal year, is derived from the annual Professional Opera Survey (POS) administered by SMU Data Arts. The POS was completed this year by 156 of OPERA America's Professional Company Members (the "Survey Universe"). Only those companies in the Survey Universe that have reported consistently for the most recent five-year period are included in the Constant Sample Group (CSG) for each budget group. This year, 101 companies qualified for the CSG.

In this report, OPERA America's U.S. Professional Company Members (PCMs) are aggregated into five budget groups. Budget group delineations are noted in the report. The report is headed by "The Field at a Glance" (p. 2) — an exploration into financial and attendance totals based on the Survey Universe and extrapolated for the full membership.

The 156 companies in the Survey Universe represent 77% of OPERA America's current Professional Company Membership, and their collective operating budgets total over \$1.01 billion. If one extrapolates by budget group for those PCMs that did not complete the survey, the North American opera industry injected over \$1.03 billion directly into the economy in fiscal year 2022. This figure 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.

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. While this somewhat reduces the imprint of the 2021–2022 season, it is done so to preserve a consistent comparison with prior years. Companies in the sample group that did not mount 2021–2022 seasons were still included in budget averages.

This year, the report has been expanded to include a section that explores the 2022–2023 season in greater depth. This season spotlight (p. 4) features insights from OPERA America's 2023 Ticket Sales Survey, in which 68 companies participated. The survey compares ticket sales and performance activity from the most recently completed season to the 2018–2019 season, the last full season before the onset of COVID-19. Additionally, the report examines the representation of North American works in the 2022–2023 season, drawing data from OPERA America's Performance Database, in which 162 companies are represented. While a detailed FY2023–FY2019 comparison will be presented in the 2024 *Annual Field Report* next year, OPERA America is dedicated to sharing valuable information as soon as possible in the post-pandemic landscape.

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Those interested in learning more should contact OPERA America's research manager, Irene Fitzgerald-Cherry, at [IFCherry@operaamerica.org](mailto:IFCherry@operaamerica.org).

## Table of Contents

The Field at a Glance in 2022 .....	2
2022–2023 Season Spotlight .....	4

### FY2022 FINANCIAL ANALYSIS

Guide to Terminology .....	5
Overview of Findings .....	6
Budget 1 .....	8
Budget 2 .....	11
Budget 3 .....	14
Budget 4 .....	17
Budget 5 .....	20

### OPERA AMERICA

2023 by the Numbers .....	23
2023 Financial Report .....	25
Annual Support .....	27
Organizational Members .....	32

# The Field at a Glance in 2022

**A**cross 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 economic, social, and cultural divides and create positive change.

Entrepreneurial artists and innovative leaders are expanding the definition of opera, the opera audience, and the audience experience. Singers, composers, librettists, directors, designers, and other artists are infusing the art form with a diversity of stories, perspectives, and artistic styles never seen before.

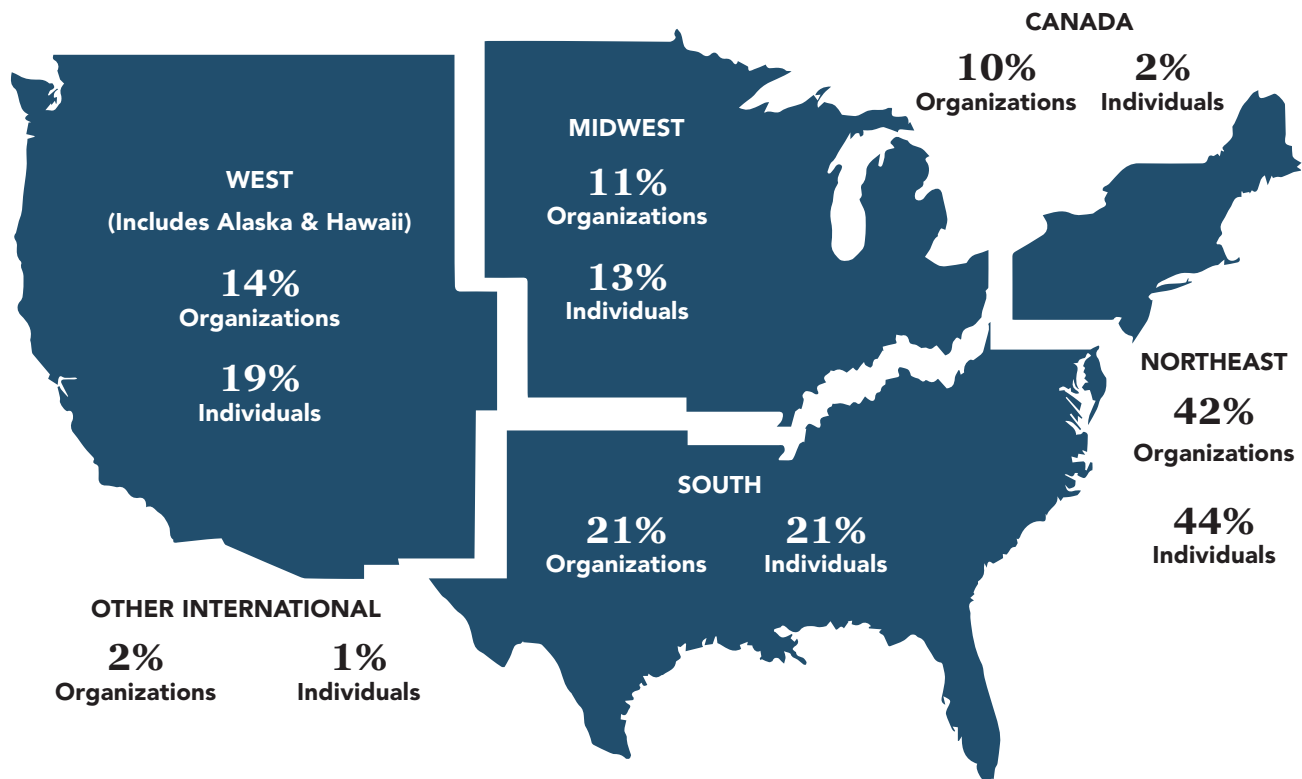
## OPERA America Membership

**203**  
Professional Company  
Members (PCMs)  
in North America

**61%**  
of PCMs have an  
annual budget  
under \$1 million

**351**  
Associate, Business,  
Career Service, and  
Educational Members

**3,167**  
Individual  
Members

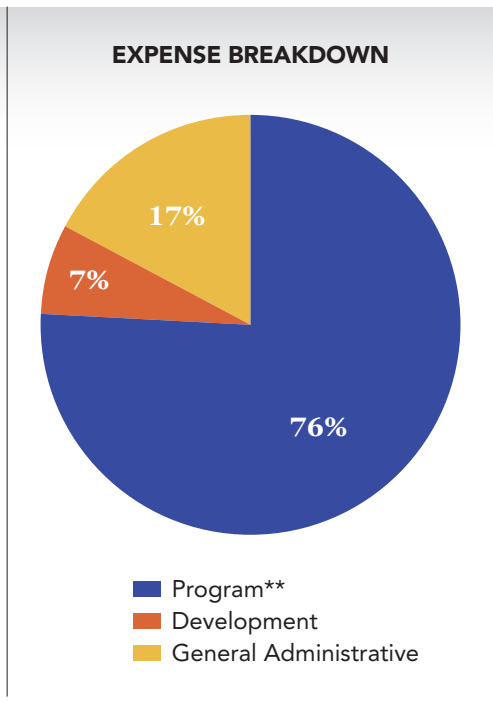
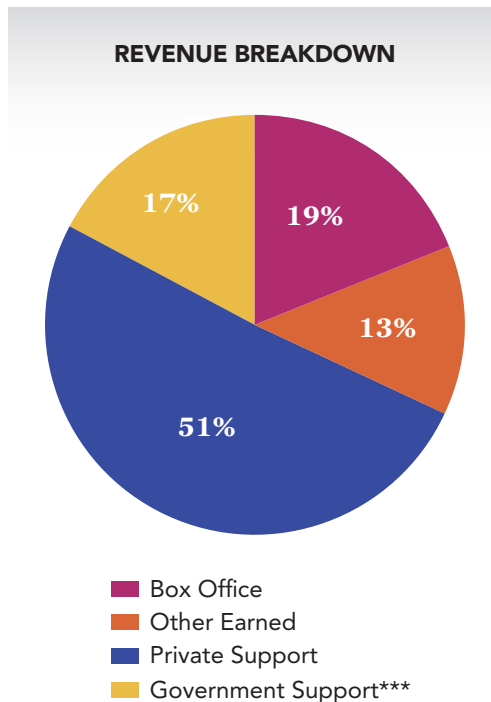


**127**  
U.S. cities have  
professional opera  
companies

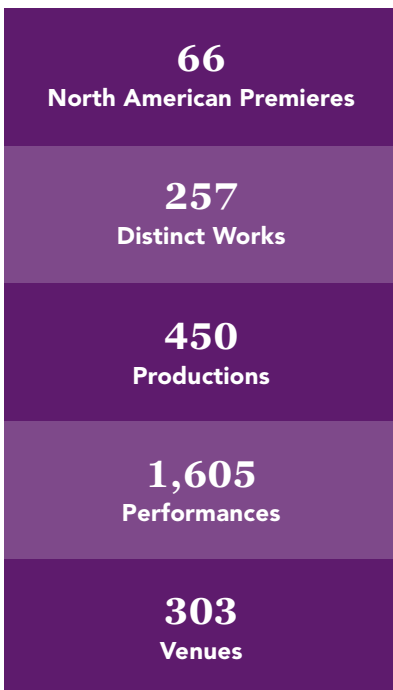
**11**  
Canadian cities have  
professional  
opera companies

**90%** of the top  
50 largest U.S. cities  
have professional  
opera companies

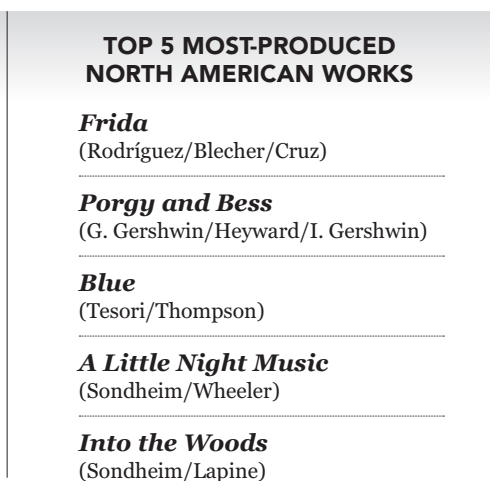
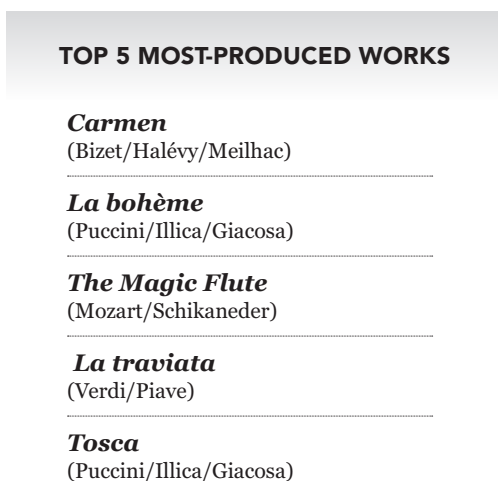
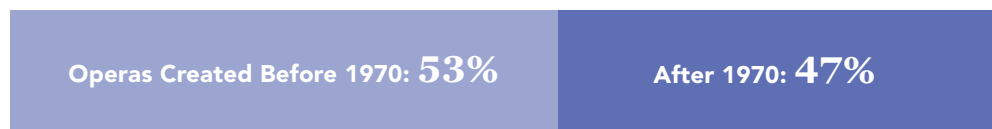
# Economic Impact



# Performance Activity: 2021–2022 Season



## REPERTOIRE



Data is from the FY2022 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.

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

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

\*\*\* The high level of government support in 2022 reflects the influx of pandemic relief through the federal PPP, ERTC, and SVOG programs. Pre-pandemic, government support accounted for less than 5% of all revenue.

# 2022–2023 Season Spotlight

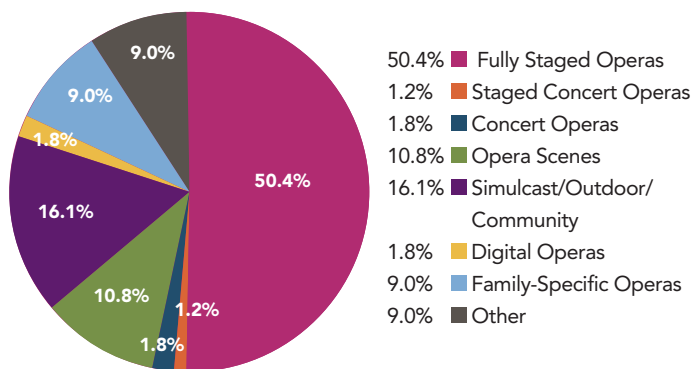
In the summer of 2023, OPERA America conducted a survey\* focused on tickets sales in the 2022–2023 season. These numbers were compared side by side with tickets sales figures from the 2018–2019 season — the last fully completed pre-pandemic season — to assess the state of audiences as opera companies rebuild in the post-pandemic environment.

The snapshot survey reveals that recent ticket sales and revenue are falling below pre-pandemic levels by just over 20%. The impact has been hardest on larger companies, while smaller companies have been able to buck this trend with audience growth. The record levels of first-time attendance reported are a sign of great hope for the future growth of audiences.

Averages by:	Budget 1	Budget 2	Budget 3	Budget 4	Budget 5	All Companies
<b>TICKET OVERVIEW</b>						
<b>Total Tickets Revenue</b>						
2018–2019 Season	\$ 10,258,631	\$ 1,654,406	\$ 388,887	\$ 136,510	\$ 28,029	\$ 1,797,497
2022–2023 Season	\$ 7,721,988	\$ 1,351,928	\$ 358,633	\$ 148,305	\$ 33,439	\$ 1,407,593
% change from 2018–2019 to 2022–2023	-24.7%	-18.3%	-7.8%	+8.6%	+19.3%	-21.7%
<b>Total Tickets Count</b>						
2018–2019 Season	92,002	21,840	6,109	2,785	729	18,663
2022–2023 Season	69,109	17,252	5,716	2,895	903	14,741
% change from 2018–2019 to 2022–2023	-24.9%	-21.0%	-6.4%	+3.9%	+23.9%	-21.0%
<b>Percent New to File</b>						
2018–2019 Season	40.9%	31.1%	16.0%	13.5%	51.2%	30.9%
2022–2023 Season	42.6%	35.9%	24.2%	18.4%	41.3%	32.9%
% change from 2018–2019 to 2022–2023	+1.7%	+4.8%	+8.2%	+4.9%	-9.9%	+2.0%

In the 2022–2023 season, fully staged operas made up half of all season programming offered by opera companies, supplemented by outdoor and community programs, opera scenes, family-specific operas, and other programming. One-third of all productions presented were North American works.

## 2022–2023 Season Programming



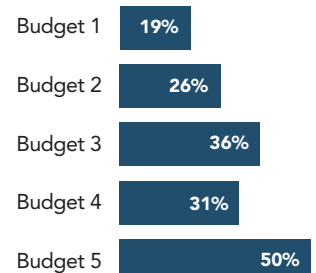
## North American Works

31% of productions were of North American works

30% of performances were of North American works

63% of companies produced a North American work

## North American Productions as % of Total 2022–2023 Season



\*Survey submissions were received from 68 of OPERA America's 203 Professional Company Members.

# FY2022 Financial Analysis: Guide to Terminology

The financial analysis of OPERA America's Professional Company Members that follows is based on data from fiscal year 2022.

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## Average Yield Per Ticket Sold

Total box office income divided by the total number of tickets sold. 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.

## Core Artistic Expenses

Core artistic expenses encompass both personnel and non-personnel artistic expenses directly associated with staging productions. This may include costs associated with singers (soloists and choristers), instrumentalists, technicians, stage sets and props, artistic administrators, etc.

## Endowments and Reserve Funds

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. Note that in this report, these funds have all been merged.

## Fixed Assets

Fixed assets include all land, buildings, equipment, any capitalized production elements (sets, props, costumes), and other fixed assets owned by the organization. Fixed assets are generally unrestricted. Net fixed assets are net of accumulated depreciation.

## Investments

Investments include current and long-term investments (stocks, bonds, etc.) as reported on an organization's balance sheet. Income from investments is available for operations or to support specific purposes. Note that this does not include separately incorporated endowments or reserve funds that are absent for the company's balance sheet.

## Productivity Ratios

Productivity ratios measure how many dollars are generated for each dollar spent on revenue-generating activities. Expenses include personnel and non-personnel costs. Marketing productivity is the total box office revenue divided by marketing expenses. Development productivity is the total contributed revenue (including unrestricted and restricted) divided by development expenses. Note that for FY2020, FY2021, and FY2022, development productivity will appear inflated due to the receipt of federal COVID-19 aid, while marketing productivity may seem deflated due to retaining marketing staff during a period of diminished box office earnings.

## Program Coverage

Program coverage is the percentage of core artistic expenses covered by box office revenue.

## Program Expenses

Program expenses are all expenses related to an organization's programs and services. While this encompasses core artistic expenses, it also includes marketing, box office, education, community programs, and other expenses associated with producing and promoting staged performances.

## Total Net Assets

Total net assets include unrestricted net assets (no donor-imposed restrictions) that are available for current use, generally including fixed assets, and restricted net assets, representing gifts for future periods or for specific projects and most commonly, endowment funds. Changes in the value of restricted net assets may reflect increases/decreases in the market value of existing investments or new donations.

## Working Capital

Working capital is a measure of a company's liquidity and short-term financial health. It is the difference between a company's current assets (cash, accounts receivable, etc.) and current liabilities (accounts payable, accrued expenses, etc.).

# FY2022 Overview of Findings

This *Annual Field Report* is the third in a series of at least four reports that will reflect the profound impact of COVID-19 on the opera field. FY2022 was the second full fiscal year distorted by the pandemic. It was more stable than FY2020 and FY2021, which sustained the most significant level of pandemic closures, but still less robust than FY2019 and previous years. OPERA America groups companies into budget groups for the purpose of analysis. These large analytic cohorts mask the many individual variations experienced by specific opera companies. In FY2022, some companies offered full seasons. Others produced fewer operas but continued to offer digital programming and extensive community programs. COVID-19 spikes led to some last-minute performance cancellations. All these nuances merit consideration when benchmarking one company against the budget groups analyzed in this report.

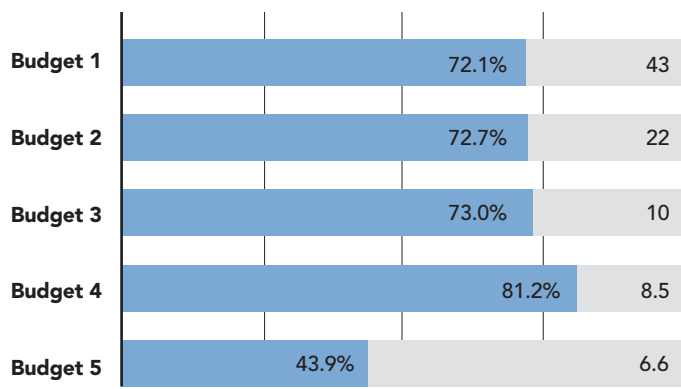
This section will examine the five-year trends from FY2018 to FY2022 with emphasis on the impact of COVID-19 on the years since FY2019, the last complete season before the pandemic.

## Productions, Performances, and Ticket Sales

- While average production output increased in the 2021–2022 season compared to the two prior seasons, it did not return to pre-pandemic levels.
- Companies in Budget Groups 1–4 showed a drop in production activity in 2021–2022 of between -16% (Budget 4) and -22% (Budget 2) compared to the 2018–2019 season. The average decline for Budget 5 companies was greater, at nearly -45% below 2018–2019.
- The number of performances per production decreased across all budget levels for 2021–2022 compared to 2018–2019.
- While all budget groups experienced an increase in paid attendance of over 100% in 2021–2022 compared to the previous season, average attendance still lagged significantly behind pre-pandemic levels. Decreases ranged from -27% for Budget 4 companies to -71% for Budget 5 companies.

### Average Number of Performances: 2021–2022 vs. 2018–2019

● 2021–2022 ● 2018–2019



## Financial Overview

- Overall operating expenses in FY2022 nearly returned to or surpassed expenses in FY2019 despite reduced productivity, revealing the impact of inflation on the field.
- Average expenses for companies in Budget Groups 1 and 2 were -5.3% and -2.7% below FY2019, respectively. Companies in Budget Groups 3, 4, and 5 exceeded their average budgets in FY2019, ranging from increases of 4.1% (Budget 3) to 18.5% (Budget 5).
- Deficits and surpluses were modest across all budget groups. Companies in Budget Groups 1, 2, and 3 recorded surpluses of between 0.7% (Budget 3) and 3.9% (Budget 2). Smaller companies did not fare as well. Companies in the Budget Group 4 reported average deficits of -3.7%, and those in the Budget Group 5 reported average deficits of -4.8% of operating expenses.
- When compared to FY2019, FY2022 showed healthy average gains in balance sheet investments, endowments, and reserve funds. Comparisons to FY2021, however, are mixed due to the timing of government relief loans and grants as well as variations in the stock market.

## Operating Revenue

- Following severe drops in FY2021 due to performance cancellations, FY2022 saw increased ticket revenue of more than 100% for all budget groups. However, box office earnings in FY2022 still remained lower than those in FY2019; average drops ranged from -10% (Budget 5) to -41% (Budget 1).



- Total private support in FY2022 increased from FY2021 on average, ranging from 2.8% for Budget 1 companies to 38% for Budget 3 companies. For most companies, however, private support has not returned to the levels achieved in FY2019; for Budget 1, 2, and 3 companies, average private support decreased by -13%, -9.4%, and -9.3%, respectively. Budget 4 and 5 companies reversed this trend, however, with increases in private support over FY2019 of 4.8% (Budget 4) and 1.9% (Budget 5).
- The return to in-person special events has yielded steady increases in revenue for most companies since FY2020.
- Companies in all budget groups experienced significant five-year decreases in corporate support by as much as -38%. Changes in foundation giving varied widely.
- Average board giving declined by nearly -25% for Budget 1 and 2 companies over the five-year period.
- Government support for companies over the last three years increased tremendously thanks to various government programs, including Payroll Protection Program loans, Shuttered Venue Operators Grants, Employee Retention Tax Credits, and special state and local grants. Reporting of this support differs from company to company and from year to year. Regardless, when comparing FY2022 to FY2019, average support from government sources increased from 349% for Budget 4 companies to more than 1,000% for Budget 1 companies.

- Marketing expenses for mid-sized and larger companies remained below FY2019 expenditures, mirroring the decrease in the number of productions and performances. For Budget 4 and 5 companies, marketing expenses reached a five-year high.
- Despite the many shifts in expenses that resulted from COVID-19, the ratio of personnel expenses to non-personnel expenses remained relatively consistently between 60% and 70% of budgets across all budget groups throughout the five years of this study. This highlights the consistency of the opera business model.

### FY2022 Core Artistic Expenses as a Percentage of Total Expenses

<b>Budget 1</b>	50.1%
<b>Budget 2</b>	43.2%
<b>Budget 3</b>	47.3%
<b>Budget 4</b>	51.1%
<b>Budget 5</b>	61.4%

## Operating Expenses

- Budgets for mid-sized and larger companies in FY2022 were below the average budgets recorded in FY2019. For companies in Budget Groups 4 and 5, however, FY2022 expense budgets increased by 8.6% and 2.5% over FY2019, respectively.
- Core artistic expenses told a different story. On a per-production basis, average core artistic expenses increased for all budget groups, revealing the impact of inflation over recent seasons.
- All companies spent more on fundraising in FY2022 than in FY2021. For Budget 4 and 5 companies, these expenses were the highest in the five years covered by this report. For companies in Budget Groups 1, 2, and 3, however, fundraising expenses were still lower than in FY2019 (-6.2%, -6.1%, and 16.4%, respectively).

## OPI vs. CPI

- OPERA America defines the annualized growth of the average per-production cost as the Opera Price Index (OPI). This measure is compared to the Consumer Price Index (CPI) to assess the cost of opera in relation to the general cost of living. Generally, the OPI is more than two times the CPI, reflecting the labor intensity of the industry.

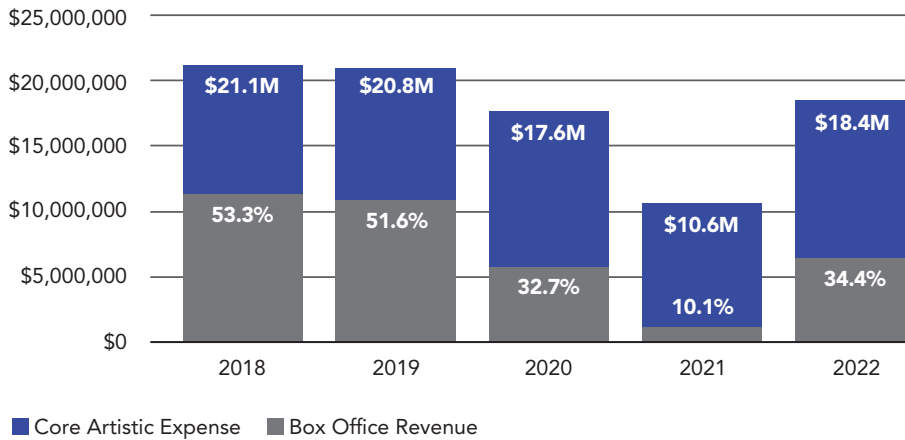
For the five years covered by this report (FY2018 to FY2022), the OPI increased at an annualized rate of 4.43% while the CPI increased at 4.95%, an unusually low ratio that reflects a combination of higher general inflation over the last three years and decisions by opera companies to mount smaller productions coming out of the pandemic.

	2018	2022	% Change	Annualized
<b>CPI</b>	\$1.00	\$1.21	+21.30%	+4.95%
<b>OPI</b>	\$820,710	\$976,235	+18.95%	+4.43%

# Budget 1

## Average Program Coverage

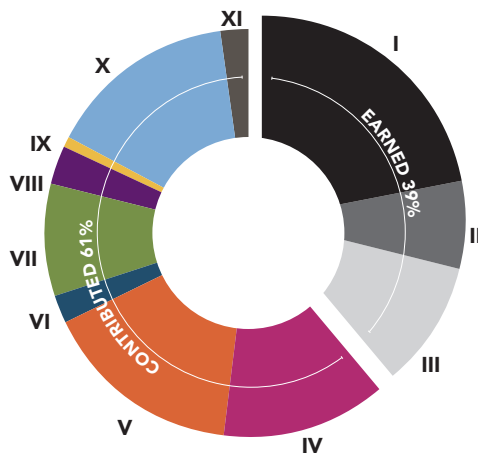
Program coverage is the amount of core artistic expenses covered by box office.



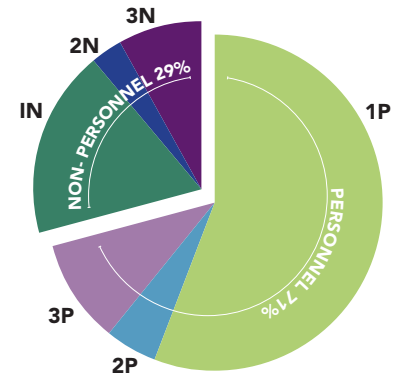
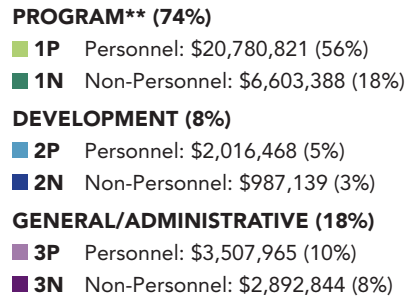
## Average Activity

\$38,186,050
<b>OPERATING REVENUE</b>
\$36,788,625
<b>OPERATING EXPENSES</b>
49,158
<b>TICKETS SOLD</b>
74,640
<b>SEATS AVAILABLE</b>
65.9%
<b>CAPACITY SOLD</b>
5.4
<b>PRODUCTIONS</b>
31
<b>PERFORMANCES</b>

## Revenue Breakdown



## Expense Breakdown



### EARNED (39%)

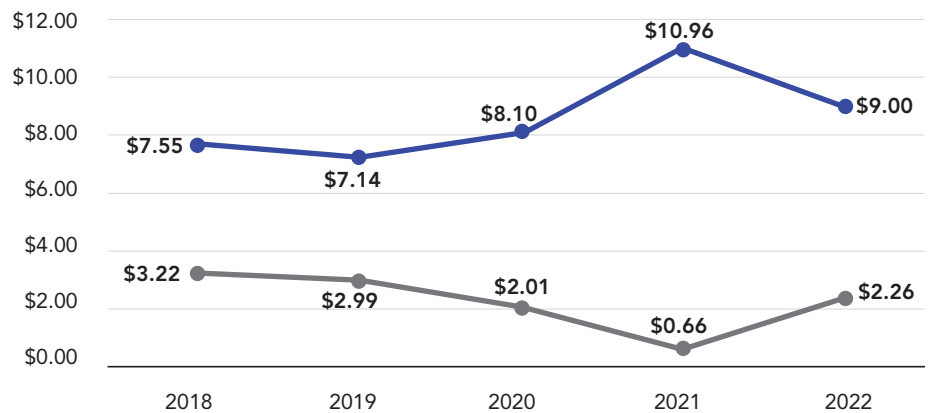
- I Box Office: \$6,329,002 (22%)
- II Investment: \$2,154,184 (7%)
- III Other Earned: \$3,025,122 (10%)

### CONTRIBUTED (61%)

- IV Board: \$3,662,650 (13%)
- V Individual: \$4,667,581 (16%)
- VI Corporate: \$519,664 (2%)
- VII Foundation: \$2,572,370 (9%)
- VIII Special Events: \$848,762 (3%)
- IX In-Kind: \$240,535 (1%)
- X Government\*: \$4,384,548 (15%)
- XI Other Contrib: \$689,564 (2%)

## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

# ANNUAL BUDGET OVER \$15,000,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 40,156,052	\$ 39,940,277	\$ 34,486,098	\$ 27,577,288	\$ 38,186,050	\$ 36,069,153	38.5%	-4.9%
Operating Expenses	\$ 39,220,498	\$ 38,830,363	\$ 34,565,118	\$ 23,366,333	\$ 36,788,625	\$ 34,554,187	57.4%	-6.2%
<b>Net Operating Income</b>	<b>\$ 935,554</b>	<b>\$ 1,109,915</b>	<b>\$ -79,020</b>	<b>\$ 4,210,955</b>	<b>\$ 1,397,425</b>	<b>\$ 1,514,966</b>	<b>-66.8%</b>	<b>49.4%</b>
as % of Expenses	2.4%	2.9%	-0.2%	18.0%	3.8%	5.4%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 11,261,705	\$ 10,757,613	\$ 5,743,645	\$ 1,069,816	\$ 6,329,002	\$ 7,032,356	491.6%	-43.8%
Investments	\$ 1,883,788	\$ 2,706,444	\$ 2,818,443	\$ 2,480,803	\$ 2,154,184	\$ 2,408,732	-13.2%	14.4%
Other Earned Revenue	\$ 3,145,828	\$ 2,968,593	\$ 2,085,302	\$ 1,298,888	\$ 3,025,122	\$ 2,504,747	132.9%	-3.8%
<b>Total Earned Revenue</b>	<b>\$ 16,291,320</b>	<b>\$ 16,432,650</b>	<b>\$ 10,647,389</b>	<b>\$ 4,849,507</b>	<b>\$ 11,508,309</b>	<b>\$ 11,945,835</b>	<b>137.3%</b>	<b>-29.4%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 4,779,102	\$ 5,736,001	\$ 3,752,583	\$ 2,664,937	\$ 3,662,650	\$ 4,119,055	37.4%	-23.4%
Individual	\$ 4,355,727	\$ 4,664,017	\$ 5,245,513	\$ 5,440,156	\$ 4,667,581	\$ 4,874,599	-14.2%	7.2%
Corporate	\$ 766,450	\$ 897,937	\$ 609,598	\$ 476,473	\$ 519,664	\$ 654,024	9.1%	-32.2%
Foundation	\$ 3,172,847	\$ 3,090,541	\$ 3,090,160	\$ 2,532,099	\$ 2,572,370	\$ 2,891,603	1.6%	-18.9%
Special Events***	--	--	\$ 539,032	\$ 445,132	\$ 848,762	\$ 610,976	90.7%	--
In-Kind	\$ 476,052	\$ 317,625	\$ 600,213	\$ 277,293	\$ 240,535	\$ 382,344	-13.3%	-49.5%
Other Private Support	\$ 219,819	\$ 469,169	\$ -380,272	\$ 390,814	\$ 689,564	\$ 277,819	76.4%	213.7%
<b>Total Private Support</b>	<b>\$ 13,769,996</b>	<b>\$ 15,175,290</b>	<b>\$ 13,456,827</b>	<b>\$ 12,226,905</b>	<b>\$ 13,201,126</b>	<b>\$ 13,566,029</b>	<b>8.0%</b>	<b>-4.1%</b>
<b>Total Government Support*</b>	<b>\$ 186,227</b>	<b>\$ 306,550</b>	<b>\$ 2,057,035</b>	<b>\$ 2,502,955</b>	<b>\$ 4,384,548</b>	<b>\$ 1,887,463</b>	<b>75.2%</b>	<b>2,254.4%</b>
<b>Total Contributed Revenue</b>	<b>\$ 13,956,223</b>	<b>\$ 15,481,841</b>	<b>\$ 15,513,862</b>	<b>\$ 14,729,860</b>	<b>\$ 17,585,674</b>	<b>\$ 15,453,492</b>	<b>19.4%</b>	<b>26.0%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 9,908,509	\$ 8,025,786	\$ 8,324,846	\$ 7,997,922	\$ 9,092,067	\$ 8,669,826	13.7%	-8.2%
<b>Total Operating Revenue</b>	<b>\$ 40,156,052</b>	<b>\$ 39,940,277</b>	<b>\$ 34,486,098</b>	<b>\$ 27,577,288</b>	<b>\$ 38,186,050</b>	<b>\$ 36,069,153</b>	<b>38.5%</b>	<b>-4.9%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 22,581,438	\$ 22,499,183	\$ 20,548,423	\$ 11,685,664	\$ 20,780,821	\$ 19,619,106	77.8%	-8.0%
Development	\$ 1,972,687	\$ 2,132,909	\$ 2,158,934	\$ 1,787,558	\$ 2,016,468	\$ 2,013,711	12.8%	2.2%
General/Administrative	\$ 2,632,064	\$ 2,697,371	\$ 3,033,167	\$ 3,002,569	\$ 3,507,965	\$ 2,974,627	16.8%	33.3%
<b>Total Personnel Expenses</b>	<b>\$ 27,186,189</b>	<b>\$ 27,329,462</b>	<b>\$ 25,740,524</b>	<b>\$ 16,475,790</b>	<b>\$ 26,305,254</b>	<b>\$ 24,607,444</b>	<b>59.7%</b>	<b>-3.2%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 8,246,581	\$ 7,937,732	\$ 5,986,216	\$ 4,665,693	\$ 6,603,388	\$ 6,687,922	41.5%	-19.9%
Development	\$ 1,043,265	\$ 1,069,773	\$ 675,376	\$ 392,133	\$ 987,139	\$ 833,537	151.7%	-5.4%
General/Administrative	\$ 2,744,464	\$ 2,493,395	\$ 2,163,002	\$ 1,832,717	\$ 2,892,844	\$ 2,425,285	57.8%	5.4%
<b>Total Non-Personnel Expenses</b>	<b>\$ 12,034,309</b>	<b>\$ 11,500,900</b>	<b>\$ 8,824,593</b>	<b>\$ 6,890,543</b>	<b>\$ 10,483,371</b>	<b>\$ 9,946,743</b>	<b>52.1%</b>	<b>-12.9%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 39,220,498</b>	<b>\$ 38,830,363</b>	<b>\$ 34,565,118</b>	<b>\$ 23,366,333</b>	<b>\$ 36,788,625</b>	<b>\$ 34,554,187</b>	<b>57.4%</b>	<b>-6.2%</b>

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

\*\*\* The Professional Opera Survey began tracking of special events support from FY2020 onward. Prior to FY2020, special events support was split across private support categories.

# Budget 1

ANNUAL BUDGET OVER \$15,000,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 29,729,339	\$ 33,724,890	\$ 30,892,058	\$ 37,560,203	\$ 35,155,915	\$ 33,412,481	-6.4%	18.3%
Restricted	\$ 77,038,499	\$ 74,554,917	\$ 76,456,319	\$ 101,154,117	\$ 93,878,509	\$ 84,616,472	-7.2%	21.9%
<b>Total Net Assets</b>	<b>\$ 106,767,838</b>	<b>\$ 108,279,807</b>	<b>\$ 107,348,377</b>	<b>\$ 138,714,320</b>	<b>\$ 129,034,424</b>	<b>\$ 118,028,953</b>	<b>-7.0%</b>	<b>20.9%</b>
as % of Expenses	272.2%	278.9%	310.6%	593.7%	350.7%	361.2%	--	--
<b>Working Capital</b>	<b>\$ 43,499,754</b>	<b>\$ 43,643,800</b>	<b>\$ 47,341,269</b>	<b>\$ 65,071,334</b>	<b>\$ 61,533,602</b>	<b>\$ 52,217,952</b>	<b>-5.4%</b>	<b>41.5%</b>
as % of Expenses	110.9%	112.4%	137.0%	278.5%	167.3%	161.2%	--	--
<b>Investments</b>	<b>\$ 76,380,662</b>	<b>\$ 78,823,130</b>	<b>\$ 78,882,560</b>	<b>\$ 106,222,078</b>	<b>\$ 92,454,207</b>	<b>\$ 86,552,527</b>	<b>-13.0%</b>	<b>21.0%</b>
as % of Expenses	194.7%	203.0%	228.2%	454.6%	251.3%	266.4%	--	--
<b>Net Fixed Assets</b>	<b>\$ 30,194,248</b>	<b>\$ 31,551,865</b>	<b>\$ 30,324,919</b>	<b>\$ 29,800,358</b>	<b>\$ 30,008,316</b>	<b>\$ 30,375,941</b>	<b>0.7%</b>	<b>-0.6%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 77,719,828</b>	<b>\$ 78,618,400</b>	<b>\$ 83,852,866</b>	<b>\$ 100,152,815</b>	<b>\$ 89,107,978</b>	<b>\$ 85,890,377</b>	<b>-11.0%</b>	<b>14.7%</b>
as % of Expenses	198.2%	202.5%	242.6%	428.6%	242.2%	262.8%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	6.8	6.8	4.0	1.3	5.4	4.8	315.4%	-20.6%
Main Season Performances	43	43	25	11	31	31	181.8%	-27.9%
<b>ATTENDANCE</b>								
Main Season Attendance	91,940	91,150	48,075	5,268	49,158	57,118	833.1%	-46.5%
Total Seats Available	118,571	121,557	68,222	6,772	74,640	77,952	1,002.2%	-37.1%
% of Capacity Sold	77.5%	75.0%	70.5%	77.8%	65.9%	73.3%	-15.3%	-15.0%
<b>PRICING</b>								
High Ticket Price	\$ 365.86	\$ 344.76	\$ 323.00	\$ 199.71	\$ 323.71	\$ 311.41	62.1%	-11.5%
Low Ticket Price	\$ 19.86	\$ 21.71	\$ 23.86	\$ 25.29	\$ 19.86	\$ 22.11	-21.5%	0.0%
Average Yield per Ticket Sold*	\$ 122.49	\$ 118.02	\$ 112.21	\$ 135.35	\$ 121.70	\$ 121.95	-10.1%	-0.6%

**CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:**

The Dallas Opera | Detroit Opera | Houston Grand Opera | Los Angeles Opera | Lyric Opera of Chicago  
 San Francisco Opera | The Santa Fe Opera | Seattle Opera

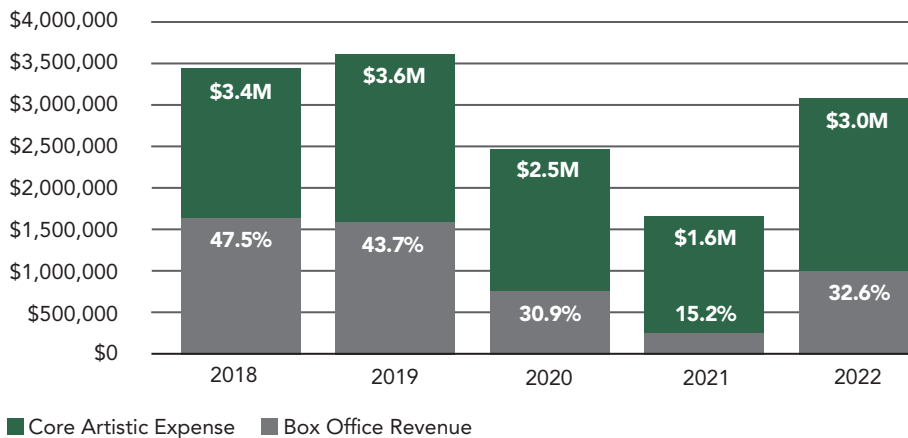
\* For FY2020, FY2021 and FY2022, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to pre-pandemic seasons.

# Budget 2

BETWEEN \$3,000,000 AND \$15,000,000

## Average Program Coverage

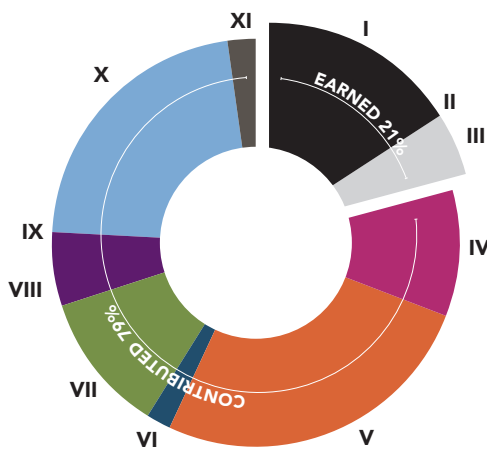
Program coverage is the amount of core artistic expenses covered by box office revenue.



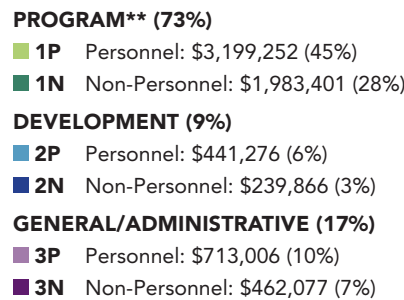
## Average Activity

\$7,312,450
<b>OPERATING REVENUE</b>
\$7,038,876
<b>OPERATING EXPENSES</b>
11,267
<b>TICKETS SOLD</b>
21,624
<b>SEATS AVAILABLE</b>
52.1%
<b>CAPACITY SOLD</b>
3.4
<b>PRODUCTIONS</b>
16
<b>PERFORMANCES</b>

## Revenue Breakdown

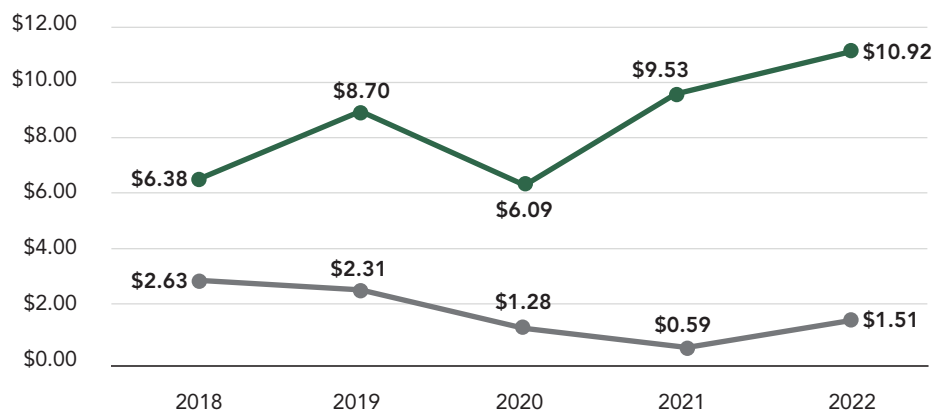


## Expense Breakdown



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

# Budget 2

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 6,957,485	\$ 7,416,644	\$ 5,988,914	\$ 5,370,585	\$ 7,312,450	\$ 6,609,216	36.2%	5.1%
Operating Expenses	\$ 7,456,477	\$ 7,236,036	\$ 5,776,981	\$ 4,595,237	\$ 7,038,876	\$ 6,420,722	53.2%	-5.6%
<b>Net Operating Income</b>	<b>\$ -498,992</b>	<b>\$ 180,608</b>	<b>\$ 211,932</b>	<b>\$ 775,347</b>	<b>\$ 273,574</b>	<b>\$ 188,494</b>	<b>-64.7%</b>	<b>154.8%</b>
as % of Expenses	-6.7%	2.5%	3.7%	16.9%	3.9%	4.0%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 1,632,122	\$ 1,560,982	\$ 767,072	\$ 250,147	\$ 989,668	\$ 1,039,998	295.6%	-39.4%
Investments	\$ 302,513	\$ 191,557	\$ 109,494	\$ 166,792	\$ -14,059	\$ 151,260	-108.4%	-104.6%
Other Earned Revenue	\$ 384,165	\$ 410,079	\$ 248,168	\$ 182,356	\$ 300,438	\$ 305,041	64.8%	-21.8%
<b>Total Earned Revenue</b>	<b>\$ 2,318,800</b>	<b>\$ 2,162,618</b>	<b>\$ 1,124,735</b>	<b>\$ 599,295</b>	<b>\$ 1,276,047</b>	<b>\$ 1,496,299</b>	<b>112.9%</b>	<b>-45.0%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 844,653	\$ 896,903	\$ 711,110	\$ 676,327	\$ 632,226	\$ 752,244	-6.5%	-25.1%
Individual	\$ 1,350,866	\$ 1,502,912	\$ 1,409,447	\$ 1,067,886	\$ 1,558,349	\$ 1,377,892	45.9%	15.4%
Corporate	\$ 134,421	\$ 113,644	\$ 99,404	\$ 76,956	\$ 113,712	\$ 107,627	47.8%	-15.4%
Foundation	\$ 566,154	\$ 953,979	\$ 586,919	\$ 559,628	\$ 669,307	\$ 667,197	19.6%	18.2%
Special Events***	--	--	\$ 241,987	\$ 138,397	\$ 338,610	\$ 239,665	144.7%	--
In-Kind	\$ 84,075	\$ 55,309	\$ 47,816	\$ 36,064	\$ 29,599	\$ 50,572	-17.9%	-64.8%
Other Private Support	\$ 353,162	\$ 296,186	\$ 138,310	\$ 148,651	\$ 116,683	\$ 210,598	-21.5%	-67.0%
<b>Total Private Support</b>	<b>\$ 3,333,330</b>	<b>\$ 3,818,932</b>	<b>\$ 3,234,993</b>	<b>\$ 2,703,908</b>	<b>\$ 3,458,487</b>	<b>\$ 3,309,930</b>	<b>27.9%</b>	<b>3.8%</b>
<b>Total Government Support*</b>	<b>\$ 209,183</b>	<b>\$ 200,091</b>	<b>\$ 335,514</b>	<b>\$ 913,858</b>	<b>\$ 1,345,035</b>	<b>\$ 600,736</b>	<b>47.2%</b>	<b>543.0%</b>
<b>Total Contributed Revenue</b>	<b>\$ 3,542,513</b>	<b>\$ 4,019,023</b>	<b>\$ 3,570,506</b>	<b>\$ 3,617,766</b>	<b>\$ 4,803,522</b>	<b>\$ 3,910,666</b>	<b>32.8%</b>	<b>35.6%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 1,096,173	\$ 1,235,003	\$ 1,293,673	\$ 1,153,523	\$ 1,232,881	\$ 1,202,251	6.9%	12.5%
<b>Total Operating Revenue</b>	<b>\$ 6,957,485</b>	<b>\$ 7,416,644</b>	<b>\$ 5,988,914</b>	<b>\$ 5,370,585</b>	<b>\$ 7,312,450</b>	<b>\$ 6,609,216</b>	<b>36.2%</b>	<b>5.1%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 3,465,706	\$ 3,431,223	\$ 2,650,657	\$ 1,956,728	\$ 3,199,252	\$ 2,940,713	63.5%	-7.7%
Development	\$ 507,787	\$ 478,729	\$ 486,289	\$ 424,165	\$ 441,276	\$ 467,649	4.0%	-13.1%
General/Administrative	\$ 598,317	\$ 594,129	\$ 579,930	\$ 655,618	\$ 713,006	\$ 628,200	8.8%	19.2%
<b>Total Personnel Expenses</b>	<b>\$ 4,571,810</b>	<b>\$ 4,504,081</b>	<b>\$ 3,716,876</b>	<b>\$ 3,036,511</b>	<b>\$ 4,353,533</b>	<b>\$ 4,036,562</b>	<b>43.4%</b>	<b>-4.8%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 1,995,975	\$ 1,997,634	\$ 1,410,319	\$ 1,080,849	\$ 1,983,401	\$ 1,693,636	83.5%	-0.6%
Development	\$ 264,248	\$ 246,444	\$ 212,493	\$ 132,415	\$ 239,866	\$ 219,093	81.1%	-9.2%
General/Administrative	\$ 624,443	\$ 487,877	\$ 437,294	\$ 345,462	\$ 462,077	\$ 471,431	33.8%	-26.0%
<b>Total Non-Personnel Expenses</b>	<b>\$ 2,884,667</b>	<b>\$ 2,731,955</b>	<b>\$ 2,060,106</b>	<b>\$ 1,558,726</b>	<b>\$ 2,685,343</b>	<b>\$ 2,384,159</b>	<b>72.3%</b>	<b>-6.9%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 7,456,477</b>	<b>\$ 7,236,036</b>	<b>\$ 5,776,981</b>	<b>\$ 4,595,237</b>	<b>\$ 7,038,876</b>	<b>\$ 6,420,722</b>	<b>53.2%</b>	<b>-5.6%</b>

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## BETWEEN \$3,000,000 AND \$15,000,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 2,868,507	\$ 3,453,310	\$ 3,748,234	\$ 4,687,649	\$ 5,313,936	\$ 4,014,327	13.4%	85.3%
Restricted	\$ 9,134,718	\$ 9,390,440	\$ 11,286,794	\$ 13,513,496	\$ 12,857,157	\$ 11,236,521	-4.9%	40.8%
<b>Total Net Assets</b>	<b>\$ 12,003,225</b>	<b>\$ 12,843,750</b>	<b>\$ 15,035,028</b>	<b>\$ 18,201,145</b>	<b>\$ 18,171,093</b>	<b>\$ 15,250,848</b>	<b>-0.2%</b>	<b>51.4%</b>
as % of Expenses	161.0%	177.5%	260.3%	396.1%	258.2%	250.6%	--	--
<b>Working Capital</b>	<b>\$ 4,255,757</b>	<b>\$ 4,627,674</b>	<b>\$ 7,485,010</b>	<b>\$ 8,073,426</b>	<b>\$ 7,387,911</b>	<b>\$ 6,365,956</b>	<b>-8.5%</b>	<b>73.6%</b>
as % of Expenses	57.1%	64.0%	129.6%	175.7%	105.0%	106.2%	--	--
<b>Investments</b>	<b>\$ 8,063,867</b>	<b>\$ 7,993,505</b>	<b>\$ 9,982,893</b>	<b>\$ 12,283,614</b>	<b>\$ 11,381,206</b>	<b>\$ 9,941,017</b>	<b>-7.3%</b>	<b>41.1%</b>
as % of Expenses	108.1%	110.5%	172.8%	267.3%	161.7%	164.1%	--	--
<b>Net Fixed Assets</b>	<b>\$ 2,302,814</b>	<b>\$ 2,721,359</b>	<b>\$ 2,594,217</b>	<b>\$ 2,588,184</b>	<b>\$ 3,050,751</b>	<b>\$ 2,651,465</b>	<b>17.9%</b>	<b>32.5%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 9,858,398</b>	<b>\$ 10,164,425</b>	<b>\$ 12,429,571</b>	<b>\$ 15,286,323</b>	<b>\$ 11,156,425</b>	<b>\$ 11,779,028</b>	<b>-27.0%</b>	<b>13.2%</b>
as % of Expenses	132.2%	140.5%	215.2%	332.7%	158.5%	195.8%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	4.7	4.4	2.5	2.2	3.4	3.4	54.5%	-27.7%
Main Season Performances	23	22	11	9	16	16	77.8%	-30.4%
<b>ATTENDANCE</b>								
Main Season Attendance	19,554	19,008	9,306	2,728	11,267	12,373	313.0%	-42.4%
Total Seats Available	30,296	28,755	15,533	5,190	21,624	20,280	316.6%	-28.6%
% of Capacity Sold	64.5%	66.1%	59.9%	52.6%	52.1%	59.0%	-1.0%	-19.2%
<b>PRICING</b>								
High Ticket Price	\$ 172.30	\$ 182.95	\$ 187.68	\$ 108.24	\$ 187.91	\$ 167.82	73.6%	9.1%
Low Ticket Price	\$ 18.62	\$ 19.28	\$ 19.50	\$ 25.29	\$ 22.77	\$ 21.09	-10.0%	22.3%
Average Yield per Ticket Sold*	\$ 83.47	\$ 82.12	\$ 79.60	\$ 66.18	\$ 83.19	\$ 78.91	25.7%	-0.3%

### CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:

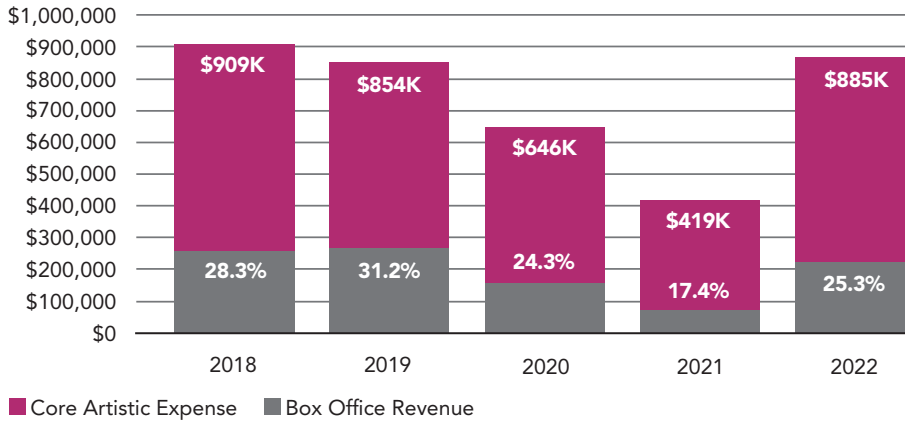
Arizona Opera | The Atlanta Opera | Austin Opera | Boston Lyric Opera | Central City Opera | Chicago Opera Theater  
Cincinnati Opera | Des Moines Metro Opera | Florida Grand Opera | The Glimmerglass Festival | Hawai'i Opera Theatre  
HERE | Lyric Opera of Kansas City | Minnesota Opera | New Orleans Opera | Opera Colorado | Opera Omaha  
Opera Philadelphia | Opera San José | Opera Theatre of Saint Louis | Palm Beach Opera | Pittsburgh Opera  
Portland Opera | San Diego Opera | Sarasota Opera | Utah Symphony | Utah Opera

\* 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.

# Budget 3

## Average Program Coverage

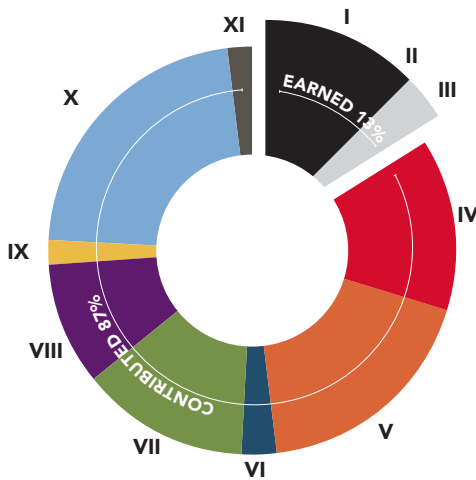
Program coverage is the amount of core artistic expenses covered by box office.



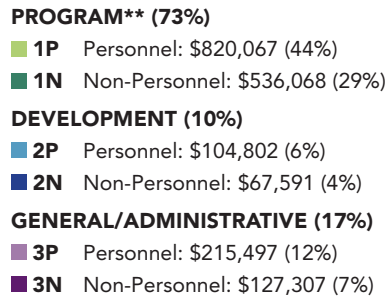
## Average Activity

\$1,884,027
<b>OPERATING REVENUE</b>
\$1,871,333
<b>OPERATING EXPENSES</b>
2,821
<b>TICKETS SOLD</b>
6,173
<b>SEATS AVAILABLE</b>
45.7%
<b>CAPACITY SOLD</b>
2.8
<b>PRODUCTIONS</b>
7.3
<b>PERFORMANCES</b>

## Revenue Breakdown

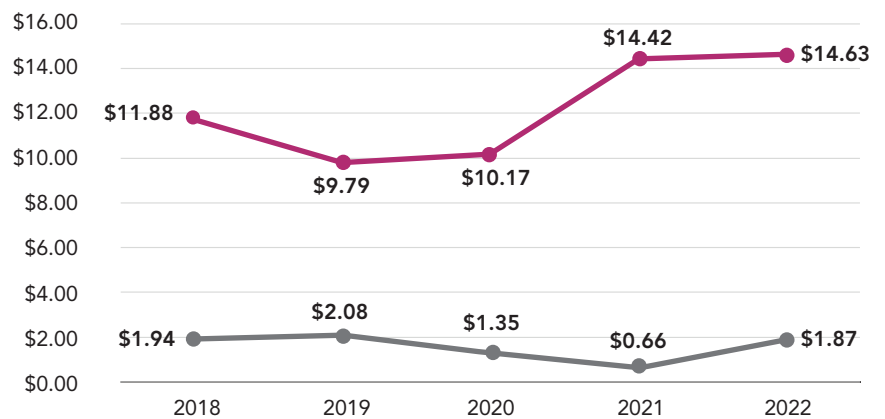


## Expense Breakdown



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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



## BETWEEN \$1,000,000 AND \$3,000,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 1,712,512	\$ 1,918,841	\$ 1,471,302	\$ 1,584,931	\$ 1,884,027	\$ 1,714,323	18.9%	10.0%
Operating Expenses	\$ 1,780,057	\$ 1,796,811	\$ 1,442,673	\$ 1,161,824	\$ 1,871,333	\$ 1,610,540	61.1%	5.1%
<b>Net Operating Income</b>	<b>\$ -67,545</b>	<b>\$ 122,030</b>	<b>\$ 28,630</b>	<b>\$ 423,107</b>	<b>\$ 12,694</b>	<b>\$ 103,783</b>	<b>-97.0%</b>	<b>118.8%</b>
as % of Expenses	-3.8%	6.8%	2.0%	36.4%	0.7%	8.4%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 256,972	\$ 266,480	\$ 157,286	\$ 72,841	\$ 224,094	\$ 195,535	207.6%	-12.8%
Investments	\$ 18,879	\$ 20,483	\$ 39,980	\$ 122,169	\$ -62,334	\$ 27,835	-151.0%	-430.2%
Other Earned Revenue	\$ 192,738	\$ 181,081	\$ 108,593	\$ 50,837	\$ 66,609	\$ 119,971	31.0%	-65.4%
<b>Total Earned Revenue</b>	<b>\$ 468,589</b>	<b>\$ 468,044</b>	<b>\$ 305,859</b>	<b>\$ 245,846</b>	<b>\$ 228,369</b>	<b>\$ 343,341</b>	<b>-7.1%</b>	<b>-51.3%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 205,591	\$ 208,316	\$ 162,873	\$ 136,659	\$ 246,089	\$ 191,906	80.1%	19.7%
Individual	\$ 238,790	\$ 438,381	\$ 307,475	\$ 278,659	\$ 330,463	\$ 318,753	18.6%	38.4%
Corporate	\$ 71,320	\$ 61,996	\$ 38,450	\$ 30,730	\$ 44,367	\$ 49,372	44.4%	-37.8%
Foundation	\$ 250,506	\$ 345,226	\$ 260,792	\$ 270,601	\$ 234,411	\$ 272,307	-13.4%	-6.4%
Special Events***	--	--	\$ 64,648	\$ 121,149	\$ 170,351	\$ 118,716	40.6%	--
In-Kind	\$ 52,213	\$ 42,254	\$ 26,486	\$ 20,562	\$ 32,158	\$ 34,735	56.4%	-38.4%
Other Private Support	\$ 158,975	\$ 111,038	\$ 55,655	\$ 61,192	\$ 36,621	\$ 84,696	-40.2%	-77.0%
<b>Total Private Support</b>	<b>\$ 977,395</b>	<b>\$ 1,207,210</b>	<b>\$ 916,378</b>	<b>\$ 919,551</b>	<b>\$ 1,094,460</b>	<b>\$ 1,022,999</b>	<b>19.0%</b>	<b>12.0%</b>
<b>Total Government Support*</b>	<b>\$ 84,343</b>	<b>\$ 83,346</b>	<b>\$ 111,743</b>	<b>\$ 317,105</b>	<b>\$ 405,164</b>	<b>\$ 200,340</b>	<b>27.8%</b>	<b>380.4%</b>
<b>Total Contributed Revenue</b>	<b>\$ 1,061,738</b>	<b>\$ 1,290,556</b>	<b>\$ 1,028,121</b>	<b>\$ 1,236,657</b>	<b>\$ 1,499,623</b>	<b>\$ 1,223,339</b>	<b>21.3%</b>	<b>41.2%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 182,185	\$ 160,240	\$ 137,322	\$ 102,428	\$ 156,035	\$ 147,642	52.3%	-14.4%
<b>Total Operating Revenue</b>	<b>\$ 1,712,512</b>	<b>\$ 1,918,841</b>	<b>\$ 1,471,302</b>	<b>\$ 1,584,931</b>	<b>\$ 1,884,027</b>	<b>\$ 1,714,323</b>	<b>18.9%</b>	<b>10.0%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 723,768	\$ 732,246	\$ 631,411	\$ 466,284	\$ 820,067	\$ 674,755	75.9%	13.3%
Development	\$ 103,304	\$ 114,446	\$ 113,162	\$ 105,988	\$ 104,802	\$ 108,340	-1.1%	1.5%
General/Administrative	\$ 184,051	\$ 181,254	\$ 177,283	\$ 205,009	\$ 215,497	\$ 192,619	5.1%	17.1%
<b>Total Personnel Expenses</b>	<b>\$ 1,011,124</b>	<b>\$ 1,027,946</b>	<b>\$ 921,856</b>	<b>\$ 777,280</b>	<b>\$ 1,140,367</b>	<b>\$ 975,715</b>	<b>46.7%</b>	<b>12.8%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 514,898	\$ 550,563	\$ 355,710	\$ 265,173	\$ 536,068	\$ 444,483	102.2%	4.1%
Development	\$ 70,335	\$ 91,824	\$ 57,166	\$ 34,154	\$ 67,591	\$ 64,214	97.9%	-3.9%
General/Administrative	\$ 183,700	\$ 126,478	\$ 107,940	\$ 85,216	\$ 127,307	\$ 126,128	49.4%	-30.7%
<b>Total Non-Personnel Expenses</b>	<b>\$ 768,933</b>	<b>\$ 768,865</b>	<b>\$ 520,817</b>	<b>\$ 384,543</b>	<b>\$ 730,967</b>	<b>\$ 634,825</b>	<b>90.1%</b>	<b>-4.9%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 1,780,057</b>	<b>\$ 1,796,811</b>	<b>\$ 1,442,673</b>	<b>\$ 1,161,824</b>	<b>\$ 1,871,333</b>	<b>\$ 1,610,540</b>	<b>61.1%</b>	<b>5.1%</b>

\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

\*\*\* The Professional Opera Survey began tracking of special events support from FY2020 onward. Prior to FY2020, special events support was split across private support categories.

# Budget 3

BETWEEN \$1,000,000 AND \$3,000,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 874,743	\$ 1,012,758	\$ 1,087,220	\$ 1,555,196	\$ 1,620,546	\$ 1,230,093	4.2%	85.3%
Restricted	\$ 896,253	\$ 858,195	\$ 773,713	\$ 972,065	\$ 904,347	\$ 880,915	-7.0%	0.9%
<b>Total Net Assets</b>	<b>\$ 1,770,996</b>	<b>\$ 1,870,953</b>	<b>\$ 1,860,934</b>	<b>\$ 2,527,261</b>	<b>\$ 2,524,893</b>	<b>\$ 2,111,007</b>	<b>-0.1%</b>	<b>42.6%</b>
as % of Expenses	99.5%	104.1%	129.0%	217.5%	134.9%	137.0%	--	--
<b>Working Capital</b>	<b>\$ 1,025,382</b>	<b>\$ 1,036,623</b>	<b>\$ 769,129</b>	<b>\$ 1,122,608</b>	<b>\$ 1,102,155</b>	<b>\$ 1,011,179</b>	<b>-1.8%</b>	<b>7.5%</b>
as % of Expenses	57.6%	57.7%	53.3%	96.6%	58.9%	64.8%	--	--
<b>Investments</b>	<b>\$ 926,810</b>	<b>\$ 1,043,247</b>	<b>\$ 1,089,911</b>	<b>\$ 1,344,005</b>	<b>\$ 1,353,051</b>	<b>\$ 1,151,405</b>	<b>0.7%</b>	<b>46.0%</b>
as % of Expenses	52.1%	58.1%	75.5%	115.7%	72.3%	74.7%	--	--
<b>Net Fixed Assets</b>	<b>\$ 785,502</b>	<b>\$ 741,459</b>	<b>\$ 712,367</b>	<b>\$ 742,218</b>	<b>\$ 540,357</b>	<b>\$ 704,381</b>	<b>-27.2%</b>	<b>-31.2%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 986,513</b>	<b>\$ 1,171,777</b>	<b>\$ 1,144,033</b>	<b>\$ 1,402,391</b>	<b>\$ 1,548,753</b>	<b>\$ 1,250,693</b>	<b>10.4%</b>	<b>57.0%</b>
as % of Expenses	55.4%	65.2%	79.3%	120.7%	82.8%	80.7%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	3.6	3.5	1.9	1.2	2.8	2.6	133.3%	-22.2%
Main Season Performances	10	10	5.1	3.3	7.3	7	121.2%	-27.0%
<b>ATTENDANCE</b>								
Main Season Attendance	4,714	4,706	2,082	1,245	2,821	3,113	126.6%	-40.2%
Total Seats Available	7,660	7,784	4,081	2,263	6,173	5,592	172.8%	-19.4%
% of Capacity Sold	61.5%	60.5%	51.0%	55.0%	45.7%	54.7%	-16.9%	-25.7%
<b>PRICING</b>								
High Ticket Price	\$ 141.83	\$ 135.59	\$ 117.69	\$ 145.12	\$ 169.24	\$ 141.89	16.6%	19.3%
Low Ticket Price	\$ 25.12	\$ 24.41	\$ 24.25	\$ 20.88	\$ 23.35	\$ 23.60	11.8%	-7.0%
Average Yield per Ticket Sold*	\$ 54.51	\$ 56.63	\$ 64.61	\$ 48.68	\$ 64.68	\$ 57.82	32.9%	18.7%

**CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:**

Beth Morrison Projects | Chautauqua Opera | Dayton Performing Arts Alliance | Florentine Opera Company  
 Fort Worth Opera | Kentucky Opera | Long Beach Opera | Madison Opera | Nashville Opera  
 North Carolina Opera | Opera Columbus | Opera Memphis | On Site Opera | Opera Orlando | Opera Parallèle  
 OPERA San Antonio | Opera Saratoga | Pensacola Opera | Piedmont Opera | Sacramento Philharmonic & Opera  
 Spoleto Festival USA | Tulsa Opera | Wolf Trap Opera

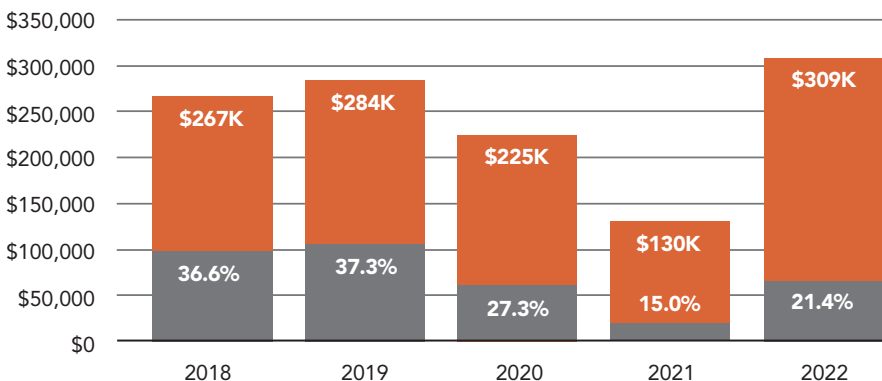
\*For FY2020, FY2021 and FY2022, yield per ticket sold excludes box office revenue from alternate programming, which accounted for a disproportionate amount of box office revenue compared to pre-pandemic seasons.

# Budget 4

BETWEEN \$250,000 AND \$1,000,000

## Average Program Coverage

Program coverage is the amount of core artistic expenses covered by box office.

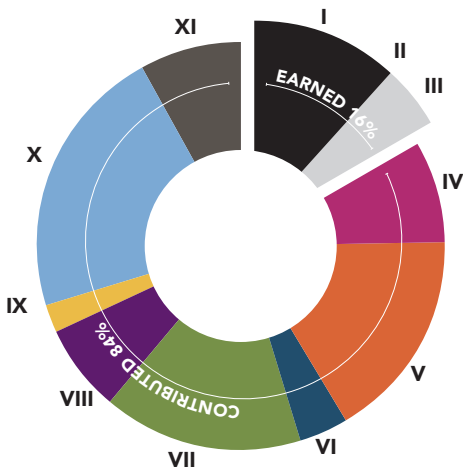


Core Artistic Expense Box Office Revenue

## Average Activity

\$581,644
OPERATING REVENUE
\$603,935
OPERATING EXPENSES
1,945
TICKETS SOLD
3,405
SEATS AVAILABLE
57.1%
CAPACITY SOLD
2.6
PRODUCTIONS
6.9
PERFORMANCES

## Revenue Breakdown



### EARNED (16%)

- I Box Office: \$66,005 (12%)
- II Investment: -\$5,473 (-1%)
- III Other Earned: \$28,060 (5%)

### CONTRIBUTED (84%)

- IV Board Contributions: \$41,997 (8%)
- V Individual: \$97,693 (17%)
- VI Corporates: \$25,059 (4%)
- VII Foundation: \$89,285 (16%)
- VIII Special Events: \$37,500 (7%)
- IX In-Kind: \$11,719 (2%)
- X Government\*: \$123,190 (22%)
- XI Other Contrib: \$43,381 (8%)

## Expense Breakdown

### PROGRAM\*\* (69%)

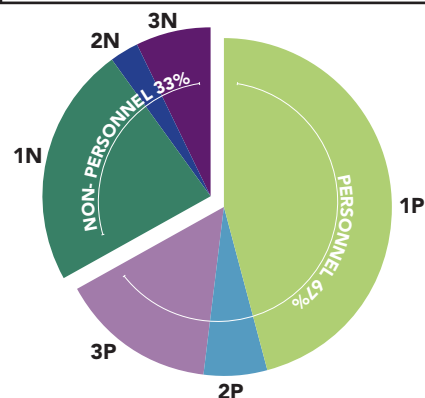
- 1P Personnel: \$277,778 (46%)
- 1N Non-Personnel: \$137,036 (23%)

### DEVELOPMENT (9%)

- 2P Personnel: \$36,036 (6%)
- 2N Non-Personnel: \$20,309 (3%)

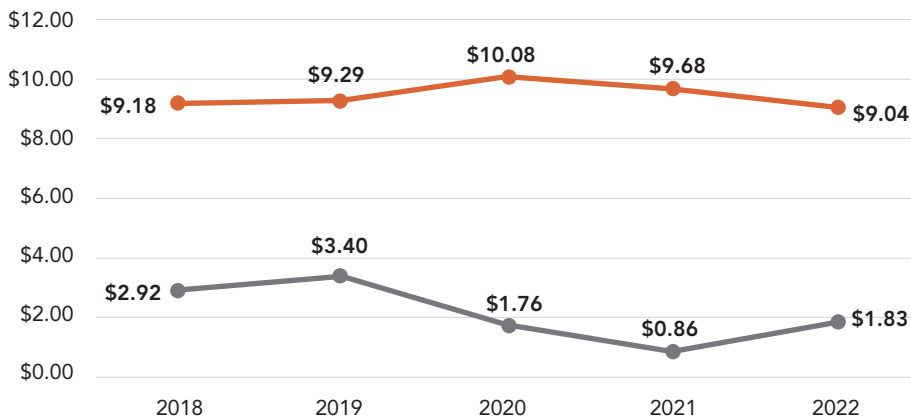
### GENERAL/ADMINISTRATIVE (22%)

- 3P Personnel: \$90,445 (15%)
- 3N Non-Personnel: \$42,331 (7%)



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

# Budget 4

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 534,086	\$ 530,298	\$ 488,047	\$ 420,559	\$ 581,644	\$ 510,927	38.3%	8.9%
Operating Expenses	\$ 532,878	\$ 553,765	\$ 468,361	\$ 378,827	\$ 603,935	\$ 507,553	59.4%	13.3%
<b>Net Operating Income</b>	<b>\$ 1,207</b>	<b>\$ -23,468</b>	<b>\$ 19,685</b>	<b>\$ 41,732</b>	<b>\$ -22,291</b>	<b>\$ 3,373</b>	<b>-153.4%</b>	<b>-1,946.8%</b>
as % of Expenses	0.2%	-4.2%	4.2%	11.0%	-3.7%	1.5%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 97,712	\$ 105,843	\$ 61,268	\$ 19,529	\$ 66,005	\$ 70,071	238.0%	-32.4%
Investments	\$ 1,462	\$ 4,827	\$ 2,881	\$ 18,220	\$ -5,473	\$ 4,383	-130.0%	-474.4%
Other Earned Revenue	\$ 44,865	\$ 47,208	\$ 32,064	\$ 19,347	\$ 28,060	\$ 34,309	45.0%	-37.5%
<b>Total Earned Revenue</b>	<b>\$ 144,039</b>	<b>\$ 157,878</b>	<b>\$ 96,214</b>	<b>\$ 57,095</b>	<b>\$ 88,591</b>	<b>\$ 108,764</b>	<b>55.2%</b>	<b>-38.5%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 43,088	\$ 44,982	\$ 46,788	\$ 35,990	\$ 41,997	\$ 42,569	16.7%	-2.5%
Individual	\$ 129,983	\$ 154,214	\$ 132,019	\$ 94,230	\$ 97,693	\$ 121,628	3.7%	-24.8%
Corporate	\$ 25,206	\$ 21,226	\$ 18,833	\$ 14,913	\$ 25,059	\$ 21,047	68.0%	-0.6%
Foundation	\$ 76,247	\$ 76,214	\$ 82,798	\$ 71,719	\$ 89,285	\$ 79,253	24.5%	17.1%
Special Events***	--	--	\$ 18,217	\$ 11,759	\$ 37,500	\$ 22,492	218.9%	--
In-Kind	\$ 18,235	\$ 20,908	\$ 22,486	\$ 12,407	\$ 11,719	\$ 17,151	-5.5%	-35.7%
Other Private Support	\$ 23,899	\$ 13,083	\$ 17,960	\$ 18,251	\$ 43,381	\$ 23,315	137.7%	81.5%
<b>Total Private Support</b>	<b>\$ 316,657</b>	<b>\$ 330,626</b>	<b>\$ 339,101</b>	<b>\$ 259,270</b>	<b>\$ 346,634</b>	<b>\$ 318,457</b>	<b>33.7%</b>	<b>9.5%</b>
<b>Total Government Support*</b>	<b>\$ 35,356</b>	<b>\$ 27,432</b>	<b>\$ 35,519</b>	<b>\$ 99,602</b>	<b>\$ 123,190</b>	<b>\$ 64,220</b>	<b>23.7%</b>	<b>248.4%</b>
<b>Total Contributed Revenue</b>	<b>\$ 352,012</b>	<b>\$ 358,058</b>	<b>\$ 374,620</b>	<b>\$ 358,871</b>	<b>\$ 469,824</b>	<b>\$ 382,677</b>	<b>30.9%</b>	<b>33.5%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 38,034	\$ 14,361	\$ 17,213	\$ 4,593	\$ 23,229	\$ 19,486	405.7%	-38.9%
<b>Total Operating Revenue</b>	<b>\$ 534,086</b>	<b>\$ 530,298</b>	<b>\$ 488,047</b>	<b>\$ 420,559</b>	<b>\$ 581,644</b>	<b>\$ 510,927</b>	<b>38.3%</b>	<b>8.9%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 235,391	\$ 252,260	\$ 200,728	\$ 147,767	\$ 277,778	\$ 222,785	88.0%	18.0%
Development	\$ 20,751	\$ 27,335	\$ 27,871	\$ 31,747	\$ 36,036	\$ 28,748	13.5%	73.7%
General/Administrative	\$ 67,129	\$ 66,023	\$ 79,450	\$ 79,714	\$ 90,445	\$ 76,552	13.5%	34.7%
<b>Total Personnel Expenses</b>	<b>\$ 323,272</b>	<b>\$ 345,618</b>	<b>\$ 308,049</b>	<b>\$ 259,228</b>	<b>\$ 404,259</b>	<b>\$ 328,085</b>	<b>55.9%</b>	<b>25.1%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 142,897	\$ 142,371	\$ 107,215	\$ 73,405	\$ 137,036	\$ 120,585	86.7%	-4.1%
Development	\$ 20,856	\$ 16,455	\$ 11,762	\$ 10,914	\$ 20,309	\$ 16,059	86.1%	-2.6%
General/Administrative	\$ 45,854	\$ 49,321	\$ 41,335	\$ 35,279	\$ 42,331	\$ 42,824	20.0%	-7.7%
<b>Total Non-Personnel Expenses</b>	<b>\$ 209,607</b>	<b>\$ 208,147</b>	<b>\$ 160,312</b>	<b>\$ 119,599</b>	<b>\$ 199,676</b>	<b>\$ 179,468</b>	<b>67.0%</b>	<b>-4.7%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 532,878</b>	<b>\$ 553,765</b>	<b>\$ 468,361</b>	<b>\$ 378,827</b>	<b>\$ 603,935</b>	<b>\$ 507,553</b>	<b>59.4%</b>	<b>13.3%</b>

\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

\*\*\* The Professional Opera Survey began tracking of special events support from FY2020 onward. Prior to FY2020, special events support was split across private support categories.

## BETWEEN \$250,000 AND \$1,000,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 207,949	\$ 230,719	\$ 236,915	\$ 272,706	\$ 290,056	\$ 247,669	6.4%	39.5%
Restricted	\$ 177,588	\$ 150,325	\$ 135,684	\$ 129,178	\$ 128,473	\$ 144,250	-0.5%	-27.7%
<b>Total Net Assets</b>	<b>\$ 385,536</b>	<b>\$ 381,045</b>	<b>\$ 372,599</b>	<b>\$ 401,884</b>	<b>\$ 418,529</b>	<b>\$ 391,919</b>	<b>4.1%</b>	<b>8.6%</b>
as % of Expenses	72.3%	68.8%	79.6%	106.1%	69.3%	79.2%	--	--
<b>Working Capital</b>	<b>\$ 144,991</b>	<b>\$ 111,467</b>	<b>\$ 127,447</b>	<b>\$ 287,660</b>	<b>\$ 309,407</b>	<b>\$ 196,194</b>	<b>7.6%</b>	<b>113.4%</b>
as % of Expenses	27.2%	20.1%	27.2%	75.9%	51.2%	40.3%	--	--
<b>Investments</b>	<b>\$ 93,125</b>	<b>\$ 121,499</b>	<b>\$ 118,168</b>	<b>\$ 164,423</b>	<b>\$ 178,794</b>	<b>\$ 135,202</b>	<b>8.7%</b>	<b>92.0%</b>
as % of Expenses	17.5%	21.9%	25.2%	43.4%	29.6%	27.5%	--	--
<b>Net Fixed Assets</b>	<b>\$ 211,043</b>	<b>\$ 199,881</b>	<b>\$ 189,722</b>	<b>\$ 56,574</b>	<b>\$ 52,359</b>	<b>\$ 141,916</b>	<b>-7.5%</b>	<b>-75.2%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 55,910</b>	<b>\$ 83,375</b>	<b>\$ 103,087</b>	<b>\$ 102,000</b>	<b>\$ 88,785</b>	<b>\$ 86,631</b>	<b>-13.0%</b>	<b>58.8%</b>
as % of Expenses	10.5%	15.1%	22.0%	26.9%	14.7%	17.8%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	3.1	3.1	1.5	1.1	2.6	2.3	136.4%	-16.1%
Main Season Performances	8.5	8.5	3.6	2.3	6.9	5.9	200.0%	-18.8%
<b>ATTENDANCE</b>								
Main Season Attendance	2,752	2,679	1,195	359	1,945	1,786	441.8%	-29.3%
Total Seats Available	4,371	4,218	1,871	1,319	3,405	3,037	158.2%	-22.1%
% of Capacity Sold	62.9%	63.5%	63.9%	27.2%	57.1%	54.9%	109.9%	-9.2%
<b>PRICING</b>								
High Ticket Price	\$ 73.06	\$ 76.00	\$ 78.36	\$ 75.36	\$ 85.77	\$ 77.71	13.8%	17.4%
Low Ticket Price	\$ 21.51	\$ 18.57	\$ 17.59	\$ 13.32	\$ 16.95	\$ 17.59	27.3%	-21.2%
Average Yield per Ticket Sold*	\$ 35.51	\$ 39.51	\$ 44.91	\$ 41.33	\$ 35.06	\$ 39.27	-15.2%	-1.3%

### CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:

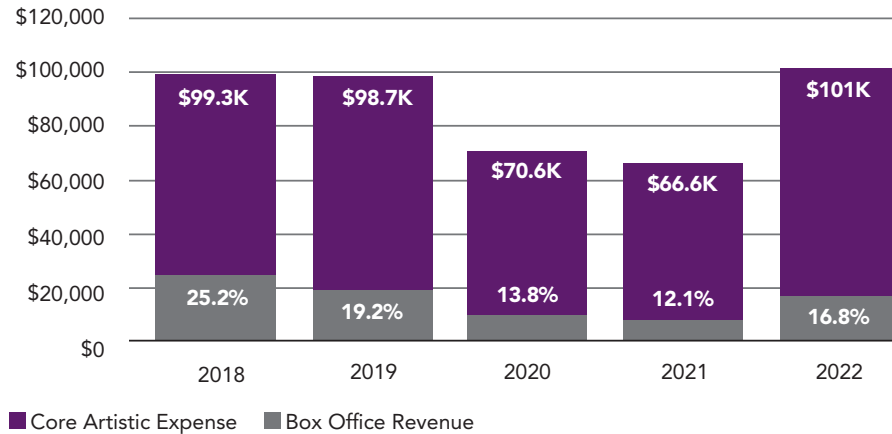
The American Opera Project | American Lyric Theater | Anchorage Opera | Ars Lyrica Houston | Cedar Rapids Opera  
 El Paso Opera | Eugene Opera | Fargo-Moorhead Opera | IN Series | The Industry | Intermountain Opera Bozeman  
 Opera Baltimore | Opera Birmingham | Opera Maine | Opera Modesto | Opera on Tap | Opera on the James  
 Opera Roanoke | Opera Southwest | Opera Steamboat | Pacific Opera Project | Pocket Opera  
 Tri-Cities Opera | Union Avenue Opera | UrbanArias

\* 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.

# Budget 5

## Average Program Coverage

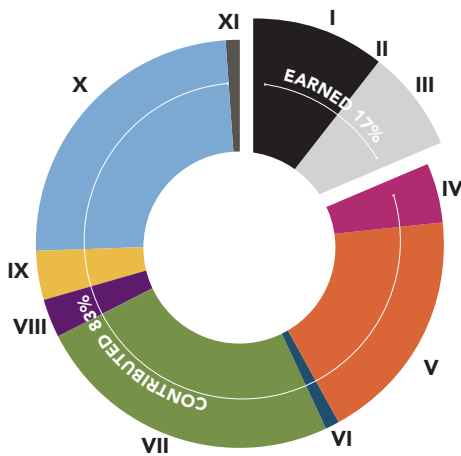
Program coverage is the amount of core artistic expenses covered by box office revenue.



## Average Activity

\$157,046
OPERATING REVENUE
\$164,903
OPERATING EXPENSES
219
TICKETS SOLD
393
SEATS AVAILABLE
55.7%
CAPACITY SOLD
1.2
PRODUCTIONS
2.9
PERFORMANCES

## Revenue Breakdown



### EARNED (17%)

- I Box Office: \$17,037 (11%)
- II Investment: -\$3,372 (-2%)
- III Other Earned: \$12,419 (8%)

### CONTRIBUTED (83%)

- IV Board: \$8,623 (5%)
- V Individual: \$29,622 (19%)
- VI Corporate: \$1,704 (1%)
- VII Foundation: \$39,550 (25%)
- VIII Special Events: \$4,123 (3%)
- IX In-Kind: \$5,902 (4%)
- X Government\*: \$39,775 (25%)
- XI Other Contrib: \$1,664 (1%)

## Expense Breakdown

### PROGRAM\*\* (68%)

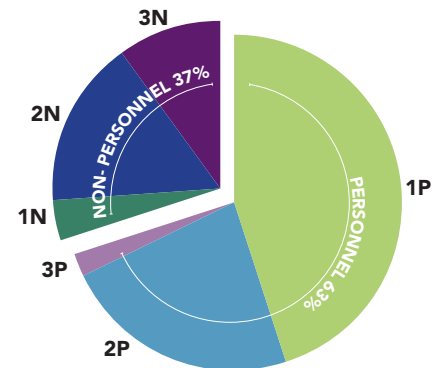
- 1P Personnel: \$74,005 (45%)
- 1N Non-Personnel: \$38,459 (23%)

### DEVELOPMENT (6%)

- 2P Personnel: \$2,532 (2%)
- 2N Non-Personnel: \$7,197 (4%)

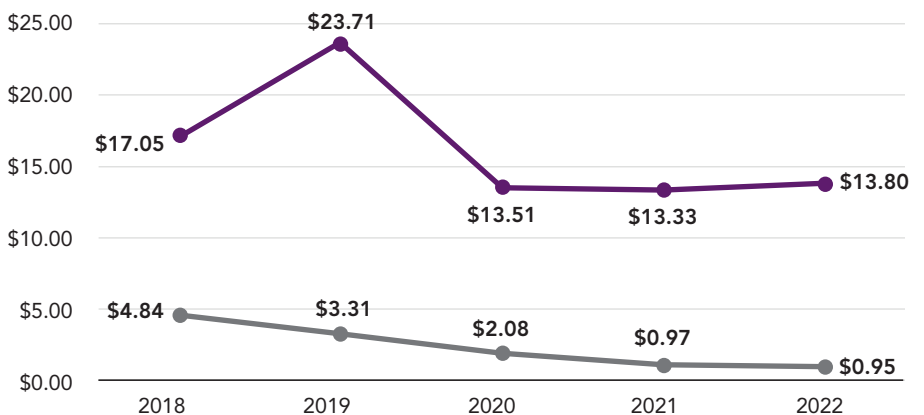
### GENERAL/ADMINISTRATIVE (26%)

- 3P Personnel: \$26,048 (16%)
- 3N Non-Personnel: \$16,663 (10%)



## Average Development & Marketing Productivity

- Development Productivity: Dollars raised from contributions per dollar spent on fundraising.
- Marketing Productivity: Dollars earned from box office revenue per dollar spent on marketing.



\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

## UNDER \$250,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>FINANCIAL OVERVIEW</b>								
Operating Revenue	\$ 127,664	\$ 132,390	\$ 115,163	\$ 120,413	\$ 157,046	\$ 130,535	30.4%	23.0%
Operating Expenses	\$ 129,319	\$ 139,212	\$ 106,139	\$ 102,743	\$ 164,903	\$ 128,463	60.5%	27.5%
<b>Net Operating Income</b>	<b>\$ -1,655</b>	<b>\$ -6,822</b>	<b>\$ 9,024</b>	<b>\$ 17,671</b>	<b>\$ -7,858</b>	<b>\$ 2,072</b>	<b>-144.5%</b>	<b>-374.8%</b>
as % of Expenses	-1.3%	-4.9%	8.5%	17.2%	-4.8%	3.0%	--	--
<b>OPERATING REVENUE</b>								
<b>UNRESTRICTED EARNED REVENUE</b>								
Box Office	\$ 25,003	\$ 18,928	\$ 9,723	\$ 8,063	\$ 17,037	\$ 15,751	111.3%	-31.9%
Investments	\$ 17	\$ 1,191	\$ 703	\$ 285	\$ -3,372	\$ -235	-1,283.2%	-19,935.3%
Other Earned Revenue	\$ 17,520	\$ 15,510	\$ 12,481	\$ 4,923	\$ 12,419	\$ 12,571	152.3%	-29.1%
<b>Total Earned Revenue</b>	<b>\$ 42,540</b>	<b>\$ 35,629</b>	<b>\$ 22,907</b>	<b>\$ 13,271</b>	<b>\$ 26,084</b>	<b>\$ 28,086</b>	<b>96.5%</b>	<b>-38.7%</b>
<b>UNRESTRICTED CONTRIBUTED REVENUE</b>								
Board	\$ 7,660	\$ 4,998	\$ 5,548	\$ 6,856	\$ 8,623	\$ 6,737	25.8%	12.6%
Individual	\$ 26,512	\$ 39,568	\$ 27,495	\$ 26,230	\$ 29,622	\$ 29,885	12.9%	11.7%
Corporate	\$ 2,653	\$ 6,911	\$ 1,718	\$ 990	\$ 1,704	\$ 2,795	72.1%	-35.8%
Foundation	\$ 21,923	\$ 20,364	\$ 29,470	\$ 25,975	\$ 39,550	\$ 27,456	52.3%	80.4%
Special Events***	--	--	\$ 5,540	\$ 3,288	\$ 4,123	\$ 4,317	25.4%	--
In-Kind	\$ 12,310	\$ 14,502	\$ 9,704	\$ 9,285	\$ 5,902	\$ 10,341	-36.4%	-52.1%
Other Private Support	\$ 2,448	\$ 3,173	\$ 919	\$ 2,452	\$ 1,664	\$ 2,131	-32.1%	-32.0%
<b>Total Private Support</b>	<b>\$ 73,506</b>	<b>\$ 89,516</b>	<b>\$ 80,392</b>	<b>\$ 75,075</b>	<b>\$ 91,188</b>	<b>\$ 81,935</b>	<b>21.5%</b>	<b>24.1%</b>
<b>Total Government Support*</b>	<b>\$ 8,404</b>	<b>\$ 7,246</b>	<b>\$ 11,864</b>	<b>\$ 28,340</b>	<b>\$ 39,775</b>	<b>\$ 19,126</b>	<b>40.3%</b>	<b>373.3%</b>
<b>Total Contributed Revenue</b>	<b>\$ 81,910</b>	<b>\$ 96,762</b>	<b>\$ 92,256</b>	<b>\$ 103,414</b>	<b>\$ 130,962</b>	<b>\$ 101,061</b>	<b>26.6%</b>	<b>59.9%</b>
<b>REVENUE SUMMARY</b>								
Net Assets Released from Restriction	\$ 3,214	\$ 0	\$ 0	\$ 3,728	\$ 0	\$ 1,389	-100.0%	-100.0%
<b>Total Operating Revenue</b>	<b>\$ 127,664</b>	<b>\$ 132,390</b>	<b>\$ 115,163</b>	<b>\$ 120,413</b>	<b>\$ 157,046</b>	<b>\$ 130,535</b>	<b>30.4%</b>	<b>23.0%</b>
<b>OPERATING EXPENSES</b>								
<b>PERSONNEL</b>								
Program**	\$ 62,510	\$ 59,984	\$ 38,866	\$ 47,813	\$ 74,005	\$ 56,635	54.8%	18.4%
Development	\$ 2,614	\$ 586	\$ 904	\$ 3,741	\$ 2,532	\$ 2,076	-32.3%	-3.1%
General/Administrative	\$ 14,693	\$ 23,797	\$ 21,916	\$ 15,587	\$ 26,048	\$ 20,408	67.1%	77.3%
<b>Total Personnel Expenses</b>	<b>\$ 79,817</b>	<b>\$ 84,367</b>	<b>\$ 61,686</b>	<b>\$ 67,141</b>	<b>\$ 102,585</b>	<b>\$ 79,119</b>	<b>52.8%</b>	<b>28.5%</b>
<b>NON-PERSONNEL</b>								
Program**	\$ 34,578	\$ 37,562	\$ 24,940	\$ 18,223	\$ 38,459	\$ 30,752	111.0%	11.2%
Development	\$ 2,508	\$ 3,633	\$ 6,299	\$ 4,423	\$ 7,197	\$ 4,812	62.7%	187.0%
General/Administrative	\$ 12,415	\$ 13,651	\$ 13,214	\$ 12,956	\$ 16,663	\$ 13,780	28.6%	34.2%
<b>Total Non-Personnel Expenses</b>	<b>\$ 49,502</b>	<b>\$ 54,845</b>	<b>\$ 44,453</b>	<b>\$ 35,602</b>	<b>\$ 62,319</b>	<b>\$ 49,344</b>	<b>75.0%</b>	<b>25.9%</b>
<b>EXPENSES SUMMARY</b>								
<b>Total Operating Expenses</b>	<b>\$ 129,319</b>	<b>\$ 139,212</b>	<b>\$ 106,139</b>	<b>\$ 102,743</b>	<b>\$ 164,903</b>	<b>\$ 128,463</b>	<b>60.5%</b>	<b>27.5%</b>

\* COVID-19 government relief funds were reported variably in companies' FY2020, FY2021, and/or FY2022 budgets depending on notification or receipt of loan forgiveness.

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

\*\*\* The Professional Opera Survey began tracking of special events support from FY2020 onward. Prior to FY2020, special events support was split across private support categories.

# Budget 5

UNDER \$250,000

Fiscal Year	2018	2019	2020	2021	2022	5-yr average	1-yr change	5-yr change
<b>BALANCE SHEET</b>								
<b>NET ASSETS</b>								
Unrestricted	\$ 30,849	\$ 39,972	\$ 51,456	\$ 74,789	\$ 70,895	\$ 53,592	-5.2%	129.8%
Restricted	\$ 20,242	\$ 2,658	\$ 1,021	\$ 1,233	\$ 1,143	\$ 5,259	-7.3%	-94.4%
<b>Total Net Assets</b>	<b>\$ 51,091</b>	<b>\$ 42,630</b>	<b>\$ 52,476</b>	<b>\$ 76,022</b>	<b>\$ 72,038</b>	<b>\$ 58,851</b>	<b>-5.2%</b>	<b>41.0%</b>
as % of Expenses	39.5%	30.6%	49.4%	74.0%	43.7%	47.4%	--	--
<b>Working Capital</b>	<b>\$ 47,373</b>	<b>\$ 21,823</b>	<b>\$ 37,571</b>	<b>\$ 69,568</b>	<b>\$ 53,819</b>	<b>\$ 46,031</b>	<b>-22.6%</b>	<b>13.6%</b>
as % of Expenses	36.6%	15.7%	35.4%	67.7%	32.6%	37.6%	--	--
<b>Investments</b>	<b>\$ 11,964</b>	<b>\$ 16,789</b>	<b>\$ 17,430</b>	<b>\$ 21,663</b>	<b>\$ 30,785</b>	<b>\$ 19,726</b>	<b>42.1%</b>	<b>157.3%</b>
as % of Expenses	9.3%	12.1%	16.4%	21.1%	18.7%	15.5%	--	--
<b>Net Fixed Assets</b>	<b>\$ 1,142</b>	<b>\$ 1,191</b>	<b>\$ 1,191</b>	<b>\$ 1,293</b>	<b>\$ 1,689</b>	<b>\$ 1,301</b>	<b>30.6%</b>	<b>47.9%</b>
<b>ENDOWMENTS AND RESERVE FUNDS</b>								
<b>Balance</b>	<b>\$ 12,529</b>	<b>\$ 15,712</b>	<b>\$ 19,347</b>	<b>\$ 21,862</b>	<b>\$ 30,988</b>	<b>\$ 20,088</b>	<b>41.7%</b>	<b>147.3%</b>
as % of Expenses	9.7%	11.3%	18.2%	21.3%	18.8%	15.9%	--	--
<b>PERFORMANCE ACTIVITY</b>								
<b>PERFORMANCES</b>								
Main Season Productions	2.8	2.2	1.1	0.7	1.2	1.6	71.4%	-57.1%
Main Season Performances	7	7	4	2	3	4.5	61.1%	-59.7%
<b>ATTENDANCE</b>								
Main Season Attendance	737	761	758	76	219	510	188.2%	-70.3%
Total Seats Available	1,239	2,827	2,316	137	393	1,382	186.9%	-68.3%
% of Capacity Sold	59.5%	26.9%	32.7%	55.5%	55.7%	46.1%	0.4%	-6.4%
<b>PRICING</b>								
High Ticket Price	\$ 56.67	\$ 52.00	\$ 51.67	\$ 57.78	\$ 52.78	\$ 54.18	-8.7%	-6.9%
Low Ticket Price	\$ 20.56	\$ 19.44	\$ 15.67	\$ 22.78	\$ 17.78	\$ 19.24	-21.9%	-13.5%
Average Yield per Ticket Sold*	\$ 33.91	\$ 24.88	\$ 11.36	\$ 36.13	\$ 37.03	\$ 28.66	2.5%	9.2%

**CONSTANT SAMPLE GROUP BASED ON DATA REPORTED FROM:**

Boston Opera Collaborative | Chelsea Opera | The Cleveland Opera | Encompass New Opera Theatre  
 Experiments in Opera | New Camerata Opera | New Philharmonic Opera | Opera for the Young | Opera Ithaca  
 Opera MODO | Orchestra of New Spain | Queen City Opera | Solo Opera | Victory Hall Opera

\*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.



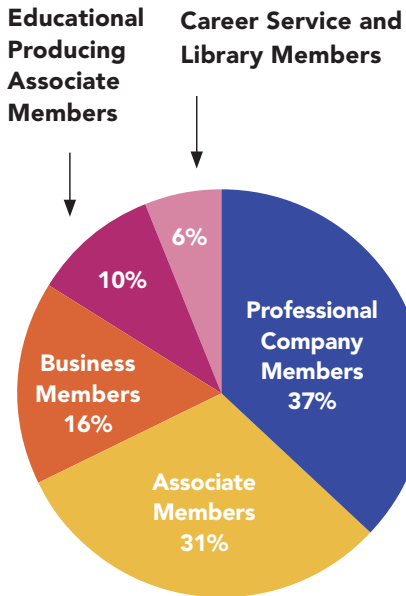
# OPERA America: 2023 by the Numbers

## MEMBERSHIP

## DIGITAL ENGAGEMENT

### ORGANIZATIONS

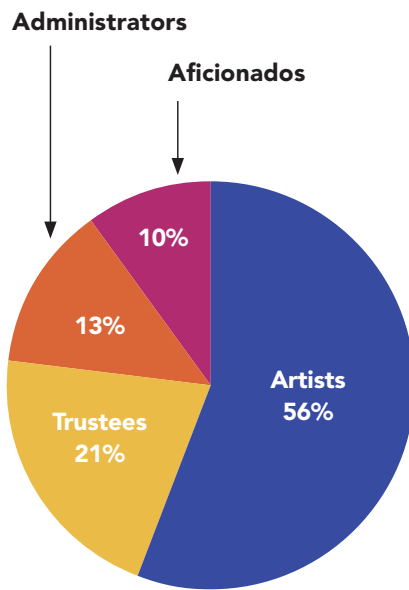
**554 Members**  
18% Growth in Members  
from 2018 to 2023



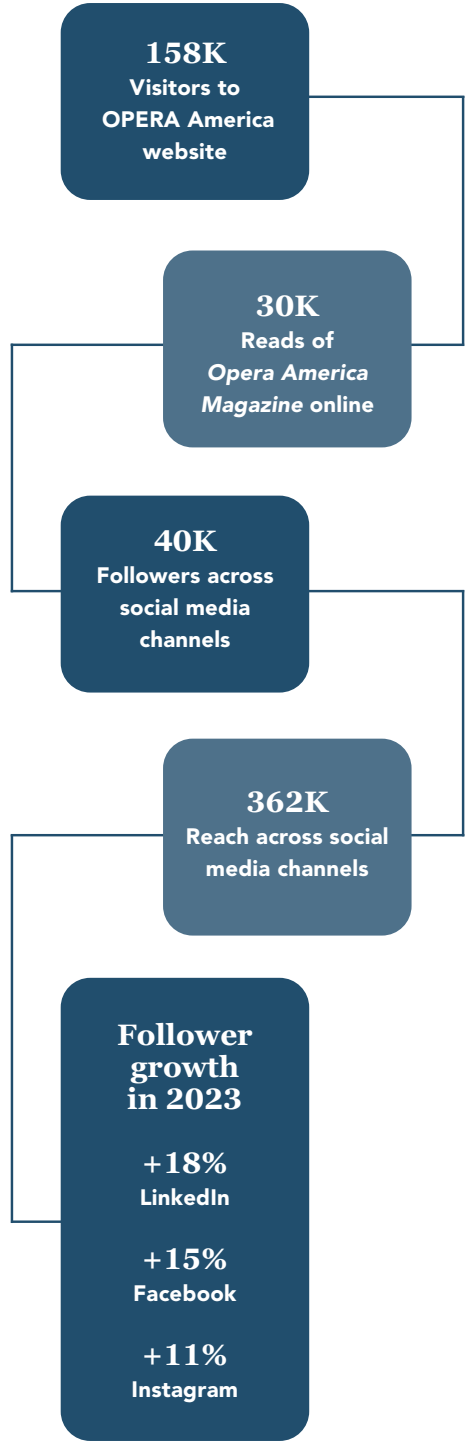
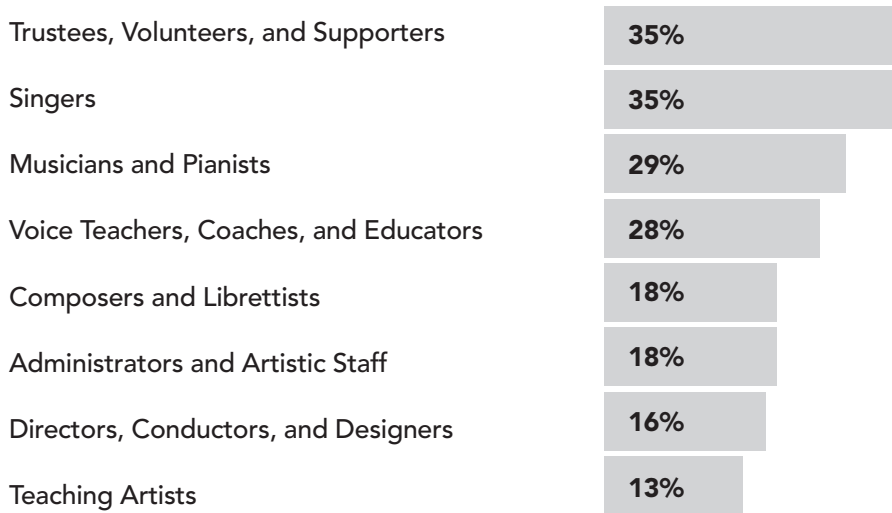
As of September 1, 2023

### INDIVIDUALS

**3,167 Members**  
94% Growth in Members  
from 2018 to 2023



### INDIVIDUAL MEMBERS BY SPECIALTY



Data based on calendar year 2023

## OPERA AMERICA'S SERVICE TO MEMBERS IN 2023

### GRANTS

# \$607K

Total Grants to Companies

# 142

Grant Applications  
from Companies

# 58

Companies  
Supported by Grants

# \$236K

Total Grants to Composers & Librettists

# 138

Grant Applications  
from Composers  
& Librettists

# 16

Composers &  
Librettists Supported  
by Grants

### PROGRAMS

# 1,100

Webinar Participants

# 1,200

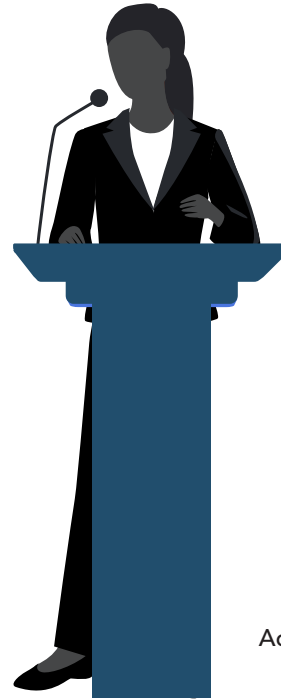
OPERA America  
Onstage Attendees

# 141

Artists in Professional  
Development Programs

# 85

Administrators in Professional  
Development Programs



### OPERA CONFERENCE 2023



# 756

Total Attendees

# 250

Organizations in  
Attendance

# 175

Artists in Attendance

### NEW INITIATIVES

# 657

Creators'  
Submissions to  
New Work  
Catalog

# 86

Companies in  
Opera Passport  
Program

# 85K

Operagoers  
Eligible for  
Opera Passport  
Discounts

### CONVENINGS

# 731

Participants in  
Forums

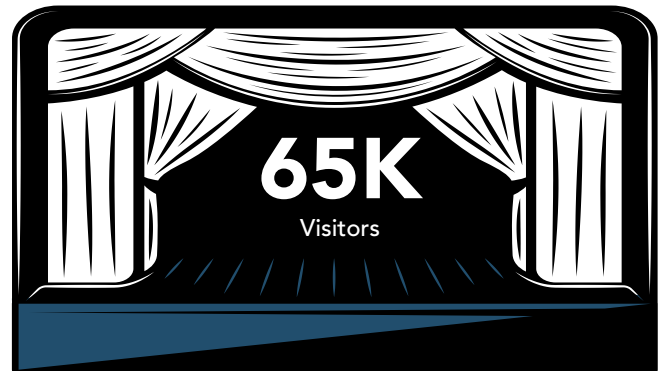
# 709

Participants in Virtual  
Artist Hangouts

# 215

Participants in Virtual  
Regional Meetings

### NATIONAL OPERA CENTER



Data based on calendar year 2023

# OPERA America Financial Report

OPERA America's finances in FY2023 began to demonstrate a return to normal — at least partially — following three years of profound disruption. Variations in revenue and expenses were related in part to the long-lasting impact of the pandemic and to programmatic enhancements that were rooted in an unwavering commitment to serving the field. Despite these variations, OPERA America ended FY2023 with a surplus of \$28,277 and an increase in net assets of almost \$10,000.

It is important to note that contributions from foundations and corporations declined between FY2022 and FY2023 due to the expiration of some multiyear contributions as well as a migration of institutional support away from the arts to other pressing societal issues. OPERA America remains profoundly grateful to the individual donors who have remained loyal in their generosity and, in many instances, have increased their contributions in recognition of the essential service OPERA America provides to the field.

Starting with a review of earned income, there are notable changes between FY2022 and FY2023. The first is in relation to government support, which in FY2022 swelled dramatically with revenue from the Paycheck Protection Program (PPP) loan forgiveness. Unlike member companies, OPERA America was not eligible to receive support from the Shuttered Venue Operators Grants. The total impact of the PPP program and the Employee Retention Tax Credits, however, exceeded \$1 million and continues to help OPERA America bridge the financial uncertainty that still unsettles the field. In FY2023, government grants totaled only \$280,000 and will decline even further in FY2024 with the end of all the pandemic relief programs.

Membership fees and dues rebounded to normal levels in FY2023 (\$812,000) following two years when organizational dues and individual dues for artists were waived thanks to the generosity of the Ann and Gordon Getty Foundation and board member C. Graham Berwind, III. It is gratifying that many of the new members who joined OPERA America during this period of waiver learned the value of the organization and elected to renew their memberships on a paying basis. As a result, OPERA America's organizational and individual membership continues near its all-time high.

The third important factor in the FY2023 budget is the continued regrowth in revenue from the operation of the National Opera Center. The facility closed completely for the last months of FY2020 and into FY2021, opening slowly to accommodate continued creative activity in the field. Traffic in the Opera Center and related income has increased gradually from \$756,000 in FY2022 to \$993,000 in FY2023 — which represents only 80 percent of pre-pandemic levels of utilization. Companies are still being cautious about returning to New York for auditions and, when they do, have spent less time listening to artists. A number of voice teachers continue their instruction virtually, and many of the young artists who left New York during the pandemic have yet to return.

On a very positive note, the OPERA America Salutes awards

dinner that marked the inauguration of the Opera Hall of Fame and recognized two classes of National Opera Trustee Recognition Award honorees was a great success. The first of its kind at OPERA America, the dinner yielded over \$250,000 to support OPERA America's professional development programs and provided a joyful, if delayed, celebration of OPERA America's 50<sup>th</sup> anniversary.

On the expense side, variations were less pronounced than on the income side of the ledger. Grants to members increased due to the timing of particular programs. National Opera Center expenses and development expenses both increased, the latter due in part to the successful OPERA America Salutes awards dinner, noted above. Prudent expense control helped offset a portion of the lower revenue.

FY2024 has begun encouragingly. Opera Center utilization continues to rebuild, and membership renewal is strong. Fortunately, residual reserves from COVID emergency programs ensure OPERA America's steadfast support of the field. Members of the Board of Directors and staff will remain alert to the dynamics of the field and focus on providing assistance and encouragement throughout the year.

## Statement of Financial Position

### As of June 30, 2023

Total Assets	\$ 24,602,632	
Total Liabilities	\$ 9,106,457	
<b>TOTAL NET ASSETS</b>	<b>\$ 15,496,175</b>	
Core Operating	\$ 99,641	
National Opera Center Fund	\$ 163,324	
Board-Designated Funds	\$ 1,348,721	
Funds with Restriction – Purpose	\$ 2,922,391	
Funds with Restriction – Perpetual	\$ 10,962,098	

## Statement of Activities

### As of June 30, 2023

Total Earned	\$ 2,374,033	32%
Total Contributed	\$ 5,044,986	68%
<b>TOTAL REVENUE</b>	<b>\$ 7,419,019</b>	
Program Services	\$ 5,925,805	80%
General and Administrative	\$ 788,006	11%
Development	\$ 695,244	10%
<b>TOTAL EXPENSES</b>	<b>\$ 7,409,055</b>	
<b>CHANGE IN NET ASSETS</b>	<b>\$ 9,964</b>	

# OPERA America Financial Report

## Operating Revenue and Expenses

As of June 30, 2023

### OPERATING REVENUE

Annual Fund/Individual Support	\$ 2,288,010	32%
Foundation Grants	\$ 1,521,500	21%
Corporate Contributions	\$ 80,000	1%
Government Grants	\$ 280,820	4%
Membership Fees and Dues	\$ 812,472	11%
Annual Conference Revenue	\$ 342,300	5%
National Opera Center Rentals	\$ 993,241	14%
Other Earned Income	\$ 239,724	3%
Opera Fund/Opera Center Endowment Draws	\$ 608,182	8%
<b>SUBTOTAL</b>	<b>\$ 7,166,249</b>	<b>100%</b>

### OPERATING EXPENSES

#### Program Services

Artistic Services	\$ 915,817	13%
Annual Conference	\$ 645,378	9%
Learning, Leadership, and Professional Development	\$ 346,620	5%
Grants to Members	\$ 749,719	11%
Information Services and Publications	\$ 626,842	9%
Media Relations and Marketing	\$ 337,251	5%
Organizational Membership	\$ 372,071	5%
National Opera Center and Occupancy Costs	\$ 1,595,603	22%
Public Affairs	\$ 65,420	1%

#### Support Services

General and Administrative	\$ 788,007	11%
Development	\$ 695,244	10%
<b>SUBTOTAL</b>	<b>\$ 7,137,972</b>	<b>100%</b>

<b>NET OPERATING SURPLUS</b>	<b>\$ 28,277</b>
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# OPERA America Annual Support

Opera's most devoted lovers and leaders invest in the vitality of opera across North America by supporting OPERA America, its National Opera Center, and its programming with annual, charitable donations. The list recognizes gifts of \$250 or more to the annual fund (December 2022 – November 2023), the 2022 OPERA America Salutes awards dinner, and special initiatives.

## LEADERSHIP CIRCLE

Bank of America  
 C. Graham Berwind, III / Spring Point Partners <sup>†</sup>  
 The Joseph and Robert Cornell Memorial Foundation  
 Ann and Gordon Getty Foundation  
 Howard Gilman Foundation  
 The Heinz Endowments  
 Carol F. Henry <sup>†</sup>  
 Charles and Cerise Jacobs Charitable Foundation  
 Lindemann Charitable Foundation II, Inc. <sup>†</sup>  
 Marineau Family Foundation  
 Mellon Foundation  
 Susan F. Morris <sup>†</sup>  
 The Music Man Foundation  
 National Endowment for the Arts  
 New York City Department of Cultural Affairs  
 Virginia B. Toulmin Foundation  
 The Wallace Foundation

## PRESIDENT'S CIRCLE

Arthur F. and Alice E. Adams Charitable Foundation  
 American Endowment Foundation  
 The Amphion Foundation  
 Arizona Community Foundation  
 Theodore H. Barth Foundation, Inc.  
 Jim and Nancy Barton  
 John and Astrid Baumgardner  
 Susan Bienkowski <sup>†</sup>  
 BIPOC Arts, at the recommendation of Alejandra Valarino Boyer  
 Larry and Coren Bomback  
 California Community Foundation  
 Mark Campbell  
 Community Foundation for Southeast Michigan  
 The Aaron Copland Fund for Music  
 Emilie Roy Corey  
 The Joseph and Robert Cornell Memorial Foundation <sup>†</sup>  
 Council for Canadian American Relations  
 Karin Eames  
 Bob Ellis <sup>†</sup>  
 David Ertel <sup>†</sup>

Elizabeth Eveillard <sup>†</sup>  
 Kenneth R. Feinberg <sup>†</sup>  
 James A. Feldman and Natalie Wexler <sup>†</sup>  
 Fidelity Charitable  
 Firefly Scientists Foundation  
 Scott H. and Margee M. Filstrup <sup>†</sup>  
 Flying Cloud Charitable Foundation  
 Francis Goelet Charitable Lead Trusts  
 Ruth and Rick Harper <sup>†</sup>  
 Jane Hartley <sup>†</sup>  
 Mrs. Jane Stieren Lacy  
 Virginia and Nix Lauridsen <sup>†</sup>  
 Carol Lazier <sup>†</sup>  
 Ronald and Barbara Leirvik  
 Jeanette Lerman-Neubauer <sup>†</sup>  
 Mont and Karen Levy <sup>†</sup>  
 Lynn J. Loader <sup>†</sup>  
 Sylvia and Paul Lorton, Jr. <sup>†</sup>  
 Madison Charitable Foundation <sup>†</sup>  
 Susan Graf Marineau <sup>†</sup>  
 Jacqueline Badger Mars <sup>†</sup>  
 Michael J. McGinley  
 The Montrone Family  
 National Philanthropic Trust  
 Sylvia M. Neil <sup>†</sup>  
 Noémi Neidorff  
 John Nesholm <sup>†</sup>  
 New York State Council on the Arts  
 Meredith L. Hathorn Penick  
 Mrs. E. Lee Perry  
 Elkhannah Pulitzer  
 Pamela Rigg <sup>†</sup>  
 Jane A. and Morton J. Robinson  
 Schwab Charitable  
 Seattle Foundation  
 Jeri Sedlar and Rick Miners  
 Howard and Sarah D. Solomon Foundation <sup>†</sup>  
 Marc A. Scorca and Joe Alvarez  
 Marc S. Solomon Family <sup>†</sup>  
 Dr. and Mrs. Gene E. Stark <sup>†</sup>  
 Jill and Bill Steinberg <sup>†</sup>  
 Eva and Marc Stern <sup>†</sup>  
 Shoshana B. Tancer  
 Barbara Augusta Teichert <sup>†</sup>  
 Thomas E. Terry <sup>†</sup>  
 The Tobin Theatre Arts Fund  
 Joanna and Peter Townsend <sup>†</sup>

Mr. and Mrs. Stephen Trampe <sup>†</sup>  
 John G. Turner and Jerry G. Fischer <sup>†</sup>  
 Mark Luis Villamar and Esther Milsted <sup>†</sup>  
 Riska Platt Wanago  
 Gary L. Wasserman <sup>†</sup>  
 The Whiting Foundation  
 Roma B. Wittcoff <sup>†</sup>  
 Carole J. Yaley <sup>†</sup>  
 Ann Ziff  
 Anonymous (2)  
 Anonymous <sup>†</sup>

## PATRON CIRCLE

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 Bruce Munro Wright  
 Tom Wright

# Organizational Members

## PROFESSIONAL COMPANY MEMBERS

### BUDGET 1 (\$15 million or more)

Canadian Opera Company <sup>C</sup> The Dallas Opera Detroit Opera	Houston Grand Opera Los Angeles Opera Lyric Opera of Chicago	The Metropolitan Opera San Francisco Opera The Santa Fe Opera	Seattle Opera Washington National Opera
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### BUDGET 2 (\$3 million to \$15 million)

Arizona Opera The Atlanta Opera Austin Opera Boston Lyric Opera Calgary Opera <sup>C</sup> Central City Opera Cincinnati Opera	Des Moines Metro Opera Edmonton Opera <sup>C</sup> Florida Grand Opera The Glimmerglass Festival Hawai'i Opera Theatre Lyric Opera of Kansas City Minnesota Opera Opera Colorado	Opéra de Montréal <sup>C</sup> Opera Omaha Opera Philadelphia Opera San José Opera Theatre of Saint Louis Pacific Opera Victoria <sup>C</sup> Palm Beach Opera Pittsburgh Opera	Portland Opera San Diego Opera Sarasota Opera Utah Symphony   Utah Opera Vancouver Opera <sup>C</sup> Virginia Opera
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### BUDGET 3 (\$1 million to \$3 million)

Beth Morrison Projects Chicago Opera Theater Dayton Performing Arts Alliance Richard B. Fisher Center for the Performing Arts Florentine Opera Company Fort Worth Opera HERE Arts Center Kentucky Opera Knoxville Opera Lamplighters Music Theatre	Long Beach Opera Madison Opera Manitoba Opera <sup>C</sup> Nashville Opera New Orleans Opera North Carolina Opera Opera Atelier <sup>C</sup> Opera Carolina Opera Columbus Opéra de Québec <sup>C</sup> Opera Idaho	Opera Lafayette Opera Memphis Opera Naples Opera Parallèle OPERA San Antonio Opera Santa Barbara Opera Saratoga Opera Tampa Opera Delaware Pensacola Opera Piedmont Opera	Soundstreams Canada <sup>C</sup> Spoleto Festival USA St. Petersburg Opera Company Tapestry Opera <sup>C</sup> Teatro Nuovo Toledo Opera Tulsa Opera Wolf Trap Opera
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### BUDGET 4 (\$250,000 to \$1 million)

Against the Grain Theatre <sup>C</sup> Amarillo Opera American Lyric Theater The American Opera Project Anchorage Opera Annapolis Opera Ars Lyrica Houston Boston Baroque Cedar Rapids Opera Charlottesville Opera Chautauqua Opera City Opera Vancouver <sup>CN</sup> El Paso Opera Eugene Opera Fargo-Moorhead Opera	Festival Opera Finger Lakes Opera Haymarket Opera Heartbeat Opera Hudson Valley International Festival of the Voice IN Series The Industry Inland Northwest Opera Intermountain Opera Bozeman Livermore Valley Opera Lyric Opera of the North Maryland Opera Mobile Opera Odyssey Opera On Site Opera	Opera Birmingham Opera for the Young Opera Grand Rapids Opera in the Heights Opéra Louisiane Opera Maine Opera Mississippi Opera Modesto Opera on Tap Opera on the Avalon <sup>C</sup> Opera on the James Opera Orlando Opera Roanoke Opera Southwest Opera Steamboat	Pacific Opera Project Pittsburgh Festival Opera Pocket Opera Salt Marsh Opera Shreveport Opera Tacoma Opera Teatro Grattaciolo Tri-Cities Opera Union Avenue Opera UrbanArias Vancouver Cantonese Opera <sup>CN</sup> Volcano Non-Profit Productions <sup>C</sup> Washington Concert Opera <sup>N</sup> White Snake Projects
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<sup>C</sup> – Professional Company Member of the Association for Opera in Canada | <sup>N</sup> – Joined as a new Professional Company Member in 2023

## BUDGET 5 (Under \$250,000)

Alliance for New Music-Theatre	Dell'Arte Opera Ensemble	Mission Opera	Opera MODO
American Baroque Opera Co.	Encompass New Opera Theatre	National Sawdust	Orchestra of New Spain
Anima Mundi Productions	Experiments in Opera	Nautilus Music-Theater	Overtone Industries <sup>N</sup>
Ardea Arts - Opera Out Of Bounds	FAWN Chamber Creative <sup>CN</sup>	New Camerata Opera	Painted Sky Opera
Ars Minerva	First Coast Opera <sup>N</sup>	New Music Theatre Project <sup>N</sup>	Penn Square Opera
Astrolabe Musik Theatre <sup>C</sup>	Greensboro Opera	New Performance Traditions	Re:Naissance Opera <sup>C</sup>
Barn Opera <sup>N</sup>	Guerilla Opera	New Philharmonic Opera	Resonance Works
Boston Opera Collaborative	Lakes Area Music Festival	Nickel City Opera	Sacramento Philharmonic & Opera
Boulder Opera	The Lighthouse Opera Company	Opera 5 <sup>C</sup>	Saskatoon Opera <sup>C</sup>
Center for Contemporary Opera	Little Opera Company <sup>C</sup>	Opera Baltimore	Solo Opera
Chants Libres, Compagnie Lyrique de Création <sup>C</sup>	The Little OPERA Theatre of NY	Opera Company of Middlebury	Sound the Alarm: Music/Theatre <sup>C</sup>
Chelsea Opera	Loose Tea Music Theatre <sup>C</sup>	Opera Cultura	Synchromy
Chicago Fringe Opera <sup>N</sup>	Lyric Opera of Orange County <sup>N</sup>	Opera Ebony	Valley Opera and Performing Arts
City Lyric Opera	Marble City Opera	Opera Fort Collins	Victory Hall Opera
The Cleveland Opera	MassOpera	Opera Ithaca	Wilmington Concert Opera
Connecticut Lyric Opera	Milwaukee Opera Theatre	Opera Kelowna <sup>C</sup>	
	MIOpera <sup>N</sup>	Opera Las Vegas	

## ASSOCIATE MEMBERS

/kor/ productions	Burnaby Lyric Opera	Filmshop	Miami Music Festival
Access Contemporary Music	Camerata New Jersey	Geneva Light Opera	Midori & Friends
ACMA	The Cape Town Opera	The Gerda Lissner Foundation	Mostly Modern Projects
ACTION FOR ARTISTS	Caramoor Center for Music and the Arts	Glass Farm Ensemble	Music of Remembrance
Adelphi Orchestra	Carnegie Hall	GO Broadway	Musical Life Foundation
Alaria Chamber Ensemble	Catalan Institute of America	Gulfshore Opera	Musique 3 Femmes
American Academy of Teachers of Singing	Catapult Opera Company	The Gustav Mahler Society of New York	National Children's Chorus
American Composers Alliance	Central Florida Vocal Arts	Hogfish	The National Chorale
American Composers Orchestra	Chamber Music America	Holy City Arts & Lyric Opera (HALO)	National Guild for Community Arts Education
The American Fundraising Foundation	The Chamber Music Center of New York, Inc.	Innovations en concert	National Opera Association
American Guild of Musical Artists	Charleston Gaillard Center	Inside Broadway	National Opera House
Amore Opera	Charleston Opera Theater	International Arts Educators Forum	NATS-National Association of Teachers of Singing
Anthony Laciura Foundation for the Arts, Inc.	Chicago Summer Opera	International Brazilian Opera Company	New Century Opera
Argento New Music Project	Classic Lyric Arts, Inc.	Internationale Meistersinger Akademie	New Music USA
Aria412	Classical Singing and New York in June	Japan Performing Arts, Inc.	New Opera West
Art Song Preservation Society of New York	Classical Tahoe	Japanese Children's Society	New Thread Quartet
The Association for Opera in Canada	The Composers Collective	The Jensen Foundation	New York City Master Chorale
Association for the Promotion of New Music, Inc.	Composers Now	The Knights	New York Composers Circle
Association of Performing Arts Presenters	Cuban Cultural Center Of New York	Kurt Weill Foundation for Music	New York Festival of Song
Athena Music Foundation	Dance/USA	La Senta	New York Opera Alliance
Bel Canto Boot Camp	The David I Martin Music Guild of NANM, Inc.	Landlocked Opera	New York Singing Teachers Association
Bella Music Foundation	Dolora Zajick Institute for Young Dramatic Voices	League of American Orchestras	New York Women Composers, Inc.
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Berks Opera Company	The Dramatists Guild of America	Liz-Mohn-Center	North/South Consonance, Inc.
Berkshire Opera Festival	Druid City Opera	Loadbang Inc.	The Olga Forrai Foundation, Inc.
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