

Tracking Our Progress: FY16

Measuring the Success of *Connecting our Community and Shaping the Future of Opera* Strategic Plan FY15 – FY20

Strategic Plan Priorities:

One: Artistic Leadership

Build on Opera Theatre’s standing as one of the most successful of all the festival opera companies, recognized as an artistic innovator and a leading destination for both established and emerging talent.

Two: Engagement & Experience

Create broader civic impact and a deepened sense of community engagement, ensuring that Opera Theatre is valued as integral to St. Louis.

Three: Human Resources, Infrastructure, & Technology

Create a theater experience that fulfills expectations for a leading arts institution. Make sure we have the technical and human resources needed.

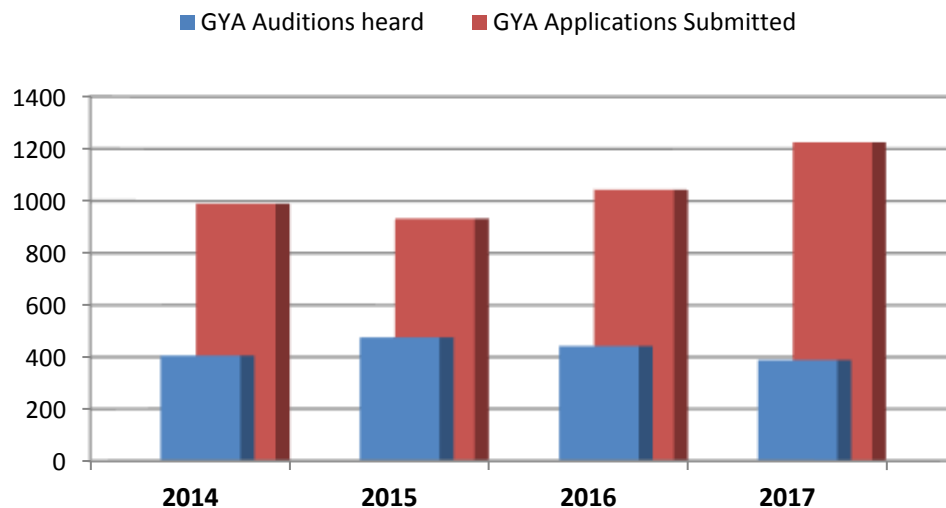
Four: Capital Structure & Financial Strength

Realize an operating model that supports flexibility, liquidity, cash flow security, and endowment funds sufficient to ensure that we remain among the leading festival opera companies in the world.

Priority One: Artistic Leadership

Young Artists Program Applications

The number of young singers who apply to audition for our young artist programs is one indicator of our reputation in the artistic community. 1,225 young singers applied for the 2017 Gerdine Young Artist program – the highest number of applicants to date.



GYA Applications Submitted	990	933	1043	1225
GYA Auditions heard	406	476	442	389
Gaddes Festival Artists (Promoted from GYA program)	9	1	8	6 ⁺

⁺Planned number for 2017 season

Audiences Traveling to Attend

In addition to attracting audiences from every zip code in the St. Louis metropolitan area, OTSL's season attracts audiences from around the US and beyond. The figures below represent the zip codes of ticket buyers in our database for each season. **Our highest "state count" in one season is 47 states.**

	2013	2014	2015	2016
# States	43	43	43	42
# Countries	6	6	5	9

National Press Coverage

As part of a benchmarking study for the strategic planning process, OPERA America tracked which of the following national publications covered OTSL each season. **The results show that increased coverage corresponds with seasons in which OTSL presents a world premiere (as in 2013, 2014, and 2016).**

	2011	2012	2013	2014	2015	2016
New York Times	X		X	X		X
Financial Times	X	X	X	X		X
Wall Street Journal	X	X	X	X	X	X
Washington Post			X	X		
Chicago Tribune	X	X	X	X	X	X
LA Times				X		
Opera News	X	X	X	X	X	X
Opera Magazine	X	X	X	X	X	X

Recent Quotations in the Press

“Intelligent, beguiling... a bravura performance”

*Corinna da Fonseca-Wollheim on SHALIMAR THE CLOWN, **The New York Times** – June, 2016*

“A gripping production that exemplifies what this envelope-pushing, opera-in-English company does best: high-gloss music theater that speaks to the cultural and political issues of today... New operas come and go, but *Shalimar* is a keeper.”

*John Von Rhein on SHALIMAR THE CLOWN, **The Chicago Tribune** – June, 2016*

“Jack Perla’s haunting *Shalimar the Clown*... succeeds at being topical, literary and theatrical.... James Robinson’s clear direction and Seán Curran’s terrific choreography... seamlessly connected the big chorus scenes and the intimate moments, drawing the parallels between personal and community tragedy.”

*Heidi Waleson on SHALIMAR THE CLOWN, **The Wall Street Journal** – June, 2016*

“Soaring choral music... with the finesse of Puccini.”

*Henry Stewart on SHALIMAR THE CLOWN, **Opera News** – June 2016*

“Moving drama and music... of poetry and power... exemplary.”

*Sarah Bryan Miller on SHALIMAR THE CLOWN, **St. Louis Post-Dispatch** – June, 2016*

“Another astonishing over-achievement from this committed and tireless company... damn thrilling.”

*James Sohre on SHALIMAR THE CLOWN, **Opera Today** – June, 2016*

“An urgent, vocally solid, and dramatically splendid performance.”

*Corinna da Fonseca-Wollheim on MACBETH, **The New York Times** – June, 2016*

“A *Macbeth* of true international festival caliber.”

*John Von Rhein on MACBETH, **The Chicago Tribune** – June, 2016*

“Four stars... a royal event... superb.”

*George Loomis on MACBETH, **The Financial Times** (London) – June, 2016*

“I haven’t been *so moved* by *La bohème* in years.”

*Henry Stewart on LA BOHÈME, **Opera News** - August 2016*

Emerson Behind the Curtain & Browning Technical Fellowships

The *Emerson Behind the Curtain* and Browning Technical Fellowship programs continue to train and develop the next generation of technical artists. Many are in the midst of booming careers across the country.

Maggie Goldrainer, 2016 *Emerson Behind the Curtain* scholarship recipient:

*"My first NYC project begins this Monday, October 17. **I'll be costume assisting James Schuette as we revive OTSL's "27" as a staged concert at Masters Voices.** As a 2016 Emerson Scholarship recipient, rest assured that I will take impeccable care of OTSL's costumes and will bring the OTSL magic touch to this interpretation."*

Paige Seiber, 2015 Larry & Jinny Browning Technical Fellowship Career Award recipient:

"I'm now based out of New York City working as a freelance lighting designer and assistant lighting designer. Since moving to NYC a little over a year ago, I've been the assistant lighting designer for BRIDGES OF MADISON COUNTY (1st National Tour), PERFECT ARRANGEMENT (Primary Stages), GOLDEN LOTUS (Broadway Asia), and PLENTY (The Public Theater). I've also been lucky enough to design lights for New York City Dance Alliance, The Young Choreographers Festival, The National Dance Institute, Metro Theater Company, and BrickaBrack Performance Collaboration.

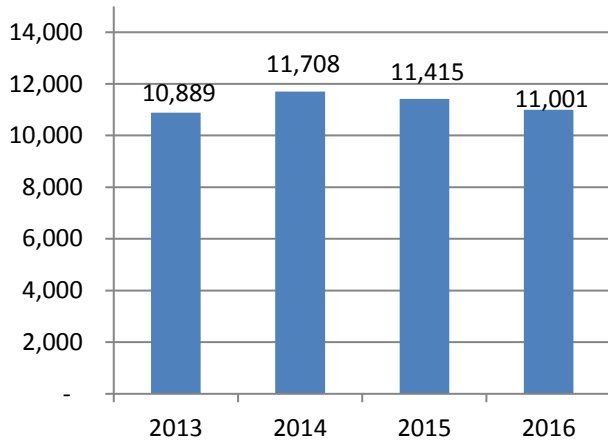
I also stay in regular contact with Chris Akerlind and Jim Ingalls, both of whom I was originally introduced to as an Emerson program participant. I have been the lighting programmer for two of Chris' most recent off Broadway shows, INDECENT and MARIE & ROSETTA.

The OTSL program gave me the experience I needed and introduced me to integral professional connections to jumpstart my freelancing career in New York."

Priority Two: Engagement & Experience

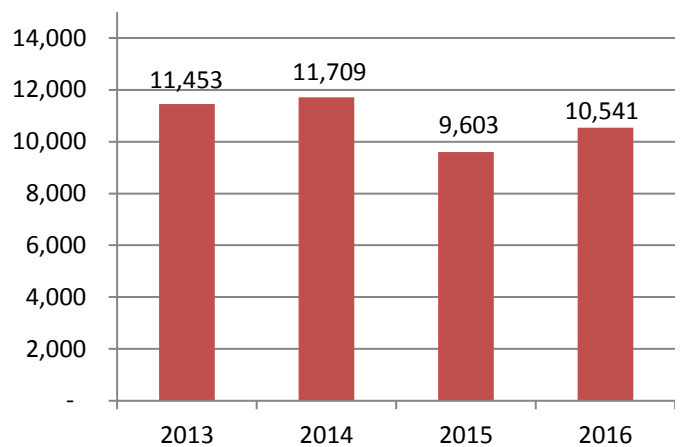
Compared with the 2015 season, overall ticket sales revenue in 2016 increased by 2.4%; attendance increased 4.4%. However, the 2016 ticket sales goal was developed with 2014 results as a benchmark, meaning that FY16 ticket sales fell short of the budgeted revenue goal by 8.4%. Despite not hitting the ticket sales goal in 2016, OTSL continued to build on pronounced growth in young and diverse audiences, thanks in part to activities funded through the Wallace Foundation *Building Audiences for Sustainability* grant. Work is proceeding on ways to utilize strategies developed for the Wallace grant to build additional groups of potential audiences.

Subscribers

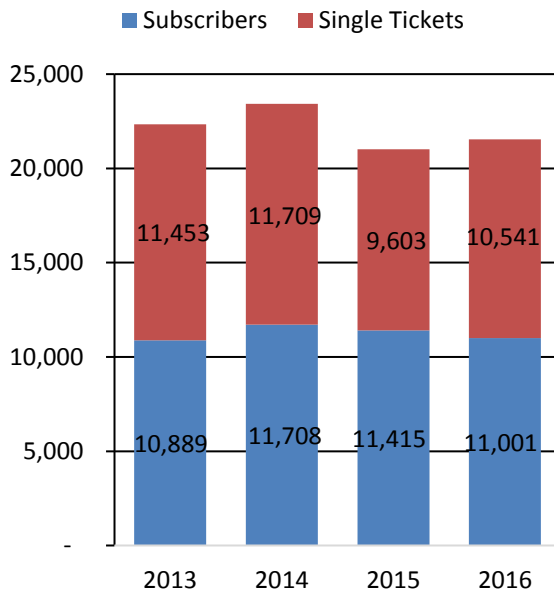


Renewal Rate	81.9%	89.2%	86.0%	86.4%
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Single Tickets

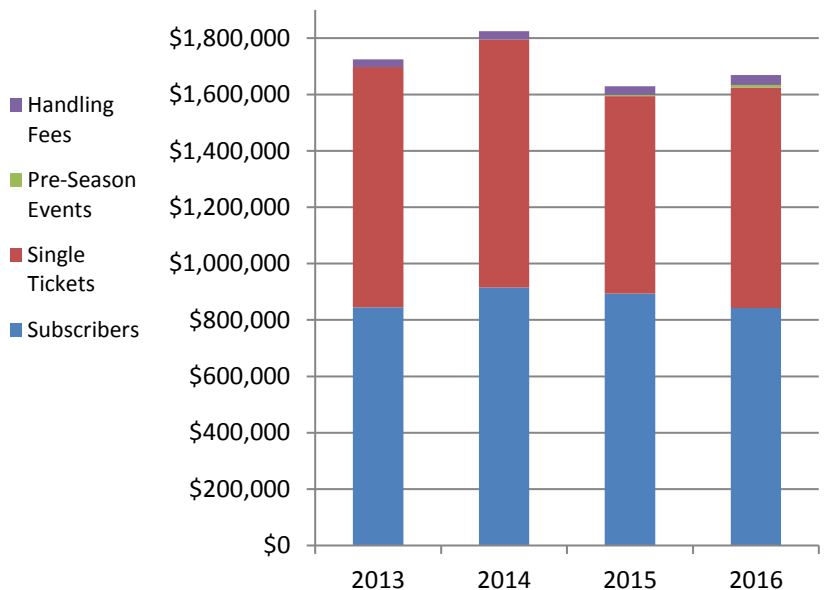


Total Tickets



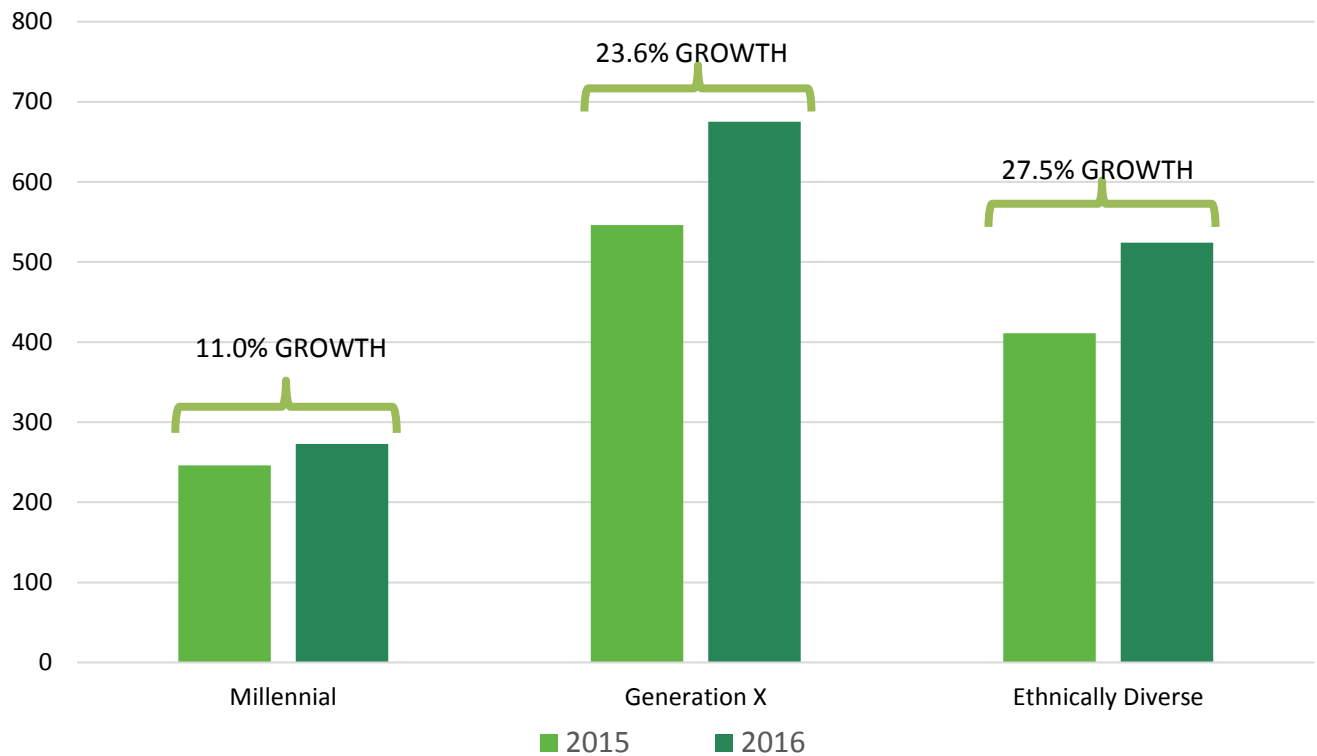
Avg. Price	\$76	\$77	\$76	\$75
% New Households	28%	26%	26%	26%

Total Ticket Revenue



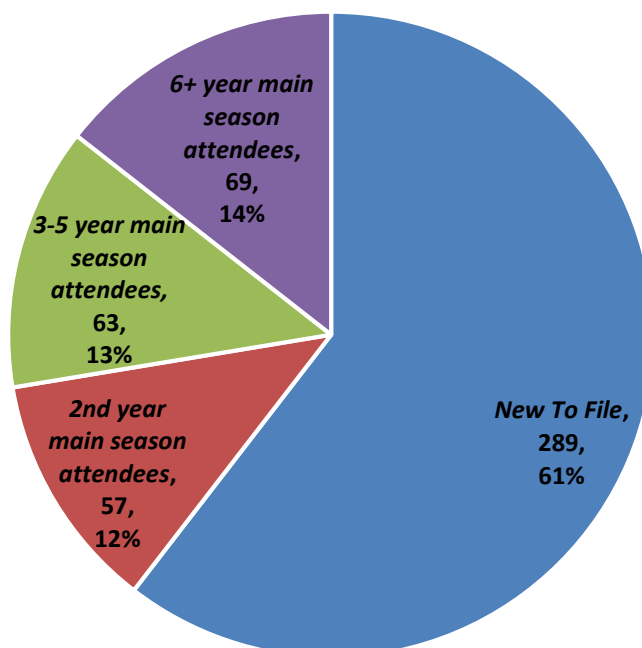
Subscribers	\$844,730	\$915,346	\$893,126	\$842,009
Single Tickets	\$852,245	\$880,061	\$701,312	\$782,635
Pre-Season Events	\$0	\$0	\$3,780	\$9,340
Handling Fees	\$27,426	\$29,574	\$31,544	\$35,293
Total Dollars	\$1,724,401	\$1,824,981	\$1,629,762	\$1,669,277

Ticket Buyer Household Growth by Demographic Segments



Opera Tastings

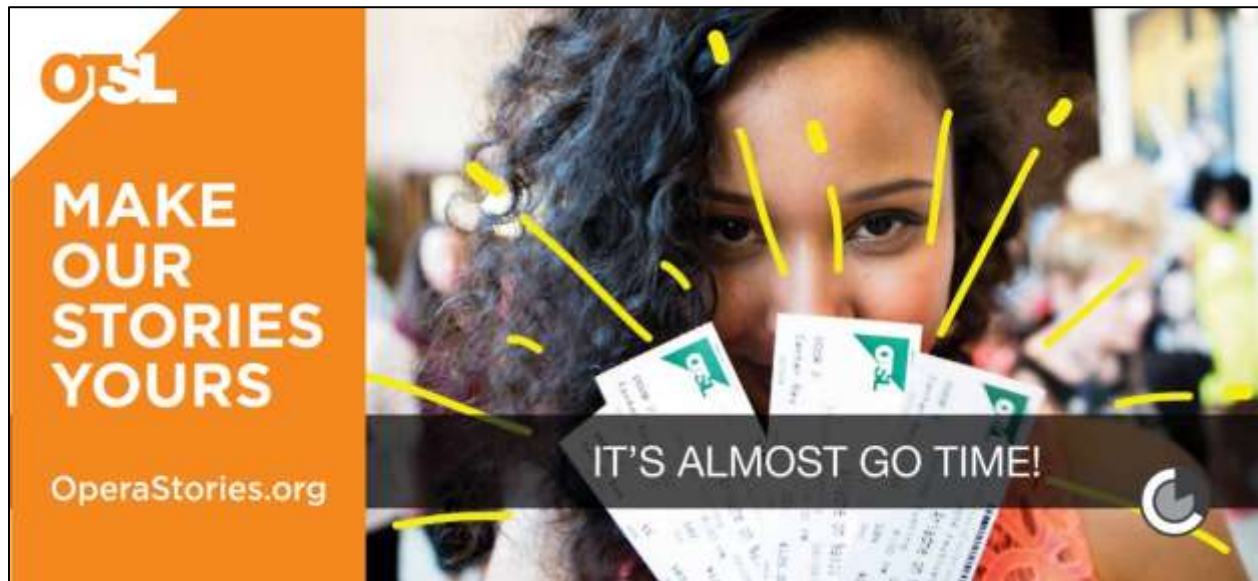
Opera Tastings has proven a successful strategy in attracting new audiences. Of the 478 non-staff attendees at the six Opera Tastings held in 2016, **61% were new-to-file households, and 86% have been purchasing tickets for fewer than 5 years.**



Brand Awareness Campaign for Millennial and Generation X Audiences

Based on research funded by The Wallace Foundation that was conducted last fall, Opera Theatre has begun its first major institutional branding campaign in recent memory, designed to debunk pre-conceived notions about opera as formal, elitist, stuffy, and foreign to Gen X and Millennial audiences. The campaign utilizes visual references from Facebook, Instagram, and Snapchat to engage this audience. A series of digital, print, and out of home ads are designed to drive traffic to a microsite (www.operastories.org), which features a 30-second promotional video and an introduction to the OTSL experience. The first burst of the campaign began in September. Subsequent bursts, also funded by The Wallace Foundation, are scheduled to occur in February and April.

Billboard Ads



Three part Riverfront Times Print Ad Series



OSL

**IT'S
CALLED A
"FESTIVAL"**

Picnic on the lawn before the show and party with the cast afterwards. Put yourself in the story.

OperaStories.org



OSL

**FUN
SHOULDN'T
BREAK THE
BANK**

It's more affordable than you might think, because it's meant for everyone.

OperaStories.org



OSL

**GREAT
STORIES
HAPPEN
HERE**

World-class shows meet world-class soirees. Always in English.

The fun begins at
OperaStories.org

Riverfront Times Digital Ad



Alive Magazine E-Blast

An e-blast for the Opera Theatre of Saint Louis (OTSL). The image features a woman with curly hair, smiling, with three champagne glasses in the foreground. The text "OTSL" is in the top left. The main headline reads "NIGHTS WORTHY OF A CHAMPAGNE TOAST". Below this, a paragraph describes the event: "World-class opera meets a world-class soiree at Opera Theatre of Saint Louis. Kick back before the show over picnic baskets and wine in our beautiful gardens. Linger with friends after the show for champagne under the stars, along with the leading men and fabulous divas of OTSL." The text "Learn more at OperaStories.org" is below the paragraph. At the bottom, it says "OPERA THEATRE OTSL of SAINT LOUIS".

Artists-in-Training

The *Monsanto Artists-in-Training Program* continues to have a profound impact on the lives of high school students in the St. Louis community. **The program has a 100% rate of students attending college in the last 5 years,** and has many more stories of how the program gives the students the skills to succeed.

Several alumni from the program experienced wonderful success in 2016 as rising stars in the opera world.

- **Chaz'men Williams-Ali** (2007) was a young artist with Glimmerglass Opera covering the role of Rodolfo and was featured in an article with the *Paris Review* about an outreach project with Attica Prison.
- **Julia Bullock** (2005) was featured in *The New York Times* for her Josephine Baker program which was performed at the Mostly Mozart Festival this August.
- **Michaela Wolz** (2013), currently an undergraduate student at the Boston Conservatory, was selected for the 2017 Gerdine Young Artist program.

Community Engagement Programs

- **The Salman Rushdie at the Sheldon** event drew 357 households, 141 of which were completely new-to-file (just over 39%). Of the total attendees, 193 (54%) returned for tickets in the 2016 main season. Of the new-to-file attendees, 15% purchased tickets to the 2016 season.
- Legendary opera star, and St. Louis native, **Grace Bumbry taught a public master class** for several young artists in May 2016. Not only did these young artists have the opportunity to learn from such an esteemed artist, but students from her alma mater, Sumner High School, were also in attendance.
- A new program, **Teens of Opera Theatre of Saint Louis**, began in 2016. This program is working to engage high school age students from around the St. Louis area. During the 2016 season, the group hosted two "Teen Matinees" where they were able to see an opera and experience special activities just for teens in the garden following the performance. The group, led by a steering committee of teenagers, will continue to host activities throughout the year. In the fall of 2016, the first event was an outdoor movie night featuring a screening of Kenneth Branagh's film version of *The Magic Flute*.

Priority Three: Human Resources, Infrastructure, & Technology

Advancing Future Leaders

Many of Opera Theatre's interns have gone on to successful careers in the arts here at OTSL, at other organizations in St. Louis, and at companies across the country.

Recent interns include:

- **Hana Abrams**, former Education Intern.
Now: Clark Elementary in Webster Groves, Music Teacher
- **Stacey Bregenzer**, former Business Intern.
Now: OTSL, Membership & Development Operations Manager
- **Mia DeJong**, former Education Intern.
Now: OTSL, Education & Community Engagement Coordinator
- **Lauren Honz**,
Now: Seckman Elementary in Fox School District, Music Teacher
- **Anh Le**, former Administrative Fellow.
Now: OTSL, Brand & Publications Manager
- **Dan Mayo**, former Education Intern.
Now: St. Louis Children's Choirs, Choir Manager
- **Kevin Nicoletti**, former Education Intern.
Now: Farmington HS in Farmington, MO, Vocal Music Director
- **Katherine Peck**, former Development Intern.
Now: Lincoln Center, Development Assistant
- **Linda Schulte**, former PR Intern.
Now: Shakespeare St. Louis, Development Director
- **Silja Tobin**, former PR Intern.
Now: Metropolitan Opera, Senior Communications Associate

Promotion of Staff

In the last month, three of Opera Theatre's staff members were internally promoted to new positions.

These new positions reflect their increased skills and responsibilities.

Michelle Myers

Associate Director for Strategy and Organizational Development
Promoted from Manager of Constituent Relations position

Caron House

Assistant Director of Development
Promoted from Manager of Institutional Grants position

Stacey Bregenzer

Membership and Development Operations Manager
Promoted from Development Systems Manager position

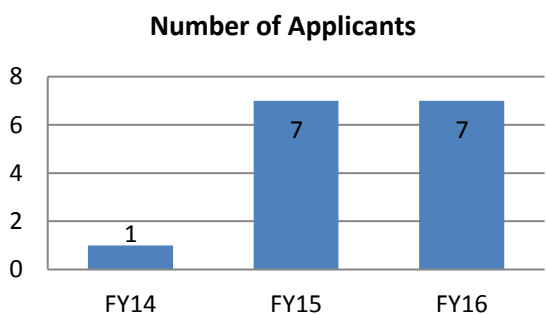
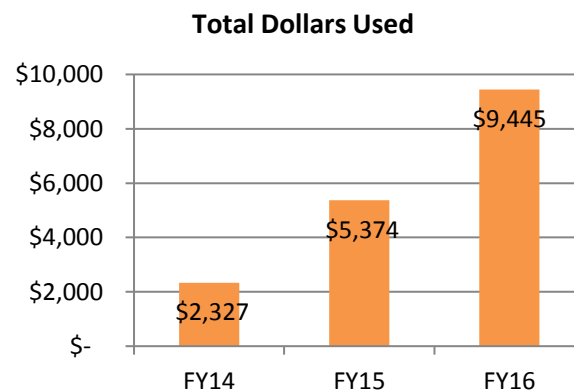
New Technology

During the 2016 season, the Box Office and Front of House staff implemented the use of **N-Scan, a new ticket scanning technology**, to improve the ticket exchange process and to ensure a more seamless front-of-house experience for patrons.

The 2016 season also saw brand new **LED lights in the theater** which both enhance the lighting capability and improve energy efficiency.

Professional Development

The use of professional development funds* grew by approximately 75% from FY15 to FY16, and more than 400% since the fund was created in FY14. Staff utilized these funds to develop skills by attending conferences, tradeshows, taking courses, and attending workshops.

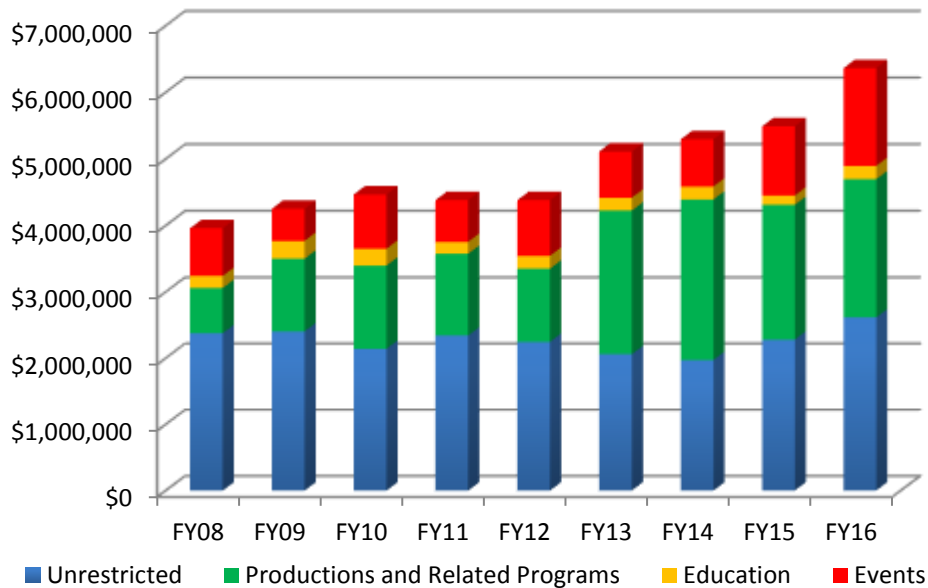


*Opera Theatre budgets \$200 per annual staff member each year for routine training programs. In addition, OTSL has a special allocation each year for staff professional development that is "above and beyond" required training. Employees are given the opportunity to apply for the use of these funds.

Priority Four: Capital Structure and Financial Strength

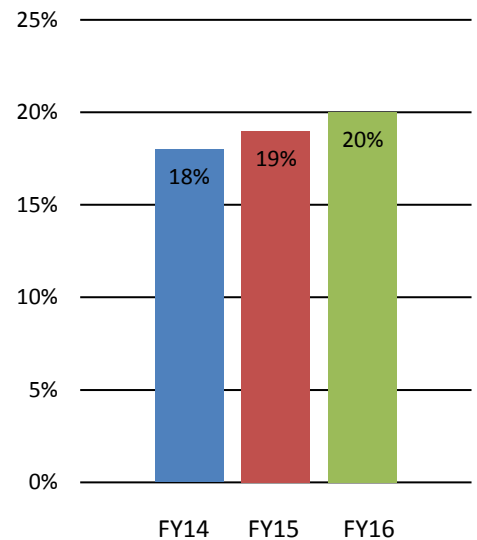
Annual Fund Contributed Revenue by Fund

Opera Theatre's board and staff also collaborated to achieve record-breaking fundraising results in 2016. **Donors contributed more than \$6.3 million in operating support, or 118% of goal.** Operating support grew by 16% from FY15 to FY16, and has increased by more than 60% since 2008.



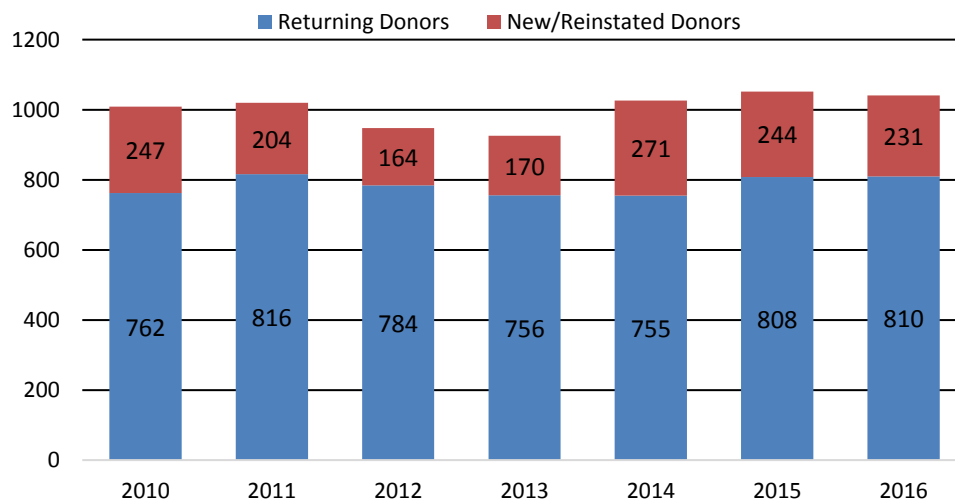
Ticket Buyers as Donors

In 2016, 20% of all regular season ticket buyers also donated to OTSL.



Total Annual Fund Donors (Individuals)

The total number of donor households decreased by 1% from FY15 to FY16, but has demonstrated **3% growth since 2010.** **OTSL's membership renewal rate was 81% in FY16.**



Total Donors	1,009	1,020	948	926	1,026	1,052	1041
% Total Returning	76%	80%	83%	82%	74%	77%	78%
% Total New/Reinstated	24%	20%	17%	18%	26%	23%	22%
% Membership Renewal	74%	81%	77%	80%	82%	79%	81%

Building on Excellence Campaign

Through the strategic planning process, OTSL expanded the goal of the Building on Excellence Campaign from \$11 million to \$18 million.

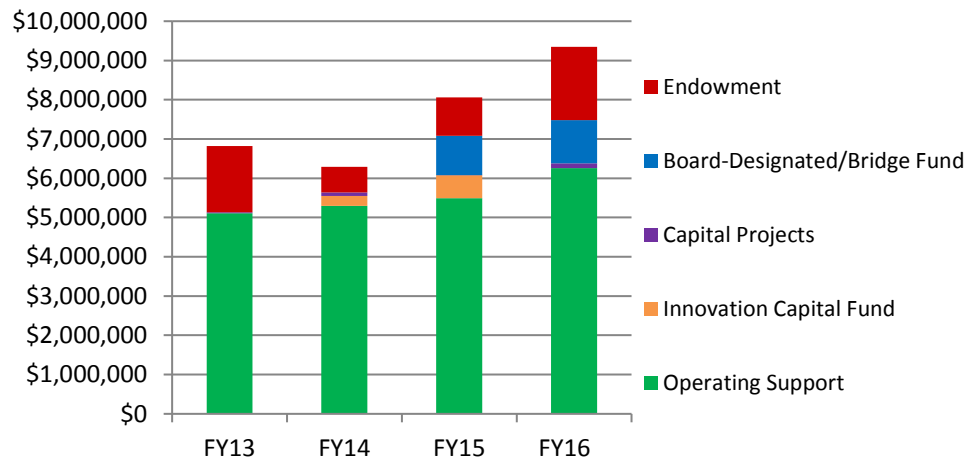
Total dollars raised for the Building on Excellence Campaign, as of September 30, 2016:

\$16,903,628

Total Fundraising – Annual Fund + Campaign

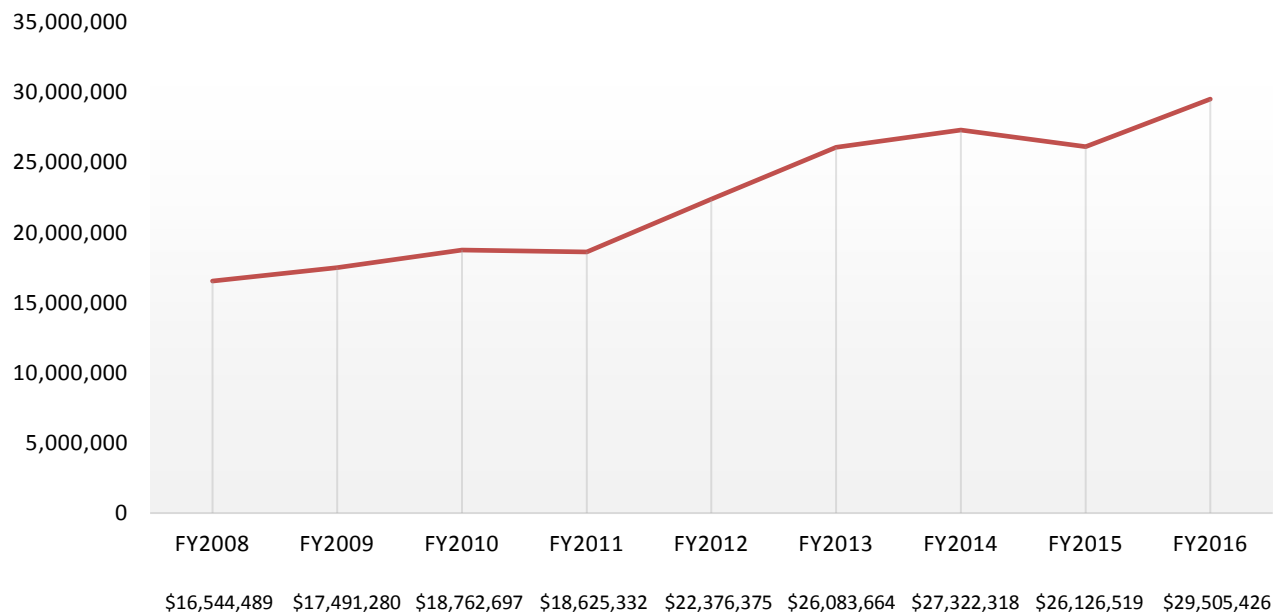
Total contributions to Opera Theatre (including operating, endowment, and capital support) exceeded \$9.4 million in FY16, an increase of 18% over the prior year.

OTSL Contributed Revenue by Fiscal Year - TOTAL Raised FY13-16



Endowment

The OTSL invested endowment portfolio has grown by more than 78% since FY2008, up from \$16.5 million to more than \$29.5 million as of September 30, 2016.



Financial Strength

	FY12	FY13	FY14	FY15	FY16*
Endowment Portfolio Market Value/Annual Operating Expenses	2.5	2.8	2.8	2.7	2.8
Endowment Distribution Rate	7.0%	5.5%	6.5%	6.0%	5.5%
Endowment draw as % of operating budget	14.1%	12.2%	15.4%	15.4%	14.0%
Increase in Net Assets	8.4%	14.1%	-0.7%	3.9%	8.6%

*FY16 represents unaudited numbers as of 9/30/16.