

French American Foundation

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French and American versions



September 12th presentation

- 🌀 Historical approach: governance and efficiency
- 🌀 1995-2004: success explanations and international comparisons
- 🌀 Challenges for the future

Historical approach: governance and efficiency

	First Empire Napoléon 1 st	1945-1994	Louis XIV and Lully	Quasi-contract and Gall	Concession 1831-1939
<i>Institution's degree of autonomy</i>	Total dependence	Direct State management	Autonomy transferred by privilege	Autonomy defined in a quasi-contract	Autonomy restricted by specifications
<i>Artistic success</i>	Occasional and short-lived	Declining, inconsistent	Exceptionally high	Box office success, Coherence, stability Creation of a repertoire	Box office success, Low risk-taking
<i>Economic success</i>	Non-significant	In steady decline	Excellent	Clear improvement Good control	Good, except at the end of the period
<i>Environmental conditions</i>		Changes in production techniques		New technologies, Favorable structural factors	Considerable increase in labor productivity
<i>Exceptional factors</i>			Lully's wide range of talents, and personality Royal support	Management team's professional-ism	

Paris Opera governance: 1995-2004

The director (Hugues Gall)

- A professional
- A six year mandate, renewable

A six year business plan

- Number of performances, lyrical and ballet
- Key expenses and revenue figures

A formal commitment between state and Hugues Gall on the respective amount of public funding and box office resources

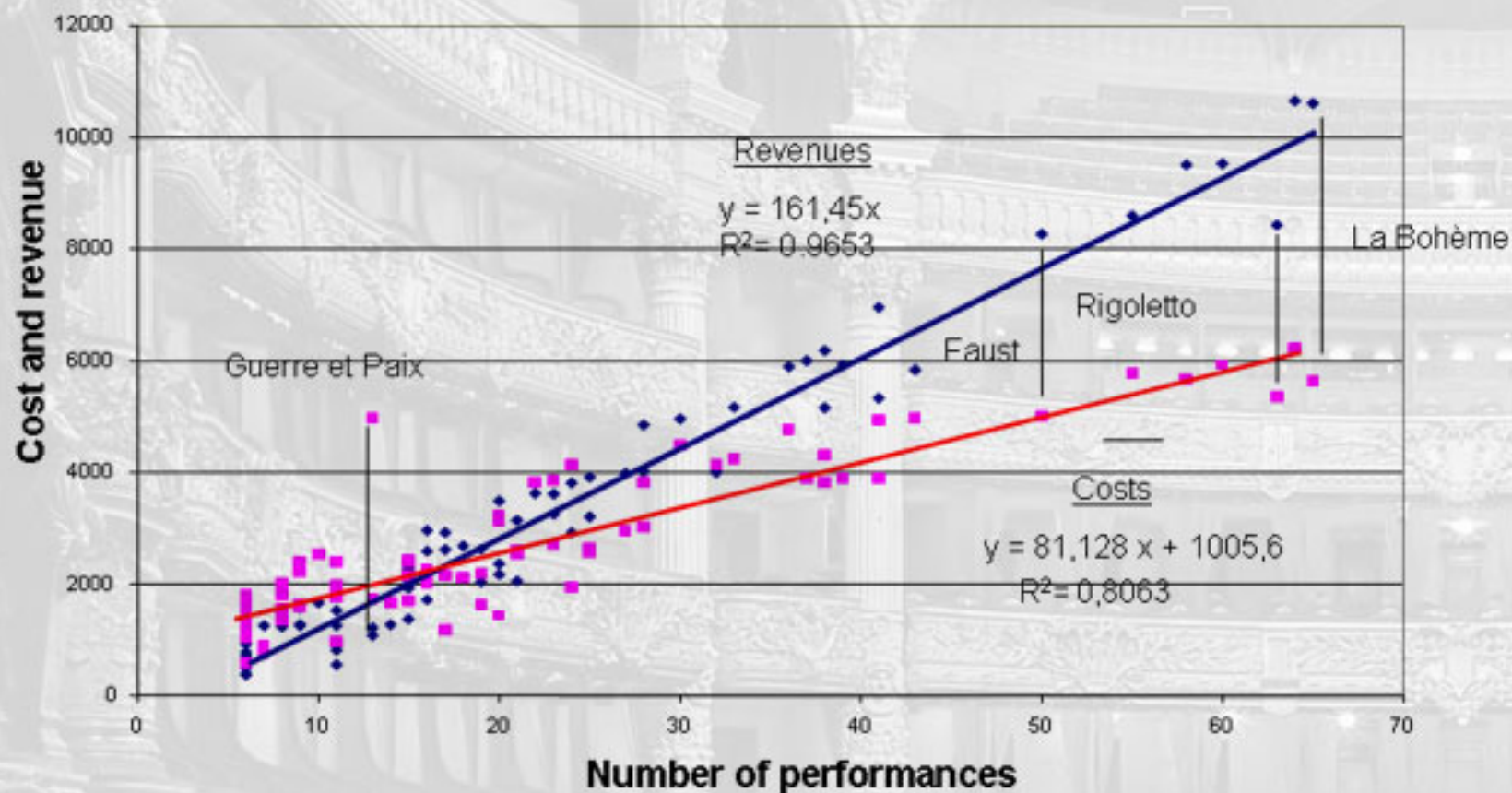
1995-2004: success explanations and international comparisons

- ❧ The Paris Opera results and explanations
- ❧ International comparisons

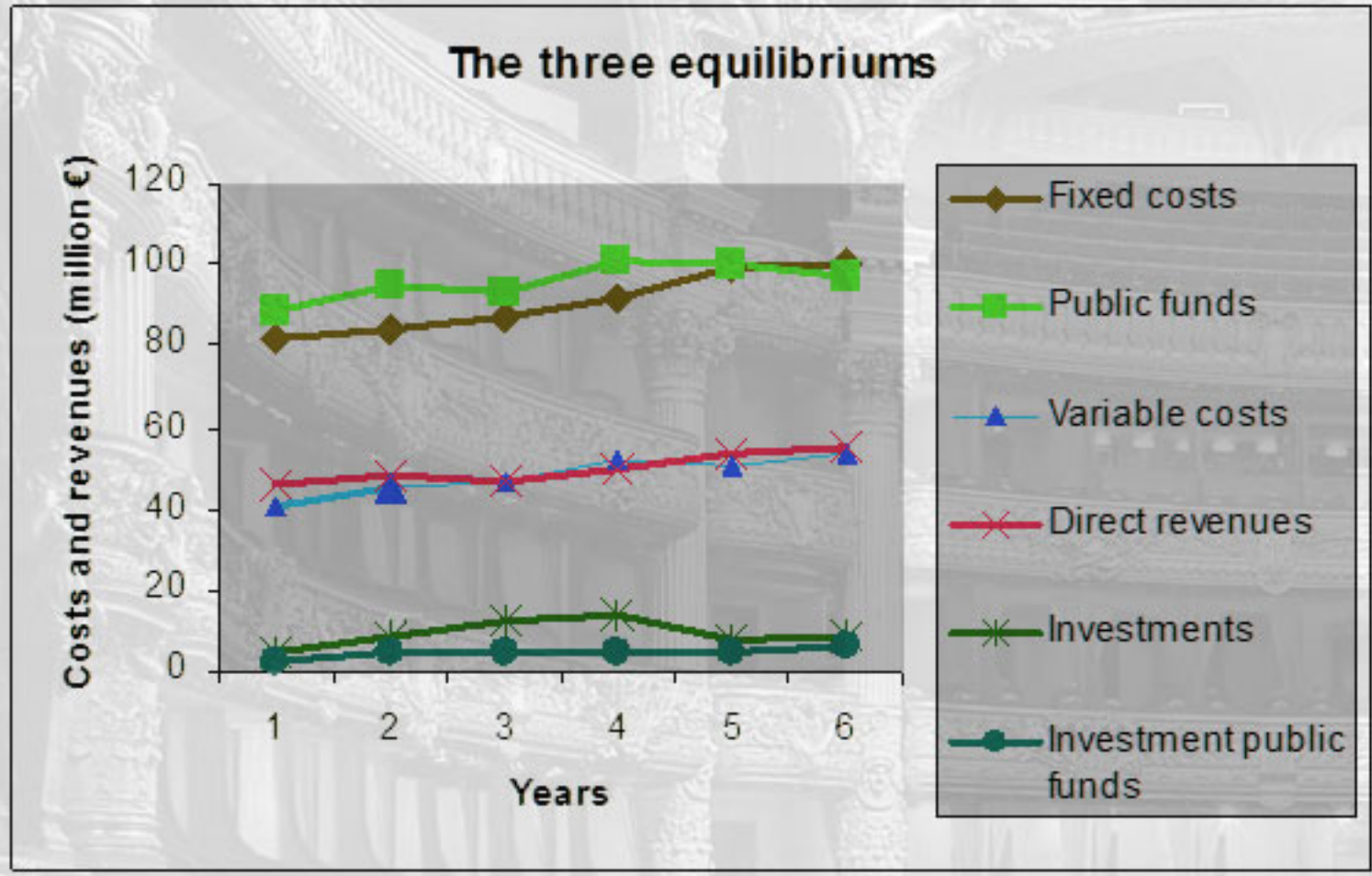
1995-2004: success explanations and international comparisons? The Paris Opera results and explanations

- ❧ Public attendance
- ❧ Creation of a repertory
- ❧ Bastille structural factors: stage technology and seating capacity
- ❧ Coherence between artistic et economic decisions: creation of a repertory, equilibrium between new productions and revivals, operas and ballets
- ❧ Global cost management

Lyric productions Bastille



The three equilibriums (1998-2003)



1995-2004: international comparisons

- ❧ Outstanding results when compared to the past
- ❧ Results in line with the business plan
- ❧ International comparisons with:
 - The MET in New York
 - The Staats Oper in Vienna
 - The Bayerische Staats Oper in Munich

Comparison of titles in repertory

% of works available in repertory	17/18 th century	19 th century	20 th century
Paris Opera House	17,15	56,82	26,14
New York Met	11,48	65,57	22,95
Wiener Staatsoper	8,57	68,57	31,43

Comparison of lyric and ballet activities

Average activities per season	Paris Opera House	Metropolitan Opera New York	Staats Oper Vienna	Bayerische Oper Munich
Number of lyric works	24	26	53	41
New lyric productions	7	5	7	6
Number of lyric representations	183	217	250	211
Number of representations by title	8	8	5	5
Number of ballets	161	76	50	73
Total number of representations	344	293	300	284

Comparison of financial data

	Paris Opera	Metropolitan Opera New York	Staats Oper Vienna	Bayerische Oper of Munich
Annual total costs in millions of € 2002	142	158	78	77
Cost per representation in thousands of € 2002	389	498	259	228
Total cost per ticket sold in € 2002	196	162	156	134
Box office in millions of € 2002	48	82	35	23



Challenges for the future

Challenges for the future

Paris

- ❧ Focus on core activities and better control of payroll expenses
- ❧ Programming has to obey strict economics constraints
- ❧ Number of lyrical performances could be higher
- ❧ Governance challenges

Challenges for the future

General

- ❧ Future of public/private subsidies and donations ?
- ❧ Renewal of the audience ?
- ❧ New visions for production renewals ?
- ❧ Future of lyric popular creation ?

Comparisons of ticket prices and receipts

In € 2002	Lyric		Ballet	
	Ticket price	Receipt/spectacle	Ticket price	Receipt/spectacle
Bastille	59	151 000	35	86 000
Garnier	65	106 000	35	54 000
Met	89	303 000	28	91 000
Vienna	48	96 000	33	63 000
Munich	44	84 000	25	41 000

Variable cost and revenue per performance

