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Royal Opera House: Setting the Stage for the Future

In September 2023, Alex Beard, the CEO of the Royal Opera House (ROH), sat in the auditorium in Covent Garden. He had rushed from a rehearsal of *The Limit*, an experimental ballet blending dialogue and dance in the Linbury Theatre downstairs. He now waited for the curtain to open on director Barrie Kosky's new production of the opera *Das Rheingold*. Audience members buzzed in anticipation of the world premiere, just as they would have in this very site 60 years ago as Margot Fonteyn and Rudolph Nureyev premiered a partnership that would come to define the ballet world, or 300 years ago as Handel premiered his series of English oratorios written just for Covent Garden.

Rheingold marked a milestone that few opera houses pursued. This was the first chapter of Wagner's *Ring* cycle, and the ROH would be staging the next chapters in the coming years, culminating in the full 16-hour cycle of four operas being performed in 2027. This was a rare feat that only a few opera houses even thought to consider, given the time, expense, and commitment required. However, the achievement was tempered by thoughts of what loomed ahead. In any given year, there would be ten other world premieres of this scale. But the 2023–24 season was atypical following the 2022 announcement of funding cuts from Arts Council England, the largest source of the company's grants. Its Leveling Up for Culture Places initiative redirected funds to theaters outside of London, amounting to a 19% funding cut for the ROH. This would hit in earnest in 2025 when temporary reliefs from 2022 ended.

Over the past few months, Beard had met with colleagues across the company to strategize how the ROH should respond to this significant change to its funding structure going forward. They could lean into more revivals as they did in 2023, staging tried-and-true pieces like *The Nutcracker* and *La Boheme* that would sell out. Yet it was the newly commissioned world premieres that attracted donors and artists to the ROH. Other considerations included growing streaming as a revenue source or cutting costs by improving processes behind the scenes. However, each option came with constraints that needed to be balanced. Beard reflected on the ROH's challenges: "If one bit of the ecosystem fails, the whole ecosystem fails. So you've got to make sure that it's 360 degrees, robust." In charting the path forward, Beard reminded himself of what had always been central to the ROH: "The focus is on the people. This is what this place is about."

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The Royal Opera House

Although the ROH was founded in 1946, it traced its roots back to 1732 when the first theater was built in Covent Garden, cementing its role as the epicenter of the performing arts in London. The theater was rebuilt in 1858 and housed both the Royal Ballet and the Royal Opera, a happenstance union that arose from the founding board's personal interest in both art forms. Its long and rich history as a cultural landmark made the ROH a premier destination, drawing diverse audiences to experience world-class performances.

The Royal Opera (RO) and the Royal Ballet (RB) were each led by a director who received full artistic control of each company, while both were supported by the same backstage staff and operations. Ballet and Opera were unique industries, which were not typically combined within the same organization. However, Beard explained that this conferred a unique advantage for the ROH, because "You just get more shows. You can stage a ballet while you're waiting for someone's voice to rest between performances. And if you're selling opera performances over three weeks as opposed to five days, there's a lot more time for word of mouth to kick in, which encourages ticket sales." Oliver Mears, Director of the RO, added, "It's a great thing. You can walk down the corridor, and you can hear the great singers of the world in their dressing rooms, singing away, and you can see the greatest ballet dancers in the world just a few meters away down the corridor."

The ROH was a large organization, reporting £132.7m in revenue during its 2021–22 season against £136.9m in expenditures (see **Exhibit 1**). "We are a substantial business, but it is important to note that we are a registered charity," remarked Mindy Kilby, Director of Finance. Mears explained that alongside their artistic roots, "the ideas of social justice and progressive change" were embedded just as indelibly into the foundation of the ROH. Mears elaborated, "It's no coincidence that this place opened its doors around the same time the National Health Service was founded in 1948. The Labour government then believed that everyone was entitled to free healthcare, and in the same way, access to the arts." Thus, the company continued to offer tickets for as little as £7 and developed educational programs for schools across the UK to bring in new audiences unfamiliar with ballet and opera. As Beard underscored, **"**I viscerally feel the opera and ballet are in and of themselves public goods. They bring the most extraordinary forces to bear on the most important questions of life.**"**

Visiting the ROH

On any given day, one could attend up to four performances at the ROH, from a contemporary opera in the 390-seater Linbury Theatre downstairs in the afternoon, to a classical ballet on the historical 2,256-seater main stage in the evening (see **Exhibit 2**). The RO and RB jointly staged about 280 performances of 30 different productions per season which ran from August to July the following year (see **Exhibit 3**). Typically, 20 of these were revivals of productions that had been staged in previous seasons, while the remaining 10 were new commissions from composers and choreographers, or new productions that refreshed the presentation of existing operas and ballets. The ROH used a repertory system to rotate through several ballets and operas at once, differing from the *stagione* model of many theaters in the US and Europe, where only one show was presented for weeks at a time. By comparison, the Metropolitan Opera staged about 200 performances of 20 operas a year,[1] while the San Francisco Ballet staged about 100 performances of 15 ballets a year.[2,3]

Performances on the main stage lasted 2-3 hours, with intermissions during which patrons could adjourn to the adjacent Paul Hamlyn Hall (see **Exhibit 2c**), built within the original 1860 greenhouse of the Covent Garden flower market. Here they could enjoy a cocktail, ice cream, or even a three-course dinner interspersed with the performance. Following the privately funded £50.7m Open Up project of

2016[4] (see **Exhibit 2d**), the entrance of the ROH was renovated to improve access to the building and its four restaurants and bars throughout the day without needing to be a ticket holder. Catering represented a significant source of revenue for the ROH—nearly £9m in the 2021–22 season. The ROH also allowed organizations to rent out these spaces for private events.

Streaming

Since 2007, 10 to 15 performances each season were live-streamed from the opera house to cinemas across the UK and more than 50 countries. Terry McGrath, Director of Audiences & Media, described online streaming as "the natural next step for us," while acknowledging that the ROH had "yet to see a full financial return on our investment from it." The ROH also recently introduced an on-demand streaming platform for home viewing. As of 2023, the platform had 7,000 subscribers, who paid a monthly subscription of £9.99 (or an annual price of £99.99). The platform offered post-produced versions of the live-streamed performances and some shorter behind-the-scenes interviews and rehearsals, which were similar to what they also published on YouTube. Beard summarized that "Streaming is [in its] early days; we'll try both long and short form content and see what works."

The post-production timeline depended on the artists, as convincing talent to stream their work could be challenging. Christopher Purves, a British baritone who sang the lead role of Alberich in 2023's *Rheingold*, shared "From a singer's point of view, we worry that if something goes wrong, not only the 2,000 people here see it, it's there for perpetuity." Ultimately, McGrath explained that "The artists get the final say. Beard's view is that our talent comes first. That is how we can attract talent here."

Broadening Engagement

Off-stage programming was made available by the Learning & Participation (L&P) Department, such as £10 Family Sundays, which 7,000 people went through in 2022. During these events, Jillian Barker, Director of L&P, described that "We take over the building and turn it into a creative playground for an inter-generational discovery of ballet and opera." L&P also staged productions for schools across the country, and offered a free ballet and singing that reached 900 schools across the UK in 2023, particularly in areas of socioeconomic disadvantage. L&P aimed to broaden the talent pool for opera and ballet. Barker noted, that "There is strong inequality in access to the arts. We want to create systemic change in how people discover our art forms, and use it as a catalyst for their creativity. The Royal Opera House is a cultural asset to the whole nation, and should represent all British people."

The Royal Opera

When Oliver Mears was appointed as the Director of Opera in 2017, he set about defining its identity. With London as a historically international city, it was clear that "people have always had an expectation when they come here, that they'll see the best singers in the world," explained Oliver. Yet despite this international leaning, Oliver felt it was important to "reconnect with composers with whom we have a particular association." As a result, the RO was committed to doing at least one opera a year by Handel that had been written specifically for Covent Garden, a legacy that was unique to the RO. Additionally, Beard described that "London is the land of Dickens and Shakespeare." Thus, Mears sought to "deliver stories that are really clearly told. Audiences want excitement, they want to be gripped when they're here and they want to be on the edge of their seats."

Classical Canon

With this identity, the RO aimed to deliver a distinctive take on a classical canon that most opera companies shared. Mears explained that opera companies "rely financially on certain pieces written in a very particular 150-year period from 1780 to 1925, broadly from around *Figaro* to *Turandot*," which amounted to about 35 classical operas. Mears was committed to "holding these pieces up to the light and making it new for a different audience." This was done by inviting a new director to create a new production that reinterpreted how the original music and libretto was performed, with newly designed sets and costumes.

A new production could remain in the company's repertoire for up to 40 years, stored for a revival in subsequent seasons with the same sets, costumes, and direction, but different cast. Given the longevity of each production, there were limits to reinterpretation. Beard noted, "There's no way we would present *La Boheme* in a spacesuit, because it's an absolute repertoire classic. That might be fine in Paris; not in London. But you're no less ambitious in terms of innovation. It's about what you're trying to achieve—a fresh, enduring take on one of the great pieces of art, versus something viscerally shocking and news-grabbing."

While honoring the classics, the RO recognized that some narratives within them could be less enduring. Dale Haddon, Director of Human Resources, explained, "We're telling stories from hundreds of years ago that have violence, rape, misogyny, all of these terrible things. Many of those issues are sadly still relevant today but they need to be told in different ways that aren't necessarily the original take on it." Artists and audiences differed in how to address this. Mears shared that the RO sought to "find a sensible, middle way through; not [necessarily] changing the end of the stories, but being aware of it, and scrutinizing it." For example, Beard explained that "When we revived *Turandot*, the stereotypical makeup was replaced by masks, allowing for a cast that was particularly diverse in all dimensions. This change also recognized our fundamental belief that for these iconic roles, anyone should be able to have their say with them."

Some directors did consider changing the story altogether. Mears shared that the British director Katie Mitchell was "a good example of someone who is a real innovator in that sense. She will have no qualms. She wouldn't change the music of course, but she might change the outcome for the female protagonist." Mitchell explained that "I make changes in the staging to address the misogyny in the original librettos and make the narratives acceptable to modern audiences. In *Lucia di Lammermoor*, I added simultaneous scenes which explored the motivation and experience of the central female character. Then in *Theodora*, I changed the staging of the final scene from a story about female suicide to a story about female emancipation."

Ultimately, Mears gave the artists significant creative control over a given opera, explaining that "The ultimate aspiration is for people to come into the theatre and say after a performance, I never knew that something like that existed. But how you measure that is difficult, so you rely on working with practitioners who are interested in innovation." Purves shared that as a singer, "What is innovative is being allowed to do what we're really good at. For me, that's communicating through gesture and telling the truth of the opera." Given his heavy reliance on artists, Mears typically brought an artist on board only after having seen other examples of their work and developing a relationship with them. He explained that through this, he could "trust them to give everything they've got. At the same time, because of that relationship, we can sit down after rehearsal, and I can give them my notes. It feels like a real dialogue and collaboration."

New Commissions

Unlike the new production of a classic which preserved the original music and libretto, a new commission involved hiring a composer and librettist to create a brand-new opera. Over the years, Covent Garden had presented new commissions from not only Handel, but renowned composers such as Benjamin Britten, Michael Tippett, Judith Weir, Mark Anthony Turnage, and George Benjamin. Accordingly, new commissions were seen as an essential continuation of the RO's tradition, and they were committed to doing at least one every other year on the main stage. However, Mears explained that the endeavor was "so expensive, not just because of the initial outlay for the composer and librettist, but also because we can charge much less per ticket if we want to have a full house."

While new commissions tended to attract donors, the classics remained a reliable way to attract new audiences. As Mears explained, "New audiences are attracted to the works they've heard of—*Tosca, Carmen, La Boheme*—because most people's first experiences of opera are of those famous tunes that they might have heard when their parents were playing records at home, or when they saw an advert on the TV. When they get interested in opera, they want to see the opera they've heard of." Consequently, Mears explained that the RO programmed many more classical pieces than new commissions on the main stage, as there was "no way we could get the audience for three or four new commissions in a season."

New commissions were often co-produced by multiple opera houses around the world to share costs. The resulting production premiered with the same cast at each opera house, who then retained the right to revive it in subsequent years. However, co-productions were challenging from a technical perspective since the shared costumes and sets had to be customized for theaters of varying sizes and operational logistics. For example, "The Venice Opera loads in equipment via boat," explained Amy Clarey, Administration Manager in the Technical, Production and Costume department. From an artistic perspective, Persian-Canadian Cameron Shahbazi, a countertenor starring in the ROH's 2023 co-production of *Picture a Day Like This*, shared that "As a freelancer, being offered a co-production is financially advantageous with the guarantee of a minimum income for multiple performances. However, I take on a risk in blocking off a huge amount of time for music that is not yet composed or a new production that is not yet conceived. I risk that the role is not as I had imagined, that the music doesn't suit the voice or allow it to develop, or that the production is not well received, yet I have made a contractual commitment to many revivals." In addition, Beard worried that a co-production might not match the specific style of the RO, as "the work has to resonate in London. Great art is specific."

Experimenting in the Linbury

The Linbury Theatre provided another vehicle to stage new commissions. Mears explained that it was "a great testing ground for talent who are cutting their teeth. We can take more risks down there because we're less reliant on vast amounts of box office income." The Linbury's smaller stage, modern design, and placement in the building's basement, shifted audiences' expectations of the type of opera they would see. Kate Wyatt and Sarah Crabtree, the joint Creative Producers for the RO, controlled artistic and financial decisions for operas in the Linbury. Wyatt explained, "The main stage has limited opportunity for change and is more fixed to traditional concepts and presentations of opera. [But] the Linbury is a space that enables audiences to meet opera in a different way."

The Linbury commissioned four to five new operas per year, which were shorter, had smaller casts, and sparer sets than those on the main stage, and did not require a full orchestra. To develop talent and ideas, the Linbury hosted programs that brought together experienced artists from different fields who were new to opera, then provided them with small budgets and the space to experiment with the

art form. Ideas that didn't work might be dropped from the program, but the artists behind them would not. Wyatt saw the Linbury as "100% an incubator," helping to resolve "a systemic problem for innovation in the sector. You have the big stages like the ROH main stage, and a lot of small companies making really small work, and there is no ladder between them. The Linbury is in that middle ground."

Casting an Opera

Planning an opera began about four years in advance, in order to secure the world-class talent that the RO aspired to showcase. The RO employed its own in-house chorus; however, principal singers, directors, conductors, designers, composers, and librettists were typically freelancers hired per production on a service contract. Planning anchored around key artists whom the RO delegated creative control to, who then suggested the remaining creative team. For example, 2023's *Rheingold* emerged from Kosky's and (RO Musical Director) Antonio Pappano's wish to work together on the *Ring* cycle. Kosky then proposed Purves for the role of Alberich, based on their previous experiences working together. Given the coordination necessary, Heather Walker, Director of Operations, explained that the ROH determined when the desired set of artists could be in London at the same time, then worked backwards from this availability.

The opera house thus allowed artists to work with other artists they admired. As Shahbazi described, in the 2023 production of Handel's *Jephtha,* "I'm performing with an amazing cast which includes a singer who I've looked up to for years. The caliber of their artistry challenges me to discover new dimensions of my own singing. Opera is a team sport, and the ROH provides a really strong team. The admin, costume department, wigs, backstage hands, everyone is really at the top of their game." A director shared that she chose to work with the ROH even though it "offers lower wages than Europe, because I trust [Mears]. He's a very good manager who would absolutely hear any of my problems."

The Royal Ballet

Kevin O'Hare was appointed as Director of the Royal Ballet (RB) in 2012, after a prominent career as a dancer. O'Hare shared that in taking the role, "One of my goals was to create the classics for the 21st century. And I think we've done it."

Classical Canon

Like the opera, ballet companies relied on a classical canon, albeit a much smaller one, of ballets originally choreographed in the 19th century. Classics like *The Nutcracker, Swan Lake* and *Romeo and Juliet* sold well and were a staple in all ballet companies, which were periodically refreshed as new productions with new sets and costumes. The RB staged around 30 performances of *The Nutcracker* almost every other year, for which Walker described, "There is a crew that could probably deliver it in their sleep." As with the opera, features of these 19th century classics could present challenges for modern audiences. Barker described that "performing for schools and seeing productions through their eyes highlighted the challenges of repertoire made in another century. For example, *The Nutcracker* included a Chinese dance that involves cultural stereotyping. I said to O'Hare: We can't do that. So he went to the rights holders, and that was re-choreographed**.**"

However, key aspects of the underlying choreography typically remained the same. Even where modern choreographers might adapt these classics, signature steps or formations remained true to the original 19th century choreography. Sarah Lamb, Principal Dancer, described that just like in "a Shakespearean play, they don't change the words, so we don't change the steps. But everyone has a different way of doing the steps. There is artistic freedom within that." In addition to the quality of

dancing, the RB differentiated itself on its storytelling of the classics. O'Hare explained that "One of our trademarks is that though we have these amazing principal dancers, it's not all about those two people in the middle of the stage. It's about the whole, so even the dancers at the side of the stage have to be telling the story. The audience might not notice it, but somewhere subliminally they will." This dedication was shared by the dancers, who joined the company specifically for its dramatic focus.

New Commissions

Beyond the classics, the RB was known for its unique choreographies. O'Hare shared that "We have two great founder choreographers that forged what the company is about and really gave the RB its identity." Beard explained that the "USPs of the Royal Ballet are Frederick Ashton and Kenneth MacMillan who created great narrative ballets, a tradition continued today by Christopher Wheeldon and Wayne McGregor." These were the company's four in-house choreographers since its founding, who had created hundreds of works specifically for the RB ranging from adaptations of Shakespeare's *Midsummer Night's Dream* to Dante's *Inferno*. While works by the in-house choreographers were performed more frequently, new works were also commissioned from guest choreographers such as Crystal Pite. O'Hare shared that, "We're working with her on telling stories of today, such as *Flight Pattern* which examines the migration crisis. Finding those stories, that's innovation to me."

New commissions progressively shifted the RB's style of dancing away from the traditional lexicon of 18th century classical ballet, expanding to include movements from modern dance, ballroom, and hip-hop. However, choreographers such as Italy-born Valentino Zucchetti, First Soloist and award-winning choreographer, still chose to "innovate within the boundaries of the traditional artform. It's a lot riskier to do this than something completely new because I stand on the shoulders of giants who have choreographed with classical ballet for over 200 years." At the same time, Emma Southworth, Creative Producer who programmed ballet at the Linbury, stated that the RB sought to "evolve what you can do with classical ballet. It's partly about finding the contemporary choreographers who are interested in the movement language of classical ballet, as opposed to coming in and just creating contemporary dance on the Royal Ballet."

O'Hare shared that while newer works could take longer to sell, he believed that over the years, "We've managed to bring the audience with us." This was in part due to many of the RB's new commissions being in short 30-60-minute format, which were then assembled into a full evening's performance known as 'mixed bills.' These often comprised a mix of contemporary and classical pieces which were marketed under a common theme, such as works by choreographers inspired by the same style or topic. The shorter format meant that new commissions in the ballet could spend less on sets and costumes than new commissions in the opera, which did not utilize mixed bills (see **Exhibit 4**).

Full-length ballet commissions were less common, occurring only once every several years. These were typically created by one of the in-house choreographers and were increasingly co-produced with another ballet company. One such commission was Christopher Wheeldon's *Alice's Adventures in Wonderland*, which featured puppetry, projections, and inventive choreography to bring Lewis Carroll's iconic tale to life as a theatrical ballet. While Wheeldon leveraged 19th century classical ballet technique, he also incorporated more modern movements and features from musical theatre and pantomime. The ballet was co-produced with the National Ballet of Canada and first staged at Covent Garden in 2011 as the RB's first commissioned full-length ballet in more than 20 years.[5] Since its debut, it had become a staple in the RB's programming as a modern-day classic, occasionally replacing *The Nutcracker* during London's Christmas season.[6, 7]

Co-productions were less common than in the RO and involved two other co-producers at most. O'Hare explained how "It really is for financial reasons. But it also means that some of our big ballets

are being seen in more companies and countries, and that's quite a lovely feeling." The RB was typically the lead co-producer, enabling the choreographer to optimize the work for the abilities of RB dancers.

Developing Choreographers

Choreographic opportunities within the RB ecosystem began at the Royal Ballet School. As O'Hare explained, "We don't run the school, but we are intrinsically linked to the Royal Ballet School. I have made it my mission to always take young dancers from the graduating year into the company as apprentices." Zucchetti shared how he began choreographing through the school's Young Choreography competition, where "at just 12 years old, they're willing to seriously consider what you're proposing. That's huge." Additional opportunities were available upon entering the company. For example, dancers who wanted to choreograph could recruit their fellow dancers to create works on. Netherlands-born First Artist and emerging choreographer Joshua Junker explained, "You have to ask friends or people who want to dance more, because they have to work outside of their contracts."

The RB's *Draft Works* program provided an avenue to present these early works to the public in the Linbury Theatre. Choreographers and directors from companies around the world were also invited, such as the Dutch National Ballet who saw Junker's choreography and commissioned him for a new work. Dancers were encouraged to pursue choreographic opportunities outside the ROH so long as they could fit around their dancing career. O'Hare shared, "I always tell young choreographers to say yes to everything—a fashion show, a play, a bit of movement—just go and take those opportunities."

The Linbury staged not only the RB's new work, but productions of other companies as well. Southworth explained that "This gives us a network when we're developing choreographers, so there isn't just one talent pipeline through the company. There is a way for people to come in from the outside. And people can have the right opportunities at the right time in their careers, as opposed to going from choreographic projects straight to the big stage." O'Hare shared that even as they developed talent for the RB, their investment in choreographers was "not just for us, but for the broader landscape of dance. We're super happy if they get their work commissioned by another company."

In their efforts to explore the boundaries of classical ballet, the RB engaged emerging choreographers from different dance backgrounds to develop works on the RB's classically-trained dancers, such as Cameroon-born Joseph Toonga who was employed in the RB's Choreographic Residency for the 2023–24 season. Toonga shared, "I come from a breaking, popping and crump style. It's a different dynamic, and I really want to understand how that looks on a ballet body." This was inspired by a choreographic workshop he attended at 17 that was led by in-house choreographer Wayne McGregor, who himself came from a contemporary dance background. Toonga explained, "I was fascinated because I saw how extreme ballet dancers can go with a move."

However, Toonga was initially hesitant to work with the RB. He shared, "Growing up, I never came to the ROH, because I just felt it wasn't for me. I thought there was no one who looked like me in this space who had some sort of power or influence. In my first six months, I wanted to leave, because it just felt like people didn't want to adjust to my style." However, Toonga was encouraged by the leadership team, where "Kevin set up a series of workshops with the dancers to get used to what I do, and then from there, they understood." Toonga also curated the RB's first *Rhythm in Resilience* festival for Black History Month, featuring Black artists from different dance genres. Ultimately, Toonga remained committed to the RB, knowing that "They're trying to change what the brand can look like. And I think having someone like me shows people that actually, it can have many different faces."

Casting a Ballet

Productions were cast from the company's 96 full-time dancers, who spanned ranks from Artist to Principal Dancer. Dancers were typically recruited directly from ballet schools around the world, with no preferential recruitment from the Royal Ballet School.

US-born Lamb began her career at Boston Ballet where she became a Principal in 2003. She moved to the RB the next year and was promoted to Principal in 2006. Lamb explained that the funding structure of ballet companies in the US made it "very difficult to put on some productions that might be deemed risky, because you need to make revenue with ticket sales." For example, a 2017 survey of US dance companies found that an average of 48% of season revenues came from *The Nutcracker* and other holiday programming.[8] Accordingly, Lamb explained that the RB "can do many more productions of different ballets per year, with more attention given to the development of the artist."

However, O'Hare shared that hiring a dancer mid-career was "very rare, because we want people to see that they can have a long career here, that they can go through the company to become its next stars. And that's how you develop your audience as well, because if they see that 18-year-old coming up, they will follow them through and want to see them do the next role and the next. They become invested in the individual dancer and their careers." Indeed, McGrath explained that "There's a lot of interest in the cast. Audiences will come a number of times within that one production to see multiple different cast members."

Behind the Scenes

The RO and RB were both supported by the same orchestra, backstage crew, and administrative functions off stage. The biggest shared function was the Technical, Production, and Costume (TPC) department, comprising approximately 350 permanent staff in over 30 teams handling costumes, scenery, props, sound, video, lighting, automation and broadcasting functions for each performance. Additional freelancers were hired as required for individual productions.

Planning

Technical preparation for a production began around three years in advance, after the artistic teams had determined the cast and the season it would be staged in. Walker described that then, "One of the first things somebody has to do is literally count the number of wagons—that doesn't sound terribly artistic, but it's a test of whether the combination of productions will fit in the building." Walker elaborated, "The best way to describe it is like that tile game that's got one tile missing. We have five 'stages' around our main stage that move, each with something in rehearsal, under construction or in performance—but the productions are different sizes, so we have to plan out, rather like choreography, how they move about one another." This allowed for the daily rotation between operas and ballets, as well as full scale rehearsals on a given tile which shortened the overall rehearsal time.

Walker explained that "The thing is so tightly planned because time on stage is precious and valuable. We plan in 15-minute chunks and know exactly where everything must be, what room, who's rehearsing there, with, what piece of prop." The schedule for these 15- minute chunks could be solved up to two years in advance, to optimize for factors such as when technical repairs should occur, or which days were most favorable for opening night press coverage. Barker summarized the ROH as "a Swiss watch, finely tuned to go very, very fast." To improve their backstage efficiency, the ROH brought many activities in-house which were typically outsourced, such as fabric dying or wig making, and had also considered buying their own hauling trucks or manufacturing pointe shoes.

Remaining productions were stored offsite in Wales, waiting to be restaged. When productions were finally decommissioned after decades in the repertoire, their sets and costumes were sold to other companies, auctioned off, or repurposed internally. Any historically significant materials were kept in the archives to be leveraged in future production designs, museum exhibitions, social media posts, or educational material. Julia Creed, Head of Collections, explained that "the beauty of archives is you can adapt the subject matter and the content to whichever audience." For example, original costumes from the company's early years were often displayed around the auditorium. Audiences valued this as a way to contextualize the history of the current production on stage and connect to the ROH's roots.

Casting a Backstage Team

As the production was underway, the TPC teams iterated on scenic, props and costume designs with the artistic team at several production gates. Emma Wilson, Director of TPC, described that key members of the production team would "start to learn the artists' language. It becomes a creative relationship. It's a bit like casting—you want to cast two leads in the film that have chemistry."

Many backstage staff came from creative backgrounds themselves. Haddon described, "They have a love of the music perhaps, or they were a dancer, singer, or musician when they were young. They have a fondness for the art forms." Thus, even though the ROH competed with the TV and film industry for talent, Haddon explained that employees were often attracted to "the creative excellence that there is here. Sometimes we get better than we could hope for because of who we are." Walker described that "The people backstage get to become performers when there's a problem that needs fixing. They get an adrenaline rush from pulling something around. While everyone hopes for a smooth show, you want a crew that problem solve when something goes wrong." However, Sam Davey, Head of Transformation, elaborated on how the ROH was trying to balance this culture. She explained, "You need to have that creative tension, particularly in an organization like this. But the levels of stress and burnout are too great. The organization can buckle underneath it."

Economics of the ROH

Costs

The ROH was an outlier in having both opera and ballet under the same corporate structure. Their atypical ownership of their performance venue led to higher fixed costs than many other performing arts organizations. Davey summarized, "There's a lot that goes into running a [theatre], on top of the energy costs to even keep this place heated and lit." The ROH also undertook many activities in-house which were usually outsourced by other institutions. The ROH had nearly 1,000 permanent employees in August 2022, of which about 73% were in artistic or general management. Members of the ballet company, orchestra, and chorus were employed by the ROH on a long-term basis (see **Exhibit 5** for a breakdown of these costs). Three separate unions represented these employees, with pay negotiated annually. Orchestra and chorus members tended to stay at the organization for decades, while ballet dancers had shorter careers. In line with the wider opera industry, lead opera singers, designers, and directors were generally contracted for specific productions.

Stage production technology also represented a considerable expense. During COVID-19, the ROH updated its fly system (for hanging scenery and lighting) for about £10m, to better automate backstage processes.[9] An approximately £35m update of its automated lighting system began during the 2022–23 season, requiring overnight installations in between shows. These technology transitions created difficulties for the multi-year opera the *Ring* cycle, where 2023's *Rheingold* had to match the finale staged in 2027. Clarey explained, "This has to look exactly the same in five years as it does today, but

our lighting rig is being upgraded within that period. So we've had to hire a lot of equipment in to match with what we may buy in the future." Despite these costs and challenges, management felt they paid off in the quality of their productions. As Wilson remarked: "*Rheingold* has an eight-meter long burnt tree that's extraordinary. Not many other opera houses can deliver that."

New commissions were generally the costliest type of production (see **Exhibit 4**). The ROH committed to a handful every year (see **Exhibit 6**) but was temporarily scaling back the amount of new work given the funding cuts announced by the Arts Council England, and to reduce risk coming out of the pandemic. (**Exhibit 7** shows comparisons of production types across the ROH and other companies.) The ROH had considered shortening its seasons to reduce variable costs, but the organization was designed to support a high number of productions. Beard explained, "We could easily decide to be winter equivalent to the Salzburg Festival and do only 50 shows. But that wouldn't build the audience and the talent pipeline in the future. And we're a charity, so it would be in gross dereliction of our public service mission because we'd only be reaching 100,000 people a year instead of half a million."

Philanthropy and Sponsorships

In FY 2021–22, philanthropy from individuals and corporations represented the ROH's largest source of income at 32% (see **Exhibit 1**). Many audience members donated through a membership scheme, where individuals and corporations could join as different levels of Patrons or Friends to receive booking and seating benefits (see **Exhibit 9**). While philanthropy could be tied to specific works—*Rheingold,* for example, was funded by the "Wagner Circle" of Friends—the ROH maintained creative control. Allowing donors to dictate artistic decisions might lead to "giving away more than you gain," according to Amanda Saunders, Director of Development and Enterprises, who described a "funding-dependent" rather than a "funder-dependent" model.

Donors were publicly recognized by the ROH for their contributions.[10] Sponsorships, such as displaying a sponsor's logo on programs, were another stream of revenue. Generally, US ballet and opera houses relied more heavily on philanthropy and sponsorship than houses in Europe, which commanded more financial support from the government. Like most performing arts organizations, the ROH worried if it could sustain its base of donors and attract new ones. Davey reflected, "We have a very strong core of personal donors but a lot of them are elderly." Younger donors were more likely to donate to causes such as climate change or other social issues, instead of the arts.[11]

Ticket Sales

The next largest source of revenue came from ticket sales—approximately 60% from opera tickets and 40% from ballet (see **Exhibit 3**). Tickets were available at different price tiers, depending on the specific performance and seat (see **Exhibit 4**). As a performance date approached, ticket prices might be discounted to hit financial and capacity targets: the ROH aimed to recoup at least 85% of the offered face value, corresponding to about 95% of the seats in the auditorium (owing to different ticket price tiers). For most attendees, except for certain Patrons who might receive bespoke services, the ROH only sold tickets to individual performances—they did not offer package deals as many other arts organizations did. Kilby shared, "Multi-buy-deals is something we are looking at; how we can best use technology to understand our customers and what they are likely to find attractive."

Despite the temporary adverse impact of COVID-19, the ROH was quickly recovering. "We've come back really, really strong," said Davey, noting that many productions were sold out. Beard elaborated that post-Covid, "We are bang on trend. The world is looking for maximalist 360-degree experiences that are genuinely transporting. That's what we do, that's at the heart of opera and ballet." Sector-wide,

nearly 40% of arts-goers reported booking tickets closer to a performance relative to before the pandemic, which complicated forecasting ticket sales.[12] Before the pandemic, audiences booked ROH tickets an average of 88 days before a performance, which fell to 43 days in the 2021–22 season.[13]

The average audience age for opera attendees at the ROH in the 2017-19 seasons was 54 years old (48 for ballet) (see **Exhibit 11**). Owing to the pandemic and heightened health anxieties, the 2021-22 figures declined to 48 years old for opera and 45 for ballet.[14] Similarly, US trends showed that opera attendees were older than ballet attendees (see **Exhibit 12**). There was some crossover between ballet and opera audiences, especially among higher-level donors. Beard explained, "For first-time audiences, there's only 15% crossover between ballet and opera. For Patrons, it's more like two thirds." Audiences tended to leave the ROH with a positive impression. In the 2021–22 season, the net promoter score for production quality was 55% for opera (73% for ballet) and for experience 77% (84%).[15]

The ROH also faced competition from other opera and dance companies (see **Exhibit 10** for selected financials across competitors**)**. Many opera-goers attended the Glyndebourne Festival, just two hours from London, or the Salzburg Festival in Austria, both of which primarily staged new commissions. The Birmingham Royal Ballet toured the UK with classical ballet and contemporary dance, and often staged its Nutcracker in London during the Christmas season.[16] Other London-based competitors included the English National Ballet, Sadler's Wells, and the English National Opera (see **Exhibit 8**). The English National Opera was known for staging operas in English, which improved accessibility and allowed wider audiences to connect with the emotional content of performances. The ROH, by contrast, preserved a more traditional approach by performing operas in their original language.

Ticket pricing for popular ballet and opera revivals was generally comparable across the ROH, Birmingham Royal Ballet, English National Ballet, and English National Opera (see **Exhibit 8** for a comparison of *The Nutcracker* and *Madame Butterfly*). While seasoned audiences typically chose between different companies' offerings based on their preferred interpretations of a given work, newcomers could find it difficult to distinguish between offerings, instead relying on status and prestige as an indicator of quality. For tourists visiting London, the ROH also competed against other live performances including plays and musicals.

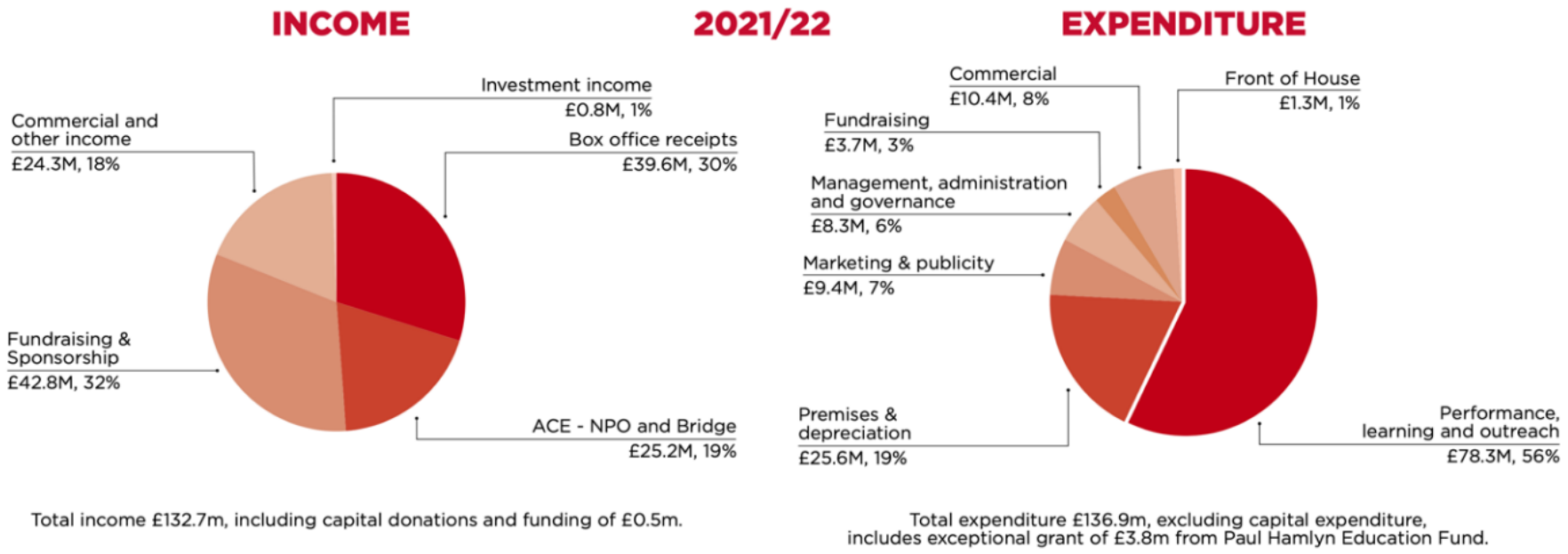
Public Support

As a prominent organization in the British cultural sector and a National Portfolio Organization, the ROH received considerable government support. In FY 2021–22, Arts Council England contributed £25.2m of revenue (19% of the total), while the Theatre Tax Credit contributed an additional £6.8m (5%).[17] Most of this funding came as a direct grant, but a smaller amount was set aside for the Bridge program, which helped the ROH work with local schools and other educational organizations. However, the ROH learned in November 2022 that Arts Council England would cut its annual grant funding by 9%—from £24,471,0000 to £22,268,584—which, in real terms, consisted of a £4.7m cut.[18]

Looking to the Future

The government funding cut had come as a shock. Though audiences were returning after the pandemic, the Royal Opera House faced the challenge of delighting existing audiences and attracting new ones. How could they maintain their high standard of quality while ensuring the ROH's long-term sustainability? Should they attempt a high-risk strategy of investing in new commissions, or take a more conservative artistic approach? How could they deepen their involvement with donors? What other techniques could they employ to raise revenues or cut costs? As the audience settled back into their seats for the second act, Alex Beard weighed these questions.

Exhibit 1 Summary of Company Financials



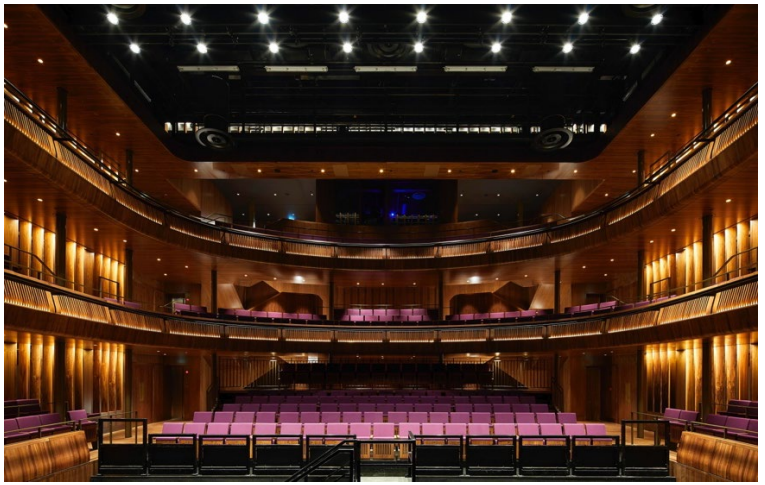
Source: ROH Annual Report 2021/22 and Arts Council England, NPO Annual Survey, Open Data (Finance).

Note: Within fundraising & sponsorship income, donations contributed £29.4m with about 78% coming from one-off gifts and the balance from regular giving. Sponsorships (including corporate memberships) contributed £2.2m, fundraising events contributed £0.4m, and trusts, foundations, and bequests contributed £3.9m.

Exhibit 2 Royal Opera House

a) Main Stage

b) Linbury Theatre



c) Paul Hamlyn Hall

d) Lobby

Source: Company documents.

Exhibit 3 Selected Financial and Performance Metrics

	Pre-COVID (2017–19 average)		2021–22	
	Opera	**Ballet**	**Opera**	**Ballet**
Revenue	£28,879,124	£16,299,051	£23,911,004	£16,140,201
Financial Capacity Achieved	85%	92%	63%	85%
Productions	24	17	22	9
Performances	154	147	154	122
Average Price Set	£100	£61	£112	£71
Average Price Sold	£85	£56	£71	£60
Number of Bookers	72,578	77,525	75,323	72,267
Occupancy	96%	98%	87%	92%
Loss to Unoccupied (Unsold)	(£1,546,631)	(£323,624)	(£4,112,029)	(£922,507)
Loss to Discount	(£1,530,775)	(£253,389)	(£4,643,128)	(£295,786)

Source: Company documents.

Exhibit 4 Representative Production Costs (£)

	Mainstage Revival		Mainstage New Commission		Linbury	
	Opera	**Ballet**	**Opera**	**Ballet**	**Opera**	**Ballet**
Ticket price range	13-270	9-180	13-240	7-125	8-80	18-45
Typical # of shows	12	30	5	12	15	12
Box office income	1,485,411	5,474,199	1,077,602	868,911	38,486	88,149
Co-production income	0	0	200,000	185,000	0	0
Guest artists	(483,991)	(113,068)	(1,030,975)	(80,250)	NA	NA
Chorus	(11,327)	0	(11,436)	0	NA	NA
Artistic team[a]	(19,035)	(41,215)	(422,400)	(329,527)	(137,881)	(106,264)
Technical[b]	(42,040)	(56,600)	(65,160)	(53,200)	(10,320)	(1,000)
Productions & costumes[c]	(15,530)	(78,640)	(628,696)	(301,000)	(64,190)	0
Costumes & wigs[d]	(70,708)	(153,139)	(64,361)	(36,967)	(5,221)	(3,000)
Royalties/Music	(279)	(107,078)	(157,312)	(124,746)	NA	NA
Extras	(10,301)	(124,198)	(68,480)	(17,005)	(27,446)	NA
Net income	832,200	4,800,261	(1,171,218)	111,216	(206,572)	(22,115)

Source: Company documents.
Note: These figures are generally representative of productions in their respective categories; however production costs can vary widely depending on creative decisions.

[a] Costs of the artistic team (e.g., director, designer, composers [new commission], choreographer).
[b] Running costs (e.g., lighting, sound, consumables).
[c] Costs for the creation of sets and costumes.
[d] Includes costs related to re-makes and alterations, wigs and makeup artists, dressers.

Exhibit 5a Staffing Levels in Full-Time Equivalents, Permanent and Casual Staff (2021–22)

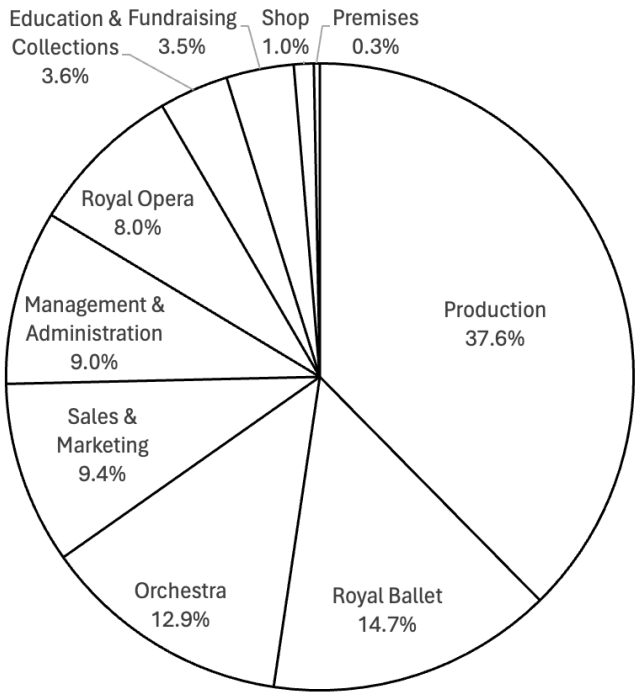


Exhibit 5b Payroll Costs

	2021–22	2020–21
Wages and Salaries (£'000)	(41,893)	(34,218)
Social Security Costs	(5,468)	(4,298)
Other Pension Costs[a]	(4,302)	(3,666)
Non-PAYE Payroll Costs	(3,491)	(3,497)
Total	**(55,154)**	**(45,679)**

Source: Company documents.

[a] Includes contributions to defined-contribution pensions and the operating costs of defined-benefit pensions.

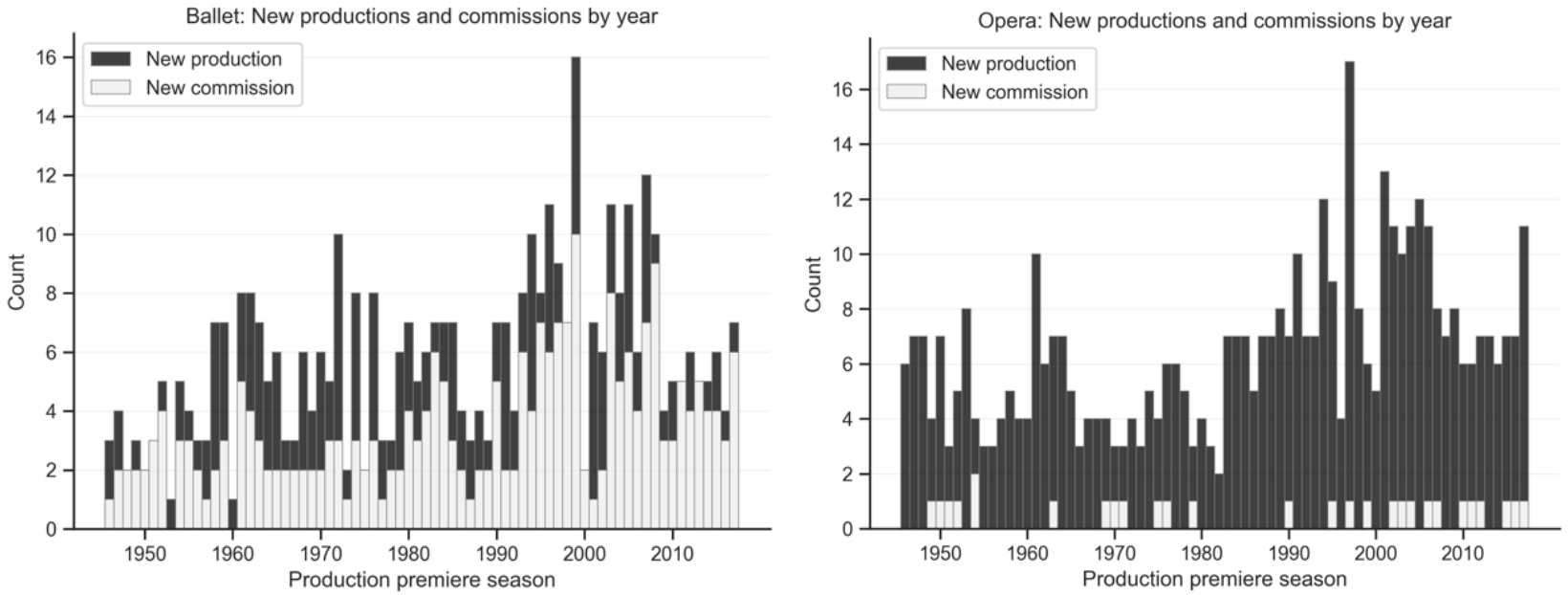
Exhibit 5c Payroll Costs, 2021–22

Cost	Performers	Artistic and General Management	Total
Up to £59,999	187	654	841
£60,000–£69,999	36	22	58
£70,000–£79,999	22	12	34
£80,000–£89,999	10	3	13
£90,000–£99,999	5	5	10
£100,000–£109,999	-	2	2
£110,000–£119,999	1	1	2
£120,000–£129,999	1	-	1
£130,000–£139,999	3	2	5
£140,000–£149,999	2	1	3
£150,000–£159,999	-	2	2
£160,000–£169,999	-	2	2
£170,000–£179,999	1	1	2
£180,000–£189,999	-	1	1
£220,000–£229,999	-	1	1
£550,000–£559,999	-	1	1
	268	710	978

Source: Royal Opera House Covent Garden Foundation, Annual Report 2021/22, Charity Commission.

Note: These figures are based on the 52-week period ending on August 28, 2022 and August 29, 2021.

Exhibit 6 New Productions versus New Commissions at the Royal Opera and Royal Ballet



Source: Authors' estimates.

Exhibit 7a Types of Productions by Other UK Companies

Organization	Type	# of New Commissions Undertaken[a]	# of New Commissions Produced[b]	# of Other New Productions	# of New Productions of Established Repertoire	# of Revivals Produced	# of Productions by Visiting Organizations
Birmingham Royal Ballet	Ballet	3	3	4	0	3	1
English National Ballet	Ballet	5	10	0	0	16	0
English National Opera	Opera	3	0	2	3	3	7
Glyndebourne	Opera	1	1	0	0	0	0
Royal Opera House	Opera, Ballet	11	1	0	6	23	10
Sadler's Wells	Contemporary dance	43	21	32	3	5	9

Source: Arts Council England, NPO Annual Survey, Open Data (Activity), for the period April 1, 2021, through March 31, 2022.[c]

[a] Refers to commissions which were begun, to be developed over several years and staged in a subsequent season.
b Refers to commissions which were actually staged in that time period.
[c] Reporting period does not exactly overlap with a given ROH season, which runs from August to July.

Exhibit 7b Types of Productions by Non-UK Companies

Organization	Type	# of New Commissions Produced	# of Other New Productions	# of Revivals Produced
Metropolitan Opera	Opera	1	5	15
San Francisco Ballet	Ballet	8	4	1
Paris Opera	Opera	0	7	15
	Ballet	1	3	8

Source: Compiled by authors using data from: Metropolitan Opera Archives (2021–22 season); https://www.sfballet.org/discover/press-center/press-releases/release/san-francisco-ballet-announces-2021-repertory-season-leap-of-faith/; La programmation artistique, Rapport d'activité de l'Opéra national de Paris (Année 2022).

Exhibit 8 *The Nutcracker* and *Madame Butterfly* Across UK Companies

				The Nutcracker		*Madame Butterfly*	
Organization	**Type**	**Venue**	**Venue Capacity**	**Price Range (£)**	**# of Shows**	**Price Range (£)**	**# of Shows**
Birmingham Royal Ballet	Ballet	Birmingham Hippodrome	1,850	25-95	27	n/a	n/a
English National Ballet	Ballet	London Coliseum	2,359	17-127	40	n/a	n/a
English National Opera	Opera	London Coliseum	2,359	n/a	n/a	12-125	12
Royal Opera House	Ballet, Opera	Main Stage at Covent Garden	2,256	9-180	30	13-270	12

Source: Compiled by casewriter.

Note: Figures reflect those for the 2023–24 season, except for English National Opera's Madame Butterfly, which reflect those for the 2019–20 season, when the production was last staged.

Exhibit 9 Royal Opera House Membership Metrics

	Pre-Covid (2017–19 Average)	2021–22
Friends (number)	22,291	21,218
… Box Office Revenue	£19,367,475	£16,003,229
… Membership Revenue	£3,733,435	£3,702,217
Patrons (number)	436	411
… Box Office Revenue	£2,233,516	£1,766,415
… Membership Revenue	£3,766,680	£3,499,886

Source: Company documents.

Note: Patrons could join at levels ranging from £7,000 (for which an Individual Patron would receive priority booking) to £70,000 (for which a Season Patron would receive four tickets in their preferred seating area every week of the season), in addition to other benefits. The Friends offering, which began at £118 per year (or £72 for patrons under 30), also allowed members to access the ticketing platform earlier than the general public.

Exhibit 10 Selected Financials of ROH and Competitors (2021–22)

Organization	Type	Total Income (£m)	Total Expenditure (£m)	Net Income (£m)
Royal Opera House	Ballet, Opera	132.7	136.9	(4.2)
English National Opera	Opera	33.7	35.0	(2.5)
Glyndebourne[a]	Opera	36.2	32.0	2.7
Birmingham Royal Ballet	Ballet	13.4	15.2	(1.8)
English National Ballet	Ballet	20.2	19.1	1.2
Sadler's Well	Contemporary dance	1.2	.37	.82

Source: Compiled by casewriter from company Annual Reports, accessed July 2025.

Note: Fiscal year 2021-22 ends on August 31, 2022 for ROH; July 31, 2022 for English National Opera; December 31, 2022 for Glyndebourne; March 31, 2022 for Birmingham Royal Ballet, English National Ballet, and Sadler's Well.

[a] Glyndebourne figures reflect all activities offered by the opera house, including the festival.

Exhibit 11 Selected Audience Statistics for ROH (Both Ballet and Opera)

a)

	Pre-Covid (2017–19 average)	**2021–22**
Average Box Office Spend (per booker)	£352	£305
… new audience	£198	£185
… returning	£477	£466
% Bookers Outside London	51%	46%
% International Bookers	18%	11%

b)

Tickets Sold by age group	**2018**	**2022**
< 30	16%	21%
30–39	19%	19%
40–49	18%	17%
50–59	19%	18%
60-69	16%	14%
70+	12%	11%

Source: Company documents.

Exhibit 12 Audience Demographics for American Opera

		US Population	Opera	Ballet
Gender	Male	48.1%	41.3%	36.0%
	Female	51.9%	58.7%	64.0%
Race/Ethnicity	Hispanic	14.9%	7.8%	9.2%
	White	66.3%	78.0%	79.4%
	African American	11.4%	6.2%	6.9%
	Other	7.4%	8.0%	4.5%
Age	18–24	13.0%	10.6%	11.2%
	25-34	17.4%	18.6%	19.9%
	35-44	16.9%	9.6%	17.2%
	45-54	18.6%	15.0%	15.9%
	55-64	16.3%	20.8%	18.3%
	65-74	10.1%	15.4%	12.2%
	75+	7.7%	10.0%	5.3%
Family Income	< $20K	17.4%	7.4%	8.5%
	$20K–$50K	32.3%	21.4%	21.8%
	$50K–75K	18.7%	17.1%	21.4%
	$75K–$100K	11.7%	11.6%	12.4%
	$100K–$150K	11.5%	20.2%	18.3%
	> $150K	8.3%	22.3%	17.6%

Source: Adapted from National Endowment for the Arts, Figure 1-10, "A Decade of Arts Engagement: Findings from the Survey of Public Participation in the Arts, 2002-2012."

Exhibit 13 Non-Box Office Earned Revenue Sources

	2020–21	2021–22
Catering (£'000)	614	8,977
Sponsorship	1,799	1,872
Sales of Audio-Visual Materials	427	1,114
Cinema Broadcast	257	257
Retail	546	1,108
Promotions and Summer Season	184	341
Venue Hire	N/A	460
Advertising	21	156
Property Recharges	468	500
Licensing	8	56
Total	**4,324**	**14,841**

Note: These figures are based on the 52-week periods ending on August 22, 2022 and August 29, 2021.

Source: Royal Opera House Covent Garden Foundation, Annual Report 2021/22, Charity Commission.

Exhibit 14 Performance Metrics for Large US Opera Companies

Fiscal Year	2017	2018	2019	2020	2021
Main Season Productions	6.5	6.8	6.8	4.0	1.3
Main Season Performances	44	43	43	25	11
Main Season Attendance	93,167	91,940	91,150	48,075	5,268
Total Seats Available	120,006	118,571	121,557	68,927	6,842
% of Capacity Sold	77.6%	77.5%	75.0%	69.7%	77.0%
High Ticket Price	$316.57	$365.86	$344.76	$323.00	$199.71
Low Ticket Price	$17.29	$19.86	$21.71	$23.86	$25.29
Average Yield per Ticket Sold	$117.67	$122.49	$118.02	$112.21	$135.35

Note: Based on a sample of US opera companies with budgets over $15m, excluding the Metropolitan Opera and the Washington National Opera.

Source: OPERA America Annual Field Report, 2022.

Endnotes

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[3] "San Francisco Ballet Announces 2023 Repertory Season, Next@90 Festival, San Francisco Ballet, https://www.sfballet.org/discover/press-center/press-releases/release/san-francisco-ballet-announces-2023-repertory-season-next90-festival/.

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[13] Company documents.

[14] Company documents.

[15] Company documents.

[16] Birmingham Royal Ballet, "The Company," https://www.brb.org.uk/the-company, accessed July 2025.

[17] Authors' calculation, reallocating the Theatre Tax Relief credit from "commercial and other income" to ACE/government funding. Royal Opera House Covent Garden Foundation, Annual Report 2021/22, Charity Commission.

[18] Royal Opera House press release, "Arts Council England makes NPO announcement," November 4, 2022.