

GLYNDEBOURNE

ANNUAL REPORT 2023



Opera in the UK in 2023

The last few years have been extremely challenging for opera in the UK. Barely had the pandemic abated when we were met with galloping inflation, debilitating cuts to public funding and a procession of negative stories predicting the end of the art form. This against a backdrop of the UK's somewhat equivocal attitude to opera.

However, we remain upbeat. Despite these headwinds, there is wonderful, ambitious work being produced at all scales, right across the nation, including – indeed especially – here at Glyndebourne. Audiences have returned. We are not looking back at what we wish had been different but forward to what needs to be done.

In 2023 Arts Council England (ACE) commissioned The Audience Agency to produce an in-depth analysis of the opera and music theatre sector in England. There is much to discuss and debate in the findings but one observation above all stood out to us: that the sector is not good at collaboration. The much vaunted opera 'ecosystem' which ought to support, for instance, talent pathways and audience development, is barely there.

As one of the UK's major opera houses, we understand our responsibility to lead and help foster this collaboration. We are working closely with the sector to establish the necessary frameworks.



Dialogues des Carmélites, Festival 2023

Richard Hubert Smith

Audiences at Glyndebourne

2023 saw the highest paid-attendance to performances at Glyndebourne in more than a decade. How can that be true? One consequence of the reduction in funding from the Arts Council was the cancellation of the Glyndebourne Tour. This created the opportunity to extend the at-home part of that programme – which had always begun here at Glyndebourne – into a fully-fledged second season: the Autumn season.

Both the Festival and the Autumn season in 2023 saw occupancy rates at 97%, with c.93,000 and c.32,000 people attending each season respectively. Festival attendance alone exceeded any year since 2018. The ‘post-pandemic’ era is over.

The loyalty of Members underpins this success. Growing the membership remains a strategic priority. The total number of Glyndebourne Festival Society and Associate Members grew to over 14,000 in 2023 (2022: c.13,200); an encouraging sign.



Glyndebourne auditorium with L'elisir d'amore on stage, Festival 2023

Festival 2023

Richard Hubert Smith



Semele
'A show that's confident, smart
and endlessly entertaining.' *The Times*

The Rake's Progress
'Melds David Hockney's ravishing design
with exquisite music' *The Independent*



Richard Hubert Smith

Dialogues des Carmélites
'Pray for a ticket to
this sublime show' *The Times*



Richard Hubert Smith

Festival 2023

Monika Rittershaus

Don Giovanni

'Stunning, exuberant production reveals human nature in all its complexity' The Arts Desk



L'elisir d'amore

'This is not to be missed' Mail on Sunday

Bill Knight

A Midsummer Night's Dream

'More than 40 years on, the magic has not dissipated' Financial Times



Tristram Kenton

Artistic overview

Festival 2023

Opera magazine called Festival 2023 a ‘vintage Glyndebourne summer’. We presented six operas: three new productions and three revivals. Unusually half were sung in English, and three were written in the same decade of the 20th century (and first staged between 1951-1960). Brave choices perhaps, but it was heartening to see our audiences engaging with varied repertoire, especially as data shows that theatre attendees are generally more risk-averse since the pandemic.

One new production in particular encapsulated Glyndebourne’s continued commitment to artistic excellence – our first ever staging of Poulenc’s *Dialogues des Carmélites*, directed by Barrie Kosky. A major hit with international resonance, *The Times* instructed its readers to ‘pray for a ticket to this sublime show’. All six Festival productions garnered five-star reviews in the press and revivals of past favourites like *A Midsummer Night’s Dream* and *The Rake’s Progress*, revived with just as much care and rehearsal time as those newly created, ensured it was possible for a 2023 revival to be the best version ever. To end the Festival with the original *Rake’s* team – director John Cox, designer David Hockney and lighting designer Robert Bryan – on stage at the curtain call, receiving a standing ovation – was wonderful and a fitting end to an exceptional season.



Graham Carlow

Curtain call for *The Rake’s Progress* featuring the original creative team: director John Cox, lighting designer Robert Bryan and designer David Hockney

Autumn 2023

As part of the newly titled Autumn season, where we showcased emerging talent and welcomed our audience, new and old, to discover our opera for the first time or to discover more about familiar works, we staged two operas and a series of concerts.

Productions of *Don Giovanni* and *L'elisir d'amore*, led by two exciting young conductors – Stephanie Childress and Adam Hickox – were warmly received, as were the two oratorios we presented as part of our concert series that featured Haydn's *The Creation* and Handel's *Messiah*, alongside our Christmas concerts. To celebrate talent development and embrace collaboration we hosted the Glyndebourne Talent Showcase which featured 50 members of Glyndebourne Youth Opera sharing the stage with international opera stars, in a concert that featured world premieres by our resident Balancing the Score¹ composers, Alex Ho and Lucy Armstrong, played by young orchestral players on our Jerwood Pit Perfect scheme for young orchestra musicians.



Sam Stephenson

Jerwood Pit Perfect players, Autumn 2023

¹ Balancing the Score is a Glyndebourne development scheme for composers from backgrounds currently underrepresented in the world of operatic composition.

Autumn 2023

Tristram Kenton



L'elisir d'amore



Don Giovanni

Richard Hubert Smith



Talent Showcase

Balancing the Score composer Lucy Armstrong with artistic director Stephen Langridge.
Photo: Richard Hubert Smith

Autumn 2023

Bill Knight



Messiah concert



Richard Hubert Smith

Christmas concert



ASH

Creation concert

Learning & Engagement

Through our Learning & Engagement programme we continue to work creatively with children and young people to participate in and explore opera and the arts through activities for schools. Working closely with music hubs and teachers the programme is designed to respond to needs in our area, with a strategic approach to supporting singing in state schools across East and West Sussex. In 2023, 2,400 young people experienced opera through our Performances for Schools, 992 more were involved in participatory singing projects, performing in Eastbourne and Crawley, and more than 800 children performed on stage in concerts at Glyndebourne.



Sarah Hickson

Schoolchildren taking part in One Voice – one of Glyndebourne's projects to support singing in state schools

Learning & Engagement



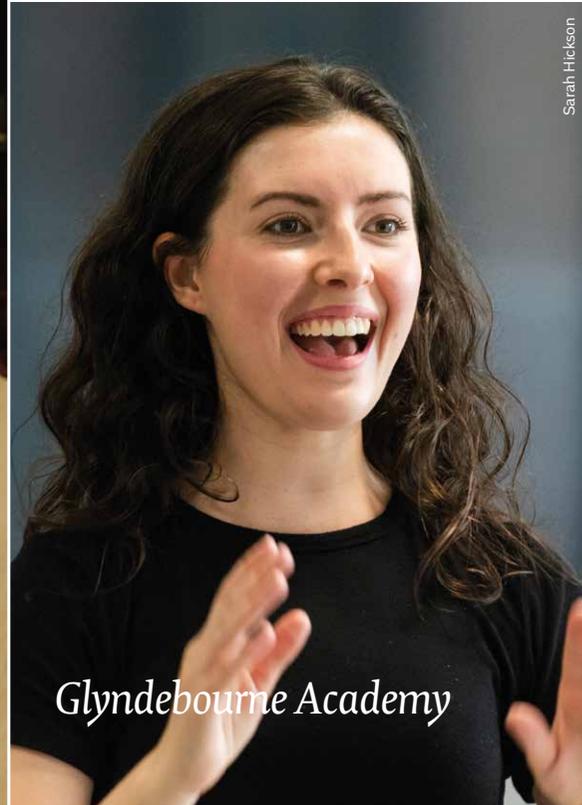
Family Day

Laura Aziz



One Voice

Andrew Hasson



Glyndebourne Academy

Sarah Hickson



Glyndebourne Youth Opera

Sarah Hickson



Glyndebourne Youth Opera

Sarah Hickson

2023 in numbers



Performances and events

75 Festival performances of six productions	2 Family Open Days
20 Autumn opera and concert productions	2 Member Open Days
	12 Backstage Tours



Tristram Kenton

Audience

125,000+ Attended live performances and events	
93,000+ Festival attendances	5,000+ Children at Autumn performances and events
32,000+ Autumn attendances	1,983 Family Open Days attendees
1,697 Under 30s subsidised Festival tickets	71% new bookers

Artists

850+ Artists, musicians and technical staff			
300+ Musicians, from the London Philharmonic Orchestra, the Orchestra of the Age of Enlightenment and the Glyndebourne Sinfonia			
79 Principal singers	66 Cover singers	32 Glyndebourne debuts	38 Visual artists exhibited
101 Young singers, composers and musicians participated in our talent development programmes			



ASH

Community

3,000+ Local schoolchildren participants		
992 Children from 30 schools participated in singing and musical composition sessions with Glyndebourne This included almost 3,000 contact hours across projects	50+ Teaching professionals attended sessions aimed at supporting development of music and singing in schools	
428 Children and young people participated in youth opera workshops across the year	196 Students from 15 groups attended Open Doors careers week at Glyndebourne	
204 People from 62 different choirs participated in the Messiah Masterclass led by chorus director Aidan Oliver	182 People from across Sussex enjoyed sessions with musicians through the 'Good Company' project	52 Young people performed on the main stage at Glyndebourne with professional singers and musicians as part of the Autumn season



Sarah Hixson

Infrastructure and the environment

We seek to invest in stage technology and infrastructure in pursuit of artistic excellence and to create the best conditions for our staff, artists and audiences so as to deepen their connection with Glyndebourne.

We remain committed to reducing our carbon footprint, with an ambition to halve our direct emissions between 2019 and 2030 and to achieve net zero emissions by 2050.

Our Environmental Champions volunteer group is continually proposing practical, small-scale changes, while our Environmental Steering Group charts the investments needed to decarbonise.

Our wind turbine stands testament to this commitment and in 2023 it produced more than 105% of our total electricity usage. Gas usage rose 8% versus 2022 due to the extended Autumn season at Glyndebourne; whereas previously we were out on tour.

We have our own bore hole which means we rarely use any mains water.

Our total waste tonnage decreased by 11% compared to 2022 while our recycling rate increased, up to 72% from 64%. The net effect of this was to reduce our non-recyclable waste tonnage by 32%. None of our waste goes to landfill. All waste that is non-recyclable is sent to a local incinerator to be converted to power for local homes.

Reuse/recycling is now standard practice in new productions. For instance, 60% of costumes in *Dialogues des Carmélites* were bought second-hand and adapted while 50% of the steel and timber flooring for *Semele* was recycled from *Rinaldo*.

However, decarbonisation is not the whole story. Part of Glyndebourne’s distinctiveness is its setting in the landscape and with nature. We want not only to meet the ethical imperative to reduce our emissions but also to achieve positive outcomes for nature. We are taking nature-positive actions, actively encouraging wildlife and increased biodiversity on the doorstep of the opera house.

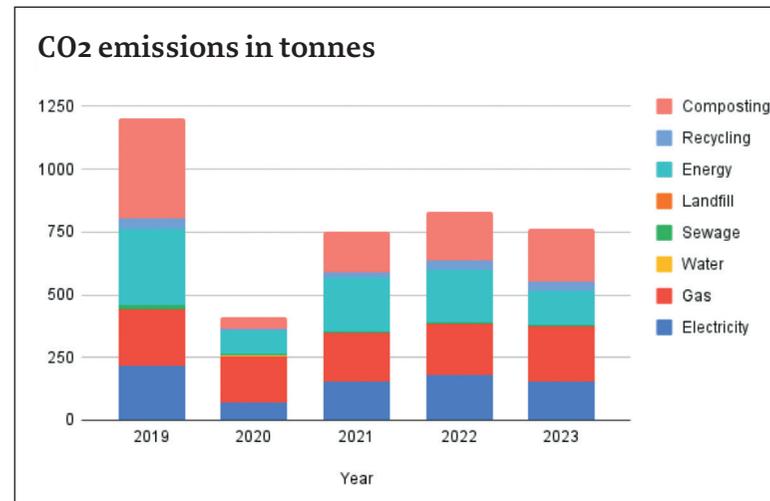
Actions taken during 2023

- New, more efficient boilers
- Sensor LEDs in dressing rooms and offices
- Double glazing the opera house first floor
- Natural beehives in the gardens
- Replanting the Bourne Garden

Actions upcoming

- Complete the opera house double glazing
- Solar panels on Production Hub
- Solar panels on the store in Ripe
- Coach park EV charging stations
- Assessment of timing/viability of replacing minibus fleet with electric buses
- Catering transition from gas to electric induction cooking
- Further deployment of sensor LEDs lighting

The chart below tracks our direct carbon emissions since 2019, measured using the Creative Climate Tools methodology developed by Julie’s Bicycle.



Looking forward

In 2024 we are making investments in strategic projects including work on the brand and refreshed statements detailing our artistic vision and fundraising case for support. This work is underpinned by paying close attention to our working culture.

We are opening our minds to the possibility of large-scale audience-facing enhancements to the physical estate. An ambitious centenary master plan is in development.

There is a bright future for opera in the UK and we are excited to be playing a leading part.



Colour-coordinated visitors during the Autumn season, 2023

Financial overview

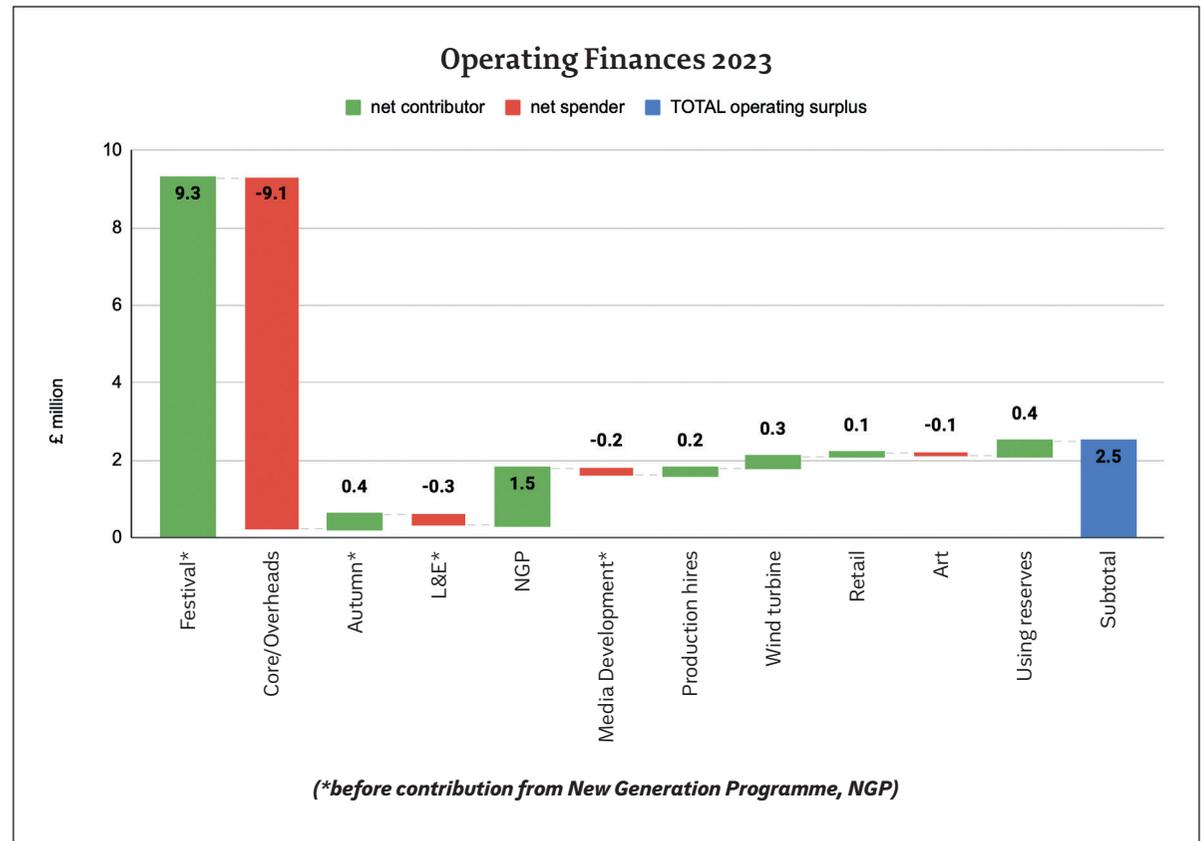
Financial performance 2023

Finances continued in good health through 2023. However, as with many arts and cultural organisations, there were financial challenges.

- Although inflation rates fell, sustained high inflation over two years led to accumulated pressure on our cost base and challenges in managing our operating and running costs within budgets. One fortunate hangover from the pandemic was that some 2020 spend on productions before the cancellation of that year’s Festival did not have to be repeated in 2023 when we brought those operas to our stage.
- Interest rate rises meant the cost of borrowing went up. Whilst helpful to have working capital from our Covid business interruption bank loan, it wasn’t financially responsible to cover ever-increasing loan interest costs. A decision was made to repay the loan in full.
- Financial market volatility was reflected in our investment portfolio performance. The portfolio benefited from a boost in markets at the end of 2023.
- The planned Tour for autumn 2023 became financially unviable with the reduction in ACE funding and was cancelled. The reimaged Autumn season of full length operas and concerts on the Glyndebourne stage was supported by two major one-off gifts in 2023.

In the face of these challenges, we were grateful for the loyal support from our members, donors and audiences. Box Office income and fundraising continued to represent the majority (80-90%) of income.

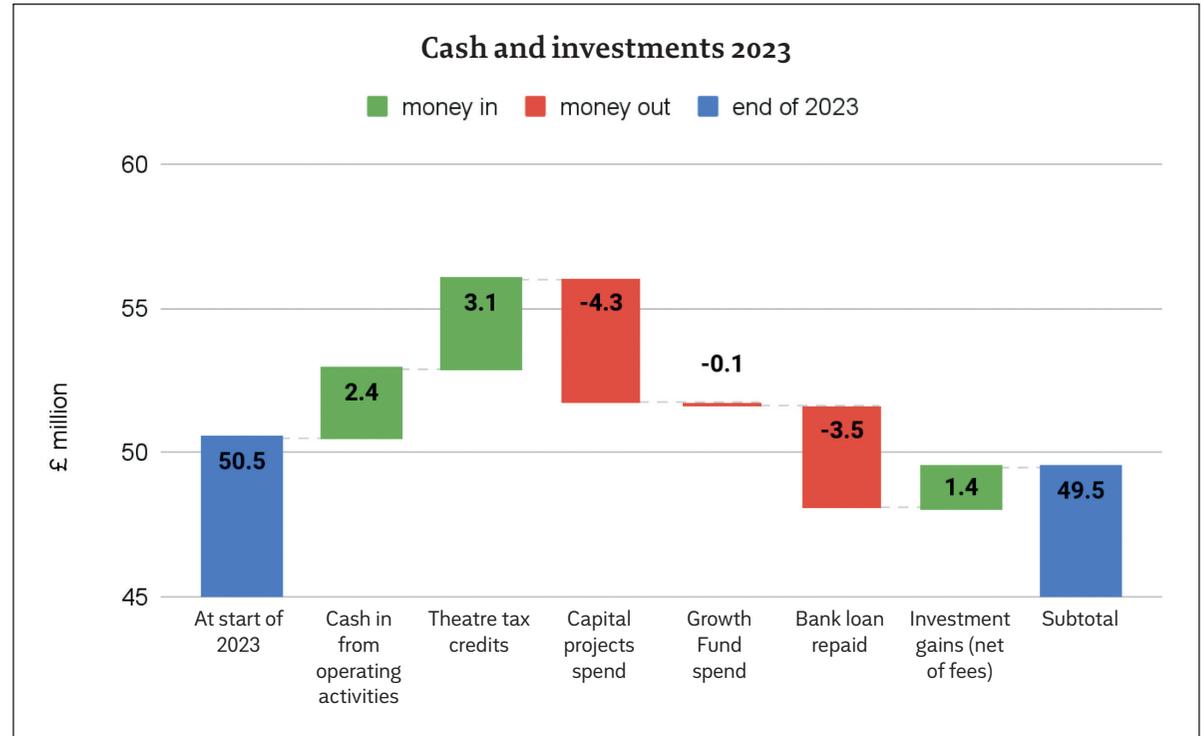
Overall an operating surplus of £2.5m was achieved for 2023, in line with that of 2022 (before depreciation). These financial surpluses give Glyndebourne a strong footing to head into a period of greater spend in the next few years with exciting plans to invest in greater numbers of new productions, coupled with ambitious investments in our physical estate, customer experience offering, and stage technological infrastructure.



Cash

Cash reserves held up through 2023 despite inflationary pressures on our cost base and increasing spend on investments in the theatre and across the site. This was thanks largely to strong Box Office performance, enhanced theatre tax credits, and a boost to the financial markets at the end of the year. We also repaid our Covid business interruption bank loan in full.

Unrestricted cash reserves at the end of 2023 were £20.7m (2022: £21.3m) with the remainder being subject to restrictions from funders on how it may be used, and designated for specific purposes.



Financial outlook

Steadying the ship on operating finances has been a big financial challenge in recent years. The growth in audience numbers and Box Office revenue has strengthened the financial outlook, further enhanced by permanent higher rates of theatre tax credits introduced by the government.

Challenges remain on the cost side. The planning of our artistic programme three-four years in advance introduces complexities in developing and managing the related financial outlook. Looking ahead to the 2024-25 repertoire, this was planned pre-pandemic and before the days of high inflation and so the cost of making and creating productions is now more than previously anticipated.

The reduction in ACE funding has also created financial challenges. We secured alternative major funding for our Autumn season for 2023-26, but without the scale of the previous ACE grant we are still set to lose money from this activity that offers important development opportunities for artistic talent and new audiences.

Actions are underway to remedy the impact of stubbornly high operating expenditure (eg utilities). Key within this is analysing and reviewing the number of performances we stage to meet audience demand – once the investment has been made in creating a production, rehearsing it and taking it to the stage, every performance enjoyed by our audiences makes a financial contribution towards covering the cost of that investment and the wider costs of running the Festival and Glyndebourne year round.



Participants in Glyndebourne Academy, 2023

Capital expenditure

We are now firmly in a period of significant capital expenditure and investment to replace and overhaul areas of the opera house building and infrastructure.

We completed the largest of our current capital investments, a £7m multi-year project encompassing the design and installation of a new fully automated fly system, early in 2023, which was used throughout the Festival. Other investments included overhauling backstage lifts essential for running costumes to dressing rooms during rehearsals and performances. We also invested for greater energy efficiency with the start of a rolling programme to install double glazing in all windows across the opera house.

The theatre building and its infrastructure, equipment and facilities are 30 years old and have been serviced and maintained well, but we must invest to ward off obsolescence of equipment and technology, to maintain and enhance our customer experience, and to keep pace with developing health and safety requirements.

Next up in our stage automation infrastructure programme is the upgrade of the orchestra pit lifts and safety net (2024) followed by a rebuild of the stage floor and development of an under-stage mezzanine level incorporating personnel-riding lifts (2025).

Other planned investments include:

- New major lighting and sound systems in the auditorium.
- Modernising the infrastructure for show- and operations-critical communication systems.
- Improvements to the audience car park.
- Continuation of investments for climate considerations and cleaner energy usage, including solar panels.

Alongside these essential investments, we are developing an exciting and ambitious centenary master plan. We look forward to sharing these plans with you.



Preparing costumes for A Midsummer Night's Dream, Festival 2023

Glyndebourne’s Executive Directorate 2023

Executive Chairman Gus Christie
Music Director Robin Ticciati
Artistic Director Stephen Langridge
Managing Director Richard Davidson-Houston
Director of Artistic Administration Steven Naylor
Finance Director Lisa Wong
Director of Audience Development Tyler Stoops
Director of Development Helen McCarthy
Operations Director Donna Marsh

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Preparing costumes for
The Rake’s Progress,
Festival 2023

Graham Carlow

Making opera is a work of passion and determination. We’d like to extend a big thank you to all Glyndebourne staff for their dedicated work throughout 2023 – and to all of our members, donors, trustees and audiences for continuing to watch, listen, celebrate and support our work.

GLYNDEBOURNE

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