OPERA AMERICA

ANNUAL FIELD REPORT

+ OPERA America Year in Review

operaamerica.org/AFR

2025

Introduction

OPERA America's *Annual Field Report* presents a data-rich lens into the dynamics of opera companies in the United States and Canada. It is designed to provide leaders in the field with a comprehensive overview of the financial health and productivity of opera companies in North America.

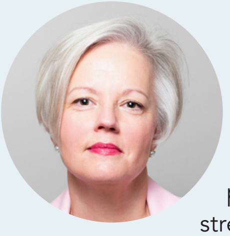
The report is a tool for those working at and supporting opera companies: to understand recent trends in the industry that underpin the operating landscape and to have benchmarks for comparing local progress. The 2025 report is built around "key performance indicators" — with explanations of each metric, insights into historical trends, and analysis of the recent data on which the report is based.

While this is the "2025" report, it is important to remember that findings are based on opera companies' 2024 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 DataArts.

Key findings of this year's report are preceded by a "Field at a Glance in 2024," which offers a snapshot of the economic impact and performance activity of North American opera companies. The report also includes a survey of OPERA America's ongoing research into the motivations, experiences, and barriers of new operagoers, including recent and forthcoming publications and resources.

The final portion of this publication is OPERA America's 2025 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.

From the Board Chair



The opera field has been engaged in a dialogue of paradoxes for several years now. We operate in a world increasingly dominated by tension, anxiety, and unease, yet our performances bring people together to strengthen community through art. We face challenging financial realities and inconsistent audience behavior, yet the caliber of work produced and performed has never been higher, and new audiences are still flocking to experience opera for the first time.

The trends in this year's *Annual Field Report* reflect the challenges opera companies are facing to uphold their extraordinary service to their communities while balancing their budgets. It is worth celebrating that box office revenue is inching nearer to pre-pandemic levels, as a percentage of total revenue, for many companies. Yet the number of productions and performances remains contracted, and pressure on fundraising increases with each subsequent year.

In the face of this, let's not forget the opportunities. Artists — singers, composers, librettists, directors, designers — are pushing the envelope of creativity and challenging the orthodoxy of what we produce. New audiences are curious to have new experiences; they are younger, more diverse, and hungry to merge live performance with their digital appetites.

If there was ever a time to innovate, now is that time. As OPERA America enters a new chapter of leadership and service, we encourage you to join us in thinking differently. We are grateful to all of you leading the way in the field and to the many donors who make this all possible.

Lee Anne Myslewski
Board Chair, OPERA America
Vice President, Opera and Classical Programming,
Wolf Trap Foundation for the Performing Arts

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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.

The 2025 Annual Field Report and OPERA America Year in Review are made possible with member support and a grant from the Wallace Foundation.

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LEARN MORE ONLINE

Read this report online and download the full data tables at operaamerica.org/AFR2025.
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

2023–2024 (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 IN 2023–2024

In the 2023–2024 season, opera companies played an important role in their local communities, both in major metropolitan areas and cities of all sizes. They employed and engaged nearly 45,000 administrators, artists, and trustees in their artistic and civic work. These companies invested nearly one and a quarter billion dollars in the economy — an increase of 4% from the season prior.

$1.23 billion +4%
Invested in the Economy

2.04 million -2%
Total Attendance

17,900 +13%
Administrators Employed*

22,700 -4%
Artists Employed

3,800 -5%
Board Members/Trustees Engaged


El Milagro del Recuerdo at San Diego Opera

88% of the top 50 largest U.S. cities have opera companies**
Total U.S. cities with opera companies: 119

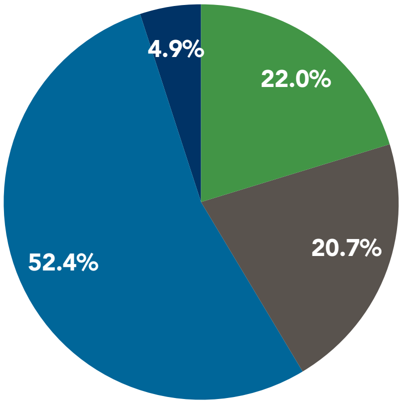
53% of the top 15 largest Canadian cities have opera companies**
Total Canadian cities with opera companies: 13

BOX OFFICE RECOVERY UPDATE

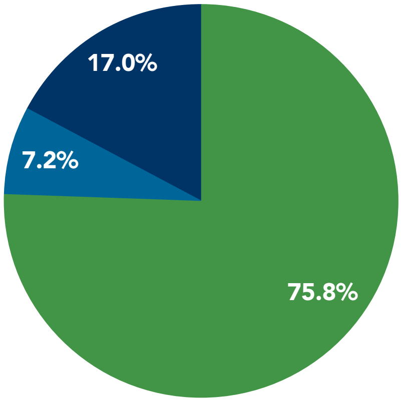
27.6%	22.0%
FY2019	FY2024

Box office as a percentage of all revenue

Revenue Breakdown



Expense Breakdown



Karli Cadel

* Administrators include full-time, part-time, and contract positions.
** Opera companies in OPERA America's Professional Company Membership. The top 50 U.S cities (as of July 1, 2024 per census.gov) and the top 15 Canadian cities (as of 2021 census per statcan.gc.ca) have populations of approximately 400,000 or more.
† For the purposes of this report, marketing expenses are included in program expenses.

PERFORMANCE ACTIVITY IN 2023–2024

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 2023–2024, companies increased the number of performances, titles, and premieres in their seasons over the previous year, though the number of productions decreased slightly. New works comprised half of the titles offered, consistent with the previous year.

247 +4%
Distinct Titles

449 -4%
Productions

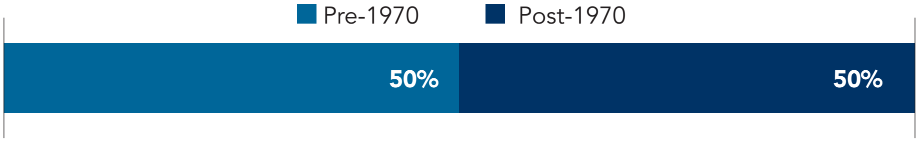
1,762 +2%
Performances

282 +2%
Venues

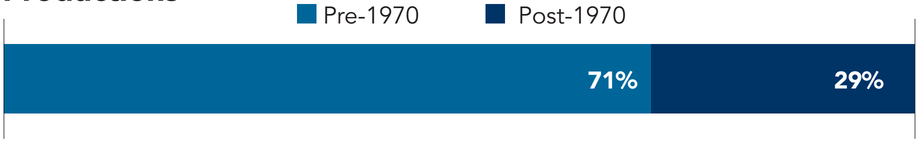
44 +7%
North American Premieres

***La bohème* at the Florentine Opera**

Titles



Productions



Top 5 Most-Produced Titles

1. ***La bohème***
(Puccini/Giacosa/Illica)
2. ***Carmen***
(Bizet/Meilhac/Halévy)
3. ***Madama Butterfly***
(Puccini/Giacosa/Illica)
4. ***The Barber of Seville***
(Rossini/Sterbini)
5. ***Don Giovanni***
(Mozart/Da Ponte) | ***La traviata***
(Verdi/Piave)

***Amahl and the Night Visitors* at Central City Opera**

Top 5 Most-Produced North American Titles

1. ***Amahl and the Night Visitors***
(Menotti)
2. ***Florencia en el Amazonas***
(Catán/Fuentes-Berain)
3. ***Book of Mountains and Seas***
(Huang Ruo)
4. ***Scalia/Ginsburg***
(Wang)
5. ***Glory Denied***
(Cipullo/Philpott)

Traveling Lemur Productions (*Bohème*); Amanda Tipton (*Amahl*)

Data are drawn from the FY2024 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

North American opera companies have excelled at attracting new audiences, especially in recent years. The opportunity now is to get these audience members to return as loyal operagoers for the future. In 2024, OPERA America published *Understanding Opera's New Audiences* (*UONA*), a national study of the motivations, experiences, and barriers faced by these first-timers.

Over the past year, new resources and research — supported by the Dr. M. Lee Pearce Foundation — have expanded and extended the field's understanding of its post-pandemic audiences. You'll find a glimpse of the learning on these pages with the full library of materials available online at **operaamerica.org/NewAudiences**.

ENGAGING OPERA'S NEW AUDIENCES

UONA pointed to numerous avenues for additional inquiry, experimentation, and strategic action that would inspire first-time audiences to return. The resource guide *Engaging Opera's New Audiences*, published in May 2025, offers a selection of tactical ideas and a framework for implementing them — all based around nine prevailing hypotheses:

Newcomers will be more likely to return if...

1. Going to the opera is a one-of-a-kind experience that is bigger than just the performance.
2. Performances are fun, social, and part of their evening (but not their entire evening).
3. They are offered a less expensive point of repeat entry.
4. The cost of a ticket delivers high value by their standards.
5. They build an appetite for opera by engaging with digital recordings before and after performances.
6. They receive communications that are tailored to them.
7. They can understand what's happening on stage from beginning to end.
8. They have a frictionless experience from ticket purchase to post-show email.
9. They can enjoy their experience without feeling they lack enough knowledge.

Audience members at Lyric Opera of Chicago

ADVICE FROM PEERS

Colleagues at Pacific Opera Project, Central City Opera, and Portland Opera offered their thoughts on how to process the research.

"*UONA* is a treasure trove, if you have the patience of a beachcomber. My best advice: Try not to tackle it in one sitting. Rather, digest it in several courses, allowing each page to spark questions and invite further investigation. Curiosity is key here. I found myself coming back to it again and again over several weeks, each time walking away with new understanding, new questions, and new ideas"

— KATHERINE POWERS, EXECUTIVE DIRECTOR, PACIFIC OPERA PROJECT

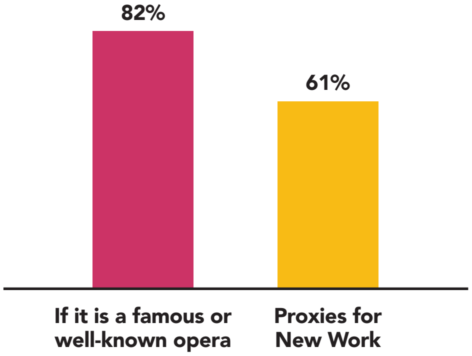
TESTING IN ACTION Fourteen opera companies in the U.S. and Canada (see p. 23) are in the process of implementing newcomer retention strategies that test the impact of customized communications, discounts, digital content, and more. With the support of $300,000 in grants from OPERA America, their rigorous A/B testing will offer insights for the entire field in the year ahead.

Kyle Flubacker

STICK TO THE CLASSICS? MAYBE NOT: A CORRECTION

UONA rattled the field when it originally concluded that first-timers "tend to stick to the classics." Fortunately, that's not quite right. Revisiting the data revealed: New audiences want to see repertoire they've heard of, which includes classics and new works.

What motivates newcomers to attend?



ANALYZING OPERA'S NEW AUDIENCES

What factors affect a newcomer's likelihood of returning? A forthcoming 2026 analytical study, conducted in partnership with the tech firm Artelize, looks at 20 years of ticketing history from 12 opera companies to consider how repertoire, pricing, calendars, and season model affect first-timer retention.

For instance, among the Budget 2/3 companies in the research sample, newcomers who bought the most expensive tickets (top 20% of the price range) were substantially more likely to return one year later.

Percentage of Newcomers Who Return One Year Later

	Overall	Cheapest Tickets (Bottom 20%)	Middle-Tier Tickets (Middle 60%)	Most Expensive Tickets (Top 20%)
Cohort	**Season 2**	**Season 2**	**Season 2**	**Season 2**
2014–15	15%	6%	20%	32%
2015–16	17%	7%	17%	24%
2016–17	19%	18%	28%	38%
2017–18	23%	13%	14%	38%
2018–19	14%	11%	6%	21%
2019–20	5%	1.9%	21%	12%
2020–21	16%	1.4%	14%	53%
2021–22	15%	4.7%	14%	21%
2022–23	18%	8%	15%	24%

PRODUCING FOR OPERA'S NEW AUDIENCES

Newcomers are looking for a "new experience," and repertoire matters for inspiring initial and repeat attendance. A newly released report highlights ways opera companies are leveraging inherited repertoire to build audiences.

Strategies include:

- Add Nuance through Changes of Perspective
- Lean into the Theatrical
- Expand the Experience
- Get Creative with Supertitles
- Perform in Bespoke Translations
- Connect with Mainstream Topics
- Cast Creatively
- Leverage New Technologies
- Shorten Performance Times
- Represent Your Local Community Onstage
- Make Productions Immersive
- Remix Old Works with New Creative Power
- Adapt Plots to Fit Modern Sensibilities

> **"We want this art form to be accessible. And I think sometimes we go out of our way to disenfranchise people who don't yet know why they might like this art form by avoiding making it easy and fun."**
>
> — ANDREW JORGENSEN, GENERAL DIRECTOR, OPERA THEATRE OF SAINT LOUIS

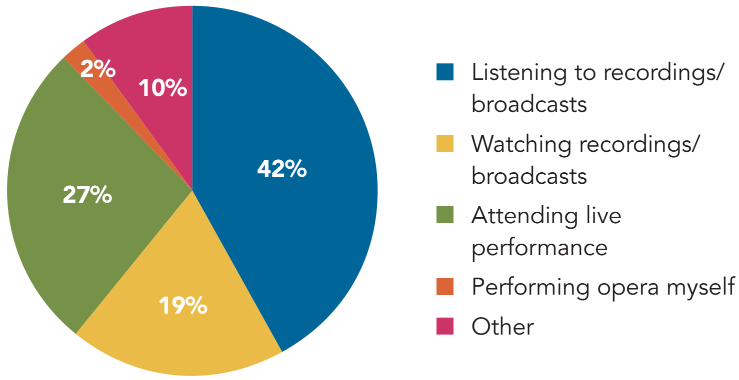
DIGITAL HABITS OF OPERA'S NEW AUDIENCES

UONA pointed to the important role that opera recordings play in introducing newcomers to the art form and in bookending their live attendance. To learn more, OPERA America partnered with the research firm Slover Linett at NORC to produce a forthcoming, two-part report on the digital habits of over 5,000 operagoers across 22 companies.

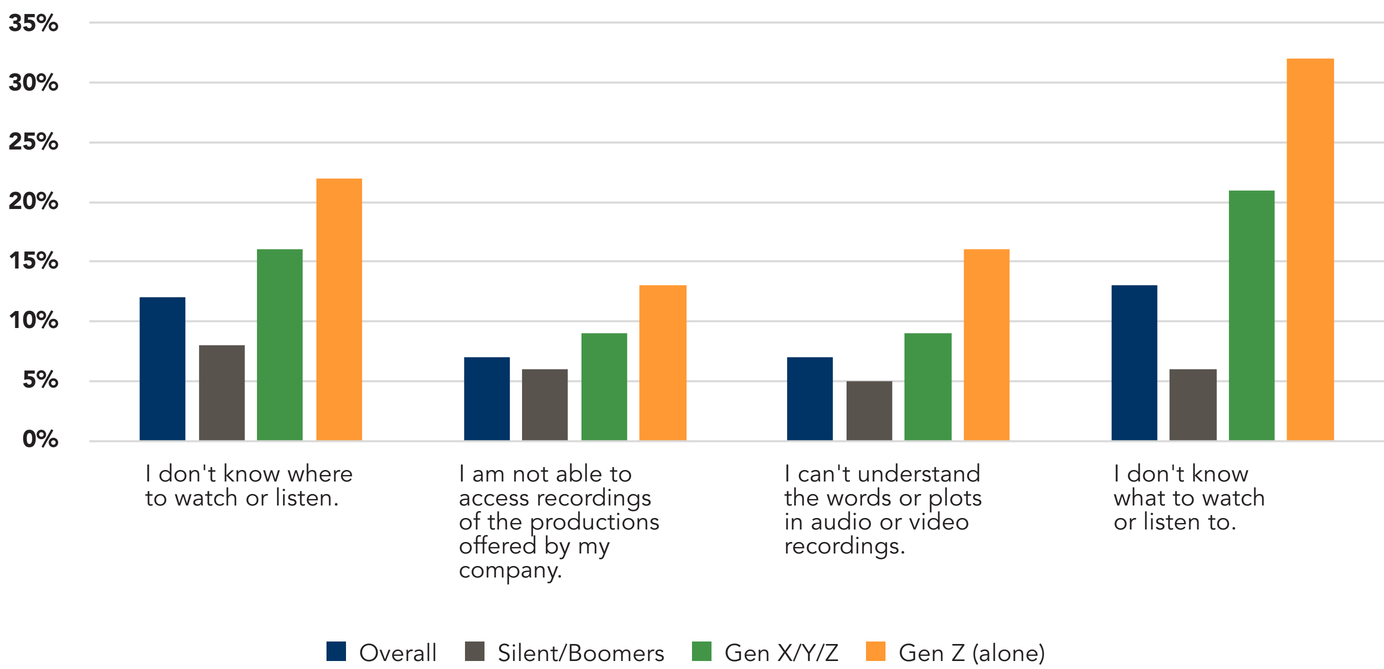
The first part explores how audiences — newcomers and ongoing attenders — were first introduced to opera. For instance, 76% reported it was as children, with 61% of them citing listening or watching recordings as their first engagement.

The second part examines the ways audiences rely on audio and video recordings around live performances: to decide whether to buy a ticket, to familiarize themselves before attending, and to re-engage with the work afterwards. One takeaway: Younger audiences, who make up a majority of newcomers, are looking for more digital content, but they need help finding it.

How were you first introduced to opera during your childhood?



What holds you back from watching/listening to opera recordings?



Liz Lauren (*Figaro*); Amanda Tipton Photography (*Barber*)

The Marriage of Figaro at Lyric Opera of Chicago

The Barber of Seville at Central City Opera

Professional Company Members, 2024–2025

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 2025, 152 of OPERA America's 204 Professional Company Members in the United States and Canada completed the survey. Of those companies, 123 qualified for the Constant Sample Group by reporting their data annually for the most recent three-year period.

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Alliance for New Music-Theatre [P]
Amarillo Opera [P G4]
American Lyric Theater [P G4]
American Opera Projects [P G4]
Anchorage Opera [P G4]
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Ars Minerva
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The Atlanta Opera [P G2]
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Boston Baroque
Boston Lyric Opera [P G2]
Buffalo Opera Unlimited [P]
Calgary Opera [P GC C]
Canadian Opera Company [C]
Cedar Rapids Opera [P G4]
Central City Opera [P G2]
Chants Libres, compagnie lyrique de création [P GC C]
Charlottesville Opera [P G4]
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Vancouver Cantonese Opera [C]
Vancouver Opera [P GC C]
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VisionIntoArt
Volcano Non-Profit Productions [P GC C]
Washington Concert Opera
Washington National Opera [P G1]
White Snake Projects [P G4]
Wilmington Concert Opera [P G5]
Wolf Trap Opera [P G3]

P — Submitted FY2024 data to the Professional Opera Survey | G# — Included in the Constant Sample Group for Budget 1–5 companies
GC — Included in the Constant Sample Group for the Association for Opera in Canada | C — Professional Company Member of the Association for Opera in Canada
N — Joined as a new Professional Company Member in FY2025


The Anonymous Lover
at Opera Philadelphia

KEY FINDINGS

Introduction to the FY2024 Key Findings

The key findings of the *Annual Field Report* are drawn from the fiscal year 2024 (FY2024) data submitted by OPERA America's member opera companies in the annual Professional Opera Survey (POS) administered by SMU DataArts.

Participating Companies

This year, 152 of OPERA America's 204 Professional Company Members in the United States and Canada completed the POS. (See p. 8 for the listing of companies.)

It is important to note, though, that the tables and charts in this report are based on the data of only a subset of these companies. The Constant Sample Group includes the companies that have completed the survey in every year of the analysis period.

Historically, OPERA America has employed a five-year period to define the Constant Sample Group, which this year would have spanned FY2020 through FY2024. However, the disruption of the pandemic to company operations in FY2020 and FY2021 makes this five-year comparison unhelpful.

Instead, this year's report uses a three-year Constant Sample Group: from FY2022 through FY2024. Consequently, the trends revealed in the tables and charts of these pages speak to the period of rebuilding that opera companies have undergone since the pandemic.

Data from FY2019 is also provided on most charts as a point of reference from the last full year before the impact of the pandemic. Due to the availability of data, the FY2019 data uses the same Constant Sample Group for Budget 1 and 2 companies and a subset of the Constant Sample Group for Budget 3–5 companies.

Findings Format

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

Canadian companies, members of the Association for Opera in Canada, are highlighted in their own section (see p. 18).

The report's findings are presented around "key performance indicators" that focus on the most pertinent takeaways from the data set. Charts highlight trends over the past three fiscal years: FY2022 through FY2024, with FY2019 as a pre-pandemic point of comparison. Adjoining tables summarize key reference points for readers, often presented as:

- One-Year Change (1-Yr. Δ) — The percentage change from FY2023 to FY2024.
- Two-Year Change (2-Yr. Δ) — The percentage change from FY2022 to FY2024.
- Three-Year Average (3-Yr. Avg.) — The average value from FY2022 to FY2024.

Full data tables are available for download at **operaamerica.org/AFR2025**.

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 three-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.

Johanna Austin

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 rental 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 from the marketing and development teams, with full cooperation of their board and staff colleagues.

In FY2024, earned revenue accounted for just one-quarter (24–28%) of income at Budget 3–5 companies with ticket sales representing the majority (17–18%). Budget 1 and 2 companies reported somewhat higher earned revenue (46% and 32%, respectively); their higher box office revenue (26% and 24%) reflects larger performance venues, and Budget 1 companies benefit from their more substantial endowments.

For some companies, box office revenue has returned to pre-pandemic levels, as a percentage of overall revenue, yet Budget 1 companies still fall short by a quarter. Most recently, Budget 2–5 saw incremental growth in ticket sales from FY2023 to FY2024, while Budget 1 companies faced a modest decrease.

Contributed revenue made up the other three-quarters of FY2024 income for Budget 3–5 companies and the other 54% and 68% for Budget 1 and 2 companies. The largest part of contributed revenue (30–40% for Budget 1–4 companies) continues to come from individuals and board members. The change in these values was positive for most but not all companies (with some variations due to how numbers are reported in the POS).

The most significant decreases in contributed revenue were among government support. While many companies relied on federal, state, and local relief from the pandemic in FY2022 and even FY2023, funds were largely exhausted by FY2024.

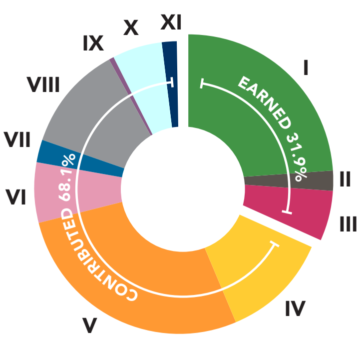


CHART: AVERAGE REVENUE FOR BUDGET 2 COMPANIES, FY2024

Earned (31.9%)
- **I** Box Office (24.1%)
- **II** Investment (2.2%)
- **III** Other Earned (5.6%)

Contributed (68.1%)
- **IV** Board (12.0%)
- **V** Individual (27.3%)
- **VI** Special Events (6.8%)
- **VII** Corporate (2.4%)
- **VIII** Foundation (11.7%)
- **IX** In-Kind (0.5%)
- **X** Government (5.6%)
- **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		
	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ
Earned Revenue	45.9%	-6.7%	+25.8%	31.9%	-7.3%	+39.4%	24.9%	+3.0%	+68.0%	24.4%	+7.0%	+44.8%	27.7%	+16.7%	+75.2%
Box Office	26.1%	-4.7%	+30.6%	24.1%	+7.5%	+33.0%	17.7%	+4.7%	+26.6%	17.1%	+7.0%	+42.3%	18.1%	+42.4%	+90.3%
Investment	10.2%	-8.5%	+49.4%	2.2%	+11.7%	+511.8%	2.3%	-8.0%	+190.2%	1.8%	+52.3%	+293.5%	0.5%	+99.2%	+22,397.1%
Other Earned	9.7%	-9.9%	-0.4%	5.6%	-44.4%	+4.8%	5.0%	+2.8%	+45.4%	5.4%	-2.5%	-4.6%	9.0%	-16.0%	+43.8%
Contributed Revenue	54.1%	+0.7%	-0.6%	68.1%	-5.3%	-24.4%	75.1%	+10.6%	+0.9%	75.6%	+1.4%	-1.2%	72.3%	-3.5%	+10.5%
Board	10.5%	-7.4%	+6.9%	12.0%	+0.3%	-3.7%	10.4%	-5.5%	+25.5%	10.4%	+11.3%	+1.7%	5.3%	-19.1%	+4.3%
Individual	20.0%	+7.5%	+33.3%	27.3%	+7.5%	-3.4%	21.6%	+14.5%	-1.7%	20.6%	-0.1%	+19.0%	13.4%	-43.4%	-35.1%
Special Events	3.3%	+32.4%	+2.7%	6.8%	-12.4%	+1.9%	10.6%	+40.0%	+50.6%	6.6%	+29.1%	+70.7%	1.8%	-6.6%	+85.4%
Corporate	2.0%	+29.2%	+19.1%	2.4%	+28.0%	+8.2%	3.2%	+13.6%	+17.4%	4.9%	-23.2%	-3.4%	2.5%	+87.2%	+68.1%
Foundation	12.7%	+29.3%	+56.5%	11.7%	+0.6%	-2.6%	15.0%	+46.9%	+30.6%	22.3%	+19.4%	+43.8%	18.8%	+4.9%	+53.6%
In-Kind	0.9%	+10.0%	+15.5%	0.5%	-12.4%	-4.2%	2.3%	-1.3%	-2.8%	2.1%	+8.0%	+19.7%	0.4%	-47.1%	-58.6%
Government	1.8%	-65.8%	-86.9%	5.6%	-46.5%	-78.5%	9.9%	-30.0%	-50.4%	7.5%	-31.5%	-54.9%	30.1%	+32.1%	+30.2%
Other Contributed	2.9%	-24.2%	+34.5%	1.9%	-20.3%	-10.7%	2.2%	+112.0%	+222.1%	1.3%	-18.0%	-78.8%	0.0%	0.0%	-100.0%

KEY FINDINGS

BOX OFFICE: FY2019 v. FY2024	FY19 Avg.	FY24 Avg.
Budget 1	34.5%	26.1%
Budget 2	24.6%	24.1%
Budget 3	18.7%	16.6%
Budget 4	21.1%	18.0%
Budget 5	20.5%	16.0%

Post-Pandemic Recovery
Ticket sales, as a percentage of overall budget, have nearly returned to pre-pandemic levels for some companies. Budget 2–5 companies are all within five percentage points of their FY2019 box office levels. Budget 1 companies still lag by eight percentage points, or by 24% of pre-pandemic levels. Variances across other revenue lines, both earned and contributed, are minute, without any one category making up for the differences.

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 comprise the majority of operating budgets, with development and general/administrative expenses in the 4–11% and 14–27% ranges, respectively. 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, FY2024 expenses grew over prior years, revealing the ongoing impact of inflation on the field. Personnel expenses increased for all companies in the past two years — the consequence of strategic investments in recruitment and retention — although the rate of growth appears to have leveled off for most companies. Still, development personnel, in a competitive nonprofit market, demanded increased salaries at all companies; and Budget 4–5 companies continued to invest more in their human assets in all categories.

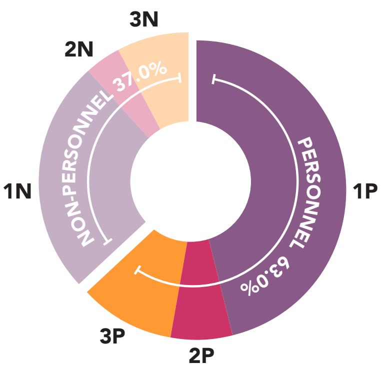


CHART: AVERAGE EXPENSES FOR BUDGET 2 COMPANIES, FY2024

Program (71.4%)
- **1P** Personnel (46.1%)
- **1N** Non-Personnel (25.3%)

Development (10.8%)
- **2P** Personnel (6.7%)
- **2N** Non-Personnel (4.1%)

General/Administrative (17.8%)
- **3P** Personnel (10.2%)
- **3N** Non-Personnel (7.5%)

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

	Budget 1			Budget 2			Budget 3			Budget 4			Budget 5		
	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ
Program	78.4%	-2.0%	+22.1%	71.4%	+0.6%	+15.0%	72.4%	-0.7%	+3.1%	68.8%	+7.6%	+12.6%	69.4%	+1.2%	+14.3%
Personnel	58.3%	-1.2%	+19.7%	46.1%	-1.0%	+20.0%	47.4%	-0.9%	+9.9%	44.5%	+7.7%	+13.4%	53.9%	+5.3%	+10.5%
Non-Personnel	20.1%	-4.2%	+29.9%	25.3%	+3.8%	+6.9%	25.0%	-0.2%	-7.6%	24.3%	+7.4%	+11.1%	15.5%	-10.8%	+29.8%
Development	7.6%	-3.8%	+6.7%	10.8%	+7.3%	+31.3%	9.1%	+12.6%	+14.4%	7.6%	-0.7%	+10.7%	4.1%	+96.8%	+92.4%
Personnel	5.1%	+0.7%	+7.4%	6.7%	+5.6%	+26.1%	6.2%	+9.8%	+20.5%	5.3%	+20.9%	+21.4%	1.8%	+24.2%	+14.8%
Non-Personnel	2.5%	-11.8%	+5.5%	4.1%	+10.3%	+40.7%	2.9%	+18.9%	+3.5%	2.3%	-29.5%	-7.9%	2.3%	+261.7%	+306.1%
General/Admin.	14.0%	-11.2%	-6.8%	17.8%	+8.7%	+22.0%	18.5%	+10.0%	+14.3%	23.6%	+2.2%	+21.1%	26.5%	+18.0%	+53.5%
Personnel	7.6%	-5.4%	-7.8%	10.2%	-3.6%	+17.3%	11.4%	+1.2%	+6.5%	16.9%	+7.4%	+26.1%	20.1%	+25.7%	+57.7%
Non-Personnel	6.4%	-17.3%	-5.7%	7.5%	+31.4%	+29.0%	7.2%	+27.6%	+29.4%	6.7%	-8.9%	+10.1%	6.4%	-1.1%	+41.5%

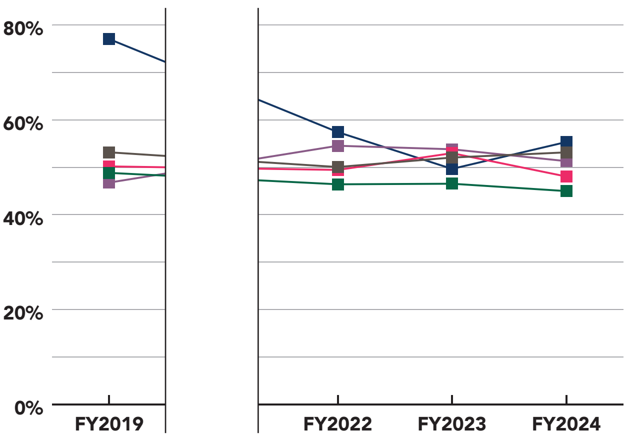
KEY FINDINGS

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.

In FY2024, the average core artistic expense ratio was around 50% for all companies. Ratios aligned with the three-year averages, which have remained relatively stable since FY2019 for nearly all companies. The ratio fell since pre-pandemic for Budget 5 companies.

CHART: CORE ARTISTIC EXPENSE RATIO ACROSS BUDGET GROUPS, FY2019–FY2024



	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1	53.1%	51.7%	+2.1%	+6.2%
Budget 2	45.0%	46.0%	-3.3%	-3.1%
Budget 3	48.1%	50.2%	-9.3%	-2.8%
Budget 4	51.3%	53.2%	-4.6%	-5.9%
Budget 5	55.3%	54.1%	+11.4%	-3.6%

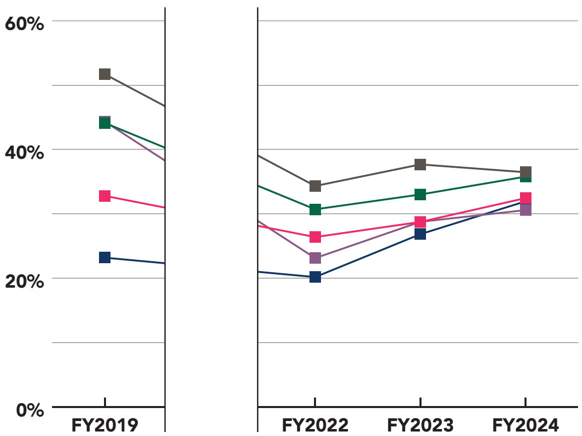
Calculation Note: Core Artistic Expense Ratio is the total artistic expenses divided by the total operating expenses reported in the Professional Opera Survey.

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 FY2024, the average program coverage was around 33% for all companies. Across nearly all budget groups, the metric increased over the prior years, reflecting incrementally increased ticket income, from increases in unit sales and ticket prices. Still, program coverage remains below pre-pandemic levels for many companies.

CHART: PROGRAM COVERAGE ACROSS BUDGET GROUPS, FY2019–FY2024



	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1	36.5%	36.2%	-3.2%	+6.2%
Budget 2	35.8%	33.2%	+8.4%	+16.5%
Budget 3	32.5%	29.2%	+12.9%	+22.9%
Budget 4	30.6%	27.5%	+6.3%	+32.3%
Budget 5	32.0%	26.3%	+19.0%	+58.3%

Calculation Note: Program Coverage is the total box office revenue divided by the total artistic expenses reported in the Professional Opera Survey.

KEY FINDINGS

Revenue Productivity Ratios

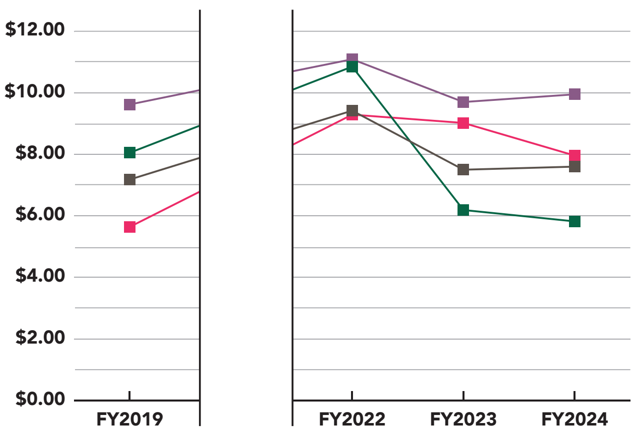
Revenue productivity ratios measure how many dollars are earned for each dollar spent on revenue-generating activities. Expenses include personnel and non-personnel costs. These ratios reflect the effectiveness of opera companies at generating revenue.

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 and $8. 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 FY2024, average development productivity ranged from $6 to $10 for Budget 1–4 and $18 for Budget 5. This represented a decrease for nearly all companies from prior years, when the ratio was inflated due to the receipt of sizeable federal pandemic aid. However, for some companies, raising money has become more challenging and expensive in recent years.

CHART: DEVELOPMENT PRODUCTIVITY ACROSS BUDGET GROUPS, FY2019–FY2024



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

	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1 ■	$7.60	$8.17	+1.4%	-19.4%
Budget 2 ■	$5.82	$7.62	-5.9%	-46.3%
Budget 3 ■	$7.96	$8.76	-11.8%	-14.4%
Budget 4 ■	$9.95	$10.25	+2.5%	-10.3%
Budget 5 ■	$18.31	$28.08	-47.4%	-41.2%

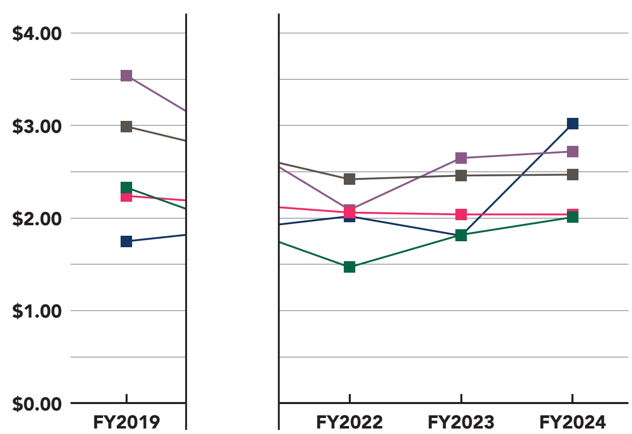
Calculation Note: Development Productivity Ratio is the total contributed revenue divided by the total fundraising expenses reported in the Professional Opera Survey.

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. It is important to remember that 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.

In FY2024, average marketing productivity ranged from $2 to $3 across budget groups, with Budget 4 and 5 companies reporting slightly higher rewards from their marketing efforts. This represented an increase for nearly all companies from the prior year, reflecting gradually increasing sales in the recent season.

CHART: MARKETING PRODUCTIVITY ACROSS BUDGET GROUPS, FY2019–FY2024



	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1 ■	$2.47	$2.45	+0.5%	+2.0%
Budget 2 ■	$2.01	$1.77	+10.3%	+37.0%
Budget 3 ■	$2.04	$2.05	-0.3%	-1.2%
Budget 4 ■	$2.72	$2.49	+2.6%	+30.1%
Budget 5 ■	$3.02	$2.28	+67.3%	+49.7%

Calculation Note: Marketing Productivity Ratio is the total box office revenue divided by the total marketing expenses reported in the Professional Opera Survey.

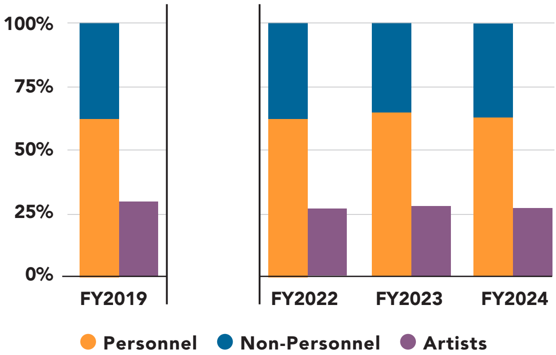
KEY FINDINGS

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.

CHART: PERSONNEL, NON-PERSONNEL & ARTISTS FOR BUDGET 2 COMPANIES, FY2019–FY2024



	Personnel		Non-Personnel		Artists	
	FY24 Avg.	3-Yr. Avg.	FY24 Avg.	3-Yr. Avg.	FY24 Avg.	3-Yr. Avg.
Budget 1	71.0%	70.7%	29.0%	29.3%	43.9%	42.0%
Budget 2	63.0%	63.3%	37.0%	36.7%	27.5%	27.3%
Budget 3	64.9%	64.5%	35.1%	35.5%	30.3%	32.0%
Budget 4	66.7%	65.6%	33.3%	34.4%	31.7%	32.0%
Budget 5	75.8%	76.1%	24.2%	23.9%	43.0%	39.3%

Calculation Note: The personnel ratio is the total salaries and employment benefits divided by the total operating expenses reported in the Professional Opera Survey. 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 FY2024, companies spent 4–11% each on both marketing and development, reflecting the importance of both functions to generate revenue. Education and community engagement received only 3–6%; 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	7.9%	8.0%	7.6%	5.8%	5.8%
Personnel	3.6%	4.0%	3.1%	2.6%	2.5%
Non-Personnel	4.3%	4.0%	4.6%	3.2%	3.3%
Development	7.6%	10.8%	9.1%	7.6%	4.1%
Personnel	5.1%	6.7%	6.2%	5.3%	1.8%
Non-Personnel	2.5%	4.1%	2.9%	2.3%	2.3%
Education/Comm. Engagement	2.7%	4.0%	5.9%	3.9%	--*
Personnel	1.7%	2.9%	3.9%	3.1%	--
Non-Personnel	1.0%	1.1%	2.0%	0.8%	--

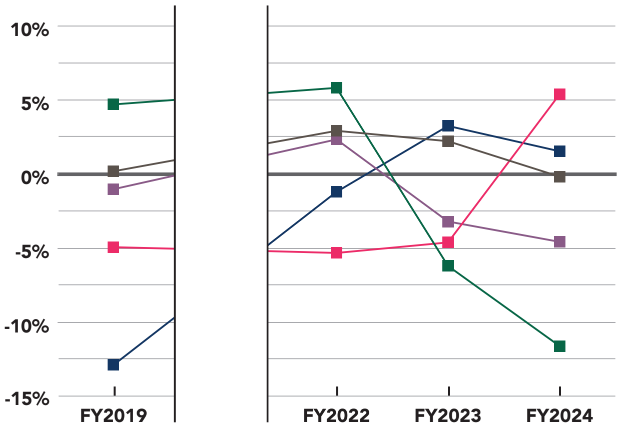
**None of the Budget 5 companies in the Constant Sample Group reported specific Education/Community Engagement expenses.*

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.

CHART: SURPLUS/DEFICIT TO EXPENSE RATIO ACROSS BUDGET GROUPS, FY2019–FY2024



Bottom lines in FY2024 varied across budget groups, from an average deficit of 11.6% at Budget 2 companies to an average surplus of 5.4% at Budget 3 companies. For all but Budget 3 companies, the ratio has gotten worse in the past year, indicating growing challenges in balancing budgets.

	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1 ■	-0.2%	1.7%	-107.0%	-105.4%
Budget 2 ■	-11.6%	-4.0%	-87.4%	-298.9%
Budget 3 ■	5.4%	-1.5%	+217.2%	+201.5%
Budget 4 ■	-4.6%	-1.8%	-43.1%	-294.4%
Budget 5 ■	1.5%	1.2%	-52.5%	+230.5%

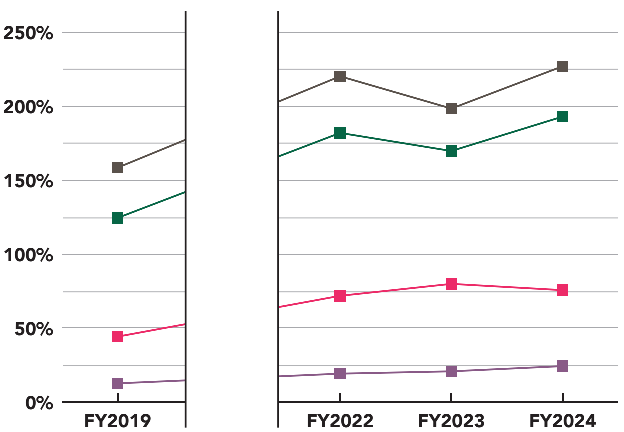
Calculation Note: Surplus/Deficit to Expense Ratio is the total surplus or deficit divided by total operating expenses reported in the Professional Opera Survey.

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 are grouped together.

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 FY2024, Budget 1 surpassed the 200% mark on average while Budget 2 companies came close; Budget 3 companies neared the 100% mark. Few smaller companies, which are usually younger organizations, had endowments of notable size. Across nearly all companies, the ratio has increased in recent years due to a combination of strong market gains, endowment campaigns, and in some cases, reduced operating budgets.

CHART: ENDOWMENT & RESERVES TO EXPENSE RATIO ACROSS BUDGET GROUPS, FY2019–FY2024



	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1 ■	227.0%	215.2%	+14.4%	+3.1%
Budget 2 ■	193.0%	181.6%	+13.7%	+6.1%
Budget 3 ■	75.6%	75.7%	-5.3%	+5.3%
Budget 4 ■	24.2%	21.3%	+17.0%	+26.7%

Note: None of the Budget 5 companies in the Constant Sample Group reported endowments/reserves over the past five years.

Calculation Note: Endowment & Reserves to Expense Ratio is the total of several endowments and reserves divided by total operating expenses reported in the Professional Opera Survey.

Production & Performance Activity

The number of productions offered by an opera company in its season, along with the number of performances of each production, is a measure of a company's output. In FY2024, Budget 1 and 2 companies produced 4–6 works while Budget 3–5 companies produced 2–3 works.

Average productivity in terms of the number of productions and performances contracted from FY2023 for larger companies. Budget 3 and 4 companies did the same number of productions but added 5–10% more performances.

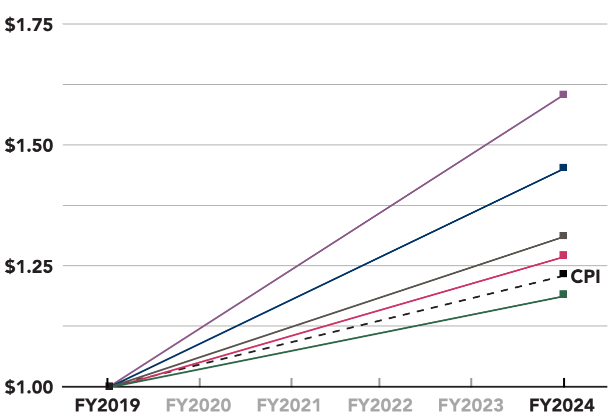
	Mainstage Productions			Performances of Mainstage Productions		
	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1	5.6	-8.2%	+4.7%	32.0	-14.1%	+4.5%
Budget 2	3.7	-6.1%	+9.4%	16.8	-8.7%	+5.8%
Budget 3	2.6	0.0%	+4.1%	7.1	+10.1%	+8.4%
Budget 4	2.2	-1.6%	+3.3%	6.6	+5.0%	+13.8%
Budget 5	1.9	0.0%	+30.8%	4.9	-32.3%	+29.4%

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 six years covered by this report (FY2019 to FY2024), the OPI increased for all companies other than Budget 2 at an annualized rate higher than the CPI of 4.18%.

CHART: OPERA PRICE INDEX VS. CONSUMER PRICE INDEX



	FY19	FY24	5-Yr. Δ	Annualized Δ
CPI - - - - -	$1.00	$1.23	+22.70%	+4.18%
Budget 1 ■	$1.00	$1.31	+30.71%	+5.50%
Budget 2 ■	$1.00	$1.19	+19.41%	+3.61%
Budget 3 ■	$1.00	$1.27	+26.93%	+4.88%
Budget 4 ■	$1.00	$1.60	+59.94%	+9.85%
Budget 5 ■	$1.00	$1.45	+44.51%	+7.64%

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

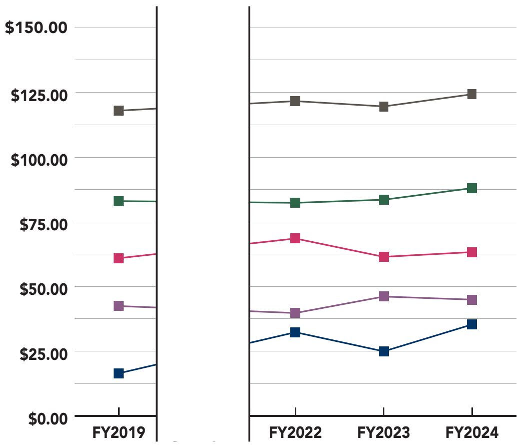
KEY FINDINGS

Pricing & Yield per Ticket

How opera companies price their tickets reflects the need to balance maximizing earned revenue and increasing access. Budget 1 and 5 companies increased their ticket prices from FY2023 to FY2024, while Budget 2–4 companies largely decreased them (Budget 2 companies increased their low-end tickets).

The yield per ticket is a measure of the average price paid for a ticket across the entire season. From FY2023 to FY2024, average yield increased modestly for Budget 1–3 companies, dipped slightly for Budget 4 companies, and spiked for Budget 5 companies. All in all, average yield remains on par with pre-pandemic rates.

CHART: YIELD PER TICKET ACROSS BUDGET GROUPS, FY2019–FY2024



	High Ticket Price				Low Ticket Price				Yield per Ticket			
	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1 ■	$376.88	$355.71	+4.5%	+14.3%	$21.50	$19.04	+22.0%	+19.4%	$124.35	$121.90	+3.9%	+2.2%
Budget 2 ■	$195.22	$190.61	-1.4%	+9.3%	$24.78	$22.54	+21.0%	+10.9%	$88.04	$84.66	+5.4%	+6.9%
Budget 3 ■	$124.60	$134.68	-3.0%	-17.5%	$21.00	$23.98	-9.9%	-24.1%	$63.30	$64.44	+3.0%	-7.7%
Budget 4 ■	$93.65	$91.24	-2.6%	+11.6%	$17.74	$19.10	-7.4%	-13.0%	$44.92	$43.59	-2.6%	+13.0%
Budget 5 ■	$57.78	$52.67	+10.9%	+20.1%	$17.22	$13.89	+30.3%	+53.5%	$35.30	$30.84	+41.7%	+9.2%

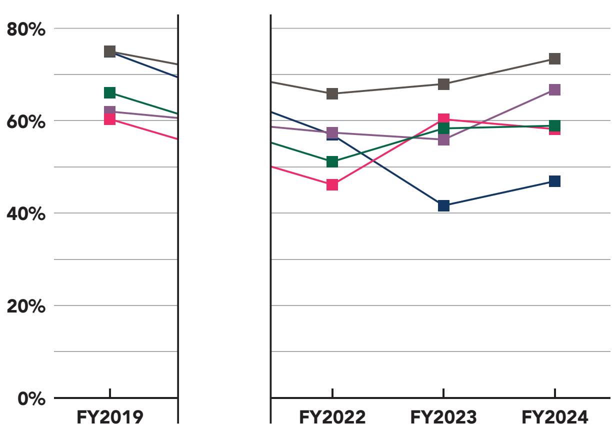
Calculation Note: Yield per Ticket is the total box office revenue divided by the total number of tickets reported in the Professional Opera Survey.

Audiences & Capacity Sold

Audience growth is a perennial priority for opera companies, especially in the years after the pandemic. Larger companies saw dips in audiences in FY2024 after growing from FY2022 to FY2023, while smaller companies showed incremental growth.

The capacity of theaters sold is a measure of how effective opera companies are at filling their theaters. In FY2024, average capacity ranged from 47% to 73%, and nearly all companies showed increases over the prior year. Still, all but Budget 4 companies remain slightly under pre-pandemic levels.

CHART: CAPACITY SOLD ACROSS BUDGET GROUPS, FY2019–FY2024



	Audiences			Capacity	Capacity Sold		
	FY24 Avg.	1-Yr. Δ	2-Yr. Δ	FY24 Avg.	FY24 Avg.	1-Yr. Δ	2-Yr. Δ
Budget 1 ■	62,311	-7.8%	+26.8%	84,900	73.4%	+8.0%	+11.4%
Budget 2 ■	13,577	-4.0%	+20.6%	23,043	58.9%	+1.0%	+15.2%
Budget 3 ■	3,621	+0.6%	+32.2%	6,224	58.2%	-3.5%	+26.0%
Budget 4 ■	1,859	+4.9%	+18.3%	2,786	66.7%	+19.3%	+16.2%
Budget 5 ■	628	+14.4%	+60.4%	1,338	46.9%	+12.7%	-17.6%

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

Canadian Opera Report

BY CHRISTINA LOEWEN, CEO, ASSOCIATION FOR OPERA IN CANADA

2024 is the first post-pandemic year in which the Canadian sample dataset is large enough to support meaningful trend analysis. Outliers at both ends of the budget spectrum have been removed to better understand the general patterns emerging within the participating companies, rather than the full complexity of the national sector.

The companies in the Canadian sample have rebuilt artistic activity with remarkable determination. Revenues are up more than 40% since the pandemic low point — a strong recovery. Within the sample, audiences are returning and donors have stepped up, particularly through individual giving, foundations, and events. This renewed private investment signals trust: Communities remain committed to opera's role and value. Government support, however, has softened slightly in this dataset, shifting greater responsibility onto philanthropy while earned income continues its gradual rebuild.

The return to fuller programming has also driven expenses upward, especially labour, as companies reinvest in artists, creators, and essential staff. In this sample, artistic spending now represents more than half of total budgets, a meaningful shift that reflects a clear value: Art and artists are at the centre of the recovery.

The sample represented here is experiencing increased expenses that are outpacing revenue growth. Cash reserves built during the early recovery period have been drawn down, and liquidity has tightened as production timelines demand more upfront cash than can be replenished from ticket sales, grants, and donations. This is heightening the need for stronger working capital or, in some cases, short-term bridge financing to manage the gap.

Higher yield per ticket is helping to offset cost pressures, but inflation and affordability concerns remain a challenge for audience accessibility. "Right-sizing" — doing slightly fewer productions and performances but with stronger attendance per show — is emerging in this sample as a practical path toward sustainability.

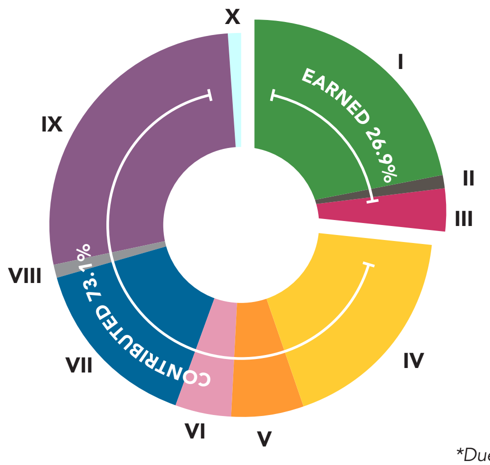
In summary, the sample reflects deep commitment to the art form and its artists, and real progress toward sustainable solutions. But gradual working capital depletion means exposure to future shocks. The priority long-term for the companies in the sample, and for the field at large, is to build a financial foundation to match artistic ambitions.

The Canadian Opera Company's *Cunning Little Vixen*

Michael Cooper

Revenue Breakdown

CHART: AVERAGE REVENUE FOR COMPANIES WITH BUDGETS >$3M, FY2024



Earned (26.9%)

- **I** Box Office (22.0%)
- **II** Investment (1.2%)
- **III** Other Earned (3.7%)

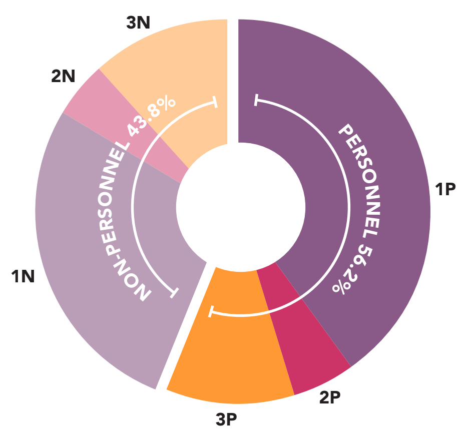
Contributed (73.1%)

- **IV** Individual* (17.9%)
- **V** Special Events (6.2%)
- **VI** Corporate (4.7%)
- **VII** Foundation (15.0%)
- **VIII** In-Kind (0.9%)
- **IX** Government (27.3%)
- **X** Other Contrib. (1.0%)

**Due to differences in reporting methods, the Canadian analysis combines board and individual giving into one category.*

Expense Breakdown

CHART: AVERAGE EXPENSES FOR COMPANIES WITH BUDGETS >$3M, FY2024



Program (67.8%)

- **1P** Personnel (40.2%)
- **1N** Non-Personnel (27.5%)

Development (9.8%)

- **2P** Personnel (5.2%)
- **2N** Non-Personnel (4.7%)

General/Administrative (22.4%)

- **3P** Personnel (10.8%)
- **3N** Non-Personnel (11.6%)

Key Ratios

	FY24 Avg.	3-Yr. Avg.	1-Yr. Δ	2-Yr. Δ
Core Artistic Expense Ratio	54.4%	50.7%	+3.7%	+20.7%
Surplus/Deficit to Expense Ratio	-3.2%	-4.4%	+72.0%	-315.6%
Yield Per Ticket	$84.08	$77.00	+6.6%	+23.6%

Attendees at Opera Conference 2025 in Memphis

OPERA America Year in Review 2025

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

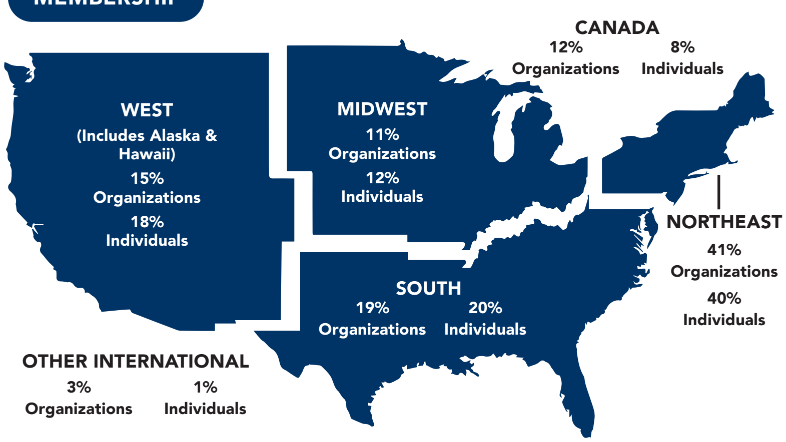
OPERA America is an action-oriented think tank for the field, partnering with members to access the power of collective experience, gather insight, and share successful practices. This was on full display in 2025 through convenings like Opera Conference 2025 and national research studies that investigated digital media consumption and ticket-buying patterns among newcomers to opera. 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.

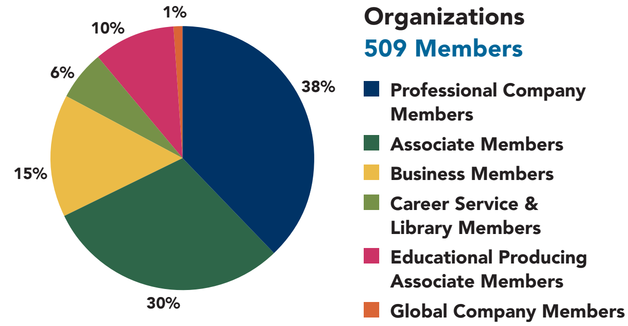
OPERA AMERICA

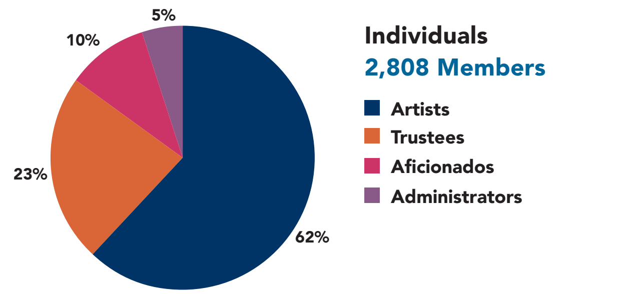
The Community

OPERA America has built an extensive membership base of over 500 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.

MEMBERSHIP







Ziggy Mack

PRESIDENT/CEO MARC A. SCORCA RETIRES

At the end of 2025, President/CEO Marc A. Scorca retired after 35 years of extraordinary leadership. In recognition of Scorca's contributions to this organization, he has been named president emeritus of OPERA America. He was succeeded by Michael J. Bobbitt, who joined the organization in January 2026.

Read more about Scorca's tenure at operaamerica.org/ScorcaArticle.

OPERA AMERICA

The Convener

Collective learning is the heart of OPERA America's national conference, forums, and network convenings each year. At Opera Conference 2025 in Memphis, the field came together to tackle the big topics shaping the future of the art form and gain practical strategies for their everyday work.

OPERA CONFERENCE 2025

"What a joy and privilege to be able to participate in this conference! I left feeling inspired and energized, and was so grateful for the interpersonal connections."

— CHRISTINA POST, DIRECTOR OF MARKETING, PORTLAND OPERA (CONFERENCE ATTENDEE)

- **486** Total Attendees
- **199** Organizations in Attendance
- **116** Artists in Attendance

"I appreciated, as a newcomer, that I felt welcomed and valued and part of the conversation."

— HOLLY BOAZ, CO-DIRECTOR, RISING WATERS COLLECTIVE (CONFERENCE ATTENDEE)

CONVENINGS

The National Trustee Forum

- **417** Participants in Forums
- **392** Participants in Webinars
- **48** Participants in Virtual Regional Meetings

Opera Conference 2025 in Memphis

Danny Bristoll (Scorca); Marcel Sokalski (Forum); Ziggy Mack (Conference)

OPERA AMERICA

The Counselor

CAREER SERVICES

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

76 **Artists in Career Advancement Programs**

127 **Administrators in Professional Development Programs**

"The Leadership Launch was the perfect way to start my journey with Lyric Opera of Kansas City. I'm grateful for the deeply informative sessions and sense of community. The experience really grounded my understanding of opera in the collaboration and community that makes opera possible at literally every step of the way."

— ELINORE NOYES, INSTITUTIONAL GIVING MANAGER, LYRIC OPERA OF KANSAS CITY (LEADERSHIP LAUNCH 2025 PARTICIPANT)

Mentorship Program for Women

Protégé: Jennifer Gordon, Center for Jewish History
Mentor: Julia Cooke, Opera Baltimore
Protégé: Joanna Latini, Palm Beach Opera
Mentor: Maggey Oplinger, Florentine Opera
Protégé: Mariel O'Connell, The Juilliard School
Mentor: Melissa Wegner, The Metropolitan Opera
Protégé: Diana Wu, Seattle Opera
Mentor: Susan Miller, Opera Montana

Leadership Intensive Participants

Emily Barber, On Site Opera
Matt Cahill, Hogfish
Megan Carpenter, OPERA America
Graham Fandrei, Persad Center
Siena Forest, Minnesota Opera
Kelsey Holmes, The Colburn School
Branden C. S. Hood, Detroit Opera
Shawn Marie Jeffery, UIA Talent Agency
Joanna Latini, Palm Beach Opera
Katherine Powers, Pacific Opera Project
Seiko, Opera on Tap Rochester
Timmy Yuen, San Francisco Opera

TRUSTEE SERVICES

SUPPORTED BY BANK OF AMERICA

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

272 **Trustees in Governance Programs**

National Opera Trustee Recognition Awards

Marc Chalifoux, Against the Grain Theatre*
Jeffrey Cunard, Washington National Opera
Janet Farrell, IN Series
Erin Flannery, Experiments in Opera
Liz Kathman Grubow, Cincinnati Opera
Robert Milne, Pacific Opera Victoria*
Mel Weingart, OPERA San Antonio

**Recipient of the Association for Opera in Canada's Best in Governance Award*

RESEARCH & PUBLICATIONS

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.

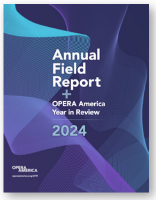
Newcomer Research

SUPPORTED BY THE DR. M. LEE PEARCE FOUNDATION

- *Engaging Opera's New Audiences: A Resource Guide to Turn Research Into Action*
- *An Important Correction to Understanding Operas New Audiences*
- Essays on Audience Research by Christina Post, Katherine Powers, and Adam Scurto

Member Publications

- *Digital Opera Catalog*
- *Multihyphenate Artist Directory*
- *New Work Catalog*



Operational Health

In 2025, OPERA America introduced an extensively reworked *Annual Field Report* to improve readability and usefulness to company staff and trustees.

OPERA AMERICA

The Granter

OPERA America's strategic approach to grantmaking has catalyzed important change in the industry. Over the past four decades, the organization has awarded over $24 million to support the creation and production of new work, audience-building initiatives, innovative business practices, and the discovery of new creative voices.

$1.01M **Total Grants Awarded**

$844K **Total Grants to Companies**

171 **Grant Applications from Companies**

46 **Companies Supported by Grants**

$166K **Total Grants to Individual Creators & Artists**

159 **Grant Applications from Individual Creators & Artists**

16 **Individual Creators & Artists Supported by Grants**


Chelsea Gallo at Dayton Opera

GRANTS AWARDED

A/B Testing Grants

SUPPORTED BY THE DR. M. LEE PEARCE FOUNDATION

Detroit Opera
Florentine Opera
Heartbeat Opera
LA Opera
Minnesota Opera
Opera Colorado
Opera Orlando
Opera San José
Pacific Opera Victoria
Pittsburgh Opera
San Diego Opera
Seattle Opera
Utah Symphony | Utah Opera
Vancouver Opera

Civic Practice Grants

SUPPORTED BY OPERA AMERICA'S OPERA FUND

Boston Lyric Opera
LA Opera
Opera Parallèle
Pacific Opera Victoria
San Diego Opera
Volcano Non-Profit Productions
White Snake Projects

IDEA Opera Grants

SUPPORTED BY THE CHARLES AND CERISE JACOBS CHARITABLE FOUNDATION

Amir ElSaffar and Zahra Ali | *Ruins of the Encampment*
Alphonso Horne and Tara L. Wilson Noth | *Storyville: The Opera*
Alex Wakim and Gregory Jafari Van Acker | *The "B!tchelorette"*

Marineau Opera Grants for Women Stage Directors and Conductors

SUPPORTED BY THE MARINEAU FAMILY FOUNDATION

American Opera Projects | Rebekah Heller
Dayton Performing Arts Alliance | Chelsea Gallo
The Glimmerglass Festival | Chía Patiño
Houston Grand Opera | Kaneza Schaal
Opera Columbus | Mila Henry
Opera Philadelphia | Jenny Koons
Sacramento Philharmonic & Opera | Sahar Nouri
San Francisco Opera | Diane Paulus
Teatro Grattacielo | Anna Laura Miszerak

Next Stage Grants

LA Opera | *The Old Man and the Sea*
Maryland Opera | *Oshun*
Nashville Opera | *Fortuna the Time Bender vs. The Schoolgirls of Doom*
Opera Southwest | *Salsipuedes: A Tale of Love, War and Anchovies*
Resonance Works | *The Jungle Book*
Soundstreams | *Pimooteewin*
Washington National Opera | *Treemonisha*

Opera Grants for Women Composers: Commissioning Grants

SUPPORTED BY THE VIRGINIA B. TOULMIN FOUNDATION

Beth Morrison Projects | *Star Singer* (Bansal/Aitken)
Experiments in Opera | *Emma: A Chamber Opera for Soprano and Percussion Ensemble* (Gosfield)
Fisher Center at Bard College | *Suddenly Last Summer* (Bryan/Lester/Fish)
Opera Ebony | *Finding the Light* (Barnes/Gonzalez)
San Francisco Opera | *The Galloping Cure* (Mazzoli/Vavrek)


The Jungle Book at Resonance Works

Opera Grants for Women Composers: Discovery Grants

SUPPORTED BY THE VIRGINIA B. TOULMIN FOUNDATION

Jamey Guzman | *Open Heart Surgery*
Wang Lu | *The Red Thread*
Angélica Negrón | *Chimera (working title)*
Molly Pease | *HYSTERIA*
Beth Ratay | *The Morpheus Quartet*
Bahar Royaee | *Nava Avaz*
Joelle Wallach | *Esperanza*
Emily Wells | *Cadillac Ranch*

OPERA Respects Training Awards

SUPPORTED BY C. GRAHAM BERWIND, III, AND THE AMERICAN GUILD OF MUSICAL ARTISTS

Central City Opera
OPERA San Antonio
San Diego Opera

Robert L.B. Tobin Director-Designer Prize

SUPPORTED BY THE TOBIN THEATRE ARTS FUND

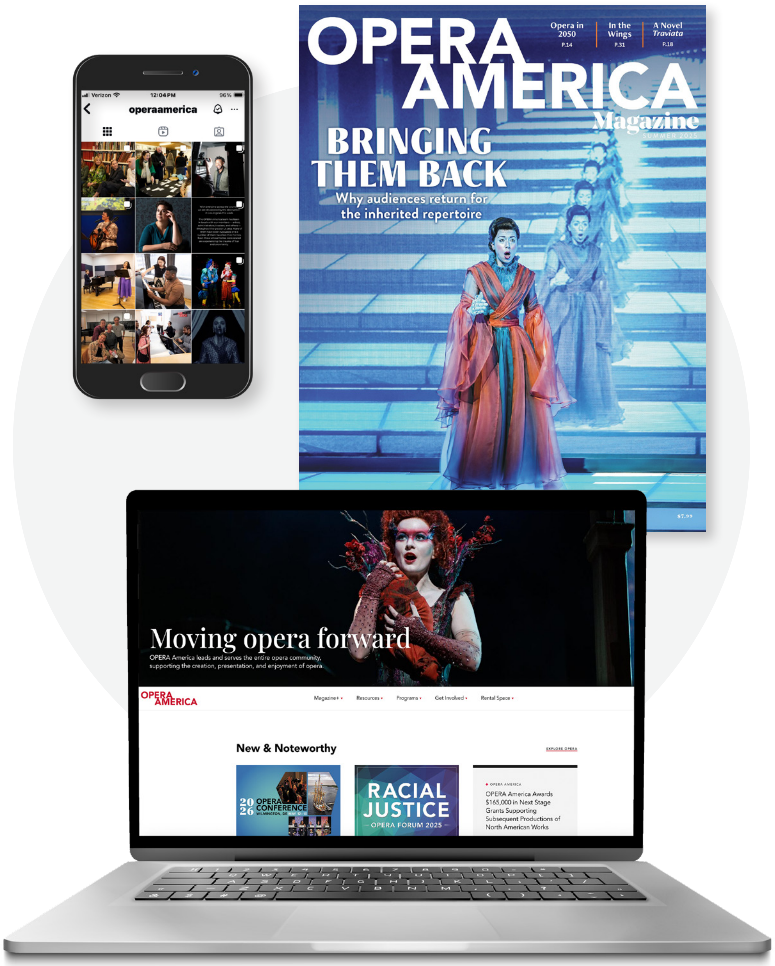
Breaking the Waves
Prod. team: Marinette Gomez, Hayley E. Wallenfeldt, John Polles, Seojung Jang
La hija de Rappaccini
Prod. team: Héctor Alvarez, Salmah Beydoun, Ashley Kae Snyder, Claire Chrzan
La hija de Rappaccini
Prod. team: Estefanía Fadul, Tanya Orellana, Christopher Vergara, Carolina Ortiz Herrera
La traviata
Prod. team: Rebecca Miller Kratzer, Tyler Herald, Camilla Dely, Stacey Boggs, Anisa Rose Threlkeld

Courtesy of Dayton Opera (Gallo); Alisa Innocenti (*Jungle Book*)

OPERA AMERICA

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.



REACH OF SERVICE

218K	**Visitors to operaamerica.org**
26K	**Reads of *Opera America Magazine***
10,000	**Readership of *Opera America Magazine* in print**
18,000	**E-newsletter Subscribers**
54K	**Followers across Instagram, Facebook & LinkedIn**

ADVOCACY

OPERA America leads the field in advocating for national, state, and local policies that strengthen the arts in American life. An advocacy toolkit, available at operaamerica.org/AdvocacyGuides, helps opera companies activate their constituencies. Biweekly arts advocacy updates, available at operaamerica.org/AdvocacyUpdates, keep the field up to date on the latest news from Capitol Hill.

1,800	**Views of the Arts Advocacy Updates Webpage**
800	**Views of the Advocacy Toolkit**

OPERA HALL OF FAME

OPERA America announced the 2025 inductees into the Opera Hall of Fame, elevating their achievements as models for others working in and supporting the art form.

Donnie Ray Albert, baritone and teacher
Mark Campbell, librettist and teacher
Denyce Graves, mezzo-soprano and teacher
Christopher Hahn, arts leader and administrator
Susan F. and William C. Morris, philanthropists and advocates
Bernard and Barbro Osher, philanthropists and advocates
Francesca Zambello, arts administrator and director

OPERA PASSPORT BY OPERA AMERICA

OPERA PASSPORT BY OPERA AMERICA
Savings For Traveling Operagoers

Opera Passport, launched in 2024, is an reciprocal ticket discount program that extends the benefits of a hometown opera subscription to over 100 opera companies across North America.

113	**Participating Companies**
101K	**Operagoers Eligible for Discounts**

OPERA AMERICA

The Home

A studio at the National Opera Center

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 2025 for auditions, rehearsals, recordings, and more.

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 AND BY THE NEW YORK CITY DEPARTMENT OF CULTURAL AFFAIRS.

STUDIO HAPPY HOURS

SUPPORTED BY THE NEW YORK STATE COUNCIL ON THE ARTS

OPERA America continued to offer subsidized rehearsal rates starting at $5 per hour, making the Opera Center accessible to individual artists.

3,359 Hours Used

670 Clients

OPERA AMERICA ONSTAGE

Jamelah Rimawi, chief programs officer, interviews director Elkhanah Pulitzer

OPERA America's signature public programming series featured interviews with soprano Nadine Sierra, artist manager Matthew Epstein, director Elkhanah Pulitzer, and company leaders from OperaCréole and Opera Lafayette, as well as a showcase of live excerpts from new works and a screening of a documentary about Frederica von Stade.

411 Attendees in Person & Online

Danny Bristoll (Opera Center); Sarah K. Ivins (Onstage)

Financial Report

OPERA America entered its 2025 fiscal year with concern for the same rising costs and stagnating revenue that challenge opera companies nationwide. Despite that, the organization concluded its year with results that were stronger than anticipated, reflecting both disciplined expense management and the generosity of donors committed to the organization's mission. While the board-approved budget had projected a $275,000 reserve transfer to offset operating losses, only $95,000 was ultimately required. (Additional reserves were applied to offset depreciation, as explained below.) The year closed with a positive change in net assets of nearly $450,000.

Support from individuals remained steady in FY2025, with gratitude to the nearly 3,000 donors and members whose annual gifts enable OPERA America's core service. However, total revenue from individuals retracted by about 10% from FY2024, when the World Opera Forum attracted record levels of special-purpose major gifts. The individual revenue ledger also includes the revenue — offset by expense in the development line — from a successful patron trip to the Savonlinna Opera Festival in July 2024.

Institutional support saw gains in FY2025, driven by new foundation relationships and various channels of government revenue. The Dr. M. Lee Pearce Foundation made a first-time, $500,000 grant to OPERA America to build upon its 2024 new opera audience research with the development of toolkits, publications, webinars, and new grantmaking. The foundation's grant support, and associated expenses (in the marketing and communications line), will span the FY2025 and FY2026 operating budgets.

Government support included generous grants from the New York City Department of Cultural Affairs and New York State Council on the Arts, as well as grants from the National Endowment for the Arts to support OPERA America's conferences and audience research. The ledger also includes $75,000 in Employee Retention Tax Credits paid retroactively from a 2020 application.

Organizational membership contributed a slight but meaningful increase to earned revenue. While the number of companies in the membership contracted to pre-pandemic levels, Professional Company Member budget increases translated into higher dues based on the sliding-scale formula. Conference revenue was understandably more moderate after its high around the combined Los Angeles conference and World Opera Forum in 2024.

Business at the National Opera Center continued its arc of recovery since the closure during the pandemic, with modest increases over FY2024 performance. Support from the New York State Council on the Arts and contributions from members of the National Opera Center Board made it possible to extend the Studio Happy Hours program, enabling OPERA America to advertise significantly reduced off-hour rates to attract new customers. Recent and forthcoming investments in the facility, including new pianos and lighting systems, have helped to drive new rentals as well.

Other income more than doubled in FY2025, driven by two key factors. First, advertising revenue across print and digital channels increased substantially. Second, the line includes an insurance reimbursement of $275,000 to cover expenses (in the general and administrative ledger) to repair the OPERA America administrative offices after damage from a fire on the floor above.

Organizational expenses reflect several variances from FY2024. Conference expenses contracted significantly after the 2024 events in Los Angeles. Leadership and professional development expenses increased due to the timing of programs and department hires. Grants to members remained above half a million dollars, though they declined by 25% as several longstanding grantmaking funders concluded their partnerships.

The FY2025 budget reflects a significant increase in depreciation and deferred rent for the National Opera Center. These non-operating costs, arising from a new lease extending through 2042, were formerly classified under operations and occupancy. For transparency, they have been separated this year and are offset in the operating statement by higher endowment draws and transfers from reserve.

As OPERA America undergoes an important leadership transition and continues to support a field navigating significant economic and artistic challenges, FY2025 demonstrates the organization's capacity to manage complexity with resilience. The combination of responsible stewardship, generous donor support, and thoughtful program adjustments ensures that OPERA America remains well-positioned to serve artists, administrators, trustees, and opera audiences nationwide with vision and stability.

Statement of Financial Position

As of June 30, 2025

Total Assets	$	31,052,199
Total Liabilities	$	14,683,529
TOTAL NET ASSETS	**$**	**16,368,670**
Core Operating	$	102,914
National Opera Center Fund	$	163,324
Board-Designated Funds	$	1,088,463
Funds with Restriction — Purpose	$	3,725,571
Funds with Restriction — Perpetual	$	11,288,398

Statement of Activities

As of June 30, 2025

Total Earned	$	2,884,332	33%
Total Contributed	$	5,770,589	67%
TOTAL REVENUE	**$**	**8,654,921**	
Program Services	$	6,159,882	75%
General and Administrative	$	959,427	12%
Development	$	1,086,572	13%
TOTAL EXPENSES	**$**	**8,205,881**	
CHANGE IN NET ASSETS	**$**	**449,040**	

Operating Revenue and Expenses

As of June 30, 2025

OPERATING REVENUE			
Individuals	$	2,405,559	29%
Foundations	$	1,229,500	15%
Corporate	$	62,500	1%
Government	$	375,103	5%
Organizational Membership	$	893,521	11%
Conference Registration	$	269,734	3%
National Opera Center Rentals	$	1,172,743	14%
Other Income	$	625,915	8%
Endowment	$	881,047	11%
Transfers from Reserves	$	290,260	4%
SUBTOTAL	**$**	**8,205,882**	**100%**
OPERATING EXPENSES			
Program Services			
Artistic Services	$	606,933	7%
Conference	$	656,676	8%
Leadership and Professional Development	$	419,395	5%
Grants to Members	$	531,000	6%
Research and IT	$	592,487	7%
Marketing and Communications	$	605,435	7%
Organizational Membership	$	380,075	5%
National Opera Center			
Operations and Occupancy	$	1,738,858	21%
Depreciation and Deferred Rent	$	541,054	7%
Government Affairs	$	87,967	1%
Support Services			
General and Administrative	$	959,430	12%
Development	$	1,086,572	13%
SUBTOTAL	**$**	**8,205,882**	**100%**
NET OPERATING SURPLUS	**$**	**—**	

OPERA AMERICA

Board & Staff

BOARD OF DIRECTORS

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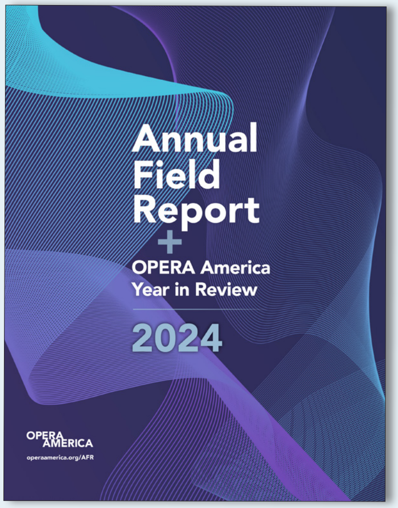

Questions about this report?

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.

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