543 performances, 11 new commissions & 26 new productions

77% of our total income is generated from ticket sales, fundraising and commercial activity and for every £1 of public money received, 70p was returned to the Treasury in tax

45% of tickets for performances in our theatre priced at £50 or less including 17,500 low-cost tickets provided through targeted schemes for families, schools (including special schools), students and isolated older people

774,000 attendances at our Covent Garden theatre: 97% occupancy

747,000 global cinema audience across 40 countries plus free BP Big Screens in 20+ locations

29,000+ attended ROH productions at other theatres

3 Olivier Awards and 2 Critics’ Circle Dance Awards

3.5 million footage minutes are viewed every month on the ROH YouTube Channel

2 productions on BBC television, 15 on BBC Radio 3, 15 on SkyArts2

14,000 took part in creative learning and participation projects. ROH Bridge worked with a further 343+ schools and other educational organizations and 143 cultural organizations, leading to a further 14,000+ young people experiencing cultural activities and 10,000 attending an event or performance

37% of our theatre audience, 44% of our schools’ matinee audience and 80% of our cinema audience lives beyond Greater London

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The income and expenditure set out above includes unrestricted general funds, designated funds and restricted funds. This excludes income and expenditure from both the pension scheme and endowment funds. For full details, please refer to the statutory accounts.
CHAIRMAN AND CHIEF EXECUTIVE
This Annual Report details a specific period in the life of the Royal Opera House and also outlines the shape of things to come. By articulating this clearly in these pages we aim to demonstrate responsible stewardship of one of the great homes of culture and inspire confidence that its future will not be compromised.

Audiences have enjoyed a year of remarkable artistic achievement by the myriad talents within The Royal Opera, The Royal Ballet and the Orchestra of the Royal Opera House. This world-class performance has been underpinned by expert craftsmanship, careful planning and sound financial management, and by a commitment to engaging with the widest possible audience.

As a Board we are dedicated to ensuring that the seriousness of intent and clarity of focus that propels our work on the stage is matched and sustained across every aspect of this great organization. We take as much pride in sparking a young person’s passion for the arts in a Thurrock classroom as we do in presenting a world-renowned performer on our stage. Equally we are as excited by the reactions of people experiencing our work in cinemas across the world as we are by the reactions of those in our home theatres.
It is a matter of enormous pride that we have achieved a better than break even financial outturn this year, while sustaining quality and extending our audience reach.

Our perennial challenge is funding the objectives of the Royal Opera House in the midst of globally challenging financial circumstances. We are privileged to have been included in the National Portfolio, one of 700 organizations that receive an annual grant from Arts Council England. Arts Council England funding currently provides 23% of our annual income and we are very grateful for the significant contribution that this makes in enabling our creative ambitions for revivals and new works. It also plays a vital role in supporting access and opportunity, from affordable ticket pricing to a wide range of learning and participation activities.

However, nothing would be possible here without the humbling range of Friends, Patrons, individual philanthropists, trusts and foundations and corporate supporters who commit themselves to supporting our work year in year out. Their passion for opera and ballet is at the heart of our success. Our gratitude cannot be measured.

I look forward to seeing our vision for the future flourishing under Alex Beard’s leadership over the coming years, and to enjoying the uniquely enriching experiences that the Royal Opera House has to offer.
From the energy of the rehearsal room, to the innovation and care of skilled craftspeople, the Royal Opera House exudes passion and creativity. It is an enormous privilege to lead such a committed and enthusiastic team. Our task is to ensure that we continue to shine and to inspire all our audiences across the country and internationally, in our theatres, on tour, in cinemas and online.

The Royal Opera House is dedicated to nurturing, creating and sharing astonishing, world-class opera, ballet and theatre craft. We are driven by an urge to deepen our impact – our impact on the continuing development of opera and ballet as living, breathing art forms, and our impact on people in the UK and overseas, reflecting our stated mission ‘to enrich people’s lives through opera and ballet’. To do this requires that we invest in replenishing the repertory and developing talent, grow audiences and deepen their involvement, effect positive change through creative learning, and realize the full potential of our buildings in London and Thurrock. Our challenge and all-consuming focus is to achieve these aims while managing resources sustainably in a hugely challenging financial environment.
We made significant progress in the year under review. The many main stage highlights included The Royal Opera’s Olivier Award-winning production of *Les Vêpres siciliennes*, and a trio of world premieres from The Royal Ballet in Wayne McGregor’s *Tetractys – The Art of Fugue*, Alastair Marriott’s *Connectome* and Christopher Wheeldon’s *The Winter’s Tale*.

Our musical reputation went from strength to strength under Antonio Pappano’s inspiring lead. Few will forget the emotion and nuance of his conducting of *Parsifal*, and the concert performance of *Ariadne auf Naxos* in Birmingham’s Symphony Hall was a triumphant showcase for the Orchestra of the Royal Opera House.

We presented work on many scales, from Es Devlin’s brilliantly innovative designs for our new *Don Giovanni* on the main stage, to the pared back simplicity of *L’Ormindo* in the new Sam Wanamaker Playhouse at Shakespeare’s Globe. The central importance of the Linbury Studio Theatre was shown, among many other productions, in the revival of Liam Scarlett’s *Hansel and Gretel*, and the world premiere of Luke Bedford’s *Through His Teeth*.

We were delighted to welcome many partners to our stages including Welsh National Opera, Music Theatre Wales, English Touring Opera, Ballet Black, Phoenix Dance Theatre, and the London International Mime Festival. The Royal Opera House plays a vital role in the national ecology of ballet and opera, providing a London performing home and much needed co-production support to many.

Our work reached an ever larger national audience, through live relays of ten productions to more than 400 cinemas across the UK, complementing three free BP Big Screen relays and collaboration with the BBC and other broadcasters. Cinema also helped us to represent UK creativity to the world with relays to more than 40 countries. In addition, The Royal Ballet toured to Moscow, Shanghai and Taipei where their performances met with rapturous applause.

We continued to offer life opportunities and experiences through such initiatives as Chance to Dance, Thurrock Community Chorus, the Youth Opera Company and our growing apprenticeship scheme. We’re strengthened in this aspect of our work though ROH Bridge, part of a nationwide Arts Council England initiative, working with cultural, educational and community organizations in Essex, Hertfordshire, Bedfordshire and North Kent to inspire more than 14,000 young people.

We also laid important foundations for the future. We began construction on the Bob and Tamar Manoukian Costume Centre in Thurrock, aiming to improve efficiency and nurture the next generation of craft skills. We made hugely important investments in energy efficiency, reducing our carbon footprint and saving costs to invest in our artistic programme. We also completed the concept design phase for Open Up, a capital project intended to enhance audiences’ experience of our work and inspire wider interest and engagement.

As important as all of the above, we managed to balance the books, attract a near capacity audience, further grow our fundraising, and develop a long term vision and sustainable plan for the organization in the years ahead.

I hope that the range and quality of our work is illuminated in the coming pages. They chart an outstanding year and a map of our future endeavours. My profound thanks go to everyone here for their professionalism, dedication and inspired creativity as we make this journey together.
WHO WE ARE & WHAT WE DO
The Royal Opera House aims to enrich people’s lives through opera and ballet. Home to two of the world’s greatest artistic companies – The Royal Opera and The Royal Ballet, performing with the Orchestra of the Royal Opera House – we seek to be always accessible and engaging, and to break new ground in the presentation of lyric theatre.

We are one of the busiest theatres in the world, delivering more than 500 performances and 1,000 learning and participation sessions each year, employing 1,000 permanent staff and generating a turnover of £128m per our statutory accounts.

‘The Followspot Operators usually light the dancers or singers from the ceiling dome at the back of the auditorium. It is said that if the audience cannot see a spotlight but can see the dancer or singer then we are doing a good job.’

Nicky Targett, Followspot Operator

In turn this enabled 1.5m attendances across Covent Garden and in cinemas worldwide last year, further extended via broadcasting, digital activity and collaboration with touring companies. We also worked with 14,000 people of all ages through creative projects in London and South Essex.

‘We watched the ballet in Leeds. It was mesmerising... To be part of the experience taking place in London, learning from the commentary, seeing the backstage activities, was unique and beautifully handled and a sheer delight. Perhaps we had the best seats in the House! Thank you all for the excitement and joy you have given us.’

Blog comment on Giselle Live
In consultation with staff and the Board, Alex Beard set out a bold vision for the Royal Opera House, spanning the period to 2020, and identified seven priorities. Over the coming pages, we have set out what was achieved against these priorities during 2013/14 and some of our future plans.
Renew the repertory of opera and ballet productions, working with the world’s greatest artists and craftspeople to create transformational new work and to offer new insights from the historic canon to audiences today. There will be a strong emphasis throughout on innovation and experiment, encouraging debate on the future development of the art forms.

‘We enjoyed Saturday evening’s performance [La traviata] immensely. Even after 25 years of marriage the romance of the opera reminds us of how it was when we first met! Violetta’s ‘Amami, Alfredo’ towards the end of the first scene of Act II brought tears to the eye - the emotion of the singing was supported and drawn out by the timpani’s strong playing.’

Ralph B.

- The Royal Opera’s year included six new main stage productions that attracted critical acclaim and healthy debate in equal measure. Stefan Herheim’s dramatic production of Giuseppe Verdi’s rarely performed Les Vêpres siciliennes, conducted by Music Director Antonio Pappano, was a worthy recipient of an Olivier Award, while Kasper Holten’s new Don Giovanni broke new ground with innovative use of video design. Another new production – Francis Poulenc’s Dialogues des Carmélites, conducted by Simon Rattle in Robert Carsen’s moving and inventive staging - included a community ensemble of 67 people with experience of homelessness, long-term unemployment or the criminal justice system together with performing arts students.
‘You could have heard a pin drop through the performance – which showed just how engrossed the audience was. In avoiding over melodramatic singing and orchestral playing (both superb by the way), last night the opera [Dialogues des Carmélites] carried far greater power than other performances I have seen and heard. I have not been able to switch on the radio this morning as I still have the music swirling around in my head.’

Michael McG.

- The Royal Opera established the Linbury Studio Theatre’s position as one of the world’s leading centre for contemporary opera, with commissions from Julian Philips, Elspeth Brooke, Francisco Coll, Luke Bedford and Matthew Herbert and critically acclaimed, award-winning productions of operas by David Bruce, Mark-Anthony Turnage, Salvatore Sciarrino, Benjamin Britten and Michael Tippett with The Opera Group, Music Theatre Wales and English Touring Opera.

- Early opera was also represented, as Director of Opera Kasper Holten directed a hugely entertaining and musically exquisite production of Francesco Cavalli’s L’Ormindo in the new Sam Wanamaker Playhouse at Shakespeare’s Globe, to be revived in the spring of 2015. 3,767 tickets were sold with all but two performances achieving more than 99% occupancy.

- 12 Royal Ballet main stage programmes included premieres of Christopher Wheeldon’s much-celebrated new ballet The Winter’s Tale, Carlos Acosta’s interpretation of Don Quixote, David Dawson’s Human Seasons and Wayne McGregor’s Tetractys – The Art of Fugue.

- The new Royal Ballet Studio Programme offered a dynamic programme of work by Company and visiting artists in the Linbury and a platform for emerging ballet choreographers. Across the Season in the Linbury there were 25 new opera and ballet productions including 15 from visiting companies.

LOOKING AHEAD:

- We are committed to maintaining this increased level of new work, identifying practitioners (composers, directors, choreographers and conductors) who have not worked at the Royal Opera House previously and who have the potential to make transformative work that develops the presentation of lyric theatre and that inspires and stretches our audiences.

- We are developing the ways that we measure the quality of new productions and their impact on audiences. For example during 2014/15 we will participate in Arts Council England’s Quality Metrics study.
Present an inspiring public programme encompassing performances, events and workshops, available across a wide range of platforms, including cinema, broadcast and other digital media, and delivered in a manner that is engaging, participatory and that supports and inspires learning.

- Ten productions were screened in more than 1,500 screens across 44 countries. Free BP Big Screens of *La traviata*, *La bohème* and *Rigoletto*. *La traviata* was also live streamed, attracting 15,731 views from 105 countries worldwide.

"These broadcasts are a thrilling development of the performing arts. The quality of production matches the dazzling onstage performances, and the inclusive nature of the whole process – Tweets from across the world – mean that we are part of a global audience all enjoying a special moment, all together. It can only enhance The Royal Ballet (and opera) worldwide reputation and bring more people flocking to Covent Garden. Meantime, down in deepest Devon, I was able to pay £17.50 and have the best seat in the house. Having said all that, can I just add that last night’s production was spectacular, and I want to thank the principals, dancers, orchestra, set and costume makers and production team for providing me with an unforgettable night."

Christopher W.

- We celebrated 25 years of partnership with BP.

- Two productions were screened on BBC television, 15 on Sky Arts and 15 broadcast on BBC Radio 3. *Don Giovanni* on the BBC attracted 185,000 viewers.
We continued to capitalize on the enduring popularity of *The Wind in the Willows* by presenting the production at the Duchess Theatre. 24,219 tickets were sold (77% occupancy) and the production won the Olivier award for Best Entertainment and Family. It was revived at the larger Vaudeville Theatre during Christmas 2014.

The Deloitte Ignite festival saw artists ranging from Gandini Juggling to designer Es Devlin and writer/performer Simon Callow respond to Wagner and Verdi’s legacies. Daytime tickets were free of charge. 6,581 people attended of which 2,336 did so for the first time. Footage recorded for the festival was released digitally as The Opera Machine - an extraordinary multi-angled view of the intricate theatrical process behind the scenes during a performance that has rapidly become the Royal Opera House’s widest reaching digital opera project.

We delivered Inside Opera: Live, a day of streamed backstage insights in collaboration with Northern Ireland Opera, Opera North, English Touring Opera, Scottish Opera, English National Opera and Welsh National Opera.

Robert Carsen’s production of *Dialogues des Carmélites* in June brought new participants into the Royal Opera House from a wide range of backgrounds, increasing self-esteem and self-confidence, as well as building life skills such as teamwork and communication. Participants took part in a programme, devised by partner organizations and our HR department, offering work-related skills in the performing arts, an understanding of careers in theatre on stage and ‘behind the scenes’, and signposting routes into work experience and work placements.

Following Paul Reeve’s departure to Into Film as Chief Executive, Jillian Barker was appointed Director of Learning and Participation, joining the ROH in January 2014. Jillian began leading a strategic review of the Learning and Participation programme to ensure maximum impact regionally, nationally and internationally into the future.

LOOKING AHEAD:

For The Royal Opera’s production of *Orfeo* at the Roundhouse (in January 2015) we have recruited twenty 14 - 21 year olds in partnership with East London Dance to participate in the production and we have also launched an online game, designed by young people, about the production.

We are developing our Insight Programme to include a 20% uplift in the number of events and digital activity.

We are developing our understanding of the cinema experience through a three-year research project with King’s College London.

The Learning and Participation programme is being developed to have a more national impact.

We are reviewing our rights framework to reflect changing digital priorities.
Strengthen relationships with audiences, while extending their range, with a particular focus on young people and diverse audiences new to opera and ballet, and providing an experience that is more welcoming and enjoyable.

‘I just cannot thank you enough for this wonderful opportunity. I was unsure about whether or not it was a good idea to bring my four year old son [to a Family Performance of *The Nutcracker*]... But I couldn’t resist the amazing ticket prices, and so I just went for it. I can honestly say I have never seen anyone as captivated by anything as he was on Saturday. From the minute we arrived at 10.30am until he flopped into bed at 8.30pm, he was completely mesmerized, inspired, excited, and very, very happy. The pre-performance event was genius – thank you so much to everyone who gave up their time to sow a seed in the next generation. I feel sure we will be coming again.

He hasn’t taken his badge off, he took his programme into school this morning and stood up and gave a talk to his class about everything he’d seen and done, and he has lost the ability to walk, instead just spins, leaps and twirls everywhere. Amazing, thank you.’

Amanda T.

- 1.5m people experienced a live performance. Attendances at performances in our home theatre averaged 97% across the season, 774,000 attendances – and cinema attendances doubled to 747,000. 37% of theatre attendees and 80% of cinema attendees reside outside London.

- 45% of main stage tickets were priced at £50 or less, and 17,500 low-cost tickets were provided through targeted schemes for families, schools (including special schools), students and isolated older people. 35% of theatre attendees had a gross household income under £40k.
Student tickets were available at all performances. Royal Opera programming included a newly commissioned opera for families, *How the Whale Became*, and two interactive productions for the under-fives with Scottish Opera and Spitalfields Music.

We established a programme of regular events including monthly Family Sundays. Each event includes themed activities, demonstrations and informal performances such as an open rehearsal with bass Jihoon Kim, director Greg Eldridge and pianist Paul Wingfield from the Jette Parker Young Artists Programme; a workshop with Royal Ballet Soloist Laura McCulloch; a Shakespeare-themed costume workshop; stage make-up demonstrations; and the ever-popular dressing-up room. Attendance has so far averaged 700, with demand consistently outstripping supply. Other events included five Big Sing Fridays, averaging 150 participants, and a new exhibitions programme is in development.

We contributed to the Audience Finder Project (a major evidence-based initiative, funded by the National Lottery through Arts Council England, designed to develop our collective understanding of audiences and public impact to inform effective planning, collaboration and advocacy) and led discussions amongst UK Tessitura database users regarding how greater data sharing could be used to spot trends and broaden audience engagement across different art forms and organizations.

We undertook research with Schoolzone to establish how best we can deliver digital content directly into schools or through regional cinemas. We continued to work with BOP Consulting (specializing in arts and the creative industries) to evaluate our impact on cultural regeneration to Thurrock and Thames Gateway.

**LOOKING AHEAD:**

- The 2014/15 Season opened with a performance of *Anna Nicole* for student audiences at heavily reduced ticket prices.
- We are introducing a student standby scheme for cinema audiences in order to diversify the cinema audience and build relationships with a new generation of opera and ballet lovers.
- We are developing the range of performances, discussion and debate available via digital streaming.
Encourage a greater sense of ownership and involvement among audiences, participants, friends and supporters, extending the opportunity to contribute and respond to all aspects of the Royal Opera House’s work and employing digital technologies to the full.

‘#ROHlormindo @The_Globe is funny, warm, sexy, surprising and utterly delightful. What a great evening.’
Tatty H.

• The number of website visits continued to grow to 7,583,067.
• Facebook ‘likes’ rose above 160,000 and Twitter followers above 129,000.

• Working with the Digital R&D Fund for the Arts (a Nesta, Arts Council England and Arts and Humanities Research Council initiative), King’s College London and Pop (our online developers) we developed and launched a new hybrid app which has provided an engaging, user-friendly platform for online booking, new Digital Guides to productions and online philanthropy.

• 25,000 people supported our work as Friends of Covent Garden.

• We refreshed our Patrons scheme, developing the range of benefits on offer and increasing renewal rates.
LOOKING AHEAD:

• We are investigating ways in which we might extend our membership, philanthropy and legacy programmes to involve the growing number of people experiencing our work via cinema, digital media and broadcasting.

• We will continue to develop opportunities to monetize digital content, building on our experience of streaming and digital publication.

‘I am in floods of tears and clapping so hard. Don’t care I am in the cinema! Wonderful! Just wonderful!’
Kaye S.
Advance the position of opera and ballet as an essential part of the culture in the UK and beyond, through developing a national and international network of partners and collaborators, embracing projects beyond the Royal Opera House, advocating for the importance of the arts in education and wider society to be fully recognized and supported, and representing UK creativity to the world.

‘I came to see The Winter’s Tale on Wednesday evening (16th) and was overwhelmed by the whole performance! – totally stunning in every respect.... And I had tears running unashamedly down my cheeks at the ending!!'

John G.

• Some of the organizations with whom we developed partnerships for the first time included ATMA Dance, Center for Contemporary Opera New York, Frank Barnes School for Deaf Children, Kingston University, MusikTheatre Transparant, Northern Ballet, Royal Greenwich Teaching Alliance, Synergy Theatre, Pimlico Opera, Polka Theatre, Protein Dance and theatres in Hannover, Shanghai and Tel-Aviv.

• The work being made by other UK opera and ballet companies was promoted through emails to our nationwide cinema mailing list, short films in cinemas and the UK Opera Live digital streaming day.
‘I’ve found lots of people here in Thurrock with the same sort of ambitions and fun personality that I have. I loved singing with them, and we made our own production! It was packed with all of our emotions, all of our feelings. We wanted to express how we felt towards different aspects of society. And although we may be born in different communities or have different ethnicities, we are united in this society.’

James G.

• We provided in-depth training for 230 teachers and trainee teachers, providing them with skills and practical tools to inspire generations of young people about opera, ballet, music and theatre craft. We also played an active role through our involvement with the arts advocacy movement What Next?, the Cultural Learning Alliance and through social media activity, in the debate about the value of arts and culture in the school curriculum.

• Arts Council England confirmed the continuation of ROH Bridge for a further three years. The programme connects young people, artists and cultural organizations across Essex, North Kent, Hertfordshire and Bedfordshire. ROH Bridge has established relationships with around 200 cultural providers and 360 education partners in the region, including contributing to 11 networks and co-investing with partners in 12 new programmes of work in 2013/14. Last year ROH Bridge worked with 343+ schools and other educational organizations and 143 cultural organizations, leading to 14,000+ young people experiencing cultural activities and 10,000 attending an event or performance.

• We submitted evidence to the Parliamentary Select Committee’s inquiry into the work of Arts Council England, outlining the essential contribution that we believe the Arts Council makes to ensure a healthy cultural ecology in England. The quality of the Royal Opera House’s work and its growing reach were widely recognized during Committee sessions.

• The Royal Ballet represented British culture overseas with performances of the Olivier Award winning The Metamorphosis in New York (5,500 attendances) and a full company tour to Shanghai, Taipei and Moscow. Performances by both companies were also screened in cinemas across 40 countries.

• Coinciding with the New York performances of The Metamorphosis, New York City, at the same time New York City Opera presented The Royal Opera’s production of Anna Nicole at the Brooklyn Academy of Music.

LOOKING AHEAD:

• ROH is working with Thurrock Borough Council to deliver Trailblazer, a groundbreaking programme to ensure cultural entitlement for every young person in the borough. 22 schools have signed up for the pilot year.

• International touring plans in 2015 include The Royal Ballet’s return to the USA, with performances in Washington, Chicago and New York, and The Royal Opera tour to Japan, cementing our reputation and relationship with audiences in that country.
Nurture a supportive environment where the world’s most exceptional artists can thrive and in which all those working at and with the Royal Opera House feel valued, challenged and satisfied.

• The quality of dancing at every level of The Royal Ballet, and across both revivals and new work was evident in consistently excellent reviews and audience enthusiasm. Contributory factors include significant investment in healthcare at the end of the previous Season, the appointment of Samantha Raine as Ballet Mistress and an influx of talented students from the Royal Ballet School. Natalia Osipova, Matthew Golding and Vadim Muntagirov joined as Principal dancers of the Company.

• Strong Royal Opera casting throughout the Season included Jonas Kaufmann (Don Carlo); Simon Keenlyside and Karita Mattila (Wozzeck); Christine Goerke (Elektra); and Luca Pisaroni, Lucy Crowe, Renata Pokupić, Christopher Maltman and Rebecca Evans (Le nozze di Figaro); plus stellar conducting from Mark Elder, Andris Nelsons and Antonio Pappano.

‘Faithful to the world’s Freudian overtones, superbly sung and conducted, this revival is gripping – and at its climax shattering.’

Evening Standard on Elektra

‘technically and artistically supreme, combining ethereal elevation with reckless ecstasy.’ – The Telegraph on Giselle
Throughout the Season there was consistently outstanding playing from the Orchestra of the Royal Opera House, under the leadership of Antonio Pappano and Barry Wordsworth, which underpinned the quality of every main stage performance and is a constant source of critical and audience praise. The Orchestra performed some of the most demanding works in the repertory including *Parsifal* and *Wozzeck*, as well as complex ballets such as *Alice’s Adventures in Wonderland*, and they also played *Simon Boccanegra* at the Symphony Hall Birmingham.

In June the work of the Royal Opera Chorus was celebrated with a wider audience as part of *West End LIVE* in Trafalgar Square. The chorus performed with Plácido Domingo at the popular, free event.

As an integral part of the development of our new business plan, we held a series of workshops with managers from every part of the organization, exploring the vision and generating new thinking about how we might achieve it.

We are committed to ensuring fair pay that reflects the varied range of very specialist skills across our workforce, the international marketplace in which we compete to fill many vacancies (e.g. senior leadership positions and performing roles). This year it was agreed to extend the London Living Wage to all Royal Opera House employees and those of our facilities contractor Mitie.

We have worked hard to ensure pension auto-enrolment is a success, resulting in 90% of staff saving for retirement. This has increased pension costs by £0.4m to £3.5m annually.

**LOOKING AHEAD:**

- Koen Kessels has been appointed Music Director of The Royal Ballet from September 2015, with Barry Wordsworth becoming Principal Guest Conductor.

- We are undertaking a comprehensive review of internal communications and information sharing and have introduced an intranet across the organization.

- We will continue to work with the Orchestra to achieve a satisfactory media agreement to enable us to maximize the reach of their exceptional performances.

‘Every Season brings new and stimulating challenges. Our job is to help realize the designer’s vision, and create a believable fantasy world on stage. What a prop is can be hard to define, as our multi-skilled department could be involved in anything 3D, from large pieces of scenery down to small hand and costume props. The artistic and technical demands can be extremely diverse and are constantly challenging, and often involve having to craft things we have never made before.’

Antony Barnett, Head Prop Maker.
Build a strong legacy for the future, through identifying and nurturing new talent, developing skills, sector-leading environmental stewardship, sound financial management, while caring for the Grade 1 listed theatre and realizing the potential of the Royal Opera House estate more widely.

‘I still cannot quite believe how lucky I am. Being chosen as the scenic artist apprentice for 2013 has been nothing short of miraculous for me and my future career. I am so pleased to rise out of bed each morning knowing what fun lies ahead of me in the day, even if it is a 5am wake up. Surely that is when you know you are in the right job.’

Danny Pheloung, Scenic Art Apprentice

• We began construction of the Bob and Tamar Manoukian Costume Centre at High House Production Park. The new Centre will provide a home for our historic costume collection, making facilities and dedicated workshops for students from South Essex College in a new partnership offering a BA Hons degree in Costume Construction.

• We completed RIBA Stages 2 and 3 (concept and detailed design) and submitted the initial planning application to Westminster City Council for Open Up, a capital project to transform our front of house spaces and Linbury Studio Theatre.
Fundraising income, excluding Endowment funds, increased by 10% to £26.5m (higher, for the first time, than our core grant from Arts Council England), including funding for the new Bob and Tamar Manoukian Costume Centre and the feasibility phase of the Open Up project, and the Royal Opera House Endowment Fund (registered charity 1089928) grew 10% to £34m net assets. This year we refreshed our Patrons scheme (resulting in 11% income growth), carried out detailed analysis regarding the potential for further growth in major gifts, became more proactive in requesting a donation when audiences book online and extended the reach of fundraising campaigns front of house, in cinemas and from audience members.

We were re-appointed as a National Portfolio Organization and Bridge by Arts Council England for 2015/18.

Exciting and varied programming and responsive pricing have maximized theatre Box Office yield while maintaining accessibility. Box Office income grew 19% to £44.2m. Similarly, cinema attendance more than doubled, supported by marketing investment and partnerships to expand international distribution, although the programme has yet to become profitable.

High theatre occupancy had a positive impact on bar and restaurant trading, which also grew through initiatives such as performance-related flexible menus and targeted post-show bar income.

We continue to invest in talent development. 32 performers and practitioners received developmental support through the Jette Parker Young Artists Programme, choreographic associateships, workshop opportunities for composer/librettists, the Draft Works showcase for new choreography and our developing relationship with the Guildhall School of Music and Drama.

16 emerging choreographers, directors and designers took part in masterclasses with artists including Wayne McGregor, Lucy Carter and Will Tuckett. Four were subsequently selected to lead a participatory project. Chance to Dance school demonstrations, workshops and community classes have been expanded into Thurrock and Thames Gateway, while the Youth Opera Company formed the children’s chorus for The Royal Opera’s Carmen and appeared in Matthew Herbert’s new opera The Crackle.

The number of apprentices has increased to 12 across technical theatre, costume and footwear, armoury, scenic metalwork, scenic art, stage engineering and learning. We take our responsibility to the wider sector very seriously.

Skills and expertise were shared with Balbir Singh Dance Company, The Garage, Mahogany Opera Group, Mid-Wales Opera, Pavilion South West Dance and StopGap Dance through the Royal Opera House Links scheme. We also launched the Culture Change programme for small and medium sized cultural organizations in the East of England and have so far reached 133 organizations. Our Digital R&D project was developed with King’s College London. ROH staff sit on the boards of 18 cultural organizations and regularly take part in conferences and informal advisory meetings.
• Support from Arts Council England’s Capital Fund enabled us to implement measures to reduce energy usage and upgrade essential technology. In 2013/14 we sent 13.45% waste to landfill which was within the revised target. Environmental performance has also been improved by initiatives including installing sub-meters, upgrading stage lighting systems and switching to 100% recycled paper.

LOOKING AHEAD:

• We will continue to develop plans and fundraise for the Open Up project following a planning consultation in autumn 2014.

• Six dancers have been recruited to the new Aud Jebsen Young Dancer Programme starting 2014 and we are also collaborating with other ballet companies to develop choreographic talent. We will develop our relationship with The Royal Ballet School.

• We are supporting a new MA in Opera Making that we have developed with the Guildhall School of Music and Drama.

• In the autumn of 2014, supported by Arts Council England’s Capital Fund, we refreshed all of the technology within the Royal Opera House including telephone systems, office applications, digital asset management and disaster recovery.
FINANCIAL SUMMARY
The summary statement of income and expenditure set out below is a combination of the unrestricted general funds, designated funds and restricted funds.

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>INCOME</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Box office receipts</td>
<td>44.2</td>
<td>37.1</td>
</tr>
<tr>
<td>ACE - NPO &amp; Bridge</td>
<td>26.0</td>
<td>26.0</td>
</tr>
<tr>
<td>ACE - capital grant</td>
<td>3.0</td>
<td>1.4</td>
</tr>
<tr>
<td>Fundraising</td>
<td>26.5</td>
<td>24.0</td>
</tr>
<tr>
<td>Commercial and other income</td>
<td>24.6</td>
<td>22.2</td>
</tr>
<tr>
<td>Investment income</td>
<td>1.4</td>
<td>1.3</td>
</tr>
<tr>
<td><strong>Total Income</strong></td>
<td>125.7</td>
<td>112.0</td>
</tr>
<tr>
<td><strong>EXPENDITURE</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performance, learning and outreach</td>
<td>77.9</td>
<td>70.9</td>
</tr>
<tr>
<td>Premises and depreciation</td>
<td>16.6</td>
<td>15.7</td>
</tr>
<tr>
<td>Marketing and publicity</td>
<td>5.8</td>
<td>5.5</td>
</tr>
<tr>
<td>Management, administration and governance</td>
<td>5.1</td>
<td>5.2</td>
</tr>
<tr>
<td>Fundraising</td>
<td>4.5</td>
<td>3.6</td>
</tr>
<tr>
<td>Commercial</td>
<td>13.3</td>
<td>12.6</td>
</tr>
<tr>
<td>House management</td>
<td>1.2</td>
<td>1.1</td>
</tr>
<tr>
<td><strong>Total Expenditure</strong></td>
<td>124.4</td>
<td>114.6</td>
</tr>
</tbody>
</table>

**TRANSFERS FROM/(TO) FUNDS**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Asset and Heritage Asset Funds</td>
<td>2.6</td>
<td>4.0</td>
</tr>
<tr>
<td>Other Designated Funds</td>
<td>(3.2)</td>
<td>(2.0)</td>
</tr>
<tr>
<td>Other transfers</td>
<td>(0.6)</td>
<td>0.6</td>
</tr>
</tbody>
</table>

**NET SURPLUS ON UNRESTRICTED GENERAL FUNDS**

<table>
<thead>
<tr>
<th></th>
<th>2014</th>
<th>2013</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>0.1</td>
<td>0.0</td>
</tr>
</tbody>
</table>

This above excludes income and expenditure from both the pension scheme and endowment funds. For full details, please refer to the statutory accounts available from Companies House.
GOVERNANCE
Board of Trustees

Simon Robey (Chairman)
Baroness Blackstone (retired 31 July 2014)
The Countess of Chichester (retired 31 July 2014)
Sir David Clementi (Senior Independent Director) (retired 31 July 2014)
Dr Peter Cruddas
Dr Genevieve Davies
Lloyd Dorfman (appointed 10 February 2015)
Dame Vivien Duffield DBE (appointed 7 October 2014)
Lady Heywood
Sir Nicholas Hytner
John Kingman (appointed 4 February 2014)

Julian Metherell
Munira Mirza (appointed 7 October 2014)
Heather Rabbatts CBE
Dame Gail Ronson DBE (retired 31 July 2014)
Roland Rudd
Sir Anthony Salz
Dame Sue Street DCB
Ian Taylor
Laura Wade-Gery
Sam Walsh (appointed 7 October 2014)
Danny Wyler (appointed 7 October 2014)

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Alex Beard

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Sir David Clementi (Chairman to 31 July 2014)
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The direction and control of the Royal Opera House is determined by the Board of Trustees, which meets at least six times a year. The role of the Board is to direct the Royal Opera House strategy and to ensure that the Royal Opera House is on the approved strategic course (including artistic strategy) and that it is properly and effectively managed. The Trustees are also responsible for the appointment of the Chief Executive, as well as the most senior management positions. The Chief Executive, with the assistance of the Executive Management Team, manages the day-to-day operation of the Royal Opera House.
We would also like to thank the following for support, advice and encouragement throughout the year:

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- Kristina Rogge

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*Sarah Lamb*
THANK YOU
The Royal Opera House gratefully acknowledges the generosity of all those who have provided support this period, including:

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