



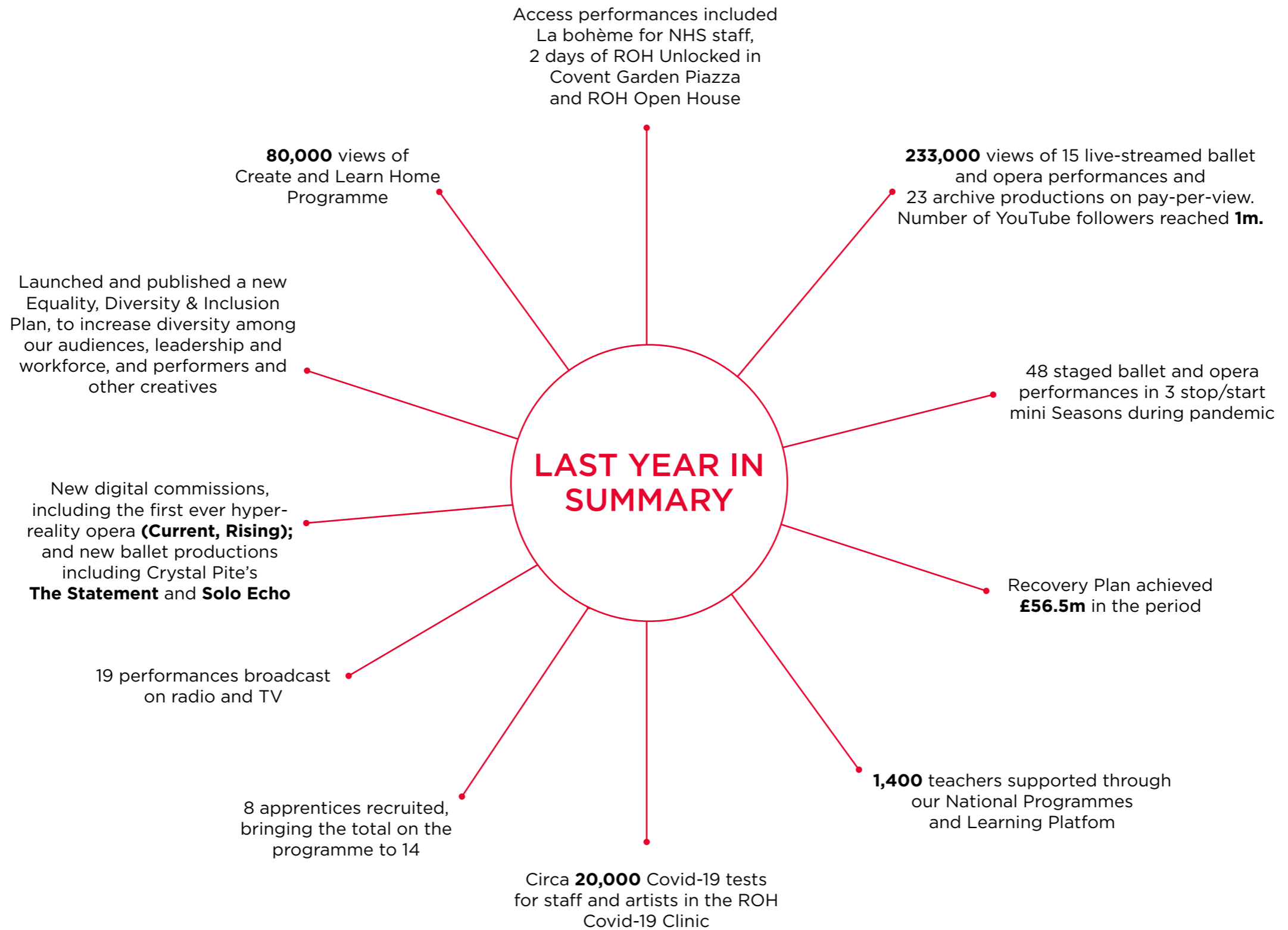
ROYAL
OPERA
HOUSE



ANNUAL

REPORT

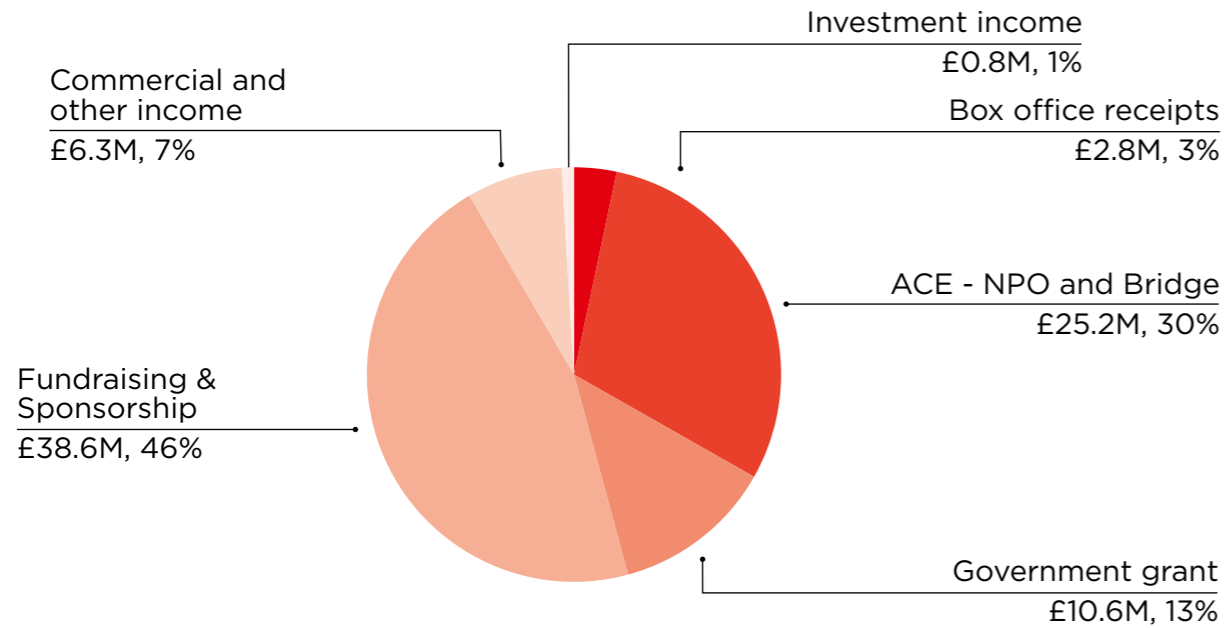
2020/21



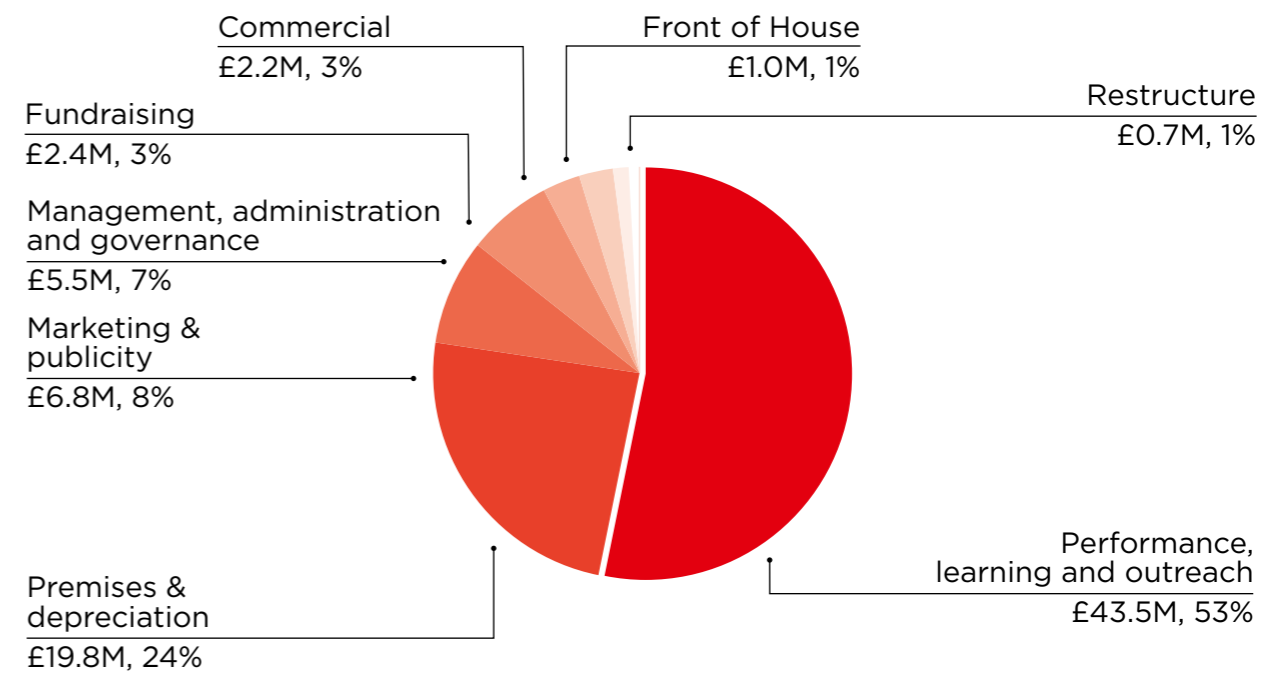
INCOME

2021

EXPENDITURE



Total income £84.3M, including capital donations and funding of £0.5M.

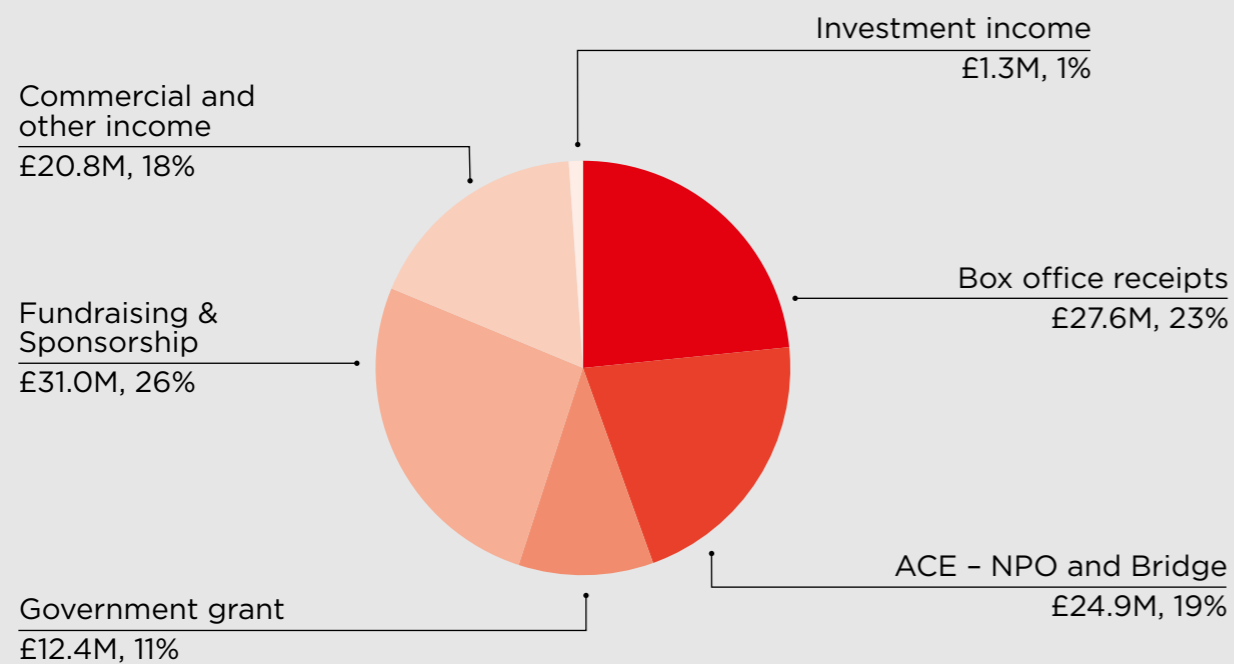


Total expenditure £81.9M, excluding capital expenditure.

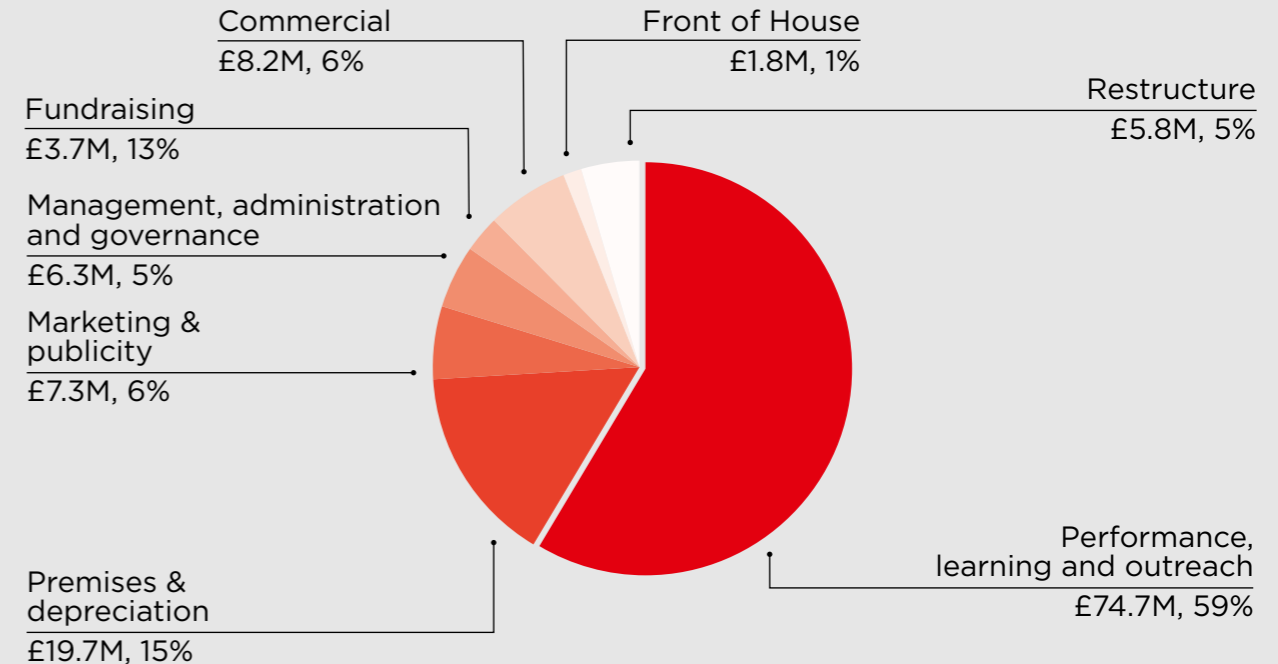
INCOME

2020

EXPENDITURE



Total income £118.0M, including capital donations and funding of £0.5M.



Total expenditure £127.5M, excluding capital expenditure.

Figures exclude gains on investment, taxation and fund transfers.



CHAIRMAN AND CHIEF EXECUTIVE



SIR SIMON ROBEY

CHAIR

Welcome to the Royal Opera House Covent Garden Foundation (Limited by Guarantee) 2020/21 Annual Report.

Due to the vagaries of company administration timetables this is the third consecutive Royal Opera House Annual Report to be completed in the shadow of the Covid-19 pandemic. The period it covers, including the 2020/21 Season, has been a profoundly difficult one for the House. I would therefore like to extend my gratitude to everyone who has contributed so much to securing the survival of the ROH and to putting it on a sustainable footing for the future. It has been a privilege to have worked with such a dedicated and talented team.

During the period of this report David Ross stood down as Chair and I agreed to take up the role again, for a limited period. I would like to reiterate my thanks to David for his leadership and guidance.

In the 2020/21 Season, much reduced as it was, the quality and range of work that emerged was remarkable. It was inspiring to observe the House being opened whenever it was possible, the extension and growth of our digital and other remote offerings, and adjustments made to productions and audience facilities, often at the last minute, to accommodate rapidly changing circumstances. I offer my huge congratulations to our staff and my thanks to everyone who has supported us and shown such patience and understanding despite the disruption and uncertainty.

At the time of writing our House is open. There are signs that plans for the future can be made without the shadow of Covid-19 and from our position as a truly world-class artistic institution. That said we still face many challenges. Notwithstanding the support from HMG, ACE, our patrons, friends and others, to each of whom I offer deep gratitude, we inevitably emerge from the pandemic in a less robust financial position than we would like. We remain reliant on the continued support of ACE and all of you. The team also instigated a far-reaching restructuring of the organisation to ensure our long-term viability and preparedness to respond to a rapidly changing world. Many colleagues have sadly left us and I would like to pay tribute to their hard work and contribution over many years. They will be missed.

The appalling events unfolding in Ukraine following the Russian invasion present new difficulties. Our thoughts are above all with those in our community of staff and artists, and amongst our audience and supporters whose friends and family are directly impacted. We will do what we can to show our solidarity and to offer support. Looking further ahead, the attending geopolitical uncertainty, and longer-term economic impacts will test anew the resilience and determination of the Royal Opera House team.

There are other changes ahead. We will have a new Chair and we will complete the search for a new Music Director to replace the extraordinary Antonio Pappano who has been with us since 2002. But Tony will remain at the helm until 2024, and we hope to see him in the pit often for many, many years beyond that. Both recruitment processes will happen this year. There is much for us to look forward to over the coming Seasons.

Sir Simon Robey
29 March 2022





ALEX BEARD *CHIEF EXECUTIVE*

The 2020/21 Season was amongst the most challenging in the Royal Opera House's history. For most of it we were unable to welcome audiences into the building and could perform on stage only sporadically. *The Nutcracker*, our Christmas favourite, ran for only 4 performances out of a scheduled 17, for example. Aside from the many lost productions and performances – many of which were in the advanced stages of preparation and will be revisited in future Seasons – our ability to engage more generally with audiences that would normally include schools, young people and the wider community, was severely curtailed.

Nevertheless, against considerable odds, we continued to produce outstanding work and extend access to our art forms both physically and digitally, working with leading artists and technicians from across the UK and internationally. In all we staged 48 ballet and opera performances in three stop/start mini-Seasons.

In October 2020, The Royal Ballet's first performance in over 6 months was a poignant selection of excerpts curated by Kevin O'Hare, Director of The Royal Ballet opening, appropriately, with Tchaikovsky's overture from *The Sleeping Beauty*. *The Royal Ballet: Back on Stage* was performed in front of an invited socially distanced audience including specially invited health workers, with the orchestra scattered throughout the stalls, and was streamed worldwide.

A re-worked *Nutcracker* provided some festive relief while the first show in 2021, *21st-Century Choreographers*, was a showcase of contemporary work by Christopher Wheeldon, Crystal Pite and rising star Kyle Abraham. In a second programme we honoured the American giants of dance George Balanchine and Jerome Robbins. It wasn't until June that we could welcome a full house and the *Beauty Mixed Programme* was a fine celebration of the breadth of The Royal Ballet's heritage and repertory.

In April, we learned of Liam Scarlett's tragic death. He was an exceptional talent who had a long history with the Company both as a dancer and as a choreographer. Our deepest sympathies remain with Liam's family, his friends and all others affected.

Opera returned to the House amidst lockdown in September 2020 with *The Royal Opera: Live in Concert*, a programme of classic excerpts curated by The Royal Opera's Director of Music Antonio Pappano, streamed online. In October socially distanced audiences returned for *4/4* a quartet of staged songs and cantatas, by Handel, Gruber, Barber and Britten. New talent then took centre stage in a two-opera programme – *The Knife of Dawn*, a one-person chamber opera by Hannah Kendall set in the prison cell of a Guyanese political activist and poet, and *A New Dark Age*, a music drama incorporating work by Missy Mazzoli, Anna Meredith and Anna Thorvaldsdottir. In November, during the Season's second lockdown, we streamed a concert performance of Handel's gripping *Ariodante*, his first written for Covent Garden, in its first presentation here since 1735.

In April 2021, the Jette Parker Young Artists performed a Weill and Brecht mixed programme of the satirical *The Seven Deadly Sins* and *Mahagonny Songspiel*. Live audiences returned in May, albeit to an auditorium at half capacity, for Richard Jones's new production of Mozart's last opera seria *La clemenza di Tito*. Eight performances of *La bohème* included a special performance thanking NHS workers, and the last operatic performance of the Season on the Main Stage came from the Jette Parker Young Artists in their annual summer show, once again showcasing the stars of the future.

Other opera projects included *8Bit*, a series of eight works for an exclusively online audience in the form of short films, audio performances and a web browser experiment. In May, we were at last able to open *Current, Rising*, the world's first opera experience in hyper reality, in a special staging within the Linbury Theatre. Although developed before Covid-19, this ground-breaking project took four audience members at a time on a 15-minute operatic journey combining virtual reality with multisensory effects.

We continued to extend our reach through broadcast and digital channels. The #OurHouseToYourHouse digital programme, launched during the first lockdown in the Spring of 2020, established a home for full-length performances, concerts, mini-documentaries and interactive activities for children, generating more than 206 million views from 183 countries. In the 2020/21 Season there were 15 live-streamed performances of ballet and opera and 23 archive productions on pay-per-view. For the first time, during this period, more than 1 million people subscribed to our YouTube channel. Meanwhile our Create and Learn online programme provided much needed educational resources for parents to home-school their children, and 1,400 teachers accessed content through our online Learning Platform to support remote lessons in schools across the country.

Away from the stage our first priority was to secure our survival, and then to establish long-term viability in a changed, and ever-changing, environment. Our income was dramatically reduced due to performing restrictions with every possible effort extended to sustain our core community of artists craftspeople and backstage staff through the year.

We again welcomed government support via the Coronavirus Job Retention Scheme for furloughed staff, a loan through the Cultural Recovery Fund, as well as continued support from Arts Council England. We embarked on a major fundraising campaign and completed the sale of the David Hockney portrait of our former chief executive Sir David Webster. Sadly, we also lost large numbers of staff through a large-scale organisation wide redundancy and restructuring programme.

We worked closely with our Trades Unions to achieve these changes and to manage the inevitably painful process in as fair and equitable way as possible, addressing gender pay issues and sustaining the organisation's overall protected characteristic employee profile, all as validated through a comprehensive Equality Impact Assessment of proposals and outcomes. The support that the Royal Opera House Benevolent fund was able to offer casual and freelance staff, in particular, was deeply appreciated. In all around 25% of permanent staff left the ROH, alongside many more in our casual workforce.

These efforts enabled us to survive financially, to continue to serve audiences and to deliver public benefit, including through our Learning and Participation programmes. The long-term health of ROH also depends on the application of our values. The ROH has a long-standing commitment to equality, diversity and inclusion and the events of the past 24 months highlighted further the stark disparities of lives between communities in the UK. We began to implement a new Equality, Diversity and Inclusion plan including many initiatives to improve the way we recruit, develop and retain staff from diverse backgrounds. Environmental sustainability is now a central consideration of all our activities, as we strive to reduce our own carbon footprint.

It was an enormously difficult period for the ROH team in practical terms, whether navigating the challenges of remote home-working in cramped accommodation, coping with salary reductions or adapting to Covid-safe working practices as we returned to site: rehearsing in masks, performing in artistic bubbles, working around office capacity constraints, adapting air handling systems or managing the logistics of carrying out over 20,000 Covid-19 PCR tests on those working in close contact. The patience, dedication, professionalism and creativity shown by all was truly inspiring.

Many challenges lie ahead. We will be dealing with the after-effects of the pandemic for many months, if not years to come. The humanitarian crisis in the Ukraine has an immediate impact on staff and artists with friends and family at risk, and potential long-term consequences for the economy and confidence more generally. There is also a likely significant real-terms reduction in our Arts Council Funding to manage in the years ahead. We will do what we can to address these challenges, while continuing to present work of the very highest quality with the extraordinary community that is the artists, craftspeople and staff here.

I also extend my gratitude to our loyal audiences, collaborators, friends and patrons. Your support and generosity has been truly exceptional, and is now more important and more deeply appreciated than ever. All of us on the ROH team are enormously grateful, and we look forward to making wonderful opera and ballet together for many years to come.

Alex Beard, Chief Executive
29 March 2022



WHO WE ARE AND WHAT WE DO





Alexandra Lowe, Masabane Cecilia Rangwanasha, Hanna Hipp and Sophie Bevan in *The Royal Opera Christmas Concert*, The Royal Opera
© 2020 ROH. Photograph by Tristram Kenton

Our mission

Our mission is to enrich the cultural life of the nation by growing the public enjoyment and appreciation of exceptional ballet and opera.

Our vision

We aspire to be a global centre of excellence for the great art we produce and for the inclusive way we do it. We want to grow our reputation still further, demonstrating our social and environmental responsibility.

How we achieve our mission and vision

We are home to three of the world's great performing art companies: The Royal Ballet, The Royal Opera and the Orchestra of the Royal Opera House. We tell stories that speak to the universal themes that move us all (love and hate, revenge and reconciliation, hope and fear), from the great works of the past to new commissions, reflecting contemporary culture and concerns.

Our theatres are in London's Covent Garden but our work is accessed and experienced across the UK and globally through touring partnerships, cinema programmes, radio, TV and online-streaming.

We aim to be a leading artistic force that takes calculated risks, both to invest in the artforms of the future and to sustain the existing repertory for new audiences. We work with the best creative teams and performers from around the world, consistently achieving the highest standards of stagecraft, and embedding constant improvement into our processes and culture. We have worked hard to maximise our reach, despite the pandemic, by providing access to our artforms online. Artistic excellence stretches beyond our Main Stage and the often more experimental Linbury Theatre, to our foyers and public spaces as well as outside our building.



Isabella Gasparini, Marcelino Sambé and Francesca Hayward in *Solo Echo*, The Royal Ballet
© 2021 ROH. Photograph by Bill Cooper

We have invested in strengthening our capabilities in data generation and analysis to ensure we are capturing and responding to audience feedback, both from those who already engage with our artforms and those who currently do not, so that we have the information we need to continually improve.

We are a National Portfolio Organisation, supported by the British public via Arts Council England, and a registered charity, receiving donations from those who share our ambitions.

Challenges

The tumultuous events of the past 24 months have highlighted stark disparities in the lives of the UK's various communities, often determined by ethnic and socio-economic background. There is a lack of equity in the provision of arts education in schools and a lack of diversity among those participating in classical singing and ballet. This is having a direct impact on the talent pipeline and on the audiences and artists of the future.

Diversifying participants in the arts is one of the most pressing issues of our time. So, in 2020/21, as well as continuing to focus on artistic excellence on our stages, performing when we could, we also prioritised achieving positive societal impact. We have a long track record of running programmes to widen access, including with young people through our national programme with schools across the country, which we continued to deliver despite the restrictions resulting from lockdown.

The following pages expand on the ways in which we worked to uphold our priorities and values throughout the 2020/21 Season, despite the challenges, and how we continued to deliver public benefit, finding new ways to serve our audiences, support those who needed it, including home-schooling families, and to ensure we can get back to a sustainable position as quickly as possible.



Artists of The Royal Ballet in rehearsal for *The Nutcracker*, The Royal Ballet
© 2020 ROH. Photograph by Rachel Hollings

Looking ahead to 2021/22 and beyond, significant financial challenges remain despite the success of our Recovery Plan (asset sales, major fundraising campaign and organisational restructure, and the CRF loan), Emerging major risks include:

- Increasing inflation, conservatively 5-7% pa – driven by rising energy costs
- At best a static Arts Council England grant from 2023, which could be a real term reduction of circa £1.2m per annum to our grant
- Geo-political uncertainty following the Russian invasion of Ukraine impacting fundraising confidence

For our 2021/22 financial year we are forecasting an income and expenditure deficit as audiences rebuild post-pandemic, covered by Recovery Funds. In addition, we have a major capital investment need to replace and upgrade end life building and equipment. We aim for ROH's operating position returning to a break-even position in future years, the pace of which will be governed by the factors above.

Our overriding objective in 2020/21 was to ensure the long-term viability of the ROH, as it soon became clear that the pandemic would have severe long-term impacts. We also remained committed to continuing to serve audiences and support our community of staff and artists. We implemented a comprehensive Recovery Plan which included:

- Major changes to our organisational strategy and operating model, significantly reducing costs, while simultaneously, keeping the core of the organisation intact so that we could return to performing at scale. This included a restructuring with over 25% staff reduction, changes to contracts, implementation of new working practices, and a reduction in all salaries over £75,000
- Disposal of assets – the sale of the David Hockney painting of Sir David Webster
- A major fundraising campaign that included asking for additional donations, and agreeing redeployment of gifts already donated or committed to support recovery



Filming *Ariodante in Concert*, The Royal Opera
© 2020 ROH. Photograph by Tristram Kenton

- Government support, through the Coronavirus Job Retention Scheme and a loan from the Cultural Recovery Fund, as well as the continuing grant support from ACE – for which we are deeply grateful

While this Recovery Plan was being implemented, we kept close to our audiences and artists online, continuing to show performances through digital streaming and on radio and TV. We also continued to support schools, families and communities by engaging them with digital content and activities. With the gradual easing of lockdown restrictions, in Spring 2021 we were able to open our doors again to audiences, albeit at significantly reduced capacity in order to meet social distancing requirements.

Our priorities included the following:

Artistic Excellence

We consistently reflect today's best people and ideas, appealing to the broadest possible audience. This includes:

- **Balanced programming** on our stages when we were able to perform, but also via digital channels, cinema, radio and TV and in our public spaces. Our goal was to continue to serve audiences, despite lockdown restrictions (the Appendix at the end of the Achievements section sets out what the ROH were able to perform in Season 2020/21)
- **Championing talent**, including foregrounding our Jette Young Artists Programme and offering employment to as many performers and freelancers as possible
- **New and under-represented artists** – we continued to deliver programmes designed to support career progression of artists, including women through our Engender programme, and aiming to increase the ethnic diversity of our performers

Outcomes summary: we maintained audience satisfaction; gave new opportunities to diverse creatives and performers; and we increased access to performances online.



NHS Performance at the Royal Opera House
© 2021 ROH. Photograph by Lara Cappelli

Opening Up and Equality, Diversity and Inclusion

We open up all aspects of the ROH so we can touch more people's lives and create a deeper sense of belonging.

We continued to welcome people into our building when we could, with daytime opening. We ensured there were tickets available at affordable prices for performances on our stages and for those that were broadcast via digital channels. We gave special performances for NHS staff who had done so much to support the nation during the pandemic.

We are committed to providing engagement opportunities for the potential performers of the future, as well as audiences of the future, including school pupils, with a focus on those from less well-off socio-economic and diverse ethnic backgrounds.

We increased staff involvement in conversations, seeking to surface issues of concern to them and to talk about potential solutions. In summary, we aim to welcome people to us, whether they are audiences, performers, other creatives or our workforce, ensuring everyone is treated with respect. As part of that, we launched a new Equality, Diversity and Inclusion (EDI) Plan that

includes a commitment to listening more closely to the views of those who engage with us and responding to what we hear.

Our priorities included:

- **National participation** – we continued to support teachers across the country to bring ballet, opera and theatre-craft into classrooms nationwide and to connect with under-served communities
- **Audience development** – we started a process to identify barriers to engagement with our artforms and to develop strategies to address them. The pandemic was a catalyst for us to expand our digital output; analysis demonstrated that this enabled us to extend our reach geographically. Even as we open the building again, we are continuing to develop our digital offer, building on what we learnt during the pandemic
- **Supporting the sector** – we engaged proactively with peer artistic organisations and the wider sector to share what we learnt, for example working within government Covid-19 guidelines and processes to keep staff, artists and audiences safe; and we continued to partner on Engender, our initiative to change gender imbalance in opera and music theatre



Doncaster Dances at Cusworth Hall
© 2020 ROH. Photograph by Jamie Stewart

- **Inclusive workforce** – we began to implement the new Equality, Diversity and Inclusion plan, which focuses on improving the way we recruit and retain staff from diverse backgrounds

Outcomes summary: we supported schools and home-schooling families with digital content, growing our engagement with young people and their families, schools and communities and supporting them to dance and sing and enjoy our artforms. We increased access to our art forms via digital channels. We strengthened our relationships with the sector. We began to implement our new EDI plan, including compulsory anti-racism training for all recruiting managers.

Revenue Growth

We increase overall income through compelling story-telling, ambitious partnerships and joined-up sales.

Given the impacts of the pandemic on box office revenue, we focussed heavily on maximising income from a variety of other sources to support the long-term viability of the organisation,

ensuring we have a sustainable income base to enable us to deliver our other objectives in the future.

This included:

- **Customer spend** – opening our doors whenever we could. However, our box office income shrank by 94% over the Season compared with the last full Season before lockdown, and hospitality and retail sales fell in line
- **Endowment** – our longer-term goal is to double the ROH Endowment and increase the income it will generate for future activity. However, given the financial implications of the pandemic, we also focussed on redeploying some of the endowment as part of the Recovery Plan
- **Recovery Campaign** – we redoubled our efforts to raise funds through philanthropic giving
- **Grant from Arts Council England** – we drew down our 2020/21 grant and secured a roll-over grant for 2021/22

Outcomes summary: although overall, income dropped significantly, by the end of 2020/21, we were well-placed to achieve our goal on the Recovery Campaign in 2021/22.



Royal Opera House, Bow Street entrance facade
© 2021 ROH. Photograph by James Bellorini

Organisational Health

We undertook a major restructuring programme to ensure the long-term financial viability of the organisation.

We reviewed all our activities and made difficult decisions that affected all areas of the organisation. In conducting the review, we recognised that, post lockdown, we couldn't simply return to 'normal'. We needed a lasting restructure to address pre-existing financial pressures that were exacerbated by the pandemic, and to anticipate the future impact on our audiences and commercial model in the months and years ahead.

We worked closely with our Trades Unions to achieve realistic structural and contractual changes to the way we work, while maintaining our ability to deliver world class performances. These contractual changes enabled us to achieve short-term operational savings, which will secure and protect jobs in the long-term.

Outcomes summary: a total of 272 employees left between July 2020 and November 2020 (25% of staff). Having carried out an Equality Impact Assessment of the restructuring process, we are confident that the organisation's overall protected characteristic employee profile was not disproportionately impacted.

ACHIEVEMENTS AND FUTURE PLANS

The overall ROH Plan was approved by the Board and shared with staff and with our principal funder Arts Council England.

Over the coming pages we will expand on what was delivered against each priority during 2020/21 and provide an overview of our Plan for 2022/23.



Nicole Chevalier as Vitellia in *La Clemenza di Tito*, The Royal Opera
© 2021 ROH. Photograph by Clive Barda

2020/21 IN SUMMARY

ARTISTIC EXCELLENCE

Balanced programming

When lockdown restrictions permitted, we performed contemporary works and repertory classics live on stage at the ROH as set out below. In total, though we had to cancel or postpone a significant number of productions and performances, we gave 48 on-stage performances.

We had to make adjustments to all the productions we were able to put on – for example, a pared-back production of Mozart's *La clemenza di Tito* - to meet government guidelines and honour our firm commitment to the safety of our audiences and performers. Nevertheless we maintained broadly the same level of audience satisfaction as for the last full year before the lockdown. The responses from ballet and opera critics and the enthusiasm of audiences was extremely pleasing.

Ballet

The 2020/21 Season opened on 9 October 2020 with *The Royal Ballet: Back on Stage*, an exhilarating programme presenting

the Company's world-class dancers at their dazzling best and highlighting the broad artistic breadth of The Royal Ballet's repertory. It was performed before a pilot audience and streamed worldwide. The repertory featured socially distanced group works as well as solos and pas de deux. The evening was dedicated to Ian Taylor, former Chairman of the Board of Trustees, in recognition of his longstanding service, philanthropy and advocacy for the work of The Royal Ballet.

In November, two programmes of repertory highlights were presented in *The Royal Ballet: Live*. Each programme closed with a one-act ballet (Kenneth MacMillan's *Elite Syncopations* in Programme A and Christopher Wheeldon's *Within the Golden Hour* in Programme B). In light of the national lockdown that month, an expanded live performance Programme A was given on 4 November and a streamed performance of Programme B on 13 November. This second programme included a new short work by Valentino Zucchetti, *Scherzo*, which went on to win a Southbank Sky Arts Award and was a highlight later in



The Royal Ballet in *Elite Syncopations*
© 2020 ROH. Photograph by Tristram Kenton

the Season at Darcey Bussell's British Ballet Charity Gala at the Royal Albert Hall.

The Nutcracker was brought to the stage for the festive season in a 'reworked' version to make it Covid-safe, including a reduced number of Royal Ballet School students and a new battle scene choreographed by Will Tuckett. We presented four of the 17 scheduled performances of *The Nutcracker* before the production had to be cancelled because of stricter lockdown measures with the UK's move into Tier 4.

Creativity continued to shine in online programming including in the Company's choreographic platform, *Draft Works*, which was presented as a film with content generated by some of the dancers during lockdown. A stream of *Spring Draft Works* followed with a programme created specially for the Main Stage. A third programme was developed for a live audience with external choreographers including Jason Kittelberger, Dickson

Mbi, Hannah Rudd and Didy Veldman, but this had to be cancelled due to scheduling issues arising from the pandemic.

Other strong online content included World Ballet Day, the enduringly popular online celebration of dance, which took place on 29 October 2020, highlighting young and diverse talent and female choreographers. Royal Opera House Insights included a discussion with six dancers for Black History Month around influences in their lives and the Black Lives Matter movement. A *Meet the Young Dancers* Masterclass Insight introduced audiences to the youngest dancers in the Company. In April, two special pop-style projects commissioned by The Royal Ballet were filmed on the Main Stage, *Lyssa* choreographed by Lynne Page with singer Nadine Shah and 17 dancers, and Arthur Pita's *Agnus Dei*, a collaboration with singer and composer Rufus Wainwright featuring Leo Dixon. Royal Ballet dancers also participated in The Royal Opera's 8bit digital initiative.



Artists of the Royal Ballet in *Anemoui*, The Royal Ballet
© 2021 ROH. Photograph by Alice Pennefather

Dancers returned to the stage to perform for live audiences in May and June in three rich programmes spanning 19th-century classics, works by American master choreographers of the 20th century and choreographers working today. The 21st-Century Choreographers Programme featured a new ballet by American choreographer Kyle Abraham, *Optional Family: a Divertissement* and two works by Crystal Pite that were new to the Company, *The Statement* and *Solo Echo*. The ‘Balanchine and Robbins’ Programme included Balanchine’s *Apollo* and *Tchaikovsky Pas de Deux* and Robbin’s *Dances at a Gathering*. This was followed by the ‘Beauty Mixed Programme’, featuring the world premiere of Valentino Zucchetti’s *Anemoui* (a choreographic development of *Scherzo*), Wayne McGregor’s *Morgen*, MacMillan’s *Winter Dreams*, Christopher Wheeldon’s *After the Rain*, Ashton’s *Voices of Spring*, *woman with water* by celebrated veteran choreographer Mats Ek and concluding with Act III of *The Sleeping Beauty*.

The Linbury Theatre’s dance season opened with summer performances by Rambert School and The Royal Ballet School, originally scheduled to be part of the scheduled Next Generation Festival that would have included international guests.

Opera

In opera, new work highlights included:

4/4

In response to the very specific conditions of the pandemic in autumn 2020, The Royal Opera embraced the challenges of the moment (social distancing on stage and in the pit, reduced staff and financial resource, travel difficulties and quarantine) and programmed an evening featuring four distinctive short works that showcased world-class vocal quality and compositions – but that were not operas. The mini-productions of Handel’s *Apollo and Daphne*, Barber’s *Knoxville: Summer of 1915*, Britten’s *Phaedra* and Gruber’s *Frankenstein!!* were not only a creative




Christine Rice and Andrés Presno in *Phaedra in 4/4*, The Royal Opera
© 2020 ROH. Photograph by Tristram Kenton

response to Covid-19 but a bold departure from The Royal Opera's traditional repertory. Four of the UK's outstanding opera and theatre directors - Deborah Warner, Richard Jones, Adele Thomas and Antony McDonald - worked with top British opera singers Christine Rice and Allan Clayton and from further afield, South African soprano Cecilia Masabane Rangwanasha, one of our Jette Parker Young Artists. These short works of high theatrical tension and drama, mostly sung in English, were immediately accessible and direct, and challenged many negative preconceptions of the art form. The productions themselves, minimal in terms of set and costume, also challenged the traditional association of opera with scenic excess, perhaps providing a glimpse of what opera can be when at its most distilled and powerful.

New Dark Age

This project took the same impulses behind *4/4* and presented works by women composers. These were directed by two leading female theatre practitioners - Katie Mitchell and Ola Ince - and

designed by Vicki Mortimer. Traditionally under-represented in the area of opera composition and direction, female creativity became central for one of the few times in The Royal Opera's history: *The Knife of Dawn* is only the fourth opera by a woman to be performed on the Covent Garden's stage in 300 years. It was also the first opera on our Main Stage by a composer of colour, supported by a mainly diverse creative team, with Peter Brathwaite in the lead role, Jonathon Heyward conducting and video designs by Akhkila Krishnan. Touching on troubling themes of colonialism and creative isolation, the opera explored the life of Guyanese poet Martin Carter, Ince's production drawing out contemporary resonances of racial oppression and discrimination. This was followed by a unique melding of works by female composers - Anna Meredith, Missy Mazoli and Anna Thorvaldsdottir - in a video installation called *A New Dark Age*, created by Katie Mitchell and Grant Gee. The atomisation wrought by the pandemic was brought home in a radical piece that combined live and recorded material, an urgent assertion of the Royal Opera House's role in reflecting society.



Opera-in-Progress, Nadifa Mohamed discusses *The Fortune Men*, Engender Festival 2021
© 2021 ROH. Photograph by Ellie Kurttz

Operas in Progress - The Engender Festival

A key part of the work of The Royal Opera House on both stages is commissioning contemporary opera that enables the cannon to develop, and to tell new stories with diverse perspectives that reflect our changing world and society. As we seek the next generation of artists and audiences we continually explore ways to open up the form of opera. Our *Opera in Progress* series provide an exchange between artists and audiences. The audience gain an insight into the very start of making an opera, hearing from the artists about how their ideas and initial text and music have emerged. Artists are able to ask the audiences questions and understand their response to these initial ideas, which supports them in the next steps of the opera's development. Three projects were presented: *History of the Present*, a hybrid working-class opera that explores the resonances and legacies of the peacelines in Northern Ireland, by interdisciplinary writer Maria Fusco and director Jude Christian; Booker Prize shortlisted, *The Fortune Men*, by writer Nadifa

Mohammed and composer Nina Whitman; and *Lambs*, an opera that takes the form of a podcast, by Director Daisy Evans and composer Laura Bowler.

Current Rising

The world's first opera in hyper reality, *Current, Rising*, was a unique collaboration between the Royal Opera House's innovation programme, Audience Labs, award-winning Figment Productions and Royal Holloway, University of London. Developed by a female-led creative team and funded by UK Research and Innovation, *Current, Rising* was an experiment in blending stagecraft, artistic excellence and cutting-edge technology to develop a radical new way of seeing opera that puts the audience at the centre of the performance. The result was a 15-minute hyper-reality opera experience, combining virtual reality with a multisensory set, inviting audiences to step into a bespoke 'Opera Tardis' and experience a dream-like journey carried musically by a poem layered in song. Critically acclaimed, *Current, Rising* demonstrated a vision for the future



Susan Bickley, Nadine Benjamin and Anna Dennis in *A New Dark Age*, The Royal Opera
© 2020 ROH. Photograph by Tristram Kenton

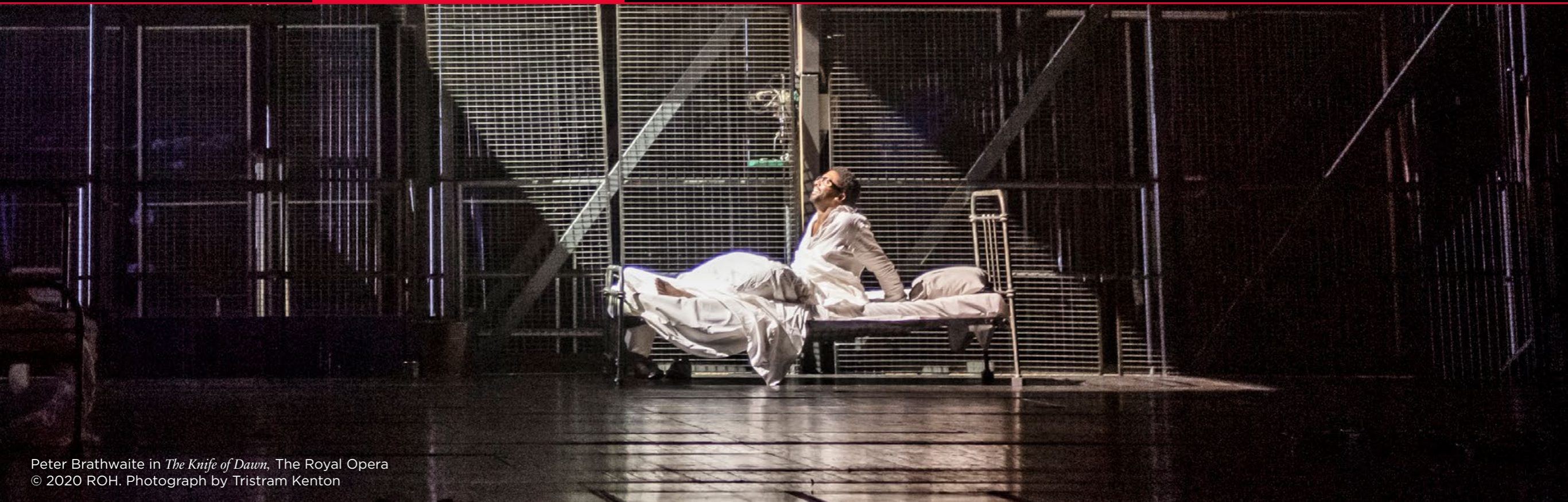
of cultural forms, encapsulating a new form, rooted in stage tradition, enriched by the magic of technology. It won the VR Award for out-of-home VR entertainment of the year.

The creative team was Director Netia Jones, composer Samantha Fernando, Designer and CGI Art Director Joanna Scotcher, librettist Melanie Wilson and sound designer David Sheppard.

8-Bit

8-Bit marked the first curated digital shorts opera series from The Royal Opera. A series of eight newly-commissioned, experimental experiences of digital opera brought together some of the most innovative contemporary artists.

Created in response to the impact of Covid-19, available for free, and hosted across Facebook, YouTube and Instagram, 8-bit gave existing and new audiences new ways to experience exceptional opera and challenge the stereotypes often associated with the art form. With century-spanning music: from Handel and Tchaikovsky to John Barber, Brian Irvine, Matt Huxley and Anna Meredith, the opera series reached an audience of over 87,500 people. The lead artists for these short operatic pieces were Dumbworld, Patrick Eakin Young, Elayce Ismail, Akhila Krishnan, Katie Mitchell, Anna Morrissey, André de Ridder and Katherine Manley and Rakhi Singh.



Peter Brathwaite in *The Knife of Dawn*, The Royal Opera
 © 2020 ROH. Photograph by Tristram Kenton

Although lockdown prevented us from doing as much work on the Main Stage as we had planned, we nevertheless fielded a top-rate list of artists, including:

Aigul Akhmetshina
 Sophie Bevan
 Peter Brathwaite
 Charles Castronovo
 Nicole Chevalier
 Allan Clayton
 Christian Curnan
 Emily D'Angelo
 Iestyn Davies
 Danielle de Niese
 Riccardo Fassi
 Gerald Finley

Joshua Guerrero
 Paula Murrihy
 Kristine Opolais
 Lisette Oropesa
 Anna Princeva
 Chen Reiss
 Christine Rice
 Erwin Schrott
 Roderick Williams
 Adela Zaharia
 Iestyn Davies
 Danielle de Niese

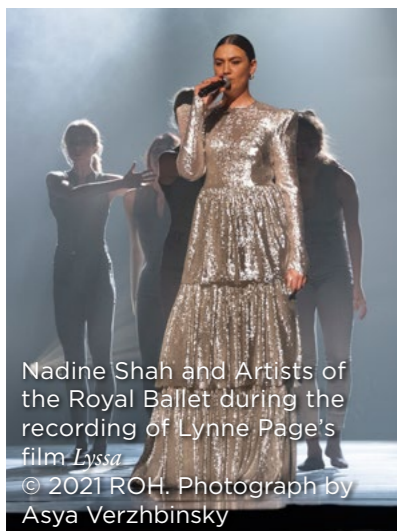
Riccardo Fassi
 Gerald Finley
 Joshua Guerrero
 Paula Murrihy
 Kristine Opolais
 Lisette Oropesa
 Anna Princeva
 Chen Reiss
 Christine Rice
 Erwin Schrott
 Roderick Williams
 Adela Zaharia



Chen Reiss in *Ariodante in Concert*,
The Royal Opera
© 2020 ROH. Photograph by
Tristram Kenton



Marcelino Sambé and
Calvin Richardson in Marcelino
Sambé's piece for
Spring Draft Works
© 2021 ROH. Photograph by
Andrej Uspensk



Nadine Shah and Artists of
the Royal Ballet during the
recording of Lynn Page's
film *Lyssa*
© 2021 ROH. Photograph by
Asya Verzhbinsky

Streamed

We increased our reach via digital channels, with 15 live streams and 23 previously recorded operas and ballets made available on pay-per-view, four of which were provided for free. The streamed productions were watched 233,000 times, with two thirds of UK viewers living outside London. The lessons learnt from streaming and pay-per-view are feeding into our future plans for increasing our digital output and reach.

New works filmed and streamed included:

- *Lyssa* – a spectacular performance by Nadine Shah, with choreography by Lynn Page, featuring Royal Ballet dancers
- *Agnus Dei* – a solo performance by Royal Ballet First Artist Leo Dixon, choreographed by Arthur Pita in collaboration with singer and composer Rufus Wainwright
- *Draft Works 1* – a streamed film of work created by Royal Ballet dancers during lockdown, shared exclusively with ROH members
- *Draft Works 2* – a film of short works created on the Main Stage of the ROH, featuring choreography by Royal Ballet dancers Amelia Townsend, Stanislaw Węgrzyn, Joshua Junker, Ashley Dean, Matthew Ball, Kristen McNally, Valentino Zucchetti and Marcelino Sambé
- *Yorke Dance Project* – Romany Pajdak, First Soloist, Lockdown Portraits choreography by Robert Cohan; this solo was the last dance to be created for Cohan's final work – *Afternoon Conversations with Dancers*. Filmed on the Main Stage at the ROH

Evaluation

To further strengthen our forward programme planning, we initiated a new evaluation process to improve our ability to learn from and react to audience feedback.

Championing talent

The Royal Opera House employs more artists than any other UK arts organisation and works with a large network of freelance creatives, singers and other performers. At the heart of our creative output are our three permanent ensembles: The Royal Ballet, The Royal Opera Chorus, and the Orchestra of the Royal Opera House. Their reputation for technical and theatrical excellence attracts international talent to the UK and is a source of great pride. While the size of the ensembles reduced over the year, we protected the core as much as possible.

This was a very difficult year for performers, creatives and freelancers, many of whom were unable to work for most of the year. The performing Companies were furloughed for much of 2020/21, but we continued to sustain daily class for dancers via Zoom and, when possible, we began to bring our dancers back to the studios for limited, socially distanced rehearsals, enabling them to gradually regain essential fitness. We also continued to support freelancers, including paying them cancellation fees when shows couldn't go ahead, and maintaining our partnerships, for example with Engender (see below).

The Jette Parker Young Artists Programme, one of the world's leading centres for new operatic talent, offers two years' training for artists with the potential to forge an international career. It also provides additional support for emerging artists from under-represented backgrounds. In 2020/21 the programme produced a broad range of filmed work, including our first opera to be live streamed from both the stage and the auditorium, and with a live Instagram feed embedded into the show. Over half of the director training cohort have gone on to paid work with the Company. The Programme also delivered two live courses for women conductors with the Orchestra of the Royal Opera House and the City of London Sinfonia.



Filipe Manu in *The Royal Opera Christmas Concert*, The Royal Opera
© 2020 ROH. Photograph by Tristram Kenton

New and underrepresented artists

We are committed to increasing the diversity of our creative programmes, and the people who create and perform them. We are on track to achieve our goal of at least 50% of the creatives we commission being women by 2022.

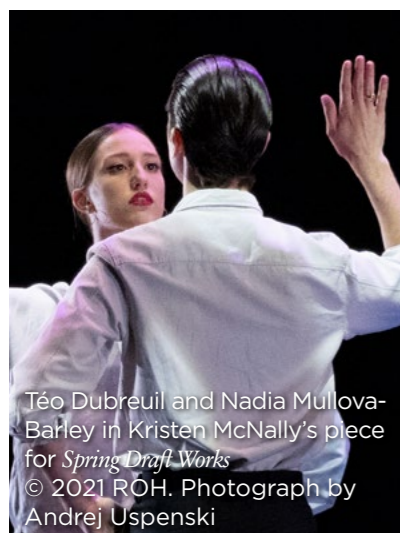
Engender is the ROH's initiative to grow and highlight women and non-binary talent both onstage and behind the scenes and to move the sector towards gender inclusivity. The programme thrived during the pandemic, moving online, which enabled more people to join from outside London and across the UK. Engender now has members from across Europe, the USA and, with support and funding from the British Council, is developing partnerships in several less economically developed countries, including South Africa and Egypt.

The network met every two months and supported artists during that period with sessions led by Tonic on a variety of subjects including wellbeing and resilience.

The Engender Festival 2021 was a hybrid of live and online events, with 15 pieces of social content generating 425,000 views and 12,500 engagements.



Simone Ibbett-Brown in *Mami Wata*, The Royal Opera
© 2021 ROH. Photograph by Ellie Kurttz



Téo Dubreuil and Nadia Mullova-Barley in Kristen McNally's piece for *Spring Draft Works*
© 2021 ROH. Photograph by Andrej Uspenski



ROH Unlocked
© 2021 ROH. Photograph by Ellie Kurttz

OPENING UP AND DIVERSITY, EQUALITY AND INCLUSION

Our programmes continued to provide opportunities for a wide range of people to engage with and enjoy our performances, both inside the building and beyond. Examples are summarised below.

ROH Unlocked

ROH Unlocked took place in the Covent Garden piazza on Saturday 10 July and Sunday 11 July 2021. This was our first public festival since lockdown bringing ROH artists out into the public space for world-class performances and giving the public a chance to take part in workshops. There were live performances from members of the Royal Opera Chorus, world-renowned soprano Anush Hovhannisyan and Zoo-Nation Youth Company, as well as participatory singing and ballet-barre workshops. Audiences were also invited to visit the ROH Story Shop, an immersive theatrical experience created in collaboration with Little Bulb theatre company.

Open House

Our Daytime Events and Festivals programme was relaunched in 2020/21 with Open House attracting over 4,500 people over one weekend. Visitors to the ROH could enjoy pop-up performances from soprano Anush Hovhannisyan, tenor Alan Pingarróen and harpist Elin Samuel as well as explore an exhibition of costumes, set, props, hats and jewellery from The Royal Opera's production of *The Tsarina's Slippers*. The weekend also marked the unveiling of the installation of two exceptional works of art: David Hockney's portrait of Sir David Webster, displayed in the Main Entrance Foyer, and Tacita Dean's extraordinary chalk-on-board *Inferno*, one of the designs for Wayne McGregor's new ballet *The Dante Project*, in the Paul Hamlyn Hall.



ROH Unlocked
© 2021 ROH. Photograph by Ellie Kurttz

Engaging with young people and their families, schools and communities

Our Learning and Participation work continued to play a vital role in our plan to build the future of ballet and opera and to diversify the talent pipeline and our future audiences. For example, one part of the overall National Programme was a suite of 'Create' programmes that supported teachers, schools, children and, for the first-time, freelancers through the pandemic.

Award	Events	Teachers	Freelancers	Total participations	Total Schools	Children and young people (max estimated)
Create & Dance	16	114	6	200	78	6,050
Create & Design	5	79	1	91	49	5,380
Create & Sing	14	213	59	432	175	18,670
TOTAL:	35	406	66	723	302	30,100



Southfield Primary Workshop-19

We also continued with our Chance to Dance programme, which works with The Royal Ballet School and private dance schools to diversify the early talent pipeline for ballet. In May, we were once again able to deliver in-person workshops in 10 primary schools (five in Essex, five in the West Midlands). 142 young people attended these sessions and also attended in-school sessions to learn dance and movement inspired by MacMillan's *Romeo and Juliet*. We also provided bursaries and support for aspiring young dancers. Doncaster Dances was a three-week long project that brought together groups from across Doncaster to create an original dance piece that reflected the Covid-19 situation at the time including social distancing practices. This resulted in a short film, inspired by Kenneth MacMillan's *Romeo and Juliet*. 135 individuals took part in the project including six community groups, care homes and schools.

ROH Bridge

Royal Opera House Bridge works to connect children and young people with great art and culture.

Through research, advocacy and co-investment we nurture networks, share learning and foster innovation within the education, arts and culture sector – particularly in communities where there is limited local provision or experience.

Our sector support work as a Bridge became a virtual programme for 2020/21 with just under 1,000 teachers and cultural partners engaging with over 47 different training and networking events across the year.

We continued our work with 12 Local Cultural Education Partnerships (LCEPs) across the South East, including distributing 8,286 creative 'Let's Create' resource packs to targeted children in response to the pandemic.



ROH Unlocked
© 2021 ROH. Photograph by Ellie Kurttz

A further £181,000 was invested in partnership programmes with the LCEPs.

Through two further rounds of the Learning Offer Development Fund grant programme, £115,000 has now been invested in the learning programmes of 23 cultural partners. 51% of the recipients were diverse-led organisations.

Audience development

We implemented a wide range of initiatives to attract more diverse audiences to our art forms, which have had some notable successes, including performances for NHS staff and ROH Unlocked. We initiated work to identify key challenges and barriers and to begin putting plans in place to address them, including starting work with a new creative agency partner

to help us connect ROH productions with younger and more diverse audiences across social, digital and also more traditional media.

We initiated a review of our Young ROH offer – our programme for 16–25-year-olds which includes tickets for £25 – with the aim of increasing sign-ups, especially from groups of people who haven't traditionally engaged with the offer.

We increased our digital output with 15 streamed performances of live ballet and opera and 23 archive productions on pay-per-view, and during this period, our You Tube following reached 1million. This has widened our audience base including out of London.



Artists of the Royal Ballet in rehearsal for *Solo Echo*
© 2021 ROH. Photograph by Andrej Uspenski

Inclusive workforce

Our new Equality, Diversity and Inclusion plan is in the early stages of implementation but we have already seen progress during the year, including greater staff engagement in conversations. All recruiting managers have been through an anti-racism training course and an anti-ableism one is planned. We have established a Staff Diversity and Inclusion Network, a forum for healthy discussion, action and reflection and, a new Access Matters Group has been formed for disabled staff and people with long term health conditions. We have reviewed and refreshed our HR recruitment policies to strengthen our ability to recruit more diverse new staff.



Salads and bakery offer for the café, Sipsmith Gin Palace at the Royal Opera House
© 2021 ROH. Photograph by Jason Spoor

REVENUE GROWTH

Customer spend

The impact of the Covid-19 pandemic was the immediate loss of all box office and ancillary trading income (catering, retail and cinema). The box office took £41.2m less than in the last full season before lockdown.

We put performances on stage when we were able to and we reopened restaurants, bars and the shop, always in compliance with the government's Covid-19 guidance at the time.

Philanthropy and partnerships

A major fundraising campaign, launched in the 2019/20 Season, continued to be a key pillar of our recovery plan. Fundraising income over two years was over £60m, a remarkable achievement given our limited ability to perform on stage. In addition, many donors generously relaxed restrictions on committed gifts.

The Campaign has shown a deep sense of loyalty from our donor base, the majority of whom responded swiftly and emotionally – they gave in order to safeguard their beloved Opera House. We are extremely grateful to all those who contributed.

Endowment

We would like to thank our Baton Associates who made the generous and thoughtful decision to leave a gift to the Royal Opera House in their will.



Royal Opera House, Bow Street entrance facade
© 2021 ROH. Photograph by James Bellorini

ORGANISATIONAL HEALTH

Restructure

In undertaking the restructure, we were mindful of the impact that the changes we needed to implement would have on all our staff, in particular those whose jobs were at risk of compulsory redundancy or whose terms and conditions were proposed to change. To mitigate the impact, we implemented a range of measures, including:

- The invitation to all staff to express their interest in voluntary redundancy, reducing the need for a compulsory leaver programme
- Amendments to proposals following staff feedback and ideas
- Increased job-matching into new roles
- More job-sharing and part-time working
- Open and transparent processes for selection for redundancy where required

A total of 272 employees left between July 2020 and November 2020:

- 43% took voluntary redundancy
- 31% compulsory redundancy
- 26% left through end of fixed-term contract, resignation, etc.

To support those staff who left, we offered a package of redundancy payments, outplacement job search support and access to a retraining fund.

We would like to extend our thanks to the people we sadly had to let go for their contribution to the work of the ROH, many of them over a long time.



Stanisław Węgrzyn, Marcelino Sambé and Kyle Abraham in rehearsal for *Optional Family a divertissement*
© 2021 ROH. Photograph by Andrej Uspenski

Estate

The Covent Garden estate was redeveloped in the late 1990s, re-opening in December 1999. Since then we completed a major upgrade to the public spaces and the Linbury Theatre, re-opening in September 2018 and January 2019, respectively, and we also completed a multi-year upgrade to the main stage flying system. However, much of the back-stage and building infrastructure is either nearing or past its life, and even failing in some instances. We developed the framework of an Estates Plan designed to maintain, upgrade and renew our stage and buildings infrastructure and equipment over the next 15 years. The plan includes an indicative cost plan and programme of works over the period, opportunities for estates reconfiguration and upgrades to drive efficiencies and support flexible ways of working and a governance structure for project design and delivery, all against the backdrop of our net zero and sustainability goals. Further survey work and feasibility studies are planned to enable us to refine and develop the plan with a focus on the next three years.

Covid-safe working

Throughout the pandemic we continued to adapt and implement our Covid-safe working plans for staff, artists and audiences in response to government guidance. All front-of-house and back-of-house activities were carefully risk-assessed and control measures were put in place. We also set-up an in-house Covid-19 testing clinic and, working with several partners, implemented a testing regime to enable us to re-commence performances, initially via online streaming and then with socially-distanced audiences. Our testing strategy reduced the potential for infection spread amongst teams and safeguarded the rehearsal and performance schedule – circa 20,000 tests were carried out on staff during the year.



Paul Hamlyn Christmas Treat
© 2021 ROH. Photograph by Veronika Ward

Environmental sustainability

While tackling the pandemic has been a world-wide emergency over the past period, in the longer term, climate change is the single biggest challenge ever faced by humanity. Cultural organisations can play a leading role in addressing the issues from engaging audiences in conversations, to reducing our own carbon footprint and using our purchasing power to influence the suppliers we work with to become more environmentally sustainable.

We are determined to play our part so, in July 2021, the Board of Trustees approved the ROH's new Environmental Policy, net-zero commitments and Sustainability Strategy and these were subsequently published externally. We have also been active in

raising sustainability standards across the theatre sector through participation in initiatives such as the Theatre Trust Green Book and the Sustainability in Production Alliance.

We are publicly committed to becoming carbon net zero on scopes 1 and 2 by 2035 (Scope 1 covers direct emissions from owned or controlled sources; Scope 2 covers indirect emissions from the generation of purchased electricity, steam, heating and cooling consumed by an organisation).



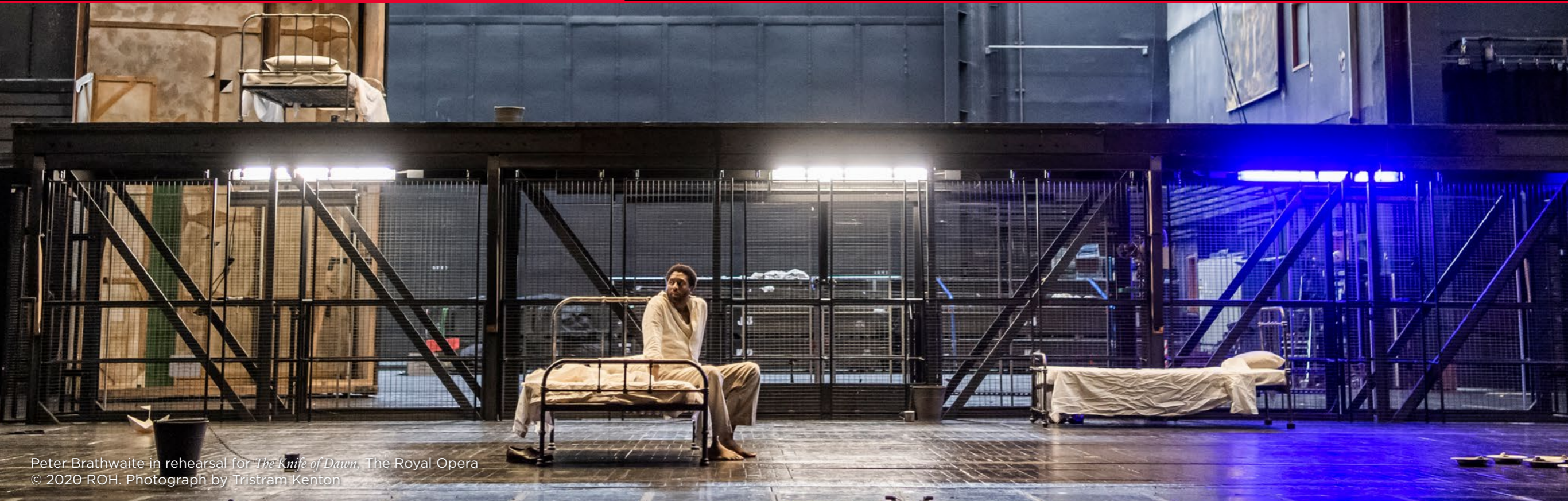
Claire Calvert, Fumi Kaneko, Melissa Hamilton and Matthew Ball in rehearsal for *Apollo*
© 2021 ROH. Photograph by Andrej Uspensk

The new strategy commits us to:

- Making progress to make our buildings in Covent Garden, Thurrock and Aberdare more environmentally sustainable, by reducing carbon emissions and improving waste management and recycling
- Improving our ability to measure progress with robust data, embedding environmental sustainability in our procurement strategies, improving the sustainability of our food offering, and minimising single use plastic and using recyclable packaging wherever possible
- Reducing the environmental impact of our productions by engaging with experts in impact measurement, making more efficient use of materials, and avoiding unnecessary use of hazardous materials and products
- Supporting staff and audiences to reduce their environmental impact by enabling audiences and visitors to understand and minimize their pollution and carbon footprint when visiting us, promoting environmental awareness amongst our employees and encouraging them to work in an

environmentally responsible manner, encouraging use of zero and low carbon forms of transport amongst staff and audiences, and enabling and participating in public discussions concerning environmental issues

- management focus on measuring, and then improving, our environmental impact across four areas: buildings, productions, operations and people (staff, artists and audiences).



Peter Brathwaite in rehearsal for *The Knife of Dawn*, The Royal Opera
 © 2020 ROH. Photograph by Tristram Kenton

Streamline Energy and Carbon Reporting

In accordance with the requirements of Streamlined Energy and Carbon Reporting (SECR) imposed by the 2018 SECR Regulations, we are required to disclose the following energy and carbon information for the reporting year 1 September 2020 to 31 August 2021.

<p>Scope 1: Emissions from combustion of Gas tCO₂e: 2021: 1,334 (Energy consumption: Gas 7,281,114 kWh) 2020: 1,127 (Energy consumption: Gas 6,127,551 kWh) 2019: 1,502 (Energy consumption: Gas 8,168,576 kWh)</p>
<p>Methodology: tCO₂e calculated from the product of the invoiced gas consumption in kWh during the reporting period and the 2020/2019 UK Government GHG Conversion Factors for Company Reporting (version 1.0) for 'Natural Gas'</p>
<p>Scope 2: Emissions from purchased electricity tCO₂e: 2021: 1,478 (Energy consumption: Electricity 6,960,717 kWh) 2020: 1,748 (Energy consumption: Electricity 7,498,289 kWh) 2019: 2,393 (Energy consumption: Electricity 9,360,362 kWh)</p>

<p>Methodology: tCO₂e calculated from the product of the above stated electricity consumption in kWh during the reporting period and the 2021/2020/2019 UK Government CHG Conversion Factors for Company Reporting (version 1.3/1.0) for 'Electricity Generated/Electricity: UK'</p>
<p>Scope 3: Emissions from business travel in rental cars or employee-owned vehicles where company is responsible for purchasing for fuel tCO₂e: 2021: 3 (9,672 miles) 2020: 13 (47,080 miles) 2019: 20 (0,0744 miles)</p>
<p>Methodology: tCO₂e calculated from the total mileage expenses claimed during the period (as stated above) multiplied by the 2021/2020/2019 UK Government CHG Conversion Factors for Company Reporting (version 1.3/1.0) for an Average Car and Unknown fuel type</p>
<p>Intensity ratio: tCO₂e gross figure based from mandatory fields (tCO₂e/m²): 2021: 0.0506 2020: 0.0520 2019: 0.0744</p>
<p>Methodology: The intensity ratio stated above has been calculated as Tonnes of CO₂e per total square metres of property owned (57,438m²)</p>



La bohème in rehearsal
© 2021 ROH. Photograph by James Bellorini

The last two years have had an unprecedented impact on cultural organisations. During the pandemic, the energy use in our buildings changed with our buildings needing to be closed and/or opened for reduced hours with staff on furlough. Non-essential plant and systems were identified and were switched off during the period to reduce energy consumption.

Our buildings were closed/opened for reduced hours between mid-March 2020 - April 2021. As our buildings started to re-open from April 2021 for staff, ballet company rehearsals, artists and audiences all ventilation systems were required to operate at 100% fresh air makeup for Covid-19 control. This resulted in a significant increase in energy use, especially our heating systems (in natural gas), during the winter months.

In the whole estate, typically, electricity accounts for around 55% of total annual energy demand and Natural Gas 45%. For the reporting period 1 Sep 2019 – 31 Aug 2020 our Electricity

showed an overall decrease in consumption of 1.9 MWh, a 20% decrease. Our Gas consumption showed an overall decrease of 2MWh, a 25% decrease. This improved performance is largely attributable to the buildings being closed/operating for reduced hours for a 6-month period during Covid-19. For the reporting period 1 Sep 2020 – 31 Aug 2021 our Electricity consumption showed an overall decrease in consumption by 0.5 MWh, a 7.2% decrease. Our Gas consumption showed an overall increase in consumption by 1.1 MWh, a 18.1% increase. This performance is reflective of the buildings being closed/operating for reduced hours for an 8-month period followed by a 4-month period of high energy use (in particular natural gas for our heating systems) for 100% ventilation for Covid-19 control.

ROH are committed to getting to Net Zero Carbon by 2035 for Scopes 1 and 2 emissions and we continue to set targets to meet this commitment, whilst accounting for the exceptional circumstances of Covid-19.



Rehearsals for *Live* from Covent Garden, 20 June 2020
© 2020 ROH. Photograph by Tristram Kenton

Appendix - 2020/21 Performance Schedule

The table below illustrates the performance we were able to put on, and also the stop/start nature of the season.

Date	Production	Notes
NATIONAL LOCKDOWN: THEATRES SHUT		
4 September 2020	The Royal Opera: Live in Concert	Stream only
9 October 2020	The Royal Ballet: Back on Stage	Pilot live audience and stream
17 October 2020	4/4 (Apollo and Daphne / Frankenstein!! / Knoxville: Summer of 1915)	Live audience (1 performance) and stream
24 October 2020	New Dark Age (The Knife of Dawn / A New Dark Age)	Live audience (1 performance) and stream
26-31 October 2020	Meet the Young Artists Week	5 events – 3 streamed, 2 with live audience (Linbury Theatre)
NATIONAL LOCKDOWN ENDS: THEATRES OPEN (REDUCED CAPACITY/ SOCIALLY-DISTANCED AUDIENCES)		
4 November 2020	The Royal Ballet: Live (Programme A)	Live audience
5 NOVEMBER 2020 – NATIONAL LOCKDOWN RE-INTRODUCED: THEATRES SHUT		
13 November 2020	The Royal Ballet: Class on Stage	Stream only
	The Royal Ballet: Live (Programme B)	Stream only
20 November 2020	Ariodante	Stream only



Production photo of *La bohème*, The Royal Opera
© 2021 ROH. Photograph by Tristram Kenton

2 DECEMBER 2020 – NATIONAL LOCKDOWN ENDS: THEATRES OPEN (REDUCED CAPACITY & SOCIALLY DISTANCED)		
11-15 December 2020	<i>The Nutcracker</i>	Live audience (4 performances out of a planned 17)
18 December 2020	The Royal Opera Christmas Concert	Stream only
19 DECEMBER 2020 – IMPENDING TIER 4 RESTRICTIONS FOR LONDON ANNOUNCED: ROH CLOSES		
6 JANUARY 2021 – NATIONAL LOCKDOWN		
9 April 2021	<i>The Seven Deadly Sins / Mahogony Songspiel</i>	Stream only (first fully-staged production live stream)
17 MAY 2021 – NATIONAL LOCKDOWN EASED: THEATRES OPEN (HALF CAPACITY AND UP TO 1000 PEOPLE)		
17-23 May 2021	<i>La clemenza di Tito</i>	Live audience (4 performances) and stream
18-30 May 2021	<i>21st Century Choreographers</i> (mixed programme)	Live audience (9 performances) and stream
21 May-10 June 2021	<i>Current, Rising</i>	Live participants (Linbury Theatre)
25, 26 May & 2 June 2021	The Royal Ballet: Class on Stage	Live audience (3 events)
4-13 June 2021	<i>Balanchine and Robbins</i> (mixed programme)	Live audience (8 performances) and stream
16 & 17 June 2021	Rambert School End of Term Performance	Live audience (2 performances) [Linbury Theatre]
19 June-6 July 2021	<i>La bohème</i>	Live audience (8 public performances, 1 NHS performance)
23-26 June 2021	The Royal Ballet School End of Term Performance	Live audience (6 performances) [in our Linbury Theatre]



Blaise Malaba, Egor Zhuravskii, Filipe Manu, Kseniia Nikolaieva, Dominic Sedgwick and Stephanie Wake-Edwards in *Mahagonny Songspiel*
© 2021 ROH. Photograph by Ellie Kurttz

21 JUNE 2021 – ALL GOVERNMENT RESTRICTIONS REMOVED – ROH CONTINUES WITH REDUCED CAPACITY AUDIENCES

26 June-11 July 2021	<i>Beauty</i> (mixed programme)	Live audience (8 performances) & stream
5-18 July 2021	<i>Don Giovanni</i>	Live audience (7 performances)
10 July 2021	Royal Ballet School Summer Performance	Live audience
12-17 July 2021	Engender Festival	Live audience [Clare Studio] and streamed events
16 & 17 July 2021	Engender Festival: Pegasus Opera	Live audience (2 performances) [Linbury Theatre]
17 July 2021	Jette Parker Young Artists Summer Performance	Live audience
29-31 July 2021	Kilimanjaro Presents: Chrissie Hynde sings Bob Dylan and Other Songs	Live audience (3 performances)
2-8 August 2021	Bill Bailey Summer Larks	Live audience (10 performances)



FINANCIAL SUMMARY

	2021		2020	
	£m		£m	
INCOME				
Box office receipts	2.8	3%	27.6	23%
ACE - NPO and Bridge	25.2	30%	24.9	21%
Grant from government	10.6	13%	12.4	11%
Fundraising	38.6	46%	31.0	26%
Commercial and other income	6.3	7%	20.8	18%
Investment income	0.8	1%	1.3	1%
	84.3	100%	118.0	100%
EXPENDITURE				
Performance, learning and outreach	43.5	53%	74.7	59%
Premises and depreciation	19.8	24%	19.7	15%
Marketing and publicity	6.8	8%	7.3	6%
Management, administration and governance	5.5	7%	6.3	5%
Fundraising	2.4	3%	3.7	3%
Commercial	2.2	3%	8.2	6%
Front of House	1.0	1%	1.8	1%
Restructure	0.7	1%	5.8	5%
	81.9	100%	127.5	100%
TRANSFERS FROM/(TO) FUNDS				
Open Up fundraising	[0.5]		[0.5]	
Fixed Asset and Heritage Asset Funds	5.5		1.6	
Other transfers	[7.8]		8.4	
NET RESULT ON UNRESTRICTED GENERAL FUNDS	[0.3]		[0.1]	

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For full details, please refer to the statutory accounts available from Companies House. This summary excludes gains on investments and taxation. Income includes capital donations and funding (2021: £0.5m, 2020: £0.5m), but expenditure does not include capital expenditure.



GOVERNANCE

Directors and Trustees

The directors of the charitable company ('The Royal Opera House' or 'the charity') are its Trustees for the purpose of charity law and throughout this report are collectively referred to as the Trustees. The Trustees who held office during the period and since period end were as follows:

Lady Heywood (Acting Chair – retired 1 September 2020)
(Deputy Chair – appointed 1 September 2020)
David Ross (Chair – appointed 1 September 2020, retired 13 May 2021)
Sir Simon Robey (Chair – appointed 14 May 2021)
Zeinab Badawi
Caroline Britton (appointed 14 December 2021)
Lord John Browne (appointed 1 September 2020)
Tim Bunting
Kirsty Cooper
Dr Genevieve Davies (retired 1 September 2021)
Sir Lloyd Dorfman CBE
Dame Vivien Duffield

Susan Hoyle OBE (Senior Independent Director – appointed 26 May 2021)
Sir Nicholas Hytner (retired 1 September 2021)
Sir John Kingman (Senior Independent Director – retired 26 May 2021,
Director – retired 1 September 2021)
Julian Metherell
Paul Morrell OBE
Indhu Rubasingham MBE (appointed 1 September 2020)
Christopher Townsend CBE (appointed 1 January 2021)
Laura Wade-Gery (retired 1 January 2021)
Roger Wright CBE
Danny Wyler

Chief Executive

Alex Beard CBE

Audit and Risk Committee

Julian Metherell (Chairman)
Caroline Britton
(appointed 8 February 2022)
Kirsty Cooper
Lady Heywood
Sir Nicholas Hytner
(retired 1 September 2021)
Sir John Kingman
(retired 1 September 2021)
Paul Morrell OBE
Laura Wade-Gery (retired 1 January 2021)
Danny Wyler

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(retired 1 September 2021)
Sir John Kingman
(retired 1 September 2021)
Julian Metherell
Paul Morrell OBE
Laura Wade-Gery (retired 1 January 2021)
Danny Wyler

Development Committee

Danny Wyler (Chairman)
Timothy Bunting
The Countess of Chichester
Nicola Davidson (retired 4 May 2021)
Sir Lloyd Dorfman
(appointed 14 December 2021)
Dame Vivien Duffield, Lady Heywood
(retired 1 September 2020)
Robert Kalf (retired 31 August 2021)
Paul Raphael (retired 11 August 2021)
Sir Simon Robey (appointed 14 May 2021)
Dame Gail Ronson

Finance and Operations Committee

Lady Heywood (Chairman)
Caroline Britton
(appointed 8 February 2022)
Lord John Browne
(appointed 26 February 2021)
Timothy Bunting (appointed 6 July 2021)
Sir Lloyd Dorfman CBE

David Ross (appointed 1 September 2020,
retired 13 May 2021)
The Earl of Snowdon
Andrew Walton (retired 31 August 2021)
Lady Young of Graffham

Donation and Income Acceptance Committee

Lady Heywood
(Chairman - retired 1 September 2020)
David Ross (Chairman – appointed 1
September, retired 13 May 2021)
Sir Simon Robey
(Chairman – appointed 14 May 2021)
Zeinab Badawi (appointed 6 July 2021)
Kirsty Cooper
Susan Hoyle (appointed 26 May 2021)
Danny Wyler

Learning and Participation Committee

Susan Hoyle (Chairman)
Alex Beard
Helen Bruckdorfer

Hilary Carty
Annie Crombie (appointed 20 April 2021)
Dame Vivien Duffield
Jane Ellison (retired 19 November 2020)
David Hall (retired 19 November 2020)
Anne McElvoy (retired 19 November 2020)
Tanya Joseph (appointed 20 April 2021)
Simon Pearson (appointed 5 October 2021)
Dame Theresa Sackler
(retired 19 November 2020)
Jonathan Sands
Bridget Whyte

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David Ross (Chairman – appointed 1
September 2020, retired 13 May 2021)
Sir Simon Robey (Chairman – appointed
14 May 2021, retired 26 May 2021)
Susan Hoyle OBE
(Chairman – appointed 26 May 2021)
Dame Vivien Duffield



Masabane Cecilia Rangwanasha
in *The Royal Opera Christmas Concert*, The Royal Opera
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Lady Heywood
Sir John Kingman (retired 1 September 2021)
Julian Metherell
Danny Wyler

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Christopher Townsend
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Timothy Bunting (appointed 20 April 2021)
Simon McGrath (appointed 20 April 2021)
Sir Simon Robey (appointed 14 May 2021)
David Ross (appointed 20 April 2021,
retired 13 May 2021)

Company Secretary

Leah Hurst

Executive Management Team

Alex Beard, Chief Executive
Jillian Barker, Director of Learning and Participation
Heather Baxter, Administrative Director,
The Royal Ballet
Bob Brandsen, Production Director
(until 31 August 2020)
Melanie Crompton, Orchestra Administrative
Director (until 30 April 2021)
Mark Dakin, Technical Director
Lindsey Glen, Head of Policy and Strategy
(until 10 December 2020)
Dale Haddon, Director of Human Resources
Mark Heholt, Head of Policy and Strategic Funding
(from 8 March 2021)
Leah Hurst, Head of Legal and Business Affairs
Peter Katona, Director of Casting
Koen Kessels, Music Director, The Royal Ballet
Mindy Kilby, Director of Finance
Terry McGrath, Director of Audiences & Media
Oliver Mears, Director of Opera
Kevin O'Hare, Director, The Royal Ballet
Antonio Pappano, Music Director
Amanda Saunders, Director of Development
and Enterprises
Cormac Simms, Administrative Director,
The Royal Opera
Laura Stevenson, Renewal Programme Director
Heather Walker, Director of Operations

James Whitebread, Chief Technology Officer
(from 10 June 2021)
Emma Wilson,
Deputy Director of Technical & Production

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Joshua Guerrero as Rodolfo and Anna Princeva as Mimi in *La bohème*, The Royal Opera
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