



Let's Create: Opera and Music Theatre Analysis

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1 Introduction

In May 2023, Arts Council England (ACE) commissioned DHA and The Audience Agency, working with MyCake, to provide an accurate account of what is currently known about the professional opera and music theatre sector in England. This study brings together data, knowledge and views from a range of perspectives, giving a fuller picture than has previously been available, or has been as clearly and openly articulated. It looks at how production, presentation and distribution take place, the range of business models used by the sector, how audiences and participants are engaged, how talent and leadership development occurs, where innovation (in its widest sense) is happening, and how the sector contributes and might contribute in the future to Arts Council England's strategy, 'Let's Create'.

With the time and resources available, this is not a comprehensive study of the sector and its activities. As agreed with ACE, there were parts of the sector – areas of the workforce, education and training routes, organisations and types of activities and practices – which we have engaged with less fully than others. Within this report we consequently suggest areas for further engagement and investigation, including in our conclusions, where we have identified gaps in the current data and understanding which are significant in decision-making for the sector.

This study has relied significantly on a wide range of organisations and individuals in, or connected to, the opera and music theatre sector, who have generously contributed their data, time, experiences and perspectives. Some contributors are familiar with sharing this kind of information, but others came from groups who are less often asked what they think about how their organisations or careers work, or how the wider opera and music theatre sector works. Some of the conversations we heard had taken place previously, and for some contributors there is a sense that we've been here before; for others, being in these conversations was a newer experience.

In setting out a shared understanding of what we know about the sector, we hope this study provides useful intelligence to support future thinking and planning. There are, however, specific areas which this study has not investigated in detail, including:

- HE training and routes into the sector¹;
- the experiences of the full range of operatic talent including conductors and music directors, orchestral musicians², and a variety of backstage and administrative roles³;
- the views of small-scale, non-proscenium arch venues (e.g. sub-800 seats) receiving opera and music theatre;
- the sector's engagement with environmental sustainability and the impacts of climate change, in the short, medium and longer-term.

¹ For example, this study was able to engage via Conservatoires UK with three England-based music conservatoires; however, there is significant variation in the approaches and practices of conservatoires, and so any further consideration of the training and routes into the wider sector would benefit from a more comprehensive engagement with providers and stakeholders in this area. In addition, talent in the opera and music theatre sector benefits from training in other institutions, including theatre schools, at centres for technical theatre training and elsewhere; this has not been explored in this study.

² Orchestral musicians are the particular focus of the [Fair and More Inclusive Classical Music](#) research commissioned by Arts Council England, and many of the findings in that work are directly relevant to orchestral musicians in the opera and music theatre sector, and to some extent to conductors, music directors and other musical workers in opera and music theatre.

³ In backstage technical theatre and administrative roles, we would expect some overlap between experiences in the opera and music theatre sector, and those in the theatre sector.

This study uses the current Arts Council England strategy, 'Let's Create', as a key reference point. That strategy is built around three Outcomes that the Arts Council wishes to achieve. In its [Delivery Plan 2021-2024](#) the Arts Council sets out a series of Elements that act as a set of priorities for each Outcome. 'Let's Create' also features a set of four Investment Principles which are intended to act as development tools for the organisations and individuals working in the creative sector to improve their performance. The Outcomes and Investment Principles are as follows:

- Outcome 1: Creative People – everyone can develop and express creativity throughout their life
- Outcome 2: Cultural Communities – villages, towns and cities thrive through a collaborative approach to culture
- Outcome 3: A Creative and Cultural Country – England's cultural sector is innovative, collaborative and international
- Investment Principle 1: Ambition and Quality – cultural organisations and individuals are ambitious and committed to improving the quality of their work
- Investment Principle 2: Dynamism – cultural organisations and individuals are dynamic and able to respond to the challenges of the next decade
- Investment Principle 3: Environmental Responsibility – cultural organisations and individuals lead the way in their approach to environmental responsibility
- Investment Principle 4: Inclusivity and Relevance – England's diversity is fully reflected in the organisations and individuals that we support and in the culture they produce.

The Arts Council appointed an independent Reference Group – Fiona Allan, Anthony Blackstock and Jan Youngusband – to provide them with advice on the Let's Create: Opera & Music Theatre Analysis project. They have provided comments to us on this report, which we are grateful for, but they are not responsible for any of its contents. We would also like to thank staff from Arts Council England and Andrew Miller from its National Council for their time and engagement.

2 Methodology and approach

The brief for the project asked us to look at opera and music theatre. The term 'music theatre' prompted questions from some contributors, and we discussed this with both Arts Council England and the Reference Group at an early stage of our work on this study. For working purposes, we started from the premise that:

- Everything opera companies (i.e. organisations whose primary activity is opera) do is included, so this involves repertoire or activities which might sit outside the traditional opera canon.
- Commercial or mainstream musical theatre, where produced/presented by a non-opera company is *not* included.
- Some modern/contemporary work is included, whether produced by opera companies or not, particularly where opera and music theatre companies and producers are presenting work beyond the existing canon, and/or that experiments with the form.

When we heard from contributors through interviews and focus groups, the term 'opera' was used almost universally. We heard the term 'music theatre' occasionally, and usually in relation to new work.

We developed a longlist of organisations (see section 2.2.1 on mapping the sector below) which formed the group for collecting and mapping data, where possible. Whilst the study focuses predominantly on England, we found some necessary overlap with organisations based in Wales, not least Welsh National Opera, but also smaller organisations regularly working in England and Wales and/or with English and Welsh partners.

The study involved four areas of research:

1. A brief literature review of existing material
2. Data collection and analysis from a range of largely quantitative sources
3. Engagement with stakeholders through interviews and focus groups
4. Case studies of practice outside England.

The main body of the report sets out how the sector undertakes production, presentation and distribution and also reflects on how the sector fits together and how it views ‘Let’s Create’. The conclusions use the six themes set out below to draw our analysis together. Throughout the text we identify areas in which the sector is engaging with ‘Let’s Create’, and in the conclusions we identify areas in which there may be opportunities for the sector to contribute more. The table below sets out how the six themes read across to ‘Let’s Create’:

	Study theme	‘Let’s Create’
1	Business models – what are the different business models currently used in the sector, and what are the specific pressures or opportunities for those models?	<ul style="list-style-type: none"> • Dynamism Investment Principle, which encourages the development of fit for the future business models
2	Who owns opera and music theatre – what are the different voices and perspectives in opera and music theatre, and how well does the sector acknowledge a breadth of practice and influence?	<ul style="list-style-type: none"> • Outcome 1, particularly widening and improving opportunities for communities, and for children and young people • Outcomes 1 and 3, supporting pathways towards sustainable careers in the creative industries (particularly for those who are under-represented, and reflecting Inclusivity and Relevance Investment Principle 4) • Outcome 2, responding to the needs and interests of communities; and in connecting people and place
3	Innovation – where is innovation taking place, in production, presentation or distribution, and what limits or supports the ambitions of the sector to develop its practices?	<ul style="list-style-type: none"> • Outcome 3, supporting new types of creative practice, new forms of cultural content and new ways of reaching new and existing audiences and participants; and innovation and research and development in the sector • Dynamism Investment Principle, reflecting innovation in business models and engaging with new technologies and audience habits • Ambition and Quality Investment Principle as evidenced in the work. • Inclusivity and Relevance Investment Principle, reflecting the range of places innovation might come from

	Study theme	'Let's Create'
4	Audiences and participants – how does the sector's engagement with the public work, what can we say about gaps and areas in which progress is being made? Who might future participants be and how could the sector engage a far broader public in future?	<ul style="list-style-type: none"> • Outcomes 1, 2 and 3 through engagement with individuals, communities and through provision of work to audiences. • Inclusivity and Relevance Investment Principle
5	Talent and leadership development – how does talent (in <i>all</i> areas of production) develop and move through the system, and what supports or inhibits this?	<ul style="list-style-type: none"> • Outcome 3, in providing opportunities for people to start and sustain a professional career; and in considering how world-class culture is brought to audiences in England. • Ambition and Quality Investment Principle • Inclusivity and Relevance Investment Principle
6	Place and geography – how well the country as a whole is served by current opera provision, as well as how the sector sees relationships with place, and engages with – or understands – place-based policies like priority places?	<ul style="list-style-type: none"> • Outcome 1, in providing opportunities to communities, and in and outside school • Outcome 2, in providing a range of cultural opportunities wherever people live, responding to community interests and needs and connecting people and place through place-based partnerships.

2.1 Literature review

We searched for existing material on the opera and music theatre sector in England from academic sources, grey literature (e.g. reports, evaluations, policy analysis and other material produced by organisations, researchers and consultancies), directly from organisations and sector networks, and via newspapers and sector publications. We focused upon material which helped contextualise or interpret the other research. In some cases, this includes earlier studies of the opera and music theatre sector, typically focusing on specific parts of the sector – for example the Eyre report on London Lyric Theatre, the Devlin and Ackrill report on small and middle-scale opera and music theatre and the Arts Council England-commissioned review of regularly funded opera and ballet companies (Eyre, 1998; Devlin and Ackrill, 2010; Arts Council England, 2014).

There is a wider range of existing literature which explores the history of opera and music theatre as a practice in Europe and the UK. There is also an active research community which spans historical and musicological engagement with opera and music theatre and connects with work on the way in which opera and music theatre works now, often including contributions from academics, researchers and practitioners in the sector, and so there are fora in which these broader perspectives are brought together in interesting ways. Where this work does not directly provide evidence of the contemporary operations and practices of the opera and music theatre sector in England or the UK, this study does not reference this material because it is outside the scope.

The bibliography for the literature review is included in Appendix D.

2.2 Data collection and analysis

2.2.1 Mapping the sector

We mapped opera and music theatre organisations in England regardless of their Arts Council England funding status. This list was assembled from a combination of information provided by Arts Council England, the literature review, analyses of Charity Commission and Companies House records by MyCake and lists generated by DataCity's AI-driven organisation classification tool (thedatacity.com). This list was then manually sense-checked to compile a list of 108 organisations across England that were active in 2018 and could be included in some element of the data available to this study, being active, formally constituted and substantially focused on the production and presentation of opera and music theatre.⁴ The list may not be exhaustive, but we believe it to be substantively complete, and is included in Appendix B.

2.2.2 Audience and participant data

Audience data came from several sources. For twelve organisations regularly funded by Arts Council England (that were in the 2018-22 National Portfolio), we used the summary returns on total audience numbers and income (including live, broadcast, screening and online audiences) as well as learning and participation activity. Most of this data covered 2018/19 to 2021/22, but we also had access to 2022/23 returns, to extend some of the summary figures further towards the present. Since 2022/23, some of the organisations in the National Portfolio have changed (or the activity included within the scope of their funding has changed) due to the advent of a new portfolio, with this current portfolio running from 2023 to 2027.⁵

This National Portfolio data was supplemented by individual requests for data from organisations (e.g. where data was missing, or where the data provided included different parts of the organisation's activity in different years). We also used survey-based demographic profile data for individual organisations, whether provided directly by them, or from The Audience Agency's Audience Answers service (based on the organisations' preferences for the source used).

We combined these sources about National Portfolio Organisations with several which gave a wider view of audiences for opera. We used Audience Answers transactional data (for events coded as 'opera' aggregated from nineteen organisations' box office systems, accounting for >90% of tickets to opera events in Audience Answers) to provide a profile of opera audiences from a wider pool of organisations, to identify changes in the profile of opera audiences since before the Covid-19 pandemic and to identify key differences within the overall opera audience (e.g. the difference in profile between those living in London and across the rest of the country). We requested summary information about audiences from Ambassadors Theatre Group, who had offered to provide it during their interview, but at the point of publication we have not received it and consequently are unable to include it in this report. We also requested some summary audience profile information from some individual 'country house' opera companies, although we only received it from one (If Opera).

We used the Department for Digital, Culture, Media and Sport's Taking Part data for a longitudinal view of engagement in opera across the whole (adult) population and as an

⁴ When mapping organisations, we found organisations who had both started trading and ceased trading in the last ten years, including in very recent years. This is discussed further in section 4.3.

⁵ As of January 2024, Arts Council England has announced an extension of its National Portfolio and Creative People and Places programmes for an additional year, leading the current portfolio to be in operation until 31 March 2027.

additional perspective on the demographic profile of opera attenders. This series ends in 2019/20 (and its replacement, the DCMS' Participation survey, doesn't include opera as a separate category in its findings).

We also used data from The Audience Agency's Cultural Participation Monitor (a nationally representative online panel survey) to provide contextual information on the broad appeal of opera performances (live, screened and online/on TV) overall and across different groups and geographical areas. In addition, we had access to a range of other reports and anecdotal contributions in relation to specific audiences, organisations, and programmes, as listed in the bibliography.

The collection of data about audiences was contextualised by the stakeholder consultation, with audiences being a key part of many of the discussions (including, but not limited to, those with Heads of Audiences and equivalent roles, with venues, and with individual opera companies). We did not directly consult audiences themselves, although this could be a useful area of future research for the sector; there are examples of recent audience surveys, but typically on a relatively small scale in terms of building a national picture (e.g. Norwich Theatre, 2023).

2.2.3 Data on productions, repertoire and artists

We sourced data on opera productions, repertoire and artists from Operabase (<https://www.operabase.com/>), a company which specialises in providing information about opera performances. The main dataset that we used was a download of the productions and performances in the UK between 2017 and 2023. This included unique references to the works, locations and companies, as well as the number of productions and performances. We then cleaned and coded this data (e.g. to remove instances of orchestral classical music, de-duplicate records of co-productions and to add details of composers and dates of first performance). Whilst this is the most comprehensive single source of opera production data we could find, there are nonetheless bound to be some omissions. So, although the overall conclusions drawn from this source are reliable, specific figures are 'best available' rather than definitive. In particular, due to the cancellation and rescheduling of performances during the Covid-19 pandemic, we have excluded performance listings from analysis that were between April 2020 and July 2021 ('step 4' of the roadmap at the end of the third national lockdown). This was because we did not have a consistent way of knowing, across the whole dataset, which events did or did not take place during this time, or which were duplicated due to rescheduling.

2.2.4 Financial data

Across the longlist of 108 organisations assembled for the sector mapping, 77 organisations produce financial data which is available via a public source (Companies House or the Charity Commission) at an appropriate (though still high-level) level of detail, which is, nonetheless, sufficient to enable us to undertake meaningful analysis of the different financial models which are common across the sector. As with other data in this report, comparison across the sector is complicated by the fact that there are a small number of large organisations and additionally one very large organisation (the Royal Opera House, which produces ballet as well as opera); many of the organisations on that list of 77 are relatively small.

To make the analysis of this data meaningful, we coded organisations by a number of key variables:

- By the main area of income (e.g. commercial and trading income including box office, donations, and grant income)

- By size
- By region
- By their main type of opera and music theatre activity (e.g. presenting opera year-round on a main stage, presenting a limited season of opera in a festival/country house setting, touring, community/education work, and talent development).

Organisations are assigned the one category which most closely fits their main activities.

These different variables enabled us to explore business models in a range of ways. Where the data looks at sub-groups by any of these variables, it typically looks at a calculation of the median within a sub-group – i.e. the average proportion of income or expenditure from a particular source, for a typical organisation within that sub-group.

There are several things which affect the quality of the data available through public sources:

- The level of detail which is publicly available. Some organisations from the longlist had to be removed from analysis because only very limited data was available.
- How organisations categorise their income, and particularly their expenditure, which may not always be consistent from year to year, nor necessarily the same as other comparable organisations.

Finally, we were also able to draw down data on grants from 360Giving, which is a charity helping organisations to publish their grants data openly, and in a standardised way. This data gives us a picture of grant-making to organisations in the opera and music theatre sector from several key grant-makers, including Arts Council England and four major trusts and foundations who fund arts and culture, as well as a number of other funders. This data has some limitations, and MyCake has filled in some gaps in data where possible. The 360Giving data does, however, give us an overall picture of:

- Grant-making to the OMT sector across the larger trusts and foundations which regularly fund arts and cultural activities
- The breadth of funders to the sector, and the broad proportional relationship between Arts Council England funding and trusts and foundations' funding.

2.2.5 Open call

We also put out an open call for organisations or individuals to share data with us. We received only a small number of responses to the open call, and from this a small amount of useful material was received and included largely within the literature review.

2.2.6 The impact of Covid-19 on analysis

Both the research team and the consultees have, inevitably, been hampered in forming an understanding of the opera and music theatre sector 'now' by the impact and legacy of Covid-19. Pre-pandemic data is now several years old. Data during the pandemic is largely either atypical (in volume, but also type of activity), missing (through a break in activity, or the means to measuring it) or misleading (e.g. of events that were rescheduled, or did not take place). Data since the pandemic (a framing which itself some would challenge, given the ongoing presence and impact of Covid-19) is also challenging. Some includes periods of 'recovery' (and hence, for example, include engagement levels which are lower earlier than later). It is also unclear how far circumstances have reached a 'new normal' (or whether that is even a useful idea), let alone whether that is true for all places or companies equally. For example, there is evidence that engagement levels appear to have recovered faster in London than elsewhere: but we cannot know for sure whether those other places are proving slower to recover, or have already recovered as far as they are going to. The expected variability found when focusing on relatively narrow slices of time is an additional challenge

in the post-Covid situation (with individual productions or performances paying an outsize role, compared to a scenario where analysis could be carried out based on a consistent five-year period, for example).

To address this, we have used a variety of approaches. In some cases, we have used pre- and post-Covid averages of a couple of years of data (to reduce the impact of variability). In others we have differentiated areas where Covid-19 impacts may be different. We have also, when looking at overall figures such as the range of titles being staged, or relative number of performances by different producers, excluded the March 2020-July 2021 period (covering the period between the build-up to the first national lockdown to the conclusion of 'step 4' of the roadmap at the end of the third national lockdown). Whilst we could check individual productions and organisations for this period, it was not practicable to look at all with equal rigour; in any case, the proportions shown in the overall picture is not substantially different for these measures by excluding this period.

2.3 Stakeholder engagement

Hearing from different contributors in the sector about their experiences and views of opera and music theatre in England was an important element. We undertook a series of interviews and focus groups, with a focus on the groups set out in the table below. In most cases, we were able to engage with a sample of organisations or individuals in these groupings; we sought, where possible, to ensure that within these samples a range of practices, organisation sizes, geographical places and experiences were represented.

Stakeholder Type	Number of stakeholders
Organisations whose core activity is opera and music theatre who are regularly funded by Arts Council England in all or part of the period from 2018/2019 onwards	13 organisations
Organisations regularly funded by Arts Council England whose activity includes (but is not exclusively focused on) opera and music theatre	5 organisations
Organisations not in receipt of regular funding by Arts Council England, whose core activity is opera and music theatre, including country house/summer festivals and smaller organisations	12 organisations
Large and mid-scale venues which receive(d) opera and music theatre, some of which are regularly funded by Arts Council England	6 organisations (including some running multiple venues)
Unions for key talent areas in opera and music theatre	3 organisations
Music conservatoires, via Conservatoires UK	3 organisations
Freelance and employed singers, choristers and répétiteurs	8 individuals
Freelance directors and creative design and specialist practitioners	8 individuals
Freelancer producers, including those working with big and small organisations, and instigating their own work	8 individuals

Reflecting the mapping figure of 108 organisations noted in 2.2.1, therefore, this study consulted in depth with 25 of those organisations, alongside freelancers, and other organisations involved in supporting or engaging with the opera and music theatre sector.

All freelance participants were offered payment for their contribution to this project.

This selection of stakeholders reflects a focus on decision-makers in opera and music theatre, and a focus on individuals or roles where a degree of creative autonomy is

available; it does not, however, cover every organisation or type of role in the sector which fits this profile. Furthermore, there is a wider workforce – artistic, specialist and administrative – which is not reflected in this selection. To make interviews and focus groups meaningful within the timescales and resources available for this study, in some cases we necessarily made choices about which groups to prioritise. It is not a comprehensive study of the sector, and where we identify potential further work, we have also suggested key groups with whom engagement might be valuable.

Participants were asked to engage with a range of questions, including some standardised questions for all participants, about their careers and/or their organisations, their ambitions for opera and music theatre, their experiences of the sector and their perspectives on its future. Appendix A includes a list of contributors.

2.4 Case studies

When we began this study, we were asked to look for examples of interesting practice and activity from outside England, which might have some relevant learning for the opera and music theatre sector in England. These case studies are not intended as exemplars or to suggest ways that work in England should be done, either by Arts Council England as the commissioner of this study or by the study's authors. Rather, they present areas where different approaches are being tried out, and learning is taking place. In addition, they enable us to recognise the wider community of practice in opera and music theatre, in the UK and beyond, and to acknowledge some of the models and approaches which are used elsewhere.

Following some of the examples offered by interview and focus group participants, and discussions with staff at Arts Council England, three topics were identified as follows:

- Co-creation
- Partnerships
- New work

Case studies are based on:

- Material available in the public domain (e.g. evaluation reports, other written material, websites, etc);
- A small number of conversations with key stakeholders, where appropriate.

3 Production

This part of the report looks at how the sector makes opera and music theatre. For any reader less familiar with the opera and music theatre sector, the paragraphs below set out some basic terms commonly used in the sector:

The sector includes a range of organisations producing (making) opera and music theatre. A production is an interpretation and realisation of a piece of opera and music theatre repertoire; typically the repertoire is a score (music) and libretto (words) already published, but where work is newer or more experimental the production process itself may develop some of the music and other elements.

Organisations make new productions, sometimes individually and sometimes with other partners (usually other opera and music theatre organisations), known as co-productions. Organisations also revive existing productions, with some, if not all, costumes, sets, lighting, stage and artistic direction and other facets of an existing production being used again. Organisations also commission new works from composers, librettists and other creative practitioners.

Typically, productions receive a number of performances though one-off events, though infrequent, are not unknown. Some organisations run their own venues and perform there, or have a relationship with a venue which is a 'home base'. Some organisations tour productions – in addition to, or instead of remaining in a single 'home base' – to a range of 'receiving' venues run by other organisations.

Organisations producing opera and music theatre bring together a wide range of creative talent from different disciplines, both on and off stage. Some talent is engaged on a freelance basis, often production-by-production. In some cases, opera and music theatre organisations work with established ensembles – e.g. orchestras – who employ musicians or retain them on a range of different bases. In some organisations, creative talent is employed in-house, and may include an employed orchestra and an employed chorus.

Many organisations in the opera and music theatre sector undertake learning and participation activities; some organisations focus their work in this area and may develop productions with members of the community. There are also organisations whose focus is on developing the talent of artists who are just beginning to work in opera and music theatre, and their work may include productions, training and other kinds of development and support, including skills in working with specific kinds of audiences and/or participants.

3.1 Who is producing opera and music theatre

Opera and music theatre is produced in England by more than 100 organisations, ranging from very large producing organisations performing throughout the year to very small organisations, producing work less regularly. Around 60% of these organisations are based in London and the South. More than half of the performances given in England are produced by five organisations, three of which are currently based in London and the South. Organisations' activities vary, and those undertaking main stage productions year-round are the largest, both in turnover and output, alongside the largest festival/country house organisations.

To map the sector and its activities, this report uses data from Operabase and a mapping of opera and music theatre organisations undertaken from sector listings, Companies House, the Charity Commission and a range of other sources. Our mapping gives us an overview of

the number and type of organisations, where they are based and their turnover. Operabase provides us with a picture of how many performances companies are staging, and what repertoire they produce. Table 1 sets out the overview of the 108 organisations we have mapped:

Table 1: Number and type of organisations

Organisation Type	No.
Large-scale main stage presentation	4
Festival/country house	20
Touring	32
Community/education	12
Talent development	7
Other	33
Total	108

Source: Mapping for Arts Council England OMT Analysis

Organisations above are grouped by their main area of activity and are allocated to one category only. Large-scale main stage presentation refers to organisations based in a main 'home' location who present opera and music theatre in that location in multiple seasons throughout the year; some of these organisations also tour productions. Festival/country house organisations typically present a limited season of opera in a festival/country house setting. Touring companies are those without a 'home' base who regularly tour to multiple locations. Community/education organisations include youth opera organisations for those prior to HE training and community-centre organisations. Talent development includes organisations focused on the development of professional talent, post or concurrent with HE training. 'Other' organisations typically reflects those with no regular pattern of work, moving from project to project or with a specialist focus beyond those already listed.

The companies listed in the Operabase data as producing most opera performances in the UK between 2017 and 2023 are as follows:

Table 2: Share of UK performances by opera company

For the period 2017-2023 (excluding April 2020-July 2021).

Rank	Opera Company / Producing Organisation	% Total	Cumulative Total
1	Royal Opera House	16%	16%
2	Glyndebourne / Glyndebourne Festival	12%	28%
3	Opera North	7%	35%
4	English National Opera	6%	41%
5	English Touring Opera	6%	47%
6	Grimeborn Opera Festival	4%	51%
7	Welsh National Opera	4%	55%
8	Ellen Kent International	3%	58%
9	Opera Holland Park	3%	61%
10	Garsington Opera	3%	64%
11	Charles Court Opera	2%	66%
12	OperaUpClose	2%	68%
13	Longborough Festival Opera	2%	69%
14	Grange Park Opera	1%	71%
15	The Grange Festival	1%	72%
16	HGO (formerly Hamstead Garden Opera)	1%	73%
17	Nevil Holt Opera	1%	74%
18	If Opera	1%	75%
19	Opera Anywhere	1%	76%
20	Opera della Luna	1%	77%

Source: Operabase data. Note: Joint productions have been shared between partners. The next 20 producing organisations account for a further 8% and include several country house opera companies, conservatoires, and a range of smaller companies.

Comparing the pair of years 2017 and 2018 with 2022 and 2023 [using pairs of years to even out substantial annual fluctuations], there has been a moderate shift in the balance of the organisations staging opera performances. The Royal Opera House (with the number of performances up around 1/3, due to the refurbishment of the Linbury Theatre which was taking place in the earlier period) and country house opera companies (inc. Glyndebourne, Opera Holland Park, Grange Park Opera, HGO; up around 10%) are staging more. Other national portfolio and publicly-funded organisations (inc. WNO, Opera North, ETO, ENO) are down around 15-20%. Annual fluctuations (including one-off variations due to redevelopments, changes in touring arrangements, or comprehensiveness of aggregate performance data) mean that definitive comparisons over time are challenging. However, there appears to be similar levels in the number of opera performances staged each year overall, but with a likely net shift from publicly funded to country house opera.

There has also been substantial growth in the level of national and international co-production in 2022 and 2023, compared to 2018 and 2019. These perhaps reflect attempts to manage costs in an increasingly challenging environment, with unevenly distributed commercial opportunities (with more opportunities in London and the home counties).

Figure 1: Distribution of 108 opera and music theatre organisations across the England⁶ by category

(Based on the address of their registered office in 2022)



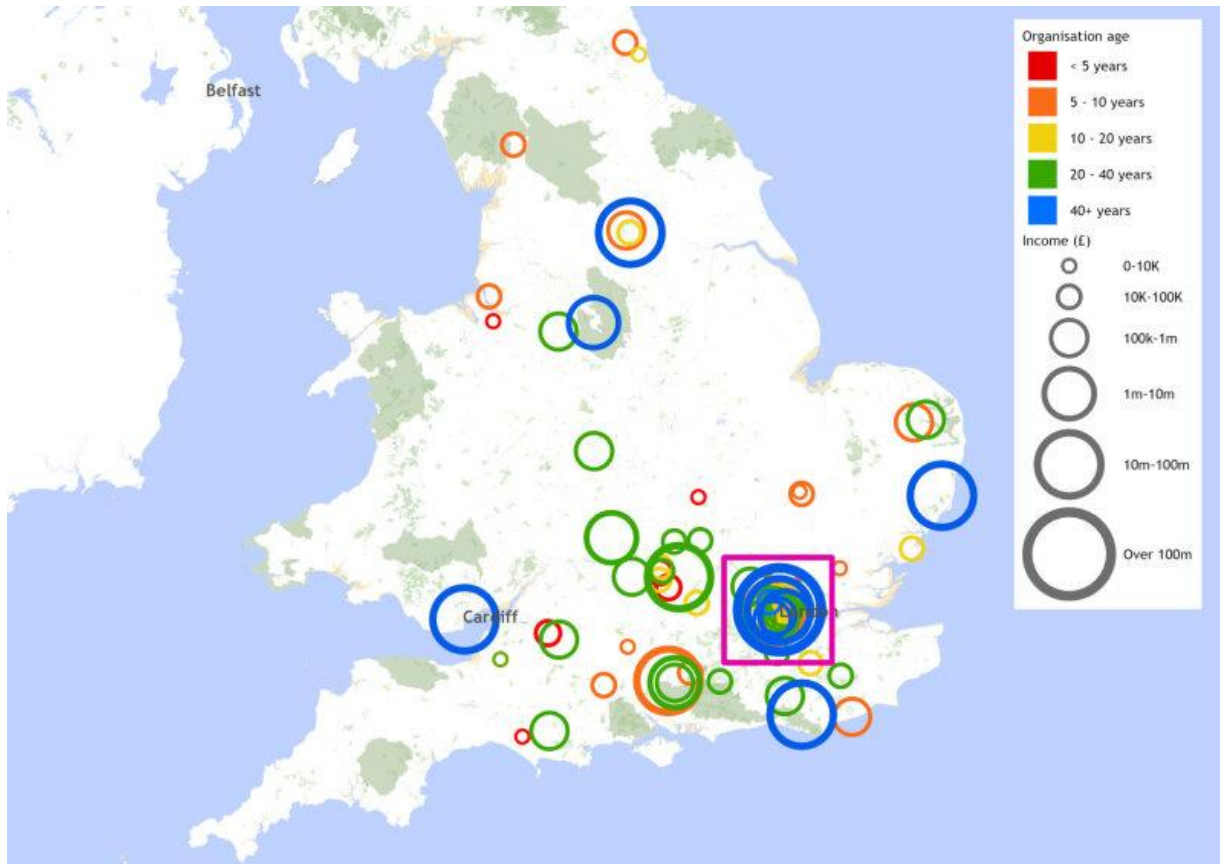
Some organisations are currently based in London, but deliver much, or all, of their work elsewhere (e.g. Streetwise Opera, ETO [which is on Arts Council England’s Transfer programme, to move out of London⁷]). This data is taken from financial data gathered by MyCake for this study, with a couple of adjustments where changes to location were known (e.g. Mahogany Opera, Opera Up Close and Tête à Tête, which are shown at their new locations outside London).

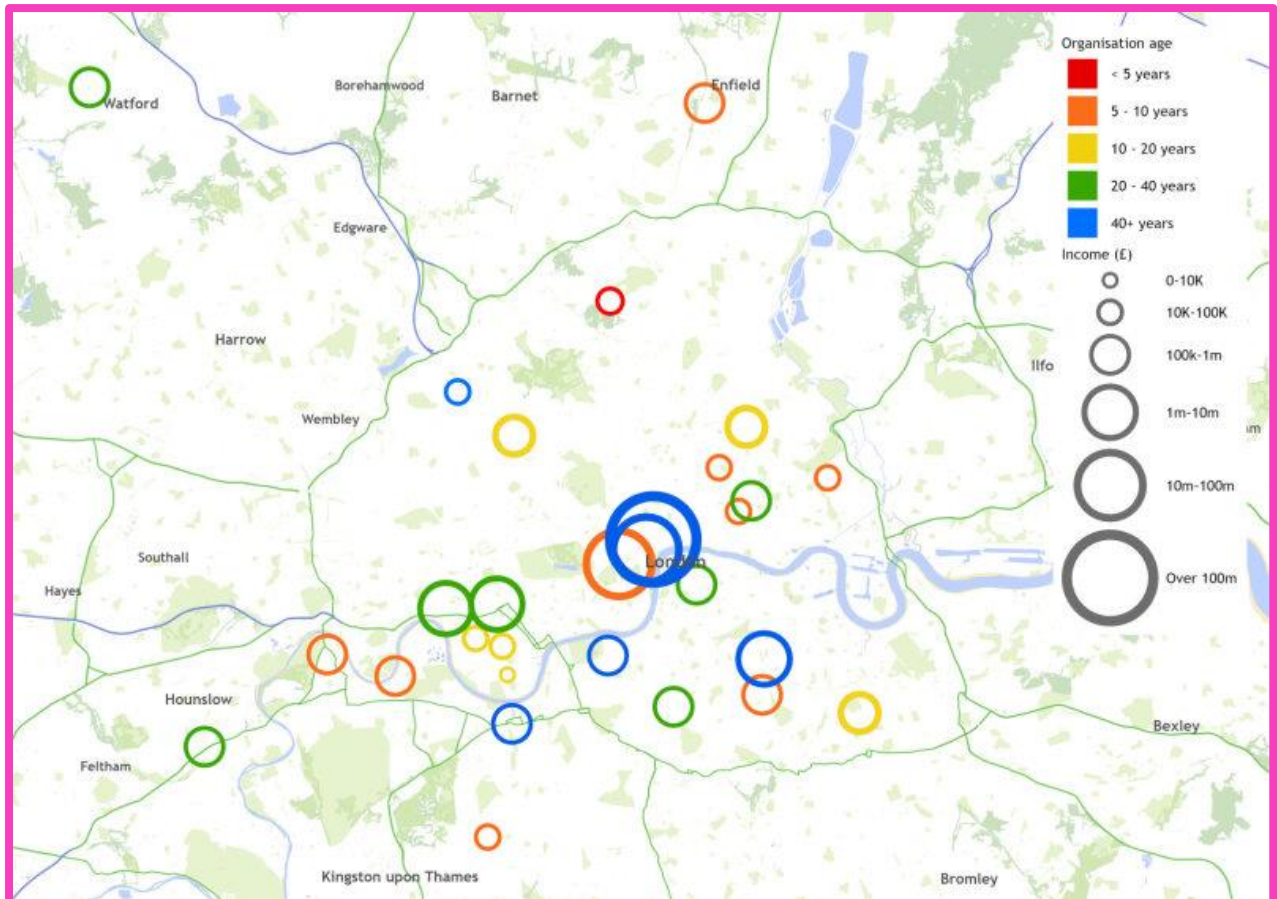
⁶ With the exception of Welsh National Opera, based in Cardiff, Wales.

⁷ For details of the transfer Programme, see <https://www.artscouncil.org.uk/2023-26-investment-programme-transfer-programme>

Figure 2: Opera companies included in this study, by age of founding with circle sizes scaled by turnover.

(Based on the address of their registered office).





The most established organisations are mostly in the South, with the highest concentration of newer organisations also spread across London and the home counties (with clusters in central Hampshire, around Oxford, and across Surrey and Sussex). With Leeds a notable exception, there are relatively few companies in the East Midlands or across the North. In the time we have been undertaking this study, English National Opera (ENO) has announced a new partnership with Greater Manchester, and expects to bring ENO's activities to a main base in the city-region by 2029. English Touring Opera (ETO) is also on the Transfer Programme, exploring the feasibility of moving its offices out of London.

In London, there is a cluster of older, centrally-based organisations (e.g. the Royal Opera House, English National Opera) as well as a cluster of mostly long-established organisations in west London, around Holland Park.

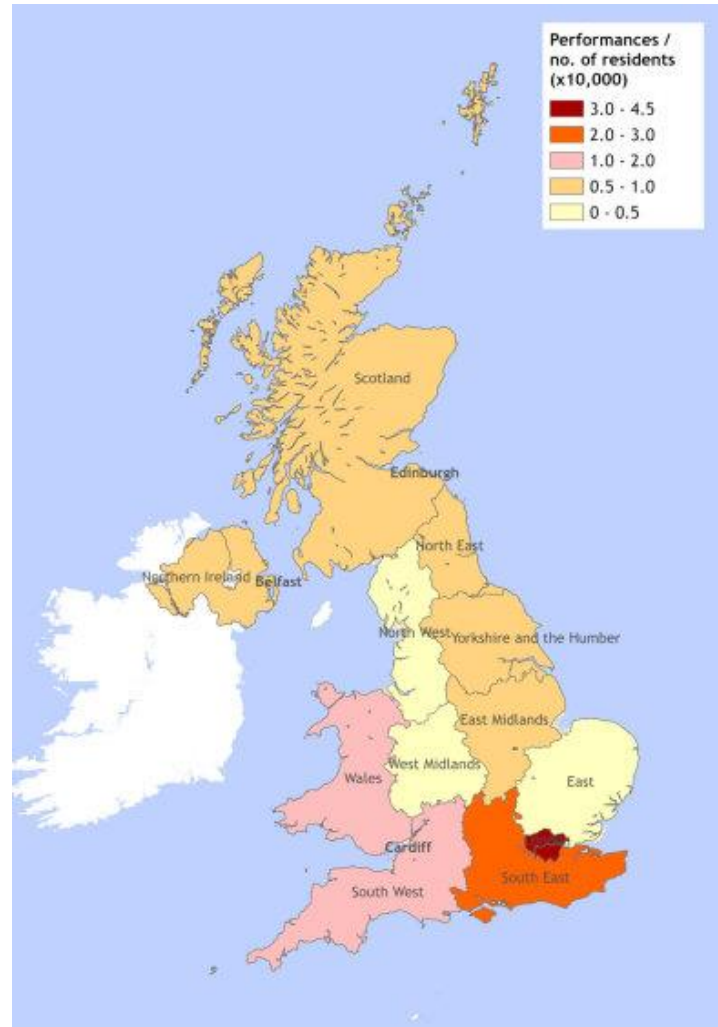
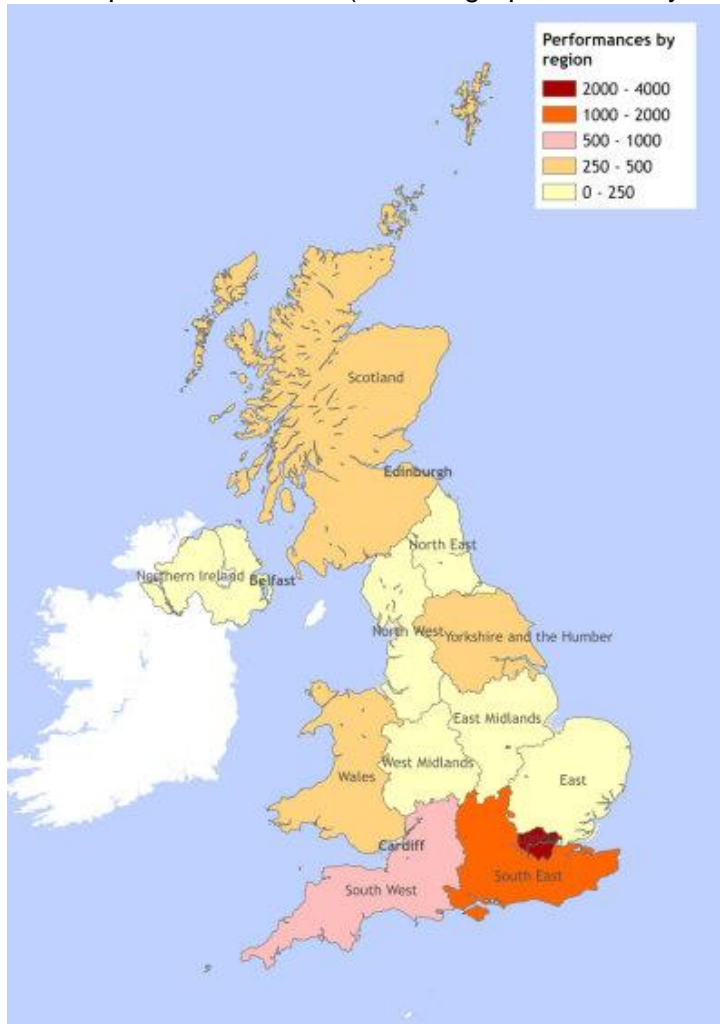
Opera North stands out, as – currently – the only large-scale opera company in England based in a city outside London (although there is also WNO in Cardiff and ENO are moving their registered address to Greater Manchester). The limited number and scale of other organisations based north (and east) of the Watford Gap is notable, compared to those to the south and west.

The geographical disparities are not only in the distribution of production of opera, but also in its performance. The following map shows the relative number of performances by region and nation across the UK and highlights the lower levels beyond London and the South East.

Figure 3: Distribution of opera performances across the UK by region

a) Overall, b) Per 10,000 residents

For the period 2017-2023 (excluding April 2020-July 2021)



Source: Operabase data (2017-2023).

3.2 What opera and music theatre repertoire is being produced

Opera performances in England (between 2017 and 2023) were heavily focused on a core repertoire, the 25 most frequently performed of which are all over 100 years old. New work is much less performed (and where it is, mainly in London) and often struggles to get a second performance or run, a challenge facing new work reflected across the music (and wider arts) sector(s).

Table 3: Opera performances in England by most popular titles

For the period 2017-2023 (excluding April 2020-July 2021)

Rank	Opera (/common translated name)	No. of Performances	% of Performances	Cumulative % of Performances
1	La Bohème	286	4.3%	4.3%
2	La traviata	232	3.5%	7.8%
3	Madama Butterfly	225	3.4%	11.2%
4	The Magic Flute	217	3.3%	14.5%
5	Carmen	193	2.9%	17.4%
6	Tosca	158	2.4%	19.8%
7	The Marriage of Figaro	152	2.3%	22.1%
8	The Barber of Seville	139	2.1%	24.2%
9	Don Giovanni	129	1.9%	26.1%
10	Così fan tutte	104	1.6%	27.7%
11	Rigoletto	103	1.6%	29.2%
12	The Mikado	90	1.4%	30.6%
13	HMS Pinafore	87	1.3%	31.9%
14	L'elisir d'amore	77	1.2%	33.1%
15	Don Pasquale	73	1.1%	34.2%
16	Aida	71	1.1%	35.2%
17	Hansel and Gretel	66	1.0%	36.2%
18	Eugene Onegin	61	0.9%	37.1%
19	Macbeth	54	0.8%	38.0%
20	Giulio Cesare in Egitto	54	0.8%	38.8%
21	La Cenerentola	53	0.8%	39.6%
22	Un ballo in maschera	50	0.8%	40.3%
23	Pagliacci	49	0.7%	41.1%
24	Dido and Aeneas	49	0.7%	41.8%
25	Orfeo ed Euridice	47	0.7%	42.5%
26	Cavalleria rusticana	46	0.7%	43.2%
27	Cendrillon	45	0.7%	43.9%
28	The Cunning Little Vixen	41	0.6%	44.5%
29	Alcina	41	0.6%	45.1%
30	The Pirates of Penzance	39	0.6%	45.7%
31	Ariadne auf Naxos	38	0.6%	46.3%
32	Turandot	38	0.6%	46.9%
33	Semele	37	0.6%	47.4%

Rank	Opera (/common translated name)	No. of Performances	% of Performances	Cumulative % of Performances
34	Gianni Schicchi	37	0.6%	48.0%
35	Patience	33	0.5%	48.5%
36	Falstaff	33	0.5%	49.0%
37	Rusalka	33	0.5%	49.5%
38	The Merry Widow	32	0.5%	50.0%
39	Lucia di Lammermoor	31	0.5%	50.4%
40	Das Rheingold	31	0.5%	50.9%

Source: Operabase data (2017-2023).

Almost 1/5th of all opera performances are of the six most popular operas: *La Bohème* (1896), *La Traviata* (1853), *Madame Butterfly* (1904), *The Magic Flute* (1791), *Carmen* (1875) and *Tosca* (1900). 28% are from the top 10 and 39% from the top 20. Half come from just 38 titles although this does leave a 'long tail' of other titles making up the other 50% (e.g. the 41st to 80th most performed titles only add a further c.14% of all performances).

Within the top 40, there are few works first performed in the last hundred years (*A Cunning Little Vixen* and *Turandot* were first performed in 1924 and 1926 respectively, and none from the post-war period (Britten's *A Turn of the Screw*, premiered in 1954, and *A Midsummer Night's Dream*, premiered in 1960, are 46th and 49th). The only British composers with works in the top 40 are Arthur Sullivan (4), Handel (3) and Purcell (1). There are no works by female composers in the top 40, indeed all are by White European men. There is an ongoing engagement by the opera and music theatre sector in the challenges of interpreting repertoire which by modern standards might be considered problematic due to (for example) the presentation of women or ethnic and national groups. Much of this repertoire remains popular with producing organisations and audiences – *Madame Butterfly*, for example, is the third most performed opera in our data – and organisations and directors are clear that contemporary interpretations often require a direct engagement with these issues.⁸

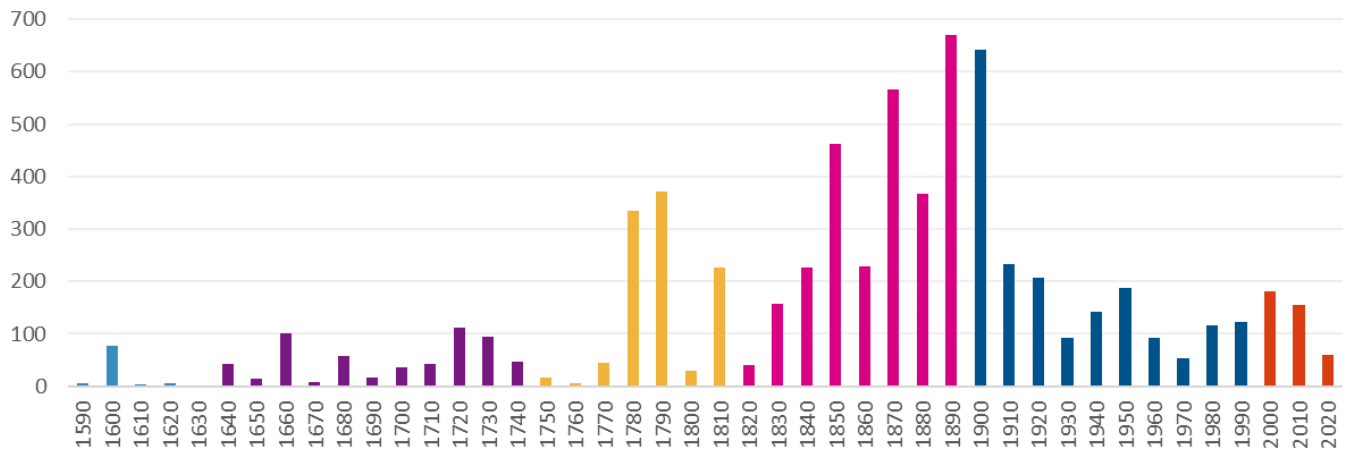
To highlight the age of the wider repertoire, the following chart shows the number of performances of works written in each decade:

⁸ Recent productions and revivals have very directly addressed the question of stereotypes and the relationship between opera and race (Nayeri, 2022).

Figure 4: Number of opera and music theatre performances by decade of first performance

For the period 2017-2023 (excluding April 2020-July 2021)

Number of performances by decade of work's first performance coloured by period



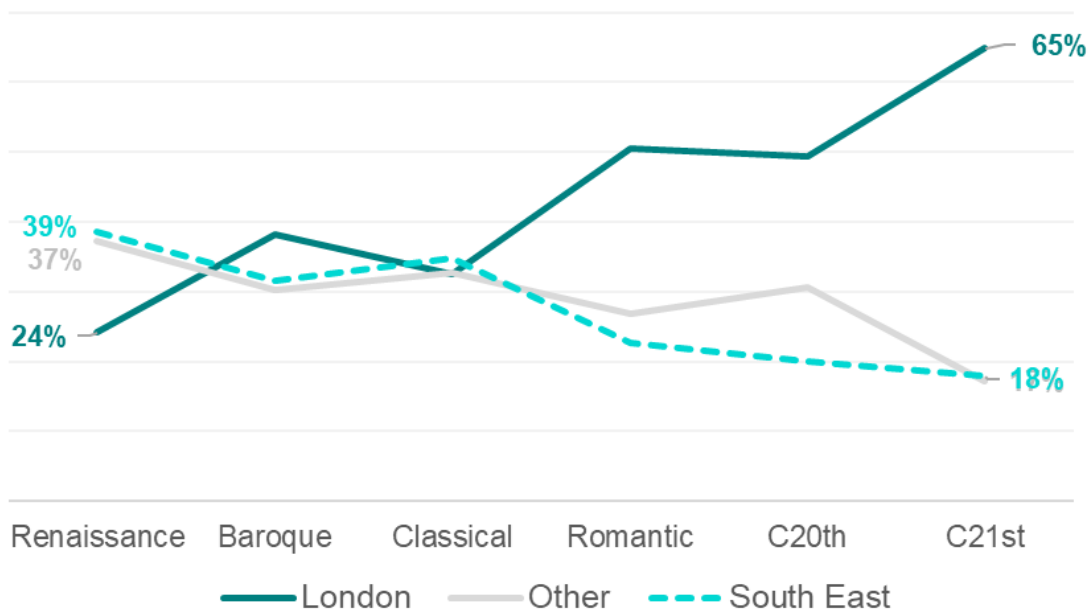
Source: Operabase data.

The dominance of the second half of the nineteenth century is clear, as are earlier peaks covering works by Mozart and Verdi.

Figure 5: Share of UK opera and music theatre performances by region and period

For the period 2017-2023 (excluding April 2020-July 2021)

Share of Performances by Period



Source: Operabase data.

Overall, 47% of opera performances in the period were in London, but 65% of performances of twenty-first century operas. 8% of London opera performances are of C21st works, but

only 4% in the South East and 4% in the rest of England. New opera is heavily concentrated in London.

Some contributors to this study feel that the stories which opera and music theatre tells are failing to connect fully with contemporary society. The key question is whose stories is opera and music theatre telling? Challenges for the sector are:

- The relative narrowness of the mainstream repertoire.
- The degree to which existing repertoire could be more openly interpreted and explored, to acknowledge and address some of its challenges for contemporary audiences.

What repertoire is prioritised, and how repertoire is interpreted and presented for contemporary audiences, is affected by the prevalence of classical music paradigms in opera and music theatre, seen by some contributors as specifically inhibiting approaches which might consider the audience experience as more central to creative decision-making. Although the distinctive value of opera was often expressed in terms of the 'gesamtkunstwerk' ('total work of art', produced by the synthesis of artforms), in practice the musical elements were generally given precedence, and consequently judged by a specific set of definitions of excellence.

This manifests itself in different ways, including amongst opera and music theatre critics, who were seen by some in the sector as often quite conservative in their tastes, often in their roles for a long time (with little turnover) and almost exclusively writing from a classical music perspective (one contributor discussed the challenge of attracting theatre critics to opera, rather than classical music critics). Some contributors perceived a limited appetite from critics and audiences familiar with opera and music theatre for more significant re-interpretations of mainstream repertoire which might more substantially deviate from or play with a composer's original vision and score.

3.3 How work is commissioned, produced and presented

This section of the report sets out what we heard about why and how opera and music theatre companies in England make the work that they do, and the way in which they do it. It sets out some of the different attitudes towards risk and creative decision-making in various business models and types of work, and some of the challenges and opportunities which the sector currently identifies.

Looking at the evidence and responses from contributors, England has a committed opera and music theatre sector in which high quality productions, including exciting and new interpretations and productions, are presented to audiences who are inspired by and passionate about the artform. There is also a wealth of work with communities and participants, including work which is embedded with and led by groups who are often otherwise marginalised in society. When we ran interviews and focus groups, we asked contributors what they found exciting in the sector at the moment. Some gave us examples of work from outside England, but we also heard from contributors who were excited by recent mainstage productions in England, work undertaken by regularly funded organisations and private organisations, innovative work from smaller organisations, and the ethos and practice of community-centred organisations in the sector.

3.3.1 Larger, producing organisations

Larger, producing organisations means organisations which typically have a turnover of more than £500k, and which present their own productions and co-productions in a ‘home’ venue and/or tour to a number of regular ‘receiving’ venue partners. Within this group are the larger organisations regularly funded by Arts Council England through the national portfolio or other routes, established festival/country house organisations and some touring companies. All these organisations present most of their work in a relatively traditional format: large or mid-scale presentation of work, typically in a proscenium arch venue to a paying public audience. Organisations are differentiated by ‘home’ location and/or touring locations; these organisations also, typically, undertake some element of learning and participation work (see section 3.3.3).

Organisations in this group typically define their contribution to the sector in terms of the artform and its practices (both in the UK and internationally), for example:

- Focusing on a particular repertoire or approach to repertoire (e.g. performed in the vernacular vs the original language)
- Work which compares with the output from other international opera houses
- Championing emerging talent or bringing the best international talent to the UK.

Some of these organisations operate mostly or partly in connection with the international opera and music theatre sector, reflecting the ambitions of ‘Let’s Create’ Outcome 3 (A Creative and Cultural Country) and the Element which emphasises the importance of international connections, including through co-productions, touring and engagement with creative practitioners.⁹ Several organisations discussed ideas of quality and excellence in relation to their work, and we understand that some opera and music theatre organisations have discussed working together to create a shared language and understanding for what we mean when we talk about quality.¹⁰

Historically, some of the organisations in this category were set up by the Arts Council of Great Britain, and for an extended period of time the Arts Council (in this earlier incarnation) was significantly involved in managing elements of their work, including organising tours. More generally, many of the larger organisations in the contemporary sector have their genesis in the post-war period, and elements of the way they work now still relate to that period, for example in the company model of the Royal Opera House with both opera and ballet production.

Two main areas have been identified which differentiate the larger, mainly presenting organisations from smaller organisations in terms of their operations and business models: how they address the cost of the artform overall, and how specifically how they structure their artistic workforce, particularly the orchestral and choral ensembles.

The cost of the artform

Both larger and smaller organisations state that opera and music theatre is an expensive artform. It is labour-intensive and requires a larger number of performers and a substantial backstage team – even at a small-scale – than is typical of many other artforms. Opera and music theatre, typically, requires a large number of performers: in most of the top 50 repertoire, an orchestra, a chorus, smaller parts and principals are all typical to a full-scale production. By comparison, for example, on their own, the membership of a full symphony orchestra or cast for a Shakespeare play require considerably fewer performers; ballet is

⁹ See [Arts Council England Delivery Plan 2021-24](#).

¹⁰ Arts Council England’s strategy ‘Let’s Create’ also suggests that there is work to do in the arts sector to consider how to talk about and communicate what ‘quality’ is and means.

more comparable with opera and music theatre, with soloists, ensemble dancers (corps de ballet) and an orchestra. Opera and music theatre at this larger scale also typically requires a lengthy rehearsal period (which may be up to 6-8 weeks), for a relatively short run of performances.

When on tour larger organisations may take two or three productions to each location for a total run of four or five performances across those productions, and at their home base may move up to 5 or 6 productions on and off stage in any given week; this kind of scheduling is expensive, using significant labour resource and creating vacant spots in schedules when changeovers take place potentially limiting the number of performances. All of this is unlike, for example, typical practices for producing theatres and other artforms like musical theatre, where longer runs of a single production are more common. Limiting changeovers is a cost driver for some opera and music theatre companies.

Some choices about repertoire are made on the basis of ensuring enough well-known, mainstream repertoire which will complement existing artistic and audience and donor development plans for host venues and their audiences. New productions of core repertoire (set out in section 3.2) also offer opportunities for directors and other artists to offer their own interpretations, and for knowledgeable audiences to experience particular performers and productions, including exploring ways to produce repertoire in a way which acknowledges historic problems (e.g. different approaches to *Madame Butterfly*). Producing some repertoire – particularly all of Wagner’s *Ring Cycle* – was cited by some organisations as a significant achievement, and in particular as a marker of being viewed more seriously by the wider sector and critics.

Beyond this core, some organisations both want to and are able to include a wider range of repertoire; this comes with the explicit acknowledgement that less well-known repertoire (and sometimes new productions) can limit income contributions from tickets and donations. We heard relatively little from contributors about other innovations in production, for example the use of digital technology in live productions; however, the use of digital scenography, for example, is now becoming a more established and regular tool including in opera and music theatre in England.¹¹

With the exception of the Royal Opera House, which presents around 20 main stage opera productions a year (and around 8 in its smaller stage in the Linbury) organisations in this group typically present between 4-9 productions a year; some of these will be revivals (often around half, sometimes more), and therefore cost less to produce, and some will be new productions. The other facet of the scale of work required to mount productions is the extended planning times which opera and music theatre, particularly at a large-scale, requires. This sometimes means that organisations cannot be as flexible as they might wish to be, and that engagement with partners outside the sector – e.g. venues hosting touring productions – is challenging because planning times are shorter for those partners.

Taken together, what this suggests is that the minimum unit of risk in large and mid-scale opera and music theatre companies is large and limits the number of choices available and capacity for risk in these organisations, whether in repertoire or production.

¹¹ Dr Caitlyn Vincent identifies 60% of Royal Opera House productions in the 2019/20 crediting a projection or video designer, more than any of the previous 14 seasons (Vincent, 2021; Vincent, 2022). Vincent reviews the role of digital scenography internationally in opera and music theatre, and concludes that digital scenography is likely to be a part of opera and music theatre production, but that the sector still has some way to go to realise its potential (Vincent, 2022).

Different organisations also have other specific pressures or limitations which affect their programming choices:

- The size and scale of venues (either 'home' venues or touring venues) limits some repertoire and/or staging choices; movement of productions between venues with different limitations also brings additional requirements.
- Seating capacity affects how risks work: large capacity venues require a lot of tickets to be sold in order to provide a meaningful return.
- Where organisations own and run venues, they also need to maximise income/limit costs in periods when they are not presenting their own work, through hires/third party performances and/or via maximising secondary revenue streams around performance times (e.g. daytime catering).
- Festival/country house organisations based outside major cities, and often not well supported by transport infrastructure, typically offer a limited period summer season because that is when they believe they can mobilise audiences, who they think would not travel in periods when it is darker and the weather is less favourable.

Finally, we also heard some significant challenge to the question of *how* expensive large and mid-scale opera and music theatre is and needs to be. The growth of organisations presenting opera and music theatre as part of limited seasons is significant in part because some of those organisations feel that they present high quality work which does cost as much as work does in larger, more established organisations. The costs of producing sets, costumes and other physical elements of productions were commonly identified as an area where there is a perceived difference between what different companies feel is 'necessary' to enable a high-quality production. Artists fees were acknowledged as reflecting a competitive, international market, but were another area in which some organisations were either unable to meet some fee levels or unwilling to believe that higher fee levels were required or provided an appropriate return for the cost.

Ensemble Models

Larger producing organisations within the sector place significant value on ensemble models – retained groups of musicians making up orchestras and choruses – which maintain a high standard of specialist musicianship and at least in part through regular working together, whether via in-house ensembles or partnership with established ensembles (particularly professional orchestras), believing that these approaches enable a better-quality artistic output.

This is achieved in different ways by different types of organisations, reflecting different patterns of work, artistic ambitions and strengths, and financial resources. Some festival/country house organisations have established relationships with orchestras (symphony, chamber and specialist). This is seen as crucial to establishing and maintaining 'quality', for example working with a specialist baroque orchestra enhances an organisation's credentials in presenting opera and music theatre from that period. Some organisations (e.g. Glyndebourne) have worked in this way for a long time, other festival/country house models have moved from relationships with freelance/scratch orchestras to relationships with more established orchestras more recently to achieve that quality in their work.

There are other festival/country house organisations and larger touring companies who recruit annually on a membership basis for their orchestras. Choruses and principal roles in festival/country house models are more typically managed on a seasonal basis, but there are organisations operating loose ensemble models which enable them to maintain a relationship with singers over a number of years. We identified two non-subsidised companies, both relatively new, exploring repertory ensemble models (akin to old-style theatre repertory companies, with a fixed salary and the potential for multiple roles) for their

performers and creative practitioners; these approaches reflect ongoing concern about the precarious nature of employment for singers and other creative practitioners, and a desire to create a 'company' feel.

The model of in-house orchestras, choruses and soloists at major opera companies has been under pressure for at least the last two decades, with large opera companies adjusting numbers and the size/time period of contracts (e.g. moving musicians and/or choristers and/or other aspects of their creative teams to part-time arrangements). As we have been writing this report, more than one company has been involved in planning or negotiations around the terms and conditions of its employed ensembles. Ensemble contracts and models have been adjusted to reflect changes to organisations' activities (e.g. rights for streaming work), and we heard about potential plans to negotiate for further adjustments, to enable organisations to deliver a wider range of activities or be more flexible about how they use the ensembles they have.

More widely, key to the way in which opera and music theatre is described by many contributors (both organisations and individuals) is the bringing together of multiple artforms, both those present in person 'on stage' and those involved in producing the look and feel of productions. This collective, creative endeavour is at the heart of how the sector views its artform; changes in how this breadth of creative work is resourced (e.g. outsourcing set-making) can limit fixed costs, but also create supply challenges. For those organisations outside London, the challenges they experience in recruiting instrumentalists, choristers and other creative and technical practitioners is also exacerbated if the offer of work is freelance and/or short-term.

What is clear is that there is a tension between several drivers and limitations:

- the income envelope available to organisations and the degree to which this can support in-house, employed specialist workforces;
- how and where specialist practitioners are available to work in non-employed models; whether different approaches to employing talent support or limit career progression and choices; and general aspirations across the sector for how work should be made (a collective, creative endeavour);
- and the needs and desire for some organisations to alter or experiment with how they work, to do things differently.

The current models of in-house employment are, effectively, a post-war approach which emerged alongside the organisations established in that period. Whilst there are organisations with permanent contracted in-house ensembles and with regular membership ensembles, there is both variation between organisations and flexibility within many contracts for ensemble musicians to make some choices about which parts of an annual schedule of work they engage with, and what they do alongside it, potentially outside their main employer. Section 5 on Talent Development considers some of these issues further.

3.3.2 Smaller organisations

This section looks at smaller organisations whose work does not typically involve presenting a regular season or seasons of work at a 'home base' including:

- organisations which produce opera and music theatre for public presentation, working in partnership with a range of venues and often touring productions and who typically undertake some form of learning and participation work alongside; and
- organisations whose work is predominantly community-centred.

Organisations in this group typically have a turnover of £1million or less.

Some of these smaller organisations also perceived opera and music theatre as an 'expensive' art-form and argued that it remained more costly than other artforms even at a smaller scale or in community-centred practice. Smaller organisations vary between those with a regular pattern of work over a year, and those who work more on a project-by-project basis (or with multiple projects running concurrently, but no fixed pattern). Like festival/country house organisations, some smaller organisations have relationships with other ensembles (e.g. chamber orchestras) and venues, and where these are in place, they are important artistic partnerships.

When making choices about repertoire, commissioning and the shape and types of activities, these smaller organisations were more typically led either directly by communities, with repertoire and production choices following, or by a specific organisational or individual artistic vision and idea which drove a production. In the former, organisations clearly understand the drivers for community-led work as set out in Outcomes 1 (Creative People) and 2 (Cultural Communities) in Let's Create. The creative process is seen itself as the means to achieving their outcomes (e.g. developing talent or supporting communities to tell their story). Many of these companies and individuals described their work as deliberately risky and disruptive; an element of this was specifically about sitting outside what they perceived to be the 'mainstream' or 'established' opera and music theatre organisations, and presenting some challenge to the ideas about what opera and music theatre are and could be.

There is evidence from very small organisations within the opera and music theatre sector in England of some innovative use of technology to develop opera and music theatre experiences, which are often site-specific, and quite different to traditional presentation approaches. The importance of specific skills, including digital skills, not necessarily common in the opera and music theatre world (e.g. sound design) was crucial, and changed the nature of the creative process itself. Organisations and individuals making this kind of work talked about the value of immersive and semi-participatory experiences for audiences, but were less convinced that the wider opera and music theatre sector understood or appreciated this kind of innovation.

For those involved in developing productions to tour or be presented in venues or at festivals, there is significant personal liability for very small companies, where individuals were sometimes personally underwriting the risks of developing productions. Festivals like Grimeborn (delivered by Arcola Theatre) and organisations like Tête à Tête are considered crucial first places for organisations and individuals to bring their work. Neither model, however, underwrites all the productions costs, and so participating individuals and organisations take on some of the risk themselves. There is a significant challenge for many in finding the next place – or the next rung on the ladder – after these initial, showcase-type opportunities.

3.3.3 Learning and participation

Learning and participation is a key part of many opera and music theatre companies' work. It is beyond the scope of this study to consider in detail the range and depth of work in this area, and aggregating data (e.g. adding up participation figures from organisations regularly funded by Arts Council England) is not meaningful given the range of different kinds of interactions and impacts different projects and activities support. There is work, for example, being undertaken by opera and music theatre companies to support health and wellbeing, with children and young people, developing the skills and experiences of young composers, and in a range of others areas, contributing to Outcome 2 (Cultural Communities) in Let's Create.

This section focuses on:

- The ways in which communities are *positioned* in work undertaken by the opera and music theatre sector, and therefore particularly addresses how the sector is engaging with understanding and responding to the needs and interests of communities (Outcome 2), and via Inclusivity and Relevance Investment Principle.
- Funding and policy priorities which shape the work which is undertaken by opera and music theatre organisations in relation to learning and participation.
- The relationship between the broader range of learning and participation work and other opera and music theatre activities.

Placing communities at the centre

Some organisations undertake learning and participation work which places the communities in the centre of their work, and often involves long-term engagement; this is sometimes, but not always, termed 'co-creation'.¹² The term co-creation reflects both a philosophy and a process, and for those who adopt it the value of this approach is seen as:

- Ensuring that individuals and communities have a voice in shaping their creative and cultural experiences
- Responding to local circumstances, needs and ambitions
- Developing the skills and talents of participants, sometimes over an extended period
- Allowing participants to determine their own journey
- Building relationships which have authenticity and integrity
- Working with partners who have a similar attitude towards the co-creation process.

This kind of work often includes a public facing element, which is an important part of the participants' experience. There is also evidence of some organisations thinking about how participants might, in the long-term, develop their skills and move into employment in the sector and/or influence decision-making and leadership within organisations. In doing so, these approaches are seeking to address directly issues of diversity and inclusion in the sector, and the questions of both 'whose stories are being told' (explored further in Section 3.2) and 'who is telling the stories' (explored further in Section 5) in opera and music theatre.

This kind of work can be challenging, and key issues for the sector are:

- The availability of a skilled workforce from within opera and music theatre, with experiences of co-creation and other participatory approaches.
- Ensuring that work is given the proper time, space and resources, particularly to support marginalised groups or those with specific access needs both within participant groups and the workforce.

Funding and policy priorities

Aspects of existing funding (both public and trusts and foundations) and policy priorities provide a complex set of challenges and opportunities for this kind of work, including:

- The comparatively limited opportunities to secure funding for long-term work with communities, rather than for 'new' projects or work with 'new' communities (beyond

¹² The term co-creation is now widely used to refer to a range of practices and work, some of which seem to indicate partnerships and others which refer more explicitly to different approaches to decision-making and creative hierarchies in cultural practices and projects (Matarasso, 2017). This section includes a brief case study of a recent trans-national co-creation project, Traction, in which there was significant work to 'formalise' the idea of co-creation as a practice; the project developed both the principles of co-creation as a practice and some tools for co-creation, [which are openly available](#).

those organisations who are regularly funded to do long-term work with communities by Arts Council England).

- Difficulties in maintaining momentum for organisations working project-to-project, particularly where they wish to ensure an ongoing relationship with a community; in smaller companies, there is also the issue of personal liability, with staff and trustees operating with no resources between funded projects.
- Gaps in music provision in schools (particularly in the absence of specialist or experienced music teachers) where organisations find themselves delivering the only music provision in schools or working with children and young people who have had minimal music experiences and education inside or outside of school.
- Changes to Bridge organisations creating an absence the ‘infrastructural support’ which connects the cultural and education sectors; this concerned several organisations who had previously worked with their regional Bridge organisation to connect into schools.¹³ More generally, work in schools is considered increasingly challenging as a result of limited budgets in schools, and the time required for organisations to make connections to schools they don’t yet work with.

How this work relates to the wider sector

There is interest in thinking about how the current learning and participation activities of opera and music theatre organisations might be more strategic, both in:

- Providing participants with routes through and between organisations (and potential progression from participation and into skills and talent development); and
- In connecting the practice and activities of different organisations.

There is evidence, however, of a disjunction between learning and participation activities and the wider opera and music theatre sector. Practitioners and specialist organisations in learning and participation feel that this work:

- Is not well or widely understood as a specialist practice, or valued more widely in the opera and music theatre sector as such;
- Not as valued by the sector as other kinds of work (e.g. professional performances on-stage).

Terms like ‘excellence’ and debates about the relationship between ‘excellence’ and ‘participation’ are indicative of the way in which opera and music theatre still retains unhelpful hierarchies about what kinds of work are valued, and what is considered to be ‘opera’ (or not).

Case Study – Co-creation and technology

Traction project and Irish National Opera’s experience

As part of the discussion guide we used when contributors were interviewed or participated in focus groups, we asked for examples of projects or activities which excited or inspired them in the wider opera and music theatre sector, both in England and elsewhere. The Traction project was mentioned by more than one contributor as an example of a project with a strong co-creation philosophy and methodology at its heart, and as an interesting example of partnership working and transnational knowledge sharing and learning.

¹³ This change is noted in the recent report on the Bridge Network, which states that: ‘from March 2023, for the first time in over 40 years, cultural learning has no form of infrastructural support that explicitly recognises the need for linkage between the cultural and education sectors’ (Parker, 2023).

The Traction project was funded by the EU's Horizon 2020 Research and Innovation Programme and involved opera and music theatre organisations in three countries (Spain, Portugal and Ireland) partnering with art schools, higher education institutions, technology companies and academics and researchers from Spain, Portugal, the Netherlands, Republic of Ireland and France over a three-year period (2020-2022). The project sought directly to address questions of inequality for European citizens, to acknowledge that opera – as part of a European cultural heritage – risks reinforcing inequalities and to find a way for opera to 'renew' itself through alternative approaches. Both co-creation and technology played a key role in the innovations which this project explored.

The project produced three new co-created operas, which were performed in traditional and non-traditional spaces. 130 non-professional artists and community members were involved, with communities from the Raval area of Barcelona, a youth training prison in Leiria (in the Central Region of Portugal) and from across Ireland (including its islands) co-creating work alongside professional composers, librettists and performers. The co-creation process was different for each project, and in some cases changed as projects progressed. Projects also both engaged with technology and presented their exploratory operas in different ways.

Irish National Opera, seeking to engage and serve communities from across the Republic, used Virtual Reality to create and present an opera which is currently being shown in various locations and at events around Ireland, and which may travel beyond Ireland in time. Key learning for INO and its partners in this project relates both to co-creation as an approach and to engagement with new technologies. The project engaged communities in stages, beginning with workshops in specific areas of activity (e.g. writing) and then offering other activities to follow on; some participants engaged in different elements across the period of the project, others came in for one or two stages only.

The experience for artists was challenging; engaging in a complex and open-ended process which involves a very different power dynamic from the one they might normally experience. The VR element of the project gave INO a way into some communities or groups where the idea of 'opera' was not initially exciting, but the idea of the technology was. The work's journey to being fully screened happened in stages, and so initial screenings were of partly finished work. Working with a commercial technology provider also brought challenges, particularly managing scope and expectations in order to deliver a meaningful project.

Whilst working with VR has provided INO with significant experience in this area (and some equipment), INO is not necessarily planning to work with VR again in the immediate future. Co-creation is a process that INO has gained significant experience of through the Traction project, learning from the other partners and the reflective learning approach which has been key to the wider project.

The learning approach at the heart of how Traction has been organised as a project means that there are substantial resources available in the wider public domain about the whole project, as well as the three exploratory operas and partnerships which underpin those new productions. These are particularly important, given the increasing use of the term co-creation and emergence of practice in this area, as one of the first attempts to formally set out what co-creation is, and how it might work. These resources include tools to support co-creation, with [a set of principles and guidance on co-creation](#) and a wide variety of material giving insight into the technologies used, the experiences of participants and partners, and the potential policy implications of the work.

These resources can be found here: [Co-art | Reimagining Opera with Communities and technology](#)

3.3.4 Partnerships

The role of partners and partnerships in enabling the opera and music theatre sector to do the work it wants to do is key, and this section looks at partnerships within the sector, partnerships with organisations outside the sector, and provides a case study from outside England of partnership working in opera and music theatre.

Partnerships within the arts sector

Co-production is a core part of how work is produced in opera and music theatre, and large and small companies work in co-production relationships with partners in England, the UK and internationally¹⁴, reflecting Outcome 3 (A Creative and Cultural Country) and the Element which emphasises the importance of international connections, including through co-productions, touring and engagement with creative practitioners.

Smaller organisations and some festival/country house opera companies more typically partner with other UK companies (and with specific vehicles for philanthropic investment and collaborative production, like Opera Ventures). There are less common examples of long-term and repeated partnerships for large-scale work being co-produced with partners within the UK (e.g. WNO and Scottish Opera). This model can:

- Drive and open-up repertoire and production choices.
- Provide those composers and artists with a wider set of meaningful relationships in the sector.
- Connect partners with a similar vision and values.
- Be more challenging when partners of a different size co-produce together, reflecting something of a power imbalance.

There is evidence of collaborations across artforms and genres, including work with visual artists to develop new music theatre works, and partnerships like Opera North's 15-year relationship with South Asian Arts (SAA-UK), which recently manifested itself in the stage production of *Orpheus Reimagined*. The latter project challenged traditional opera and music theatre creative processes and exposed some interesting challenges in terms of power imbalances and how decisions are made.¹⁵

Partnerships outside the arts sector

Partnerships – particularly with those in other sectors or from very different cultural perspectives – were a key way in which opera and music theatre organisations felt they could change the perceptions of the sector and the artform and could reach people who might otherwise be put off by the word 'opera'. They also help organisations to engage with and serve particular communities, supporting the ambitions in Outcome 1 (Creative People) and Outcome 2 (Cultural Communities) in 'Let's Create'. Working with partners outside the sector has specific challenges, not least that partners in the public and third sector are vulnerable to changes in agendas and funding pressures which can affect those partnerships (an issue not unique to opera and music theatre as an artform, but something other artforms experience too).

¹⁴ These international partners are mainly from the EU (e.g. Gran Teatre del Liceu, Opera National de Paris, Gothenburg Opera, Deutsche Oper Berlin, Irish National Opera) and the US (e.g. The Metropolitan Opera, Houston Grand Opera, San Francisco Opera, Opera Santa Fe). There were also a number of co-productions with Australia and New Zealand.

¹⁵ There is a full evaluation of the *Orpheus Reimagined* project (2023), supplied by Opera North to the research team for this study, which contains useful learning and reflection not only for the partners but potentially for the wider sector.

There is evidence of long-term, place-based partnerships developed by opera and music theatre organisations, typically focused on learning and participatory work (for example Streetwise’s work across three locations (London, Manchester and Nottingham); organisations in the sector aspire to do more of this kind of work, but the capacity to develop it is a limiting factor, recognising that it takes significant time – potentially years – to build up meaningful relationships and respond to the needs of local communities and infrastructure. Recent relocations by three smaller opera and music theatre organisations include, for some of those organisations, an aspiration to build significant local partnerships and connections.

Place-based initiatives like the UK City of Culture have provided opportunities for opera and music theatre companies to engage with places in different ways, including through multi-year programmes. Elsewhere, some places are taking the lead locally in setting out their ambitions for the future engagement of their local communities with opera and music theatre. In Birmingham, for example, some work including discussions extending beyond the opera and music theatre sector (e.g. including venues, and local and regional authorities) in 2023 about their ambitions for opera and music theatre, and its role in the city and its cultural offer.

For some organisations partnerships are at the heart of all their activities; on the whole, these organisations use partnerships as a mechanism to deliver aspects of their mission or vision which aim to be responsive to specific contexts in society, and which require space for different voices – those of different communities, stakeholders or practices – to be heard in shaping artistic practices and productions. In these instances, partnership is part of the philosophy of an organisation, and informs its methods and its operating model. Within England we heard from several organisations for whom this was the case; contributors also identified examples of this kind of working from outside England, and the following short case study explores one of these examples.

Case Study – Partnerships

Scottish Opera

A number of consultees referenced Scottish Opera, both for the effective way in which they develop and manage partnerships and for how they have boldly evolved their business model in response to significant economic challenges in recent decades. Scottish Opera has been trying out new ways of doing things; as they say themselves, history will be their judge.

There are several characteristics that underpin the culture that drives decision making within Scottish Opera. The identity of the company is founded on the belief that Scottish Opera has a duty to bring the riches of the artform to the Scottish public, wherever they are, complemented by the knowledge that opera is a robust artform that can turn up anywhere, at any scale. There is a recognition that partnership working is key to the success of their business model, that successful collaborations are based on mutual trust and respect and that it takes, often, many years to build that trust. It is also very evident that the current General Director places great value and invests heavily, at a personal level, in being an effective collaborator. These characteristics are not exclusive to Scottish Opera but the strength with which they inform everything Scottish Opera does is particularly evident.

A few examples of how this culture manifests itself:

Venue Management: Scottish Opera owns the Theatre Royal in Glasgow. In 2005 they leased the building to the Ambassadors Theatre Group (ATG) which, in turn, leases the theatre back to Scottish Opera for an agreed number of weeks each year. The partnership works well for both parties: Scottish Opera continues to have a home at the Theatre Royal

(as do Scottish Ballet), without the costs and risks associated with the responsibility of running a building; ATG can promote and present a broader programme in Glasgow whilst benefitting reputationally from having an opera company in residence. The audience relationship is owned jointly by both parties. There is some loss of autonomy for Scottish Opera, which no longer has direct control of the total audience experience, but the strength and mutual value of the relationship suggests a shared commitment to continuing to make this model work for everyone.

Programme: The company produces work at every scale, with none given more value weighting than another. The *Opera Highlights* programme - which tours four singers, a piano and a technician to around 35 community venues each year across the whole of Scotland, with performances regularly selling out - is presented unashamedly as 'Opera'. There is no suggestion that it is in any way a watered-down version of the real thing. Scottish Opera has long been a trailblazer in community arts engagement. In 2018, what became known as the Paisley Opera House (a marquee in a city park) hosted a promenade production of Leoncavallo's *I Pagliacci*, where people from the local community of all backgrounds and ages joined in the performances together with the full forces of the Orchestra of Scottish Opera, soloists and a professional chorus. A further example was outdoor performances of Bernstein's *Candide* in 2022. Performing side-by-side with a cast of international soloists was an 80-strong community chorus, of all ages, with different life experiences and from all corners of the world, in partnership with Maryhill Integration Network, an organisation bringing asylum seekers, refugees and settled inhabitants of Glasgow together through art. Both projects fuelled a love of opera and left significant legacies in these communities. Scottish Opera take small-scale work very seriously, maintaining external relationships and internal skills and expertise which enable them to efficiently make and tour small-to-mid-scale productions. The company has also developed a strong and passionate commitment to 21st Century repertoire and annually commissions, or co-commissions, new operas at all scales. These undertakings are felt to be valid for the organisation as a national opera company because the company also works at a large scale, international level.

As a co-producer: Scottish Opera co-produces opera productions with both international and national partners. Their current co-production business model looks more akin to that of a film financing model, with a matrix of artistic, investment and venue/festival partners. By way of example, the recent production of Golijov's *Ainadamar* (premiered in Glasgow, October 2022) was enabled through Opera Ventures providing financing for a creative collaboration which includes The Metropolitan Opera, Welsh National Opera, Detroit Opera, Houston Grand Opera, The Edinburgh International Festival and Adelaide Festival as partners.

We have noted elsewhere that it is rare to see UK opera companies co-producing with one another at the larger production scale, so Scottish Opera's long standing co-production relationship with Welsh National Opera, with whom they have an alignment of both production scale and, certainly recently, artistic leadership values, is notable. Their co-production partnership with Music Theatre Wales enabled Scottish Opera to further its ambition to commission and create new work, at a mid-scale, and to ensure that this work reaches more audiences than it would otherwise reach in Scotland alone.

A decade-long partnership with D'Oyly Carte Opera Company has resulted in new productions of *Pirates of Penzance*, *The Mikado*, *The Gondoliers* and *Utopia, Ltd*. The D'Oyly Carte library is now managed by Scottish Opera.

The model for orchestral and choral ensembles and talent development: Scottish Opera has significantly changed its ensemble model in the last two decades. Whilst these decisions have for the most part been driven by financial challenges, the company has made these changes in a way that enables it to remain true to its artistic and social identity/purpose. The Chorus is now engaged on a freelance basis, with strong musical direction and

annual/biannual auditions ensuring that the loyal, core ensemble remains artistically strong. The Orchestra is employed on a contract which guarantees 29 weeks work each season, a move which has enabled the company to retain regular access to a full-size ensemble. Again, strong musical leadership is recognised as being key to maintaining standards and morale. The company's Emerging Artist programme has a strong focus on young Scottish artists, including singers, répétiteurs, composers, directors and costume trainees, many of whom then continue to develop and establish their careers within the company. Scottish Opera and the Royal Conservatoire of Scotland, in a fresh working model, have just launched a new joint Artist Diploma in Opera in a shared commitment to develop and support the talent pipeline for the industry.

3.3.5 New Work

For advocates of new work, the limited presence of new work suggests overall that opera and music theatre as an artform lacks confidence in England: it is only engaging in a limited way with the stories of the contemporary nation and failing to keep the artform alive if it only performs old works. This lack of 'confidence' in new work was typically ascribed to the financial risks associated with presenting unfamiliar repertoire and the perceived lack of audiences, or knowledge about how to build audiences for new work, but some contributors also thought that there were parts of the sector which did place significant value on new work as important for the development of the artform itself.

The concentration of companies – and particular types of audiences - in London means that new work is most prevalent there; it also means that in the rest of the country, opera and music theatre is potentially less likely to be perceived or experienced as a 'contemporary' art form. As a result of its limited engagement with the creation of new work, opera and music theatre may find it harder to make an argument for its continued evolution as a cultural practice; and thus for its contribution to parts of Outcome 3 (A Creative and Cultural Country) in Let's Create, which focus on new types of creative practice and forms of cultural content, as well as to the Inclusivity and Relevance Investment Principle.

When we explored how new work is made in England, the pipeline for new work is considered to be insufficient, providing:

- Not enough opportunities overall, from workshops and R&D to commissions and full productions.
- Not enough connections between opportunities, for work developed in one organisation or at a particular scale to then be picked up by or signposted onto another organisation or scaled up, or for individuals developing new work to find their next stepping stone.
- Not enough opportunities for new work to be repeated and, if 'good' enough, find space for second and subsequent performances, and if artistically and financially successful, become a modern fixture in the sector's repertoire.

There is a widespread perception that new work is more valued (by organisations, funders and audiences – those who make decisions, or influence what work is made) outside the UK, and both the US and European contexts were considered, by some, to be better environments for composers¹⁶ and others who might lead on developing new work; several of our contributors worked in the UK and internationally, and so were able to draw specific comparisons in the context of their own experiences.

¹⁶ Notably, we primarily heard about composers as the lead creatives from contributors to this study; we are aware that, for example in the US, it might be more typical for a wider creative team to come together earlier on.

This lack of a pipeline exacerbates the first issue: if work takes place in smaller organisations or smaller stages, it is not seen or does not appear to be valued in the same way as work which takes place on the mainstage of larger opera companies. The answer is not that all new commissions or composers are only successful if they eventually reach the mainstage, or that ‘success’ is always a full production. Rather, the sector needs to value new work across the different settings it takes place in – when developed by small organisations, with and in communities, in alternative spaces, in small-scale, mid-scale and large-scale theatres and venues – and it needs to create better pipelines for new work and composers to have a longer life in the sector, and it needs to consider how it might value the process of development more, even where the outcome might not be a full production.

Key to this is the way in which new work is developed and who is supported to do that work. Contributors identified the following issues:

- A wider range of creative practitioners, including a wider diversity of composers and other practitioners – both established and new – need to be supported to initiate, develop, produce and promote work, and to be allowed to fail.
- There are insufficient experienced producers with the specific skills and connections to be able to develop work from a research and development phase to the stage, particularly beyond those organisations (ROH Linbury, Britten Pears) where structures are in place to support that transition.
- There is an insufficient range of formats for ‘trying out’ new work in the UK, and that different possible outcomes (i.e. not always a full-staged production) are valuable. Gaps between different stages of the pipeline (for example between festival showcase type events such as Grimeborn or Tête à Tête on the one hand, and more venue-based producing houses such as the ROH Linbury on the other) are too big; more rungs on the ladder are required.
- Challenges in securing funding are experienced by virtually all those seeking to develop new work: private philanthropy underwrites some new work; and some trusts and foundations have moved to fund individuals directly, but this limits the capacity to build a ‘system’ for new work.¹⁷

Co-production approaches are used as a way to create funding coalitions for new work and manage risk; this also sometimes gives new work a longer life, guaranteeing it more performances, possibly across multiple locations. However, making such partnerships work is difficult when many of the partners are very small-scale and may have inconsistent access to funding. There is enthusiasm for collaboration between those contributors who work in large and small organisations which support new work. It was clear that some contributors to this study had had exploratory conversations around greater collaboration between companies in the last two-three years, though capacity constraints had limited these discussions being taken further.

There are examples of successful practice in attracting audiences for new work, and – in some cases – finding audiences who were new to organisations via new work. Organisations recognise the need to build audiences for new work, and to develop audiences’ knowledge of and confidence in engaging with new repertoire, but they did not always feel well-equipped to do so. The internal risk/contribution models in opera and music theatre companies which were discussed in section 3.3.1, and the size of an individual production as a unit of cost, makes it hard to manage the potential for significant failure. A few contributors

¹⁷ We heard of examples outside the UK (e.g. the Canadian National Arts Centre’s National Creative Fund) where funding approaches required partnerships between individual creatives and organisations, as an alternative approach which might offer more agency for creatives, but ensure that the infrastructure was available to support them.

noted that opera and music theatre has not, as yet, made a 'War Horse' or a 'Matilda': a new commission which begins as a production in a subsidised company, but subsequently goes on to have a significant commercial life. One of the key learnings from these examples has been the commercial viability of the product, and it is unclear if the high costs involved in opera and music theatre might prohibit this kind of extended development, and whether the conceptual and R&D spaces exist in opera and music theatre potentially to support this kind of work.

Case Study - New works, new worlds

The perception of contributors to this study is that other countries are more successful at integrating new works into their company repertoire, so we spoke to people with experience of supporting the creative processes in Denmark, New Zealand, Sweden, the USA to understand what lessons we could learn. It is clear that some countries operate in an entirely different context, with significantly higher levels, variously, of public funding, private philanthropy and societal support altering the risks associated with new work.

The overwhelming response was that the stories told through contemporary operas needed to be more relevant and appeal to a wider audience. *The (R)evolution of Steve Jobs* - commissioned by San Francisco Opera, The Santa Fe Opera and Seattle Opera with support from Cal Performances and co-produced with Indiana University Jacobs School of Music – was cited as an example of an intriguing story with contemporary relevance, which attracted an audience of existing opera goers alongside people who had not previously attended such an event. Its initial run in Seattle of seven performances sold around 15,000 tickets, and it was felt this was largely linked to targeted marketing, in a city which is one of the fastest growing tech hubs in America.

The approachable nature of the work by Mason Bates and Mark Campbell resonated, with several contributors remarking on the esoteric nature and lack of diversity in much of the UK's new work: "*it's all too arthouse!*", said one, going on to muse that there were no English opera companies commissioning the equivalent of James Graham's *Dear England* which has proved such a hit with theatre audiences.

An example of diversity being placed successfully front and centre was *Hohepa*, a commission from Wellington composer Jenny McLeod for New Zealand Opera in 2012, which told the true story of the friendship between Māori chief Hōhepa Te Umuroa and English colonist Thomas Mason during the New Zealand Wars, with libretto in English and Māori. Following extensive work with the tribal elders to understand the story from their perspective, an entire performance was offered to their community, which became a joyous celebration cultural exchange over more than 150 years.

Co-commissioning and co-producing were seen as a strong way to establish new work – such as the Steve Jobs coalition outlined above, notable for the involvement of a university which provided workshopping and rehearsal space. A more commercial vision for the sector, and one that uses diversity in its widest sense as renewal for the artform, was considered an exciting opportunity, with the US again being praised for its crusade to tell stories which are the opposite of 19th century European grand opera. Worth noting in the US is the establishment of a new canon of opera and music theatre which is *adjacent* to musical theatre (arguably beginning with works like Bernstein's *Candide* and *West Side Story*) rather than treating it largely as a contemporary classical work.

Finally, there are approaches to the creative process of developing new work which are different to those common in the UK. There is more emphasis outside the UK on companies identifying themes with resonance with their existing and potential audiences, and then curating artistic teams to deliver projects, rather than being deferential to the vision of a composer and/or librettist.

4 Financial Models

As stated in section 2.2.4, for the purposes of this study we mapped opera and music theatre organisations in England, including those funded by Arts Council England and those not funded by Arts Council England. Across this longlist of more than 108 organisations, 77 organisations produce financial data which is available via a public source (Companies House or the Charity Commission) at an appropriate level of detail to enable us to undertake meaningful analysis of the different financial models which are common across the sector (see Section 2.2.4 for a fuller explanation of the data, its reliability and the approach used to produce this analysis). We also heard directly from organisations about their income and expenditure, and challenges within their financial models.

The data enables us to look across the sector at the overall pattern of different income streams, set out in Table 4; it includes data by location of the registered office of the organisation (in the most recent available year of accounts).

Table 4: Income across the sector by main types and location, 2022 or nearest available year

Income type	London -median % of income by category	Rest of the South - median % of income by category	Other - median % of income by category	All England - Median % income	Total % income across all organisations	% of orgs reporting any income in category
Commercial & Trading	13%	44%	9%	28%	38%	71%
Grants	41%	30%	68%	39%	32%	66%
Donations	31%	17%	5%	23%	21%	86%
Other Income	10%	15%	13%	11%	9%	78%
					100%	

Source: MyCake for the Opera and Music Theatre Analysis Study, n=77

Commercial and trading income is income from ticket sales, programmes sales, catering and other secondary sales relating to the experience of going to opera and music theatre. Where organisations tour, it reflects touring income. It may also include co-production income, or income from licensing out productions to other companies, exploiting parts of productions or hiring out sets, costumes and other aspects of productions where such income is detailed in accounts. Where organisations run their own venues, some also gain income from hiring the venue out to other users. 29% of organisations report no commercial and trading income at all.

Grant income reflects income from both public and private sources of grants: arts councils, local authorities, lottery funds distributed by other bodies (e.g. National Lottery Heritage Fund and National Lottery Community Fund), and trusts and foundations. Typically, then, grants represent the highest proportion of income; again, however, what we can see is that a substantial group (34%) report no grant income at all. Donation income is largely income from individuals making donations. Donations are the most commonly reported income type across all organisations.

This overall picture suggests that there are different business models operating in the opera and music theatre sector; and that the distribution of business models is different in different geographical areas. The following sections outline where clear groupings exist, and what we can say about organisations with more fluid models.

4.1 Commercial and trading income and donations as dominant income sources

The Royal Opera House is significantly bigger than other organisations in the opera and music theatre sector, presenting both opera and ballet on a year-round schedule, with a turnover in 2022 of £132.7million, which breaks down (using the categories we set out above) as:

- Commercial and trading income: 44% of turnover (including box office income 30% of turnover)
- Donations: 27% of turnover
- Grants: 19% of turnover (including Arts Council England national portfolio regular funding which is 18% of turnover).
- Other: 10% of turnover

The organisation's work across two artforms and the volume of its work mean that it is different from most of the other opera and music theatre organisations in England; despite this, it shares some similarities with other business models which have commercial and trading income and donations as dominant income sources.

There are 7 organisations¹⁸ operating in the festival/country house model, with a limited season – usually in the summer – with a turnover of more than £1million¹⁹, and a further five smaller organisations²⁰ also using the same festival/country house model, with an annual turnover of between £100k-£1million. With the exception of one organisation, all are based in London and the rest in the South. Their commercial and trading income includes:

- Substantial ticket sales, being typically more than 20% of their income but in some cases around 50% or more;
- Associated sales of programmes, catering and other kinds of hospitality;
- Some elements of co-production, production exploitation, hire or other income line (typically other income is related to the main business, but in at least one case it is unrelated).

For many of these organisations, donations are the second most significant income source, and are often around a third of income or higher. There are four organisations in this group of 12 for whom donations are a higher proportion of turnover than commercial and trading income.

The relationship between commercial and trading income and donations is an important part of these business models. All have membership/friends models which may include a baseline donation and also provide access to ticketing benefits (e.g. early booking); some

¹⁸ Glyndebourne, Garsington Opera, Grange Park Opera, Longborough Festival Opera, Opera Holland Park, Nevil Holt Festival and the Grange Festival.

¹⁹ It is worth noting that there is significant range in the scale of these organisations: Glyndebourne has a turnover of more than £36million (2022) and produced around 9% of opera performances in the UK between 2017-2023; comparatively other organisations in this group are significantly smaller. Garsington Opera has a turnover of more than £11million (2022), and the next five organisations range from between £1-4million in turnover.

²⁰ Bampton Classical Opera, Iford Arts Limited, Dorset Opera, West Green House Opera Limited, Waterperry Opera Festival.

members may go beyond the baseline donation, and become significant donors. There are also examples of ticketing models with an optional donation included. Core supporters of opera and music theatre, who regularly buy tickets and give donations to a lesser or greater extent, are a core income stream for these business models, and for the Royal Opera House. Across these organisations the overlap between donors and ticket buyers will vary, and the Royal Opera House (like other large-scale main stage presentation organisations based in a city) also sells a substantial number of tickets each year to audience members who are new to the organisation.

Whilst some of these organisations report income from corporate sponsorship, it is relatively small in comparison with donations and ticket sales. Four of these organisations were established in the last 12 years and there is a widespread perception from contributors to this study that festival/country house opera and music theatre is both thriving and growing.²¹

Some organisations in this group also receive grants, from arts councils, local authorities and trusts and foundations. Whilst it is typically the third area of income (after commercial and trading income and donations income), grant income still plays an important role. In some cases it is clearly ring-fenced for specific types of activities (e.g. learning and participation work), but there is also grant-making which underpins capacity to produce different repertoire, support talent and skills development and undertake a wide range of related work.

Across this group of larger 12 festival/country house organisations, salary costs are typically a significantly lower proportion of turnover by comparison than mid-scale and large organisations regularly funded by Arts Council England which regularly present opera and music theatre, reflecting the limited seasonal presentation and the model of partnerships with orchestras or freelance employment (rather than in-house ensembles).²² Typically, building costs are also low; organisations vary between permanent theatres constructed within larger estates, and more temporary arrangements. The wider costs of the estates within which activities take place are often not part of the operating of the opera and music theatre organisation, and therefore the patronage relationship between the estate and the organisation is another key element of the way in which business models operate.

The limited season is also a significant part of the festival/country house business model, and typically organisations are cautious about extending beyond a single summer season and occasional one-off concerts and unsure that audiences might be prepared to travel in poor weather. The two largest organisations in this group, however, do go beyond this: Glyndebourne produced an Autumn season in 2023, partly reflecting the cessation of touring²³ due to changes in their Arts Council England national portfolio grant; and Garsington are also developing their capital capacity, building studio space which may support a range of activities and income generation (not all public facing) throughout the year.

²¹ Despite this, it is worth noting that one of the organisations in this group, Nevill Holt Opera as it was named at the time, cancelled shows in 2023 due to poor ticket sales citing losses due to Covid disruption, inflation and the rising cost of living affecting sales (Hemley, 2023). The organisation has subsequently announced it will be delivering a multi-arts festival from 2024 onwards, which will still include opera but alongside jazz, contemporary music and conversations with writers, broadcasters and artists (Nevill Holt Festival, 2024).

²² Across all festival/country house models, including those smaller than £100k (therefore a total group of 17), median spend on salary costs is 11% of turnover; across the four largest Arts Council England regularly funded organisations, median spend on salary is 49% of turnover.

²³ Glyndebourne first toured in 1968, and typically toured in the Autumn season taking productions from the summer festival to venues around England.

There are a further 7 organisations, 6 of which are touring organisations, with a turnover of between £100k and £1million, with either commercial and trading income or donations as the dominant income source. At the next size down (with a turnover of below £100k) is a range of organisations, including touring organisations, small-scale festivals, organisations producing specialist repertoire, some community/education focused organisations, and organisations moving from project to project without a regular pattern of work.

Some organisations report income from both commercial and trading (often tickets) and from donations, and there is some evidence of models which are, effectively, a smaller-scale version of that in the larger festival/country house models. On the whole, however, there are more organisations within this group with a significant majority of their income from only one of these sources, i.e. either funded significantly by donations, or funded significantly by commercial and trading income. One smaller organisation regularly funded by Arts Council England, British Youth Opera, falls into this group with its dominant income source over the 2017-2022 period being donations. There is also in this group some evidence of fluctuation between years, suggesting a less mature and/or stable financial model.²⁴

4.2 Grants as dominant income source

23 organisations, from the dataset of 77, have grant income as their dominant grant source. A higher proportion of this group is based *outside* London and the rest of the South, and a smaller proportion of this group is based in the rest of the South than is the case with other groups by dominant income source. Organisations based outside London and the Rest of the South typically have a significantly higher proportion of their turnover from grant income (median proportion of turnover from grants is 68%, see Table 4). Grant-funding is crucial to the presence of opera and music theatre outside London and the Rest of the South.

Looking at data from 2022 or the nearest available year, 6 organisations regularly funded by Arts Council England received more than half of their income from that regular funding, or in the case of Welsh National Opera, Arts Council England and Arts Council Wales.²⁵²⁶ All of these organisations report some levels of commercial and trading income (including ticket sales) and of donations, but they are proportionally substantially lower than is the case for organisations discussed in the previous section (4.1). These organisations are able to operate due to Arts Council England funding. The presence of large and mid-scale opera and music theatre outside London and the rest of the South is made possible by Arts Council England funding.²⁷ Reflected in the expenditure of these organisations is the significant in-house artistic workforce, with between 45-48% median expenditure on salaries (for comparison, for Festival/country house organisations, salary costs are 11% median expenditure).

Two further organisations which are regularly funded by Arts Council England – National Opera Studio and Streetwise – have grants as their dominant income source; however, their

²⁴ One other organisation which is currently regularly funded by Arts Council England, Pegasus Opera Company, falls into this category; the data in this study pre-dates the organisation's regular funding, and so the organisation will be an interesting future case study on the impact which regular funding will make on their business model.

²⁵ Birmingham Opera Company, English National Opera, English Touring Opera, Opera North, Tête à Tête and Welsh National Opera.

²⁶ Regular funding at this level from Arts Council England is comparable with that in regional ballet, for example.

²⁷ Additionally, two organisations which are majority-funded by Arts Council England focus on specific types of activities: Birmingham Opera Company on community-centred participatory work, and Tête à Tête on new, small-scale work, including work developed by small companies, and individual producers and talent. One of these organisations is based entirely outside London and the rest of the South.

Arts Council England funding – whilst important and the largest single source, accounts for less than a quarter of the overall turnover. Significant grant funding from elsewhere, including other sources of public grants (e.g. non-arts lottery funding and local authority funding) (for Streetwise) and trusts and foundations, for both organisations, is crucial alongside some donations and commercial and trading income.

This model of a range of grants, including Arts Council England project funding, trusts and foundations and other sources, as the dominant income also exists across 16 further organisations, including community/education focused organisations like Pimlico Opera, touring organisations which also undertake learning and participation work like Mahogany Opera Group, OperaUpClose²⁸ and Barefoot Opera, organisations running small festivals alongside learning and participation work like Northern Opera Group and Into Opera, and smaller organisations, including those specialising in particular repertoire like the London Early Opera Company. Half of this group has a turnover of between £100k-£1 million, and the rest have a turnover of less than £100k (including three organisations with a turnover of less than £25k).

Not all organisations specify where their grant funding comes from, but we can see that for some organisations trusts and foundations fundraising is typically worth more to them than grants from public sources. Across all organisations whose dominant income is grants, the median proportion of income from commercial and trading is 6%, and the median proportion of income from donations is 5%. There are, however, around five organisations in this group achieving a significant proportion of their income from donations²⁹; in the period for which we have financial data, four of those organisations were based in London.

4.3 Small organisations without salaried staff

When we mapped the longlist of opera and music theatre organisations, we were able to identify that 6 organisations on our longlist had ceased trading in the period 2019-2023.³⁰ 44 had only started trading from 2018 onwards, so there is evidence of ‘churn’ and new organisations/companies emerging in the sector; this suggests both energy from opera and music theatre makers to begin new enterprises, but also vulnerability in the business models of new organisations.³¹ On the whole, newer organisations are smaller organisations. Of the 37 organisations with a turnover of more than £100k, 10 were established in 2014 or after; 11 were established prior to 1990. In contrast, when we look at 40 smaller organisations with a turnover of less than £100k, 25 (more than half) were established in 2014 or more recently; only 9 predate 2000, and only 1 predates 1990.

²⁸ As with Pegasus Opera Company, OperaUpClose is now regularly funded by Arts Council England, but the data available for this study predates that funding. OperaUpClose will also be an interesting case study in the potential impact of this regular funding.

²⁹ These are: Music and Theatre for All, OperaUpClose (as noted above, now regularly funded by Arts Council England), Outland Opera, Pimlico Opera and The Opera Story.

³⁰ It is not clear from desk research why these companies have all ceased, but there is some evidence of plans made for 2020 (a period of significant Covid-related disruption) being put on hold, and then no subsequent activity in some cases, suggesting that some companies might have ceased due to difficulties re-starting activities post-pandemic.

³¹ When we look at the financial data over time, we can also see that all the organisations in our dataset of 77 saw a dip in turnover in 2020, in relation to the pandemic; organisations which report salary costs typically returned to normal turnover levels in 2021, but those which do not report salary costs only returned to normal levels in 2022, suggesting a longer impact and, potentially, some challenges in ‘re-starting’ their activity.

47 of the 77 organisations in our dataset do not report any salary costs, and they are typically substantially smaller than other companies.³² Median direct costs as a proportion of turnover are much higher (81% in non-salaried organisations vs 52% in those with some salary costs). Effectively, what we can see here is organisations where income goes straight into the direct costs of producing work, often with limited evidence of any ongoing operations, effectively working from project to project. Practitioners in the sector discussed smaller organisations which are vehicles for fundraising and producing work, and sometimes for earned income, but where those individuals appeared to be taking no regular salary at all or where staff members were all freelance.³³

For those engaged in running or working with these organisations, remuneration was typically described as not being commensurate with the volume of work required, particularly in the period in which organisations might be seeking funding or investment for the next project. Small and very small organisations are heavily reliant on individual opera and music theatre practitioners to drive them and provide labour beyond that which is paid. This is not unique to opera and music theatre, but rather a feature of small organisations and individual practitioners work across most artforms; nonetheless, it means that risk is borne predominantly by individuals, who often make ends meet by balancing these less well-paid activities with other paid labour in the sector.³⁴

Whilst grants are an important income area for small organisations and those without salaries, data from 360Giving suggests that typical grant value for small organisations is smaller in proportion to their turnover than is the case for larger organisations and for those who are salaried. Small organisations potentially incur a higher time cost per grant if they are applying for lots of small grants, another indicator of the relative insecurity of these business models.

4.4 How robust are these income streams?

We heard from organisations about the challenges of achieving different income streams, and some of the particular pressures in specific business models. There is also a range of broader data across the sector which helps to build a picture of how income streams may change in the future.

4.4.1 Ticket sales

For those organisations where ticket sales are a substantial proportion of their income, this is a key driver in decision-making about ticket prices, repertoire and numbers of performances. We can get an overall sense of how income yields from tickets are faring by looking at National Portfolio Organisations' returns to Arts Council England for 2022/23, in which ticket sales are at about 101% of the average of 2018/19 and 2019/20 counts, with income up 16% in nominal terms (suggesting that it is in fact a real terms decrease (since goods worth £100 in 2019 would be worth £123 in 2023, according to the Bank of England Inflation

³² With a median annual turnover of £42k for those without salary costs vs £716k for those with.

³³ This accords with the findings from the 2010 survey of small and middle scale opera and music theatre sector in England commissioned by the Opera and Music Theatre Forum, which identified a 'general scarcity of salaried staff' and a 'very strong voluntary culture', as well as almost no salaried artistic staff (Devlin and Ackrill, 2010: 24)

³⁴ In the stakeholder engagement, we came across several individuals running their own activities, including organisations, alongside maintaining a freelance career in areas like singing, directing and producing. They talked significantly about the differences between their 'own' work and the work they undertook for other employers.

Calculator³⁵). Average ticket yield for the 11 regularly funded organisations looked at³⁶ has increased from £53.64 to £61.61 in the same period (again, a below inflation increase). ENO and ROH have seen relatively lower increases in average yield, perhaps reflecting the increases in the proportion of younger audiences on discounted tickets.

These below-inflationary increases in ticket income and yield suggest an increase in the financial pressure on organisations (especially when coupled with real terms decreases in core funding, and trust and foundation income).

4.4.2 Donations

Individual philanthropy is important for most of the large organisations we spoke to, but it also plays a part for smaller organisations, including those whose focus is on learning and participatory activities and/or talent development. When we look at the proportion of total income which comes from donations, organisations outside London and the rest of the South report a much lower proportion (median 5% of income from donations) than those in London (median 31% of income from donations) and the rest of the South (median 17% of income from donations). This suggests, as we would expect to see in other artforms, that geography (proximity to potential donors) plays a significant role both in income, and in the feasibility of business models working in different locations.

Organisations stress the importance of the relationship they have with donors; they know them well, and donors like to feel engaged with the organisation, and this engagement can enable organisations to encourage donors to fund a wider range of activities than they might be initially interested in. Covid created an opportunity for some organisations to talk to donors and potential donors in different ways; on the whole, donorship and membership arrangements appear to have survived Covid, or at least returned to similar pre-Covid levels. Changes planned in the forthcoming Data Protection and Digital Information Bill (extending to charities what is known as the 'soft opt-in') will also make it easier for organisations to approach ticket buyers and members for donations (Fluskey, No date).

A short study by Tessitura Network based on 24 cultural organisations in the UK, including major opera companies, shows a decline of 9% in the overall value of donations across a full five-year period from 2018-2022. The study suggests that whilst income has dropped, the number of overall donors has risen (Puffett, 2023). Some contributors suggested that Brexit had had an effect on individual donors and on corporate sponsors.

4.4.3 Sponsorship and commercial partnerships

Corporate sponsorship is becoming harder to secure, corporate hospitality-type relationships are becoming less common, with commercial organisations choosing to do their entertaining or exercise their social responsibility in different ways. Sponsorship was relatively rarely identified as a specific line in organisation's account and was typically a small income stream. However, some larger organisations are exploring alternative approaches in this area, including the potential for brand partnerships.

4.4.4 Arts Council England grant-making

Grant-making by Arts Council England to the opera and music theatre sector falls into three categories: project grants, regular funding and strategic funding. Reflecting the presence of

³⁵ <https://www.bankofengland.co.uk/monetary-policy/inflation/inflation-calculator>

³⁶ 11 rather than 13 organisations, due to missing or incomparable data from English Touring Opera and Glyndebourne.

two large regularly funded organisations in London, including the largest single regularly funded organisation across Arts Council England’s national portfolio, the significant majority of Arts Council England funding has been to London-based organisations between 2018/19 and 2022/23.

Table 5: Arts Council England Funding 2018/19 – 2022/23, by area and funding type

	Project Grants	Regular Funding	Strategic Funding	Area Total
London	£1,769,837	£134,214,267	£215,583	£136,199,687
North	£988,039	£53,109,930	£1,446,477	£55,544,446
Midlands	£676,502	£33,367,576	£24,419	£34,068,497
South East	£1,558,178	£8,235,200	£75,326	£9,868,704
South West	£299,121	£0	£51,488	£350,609
Funding Type Total	£5,291,677	£228,926,973	£1,813,293	£236,031,943

Source: Arts Council England³⁷

A key challenge for some organisations is the relative standstill of Arts Council England grants over the last decade. Appendix C of this report sets out in detail Arts Council England regular funding to opera and music theatre organisations between 2015/16 and 2023/24. The picture varies between organisations, but overall – and in comparison with inflation – the real value of regular grants from Arts Council England to opera and music theatre organisations has, in most cases, declined, even where funding rounds have awarded specific uplifts in funding, as the tables below show. This pattern is reflected in other artforms where organisations receive funding from Arts Council England and is not unique to opera and music theatre.

Table 6: Total Arts Council England Regular funding, cumulative change against inflation

Year	Total ACE regular funding	Change against 2015/16	CPI change against 2015/16
2015/16	£45,837,625		
2016/17	£45,837,625	0%	1%
2017/18	£45,837,625	0%	3%
2018/19	£45,285,443	-1%	6%
2019/20	£45,430,183	-1%	8%
2020/21	£45,973,956	0%	9%
2021/22	£46,118,696	1%	11%
2022/23	£46,118,696	1%	22%
2023/24	£42,271,691	-8%	32%

Source: Arts Council England; Bank of England Consumer Price Index (CPI) calculator.

Funding from Arts Council England to the opera and music theatre has remained static, except in the most recent year of funding where there is an overall 8% reduction against the

³⁷ The figures for the North include strategic grants for Opera North’s delivery of the In Harmony programme also.

2015/16 funding levels. The table below sets out the impact on individual organisations who were regularly funded throughout the 2015/16 – 2023/24 period. The left-hand column indicates the nominal proportional change in regular funding between 2015/16 and 2023/24; the right-hand column indicates the proportional change over the same period, factoring in inflation.

Table 7: Nominal % change in regular funding from Arts Council England to opera and music theatre organisations, 2015/16 to 2023/24

	% change from 2015/16 to 2023/24	% change from 2015/16 to 2023/24 in real terms
Birmingham Opera Company	+79%	+35%
British Youth Opera	+17%	-11%
Buxton Arts Festival Ltd	+2%	-23%
English National Opera	-3%	-27%
English Touring Opera	+22%	-8%
Glyndebourne	-51%	-63%
National Opera Studio	+2%	-23%
Opera North	+3%	-22%
Royal Opera House	-10%	-32%
Streetwise Opera	+2%	-23%
Tête à Tête	+2%	-23%
Welsh National Opera	-35%	-51%

Source: Arts Council England³⁸; Bank of England Consumer Price Index (CPI) calculator.³⁹

Organisations report trying to bridge the gap with ticket sales and fundraising.⁴⁰ Additionally, Theatre Tax Relief (discussed in detail in section 4.4.7) has been an important new area of income for many opera and music theatre organisations.

For organisations who are newer to the national portfolio, Arts Council England funding has moved them on from project-by-project funding and is creating more headroom for them to be more strategic in planning their own work, and to develop their own voice; at present this investment is too new to understand if it is fundamentally altering the sustainability of these organisations.

Amongst smaller organisations, we heard from some successful and unsuccessful applicants for project funds from Arts Council England. There was some concern that the model of funding and reporting meant that it could be hard to secure your minimum match

³⁸ Buxton Arts Festival Ltd is included here and in the Arts Council England data on funding for opera and music theatre; the organisation is not included in the wider financial mapping, due to the wider range of activities which it undertakes making it less strictly comparable with other organisations in the dataset.

³⁹ As set out in Table 6, the Bank of England CPI calculator reports inflation at 32% over the period covered in Table 6 and 7.

⁴⁰ The yield figures set out in 4.4.1 suggests that organisations may be achieving some success with increasing their income from ticket sales; however, to assess whether this is being achieved sufficiently to offset the decline in the real value of grant funding would require detailed analysis on an organisation by organisation basis.

funding in order to get started with an Arts Council England application; and that the retention of a final amount until after the last report had been submitted placed real liability on small organisations, and in practice often on individuals.⁴¹ More generally, we heard from small organisations who were apprehensive about Arts Council England funding, had heard from others about what Arts Council England would and would not fund, and felt that their work might not 'fit'.⁴²

4.4.5 Other public grant-making

Local authority funding is widely viewed as having all but ceased for activities like opera and music theatre; those who referred to it suggested that this was a widespread issue in the arts (not specific to opera and music theatre), where local authority funding is significantly under threat, and in some cases has already ceased or is declining rapidly. Looking at data from NPOs 2019-2022 annual survey, opera and music theatre NPOs received a much smaller proportion of their income from local authorities (2.6% median of total income) than was the case for all music NPOs (5.1% median of total income), in part this reflects the significant presence of local authority funding in the business models of regional symphony orchestras specifically, reflecting a historical establishment of organisations and set of relationships not present in opera and music theatre, with the exception of Opera North.⁴³

Some other forms of public funding which were previously available from the EU, e.g. Creative Europe, have ceased due to Brexit. There are still some ways in which UK-based opera and music theatre organisations benefit from EU-funded activities, for example: via OperaVision (run by Opera Europa) which is a freeview opera streaming platform supported by the European Union's *Creative Europe* programme and which some England-based opera and music theatre organisations use; and RESEO (European Network for Opera and Dance Education) which has received EU funding, and which has members in the UK including England. Beyond this, however, are a wide range of opera and music theatre networks, events and activities benefitting from EU funding (e.g. O. Festival for Opera. Music. Theatre. in Rotterdam) which enrich the opera and music theatre sector in the EU area significantly, but from which UK-based opera and music theatre organisations cannot benefit.

4.4.6 Grants from other sources

Some trusts and foundations have altered their grant-giving approaches relatively recently, including:

- funding artists and creatives directly, rather than through organisations
- focusing more on community-centred work
- moving away from funding more traditional presentation of art to audiences.

For some organisations these means that funding is harder to achieve, whilst others have found that their work now aligns more with what trusts and foundations want to fund. There is wider evidence that trusts and foundations are considering different approaches, including spending down (i.e. spending all assets over a short time period and, ultimately, ceasing

⁴¹ National Lottery Project Grants from Arts Council England require a minimum of 10% match funding, which can be in-kind as well as in cash.

⁴² Section 6 discusses perceptions of Arts Council England and grant funding further.

⁴³ Looking at the 2019-2022 data, across all NPOs local authority funding is median 5.8% proportion of total income. Overall, 46% of opera and music theatre NPOs receiving some local authority funding; 63% of the whole portfolio, and 51% of music NPOs, receive some local authority funding. What this reflects is the differences in the types of organisations which local authorities typically fund: building-based organisations, including museums and theatres, for example, or regional symphony orchestras.

grant-making), and that newer trusts and foundations are less likely to be supporting arts and cultural work. In some cases trusts and foundations are identifying other pressing causes (e.g. climate change) or spending out because they want to address immediate need (Wilson, 2023).

The table below sets out an example year across all the accounts available for 2022 for the 77 organisations in our dataset, and demonstrates the scale of arts councils' funding against all other grant funding sources reported in that year.

Table 8: Grants income in accounts by type in 2022, or nearest year

Grant funding	£ms
Private Trusts and Foundations	£4.9
Local Authorities	£1.2
Arts Council England	£59.5
Arts Council Wales ⁴⁴	£4.6
Other Gov't and related public sector grants	£4.6
Any Other Revenue grants	£8.6
Grand Total	£83.4

Source: MyCake for the Opera and Music Theatre Analysis study

4.4.7 Creative Industry Tax Reliefs

Theatre Tax Relief (TTR) was introduced in 2014 and is available for opera and music theatre productions, where all or a high proportion of the performances are for paying members of the general public or provided for educational purposes, and at least 25% of the 'core costs' are used on goods or services provided from within the UK or EEA (European Economic Area). For activity which qualifies, organisations can claim a deduction to reduce profits, or increase a loss, to reduce the amount of Corporation Tax they pay; charities, including voluntary and leisure-time (i.e. amateur) music organisations are also able to access TTR. Opera and music theatre organisations who have orchestras, and who undertake orchestral concerts, are also able to claim for Orchestra Tax Relief (OTR), which was introduced in 2016.

TTR rates were initially set at 20% of the 'loss' for non-touring productions, and 25% for touring productions. From Autumn 2021 to April 2023 rates were increased to 45% for non-touring productions and 50% for touring productions, and this increased rate was then extended for a further two years to April 2025. In April 2025 rates are due to be reduced back to 30% for non-touring and 35% for touring, with a further reduction planned in April 2026 to 20% for non-touring and 25% for non-touring. Orchestra Tax Relief has seen a similar increase, and a similar reduction back to original levels is planned.

Looking at a single year of accounts (2022 or the nearest available year), where we can specifically identify Creative Industry Tax Reliefs they are worth just over £19million, around 7% of the total turnover of the organisations in our dataset. 32 organisations in our dataset claimed tax relief in this year (that we can identify); the value of this tax relief ranges between 1% of annual turnover to 23% for individual organisations. For organisations

⁴⁴ Welsh National Opera is funded by Arts Council England and tours in England, and is therefore included in this dataset; and is also regularly funded by Arts Council Wales. The funding set out above does not, otherwise, reflect the funding received by other opera and music theatre organisations based in Wales.

regularly funded by Arts Council England in 2022 or the previous year, tax relief in that year was worth 6.2% of the total turnover of all those organisations.

Amongst Festival/Country House organisations running time-limited seasons of work, the value ranges from 9% to 21% of their turnover; this reflects the overall model, where presenting productions on stage is a larger overall part of these models. We heard some widespread concern about the future of Theatre Tax Relief, and the potential impacts of planned reductions. Contributors were concerned about their own organisations, and the wider vulnerability of the sector. It is worth noting that, in a period in which grants from public sources have largely stayed still or reduced, Creative Industry Tax Reliefs have been the single new, reliable source of income which can be accessed by quite a large proportion of the orchestra and music theatre sector.

Looking at organisations regularly funded by Arts Council England, we estimate that they received just over £15million in Theatre Tax Relief in 2022 or the nearest available year. This is more than the gap created by the standstill in Arts Council England funding; for example if regular funding had tracked inflation (using CPI) between 2015/16, we might have expected the overall level of regular funding in 2022/23 to be just under £56million, effectively an additional £10million of funding across those regularly funded organisations. It is worth noting, however, that Theatre Tax Relief does not benefit all organisations in a similar way. Those organisations where putting on new productions to audiences is a significant portion of their activity get a greater benefit than, for example, organisations whose work is community-based and where the number of productions in any year may be relatively few. Thus, Theatre Tax Relief also benefits organisations not funded by Arts Council England (e.g. festival/country house organisations) significantly, reflecting the activities that they undertake.

4.4.8 Partnerships

We heard about some partnerships, both traditional co-production arrangements but also partnerships with commercial producers to support the development of work; this income is usually included in commercial and trading income, discussed above. Some organisations have partnerships with other sectors – e.g. HE organisations or commercial media partners – which yield some income. More generally, we heard about partnerships in which there used to be significant in-kind support exchanged (sometimes alongside some funding), for example through relationships with venues; on the whole, contributors felt that these kinds of resources were under significant pressure. Organisations who benefited significantly from volunteer support also reported that volunteers' capacity was under pressure.

4.4.9 Other forms of income

Beyond this we heard a small amount of interest in other potential forms of funding and support, for example loans and grants combined, or government funding for start-ups. One interviewee discussed taking out a personal loan to fund an initial production which had then gone on to return well on that original investment. There was relatively little discussion of these kinds of alternative approaches, and we did not hear widespread knowledge of any existing examples of funding for start-ups, entrepreneurial activities or research and development of activities which might later turn into assets.

4.5 Rising costs

Organisations almost universally reported challenges with rising costs. This included the costs of making productions (including the costs of raw materials), for touring organisations

or festivals/venues receiving touring product the impact on travelling with productions (not just fuel but the costs of accommodation and venue hire) and the costs of running and maintaining venues, including upgrading equipment. Section 5.1.4 of this report discusses wages and fees, and the widespread perception that typical wages and fees have declined in their value (i.e. failed to keep pace with inflation); as noted elsewhere in this report, very small organisations are often held together by volunteers or with periods of unpaid labour. In a period in which income streams are under pressure, and in some areas declining, the impact of rising costs and depressed income appears to be being absorbed in part by particular aspects of the workforce. Additionally, organisations are affected, as rising costs limit the range and ambition of the work they can produce.

5 Talent development and retention

5.1.1 Diversity

In section 3.2 we identified concern within the sector about whose stories opera and music theatre tells; a related concern expressed to us was who is telling the stories? When we talk about diversity, we are interested in the degree to which people from a range of protected characteristics and those who experience socio-economic disadvantage are present in groups like the workforce, and what their experiences are. The sector is aware of the lack of diversity on and off the stage, and acknowledges it, but there are some deeper questions about who makes artistic decisions, the kinds of groups who are still not being routinely represented in opera and music theatre, and more broadly whose artistic vision is being given a platform.^{45 46} Whilst the sector discusses diversity, and produces data – particularly those organisations regularly funded by Arts Council England – for monitoring and transparency, typically contributors and initiatives are currently focused on gender and ethnicity in the workforce. There is a relative absence of discussion about the presence and experiences of disabled people in opera and music theatre, for example.

The opera and music theatre workforce in organisations regularly funded by Arts Council England⁴⁷ is not reflective of the population as a whole. For example, based on 2021/22 data:

- 10.6% of the permanently employed NPO opera workforce reported being from Global Majority backgrounds, compared to 23.4% of the UK population according to the 2021 Census.⁴⁸
- 6% of permanent staff who reported having a disability, compared to 17% in the general population (again from the 2021 Census).

On the whole, permanent staff appear to be more diverse than freelance staff in the national portfolio organisations in the 2021/22 data, whether in terms of:

- gender (53% female cf. 43%)
- disability (6% identifying as having a disability cf. 5%)
- ethnicity (10% Global Majority cf. 6%)
- sexual orientation (12% LGBTQ+ cf. 8%).

This may suggest that having a largely freelance workforce (with freelancers outnumbering permanently employed staff more than 2:1) could help to entrench privileged groups. It is worth noting however, that compared to Office of National Statistics 2021 Census data, all opera workforce groups over-represent LGBTQ+ people compared to the general population (c. 3% gay, lesbian, bisexual or any other sexual orientation [excluding straight or

⁴⁵ Opera and music theatre is not the only sector in which diversity is a challenge; work on classical music, for example, suggests an unrepresentative workforce, and that the workforce in particular roles/jobs/instruments are less likely to be representative of the population than others (Cox and Kilshaw, 2021).

⁴⁶ The opera and music theatre sector is not alone in finding its core repertoire and practices at odds with issues of diversity and social justice, and in finding it hard to navigate between stated intentions and the job of making actual changes. A recent report from the APPG for Creative Diversity suggests, for example, that greater diversity in the creative industries will require a wide range of approaches over an extended period of time, alongside learning and reflection, as well as significant leadership (Wreyford, O'Brien et al., 2021).

⁴⁷ Those for whom there are summary workforce profiles submitted to Arts Council England. The data that we have relates to 2021/22, so does not include NPO's newly admitted to the national portfolio as a result of the November 2022 NPO decisions.

⁴⁸ By Global Majority we mean specifically: Black, Asian, Latin American, Arab, Mixed and Other backgrounds.

heterosexual] and 0.5% transgender), although these figures are necessarily approximate. Opera and music theatre NPO boards tended to have higher proportions of Global Majority members than permanently employed staff (16%), but fewer disabled people (4%), LGBTQ+ people (9%) and women (45%), based on 2021/22 NPO data.

Organisations feel that they are making changes in relation to the diversity of the opera and music theatre workforce, and recognised the imperative to do so (set out in Let's Create Outcome 3, and the Inclusivity and Relevance Investment Principle). Contributors talked about 'diversity' in general terms, and sometimes specifically discussed ethnic diversity, gender diversity and socio-economic diversity; we heard relatively little about the inclusion of disabled people, or of other typically marginalised or under-represented groups. Conversations about diversity often focused on singers – as a very visible part of the talent in the sector – and less often on other areas.

As a consequence, there is evidence that there is still significant work to do in key areas, for example:

- The leadership of major organisations is not diverse, though there has been some significant change recently⁴⁹, and is seen as very closed.
- There is evidence that men still dominate strongly in artistic decision-making roles, e.g. as directors, although progress is being made. Notably women directors are more likely to work with more women in the wider creative design team.⁵⁰

In this study we heard about poor experiences of working in or with the opera and music theatre sector from individuals from underrepresented groups, and from companies led by those underrepresented in opera and music theatre.⁵¹ They are sometimes apprehensive about whether engaging with larger companies meant they would be properly recognised as partners, or whether they were essentially being used as 'window dressing' to suggest that companies were engaging with questions of equality, diversity and inclusion, but without really doing so. This included examples where smaller companies and individuals felt undervalued or treated with prejudice, and/or where they felt their presence was papering over bigger challenges which the organisation itself needed to address.

⁴⁹ In the last two years, seven organisations regularly funded by Arts Council England have had a change of leadership, with several women taking leadership roles (both temporary and permanent), and with expertise coming into opera and music theatre from outside the sector in key appointees also.

⁵⁰ A recent journal paper which takes a fifteen-season period from 2005/6 to 2019/20 at the Royal Opera House as a case study also identified the way in which specific roles are often dominated by particular groups, e.g. directors are mostly men, though women are better represented amongst new productions than revivals, and amongst modern works and less popular and non-canonical works than canonical works. Men were also much more likely to be booked more than once. The paper also finds that the presence of women in creative design roles is lower than the presence of men, and that sometimes the only woman in any of these roles would be the costume designer. Productions directed by women were significantly more likely to have other women in creative roles. There is, however, evidence of increases in women in key creative roles in the last five seasons covered by this paper, though some roles (e.g. costume director) saw faster increases than others (Vincent, Coles et al., 2022).

⁵¹ Across the wider music sector, a recent inquiry into misogyny in music by the Women and Equalities Committee published a report which finds that women working in the music industry face 'limitations in opportunity, a lack of support, gender discrimination and sexual harassment and assault as well as the persistent issue of unequal pay...these issues are endemic and are intensified for women faced with intersectional barriers, particularly racial discrimination' (Women and Equalities Committee, 2024: 3). The Creative Industries Independent Standards Authority (CIISA) has [welcomed the report](#), and will be providing a single point of accountability and work with other stakeholders to address the report's recommendations.

More widely, research on the varying terms and conditions experienced by workers from different groups suggests that in the theatre and music sectors there is a significant pay gap between men and women (Freelancers Make Theatre Work, 2023; Help Musicians and The Musicians' Union, 2023). There is also evidence of a significant pay gap in music between disabled musicians and non-disabled musicians, between those who are LGBTQ+ and those who are not, and between those who are white and those who identify as being from the Global Majority (Help Musicians and The Musicians' Union, 2023). Given the overlap between the theatre and music sectors and opera and music theatre, we might expect to find the same pay gaps in opera and music theatre.

There are a range of formal initiatives taking place, for example the Engender programme, run by the Royal Opera House, to address gender imbalances in opera and music theatre, including a network, professional development opportunities and research and development commissions.⁵² There are also discussions which have been convened across the sector (e.g. Diverse Voices⁵³) in which a range of stakeholders and individuals have come together to consider what could be done (National Opera Studio, 2018). Other partnerships between smaller and larger organisations (e.g. the partnership between Glyndebourne and the Pegasus Opera Company) have also had a meaningful impact, yielding a mentoring programme and a movement at Glyndebourne towards screened auditions for chorus roles.

These initiatives are important, but there is evidence that the sector is struggling with its own practices. For example:

- Some organisations report that recruiting Global Majority singers is challenging; but those companies who worked more often with Global Majority singers were confident that enough singers were available, but perhaps not being appropriately supported or recognised.
- Organisations acknowledged that open calls for casting singers⁵⁴ might – in principle – provide more equal access, but felt that they were often limited by the resource required to run them.
- It is unclear whether the sector as a whole is equipped for supporting talent from marginalised groups to develop a career post-training, although there are a number of relatively initiatives which are relatively new and from which there may be substantial learning.⁵⁵

Finally, the provision (or lack thereof) of music and creative education in schools is seen as significantly limiting the opportunities for a wide range of children and young people to access artforms like opera and music theatre; and then to move on to consider potential training routes into the profession. There is a widespread view that music education of all forms has diminished in state schools, and particularly that there are fewer opportunities to learn instruments and engage in other activities which might introduce them to opera and music theatre, and to classical music.⁵⁶ Ultimately, uneven opportunities at home and inside and outside of school will affect the potential for diversity in the sector.

⁵² <https://www.roh.org.uk/about/the-royal-opera/engender>

⁵³ The Diverse Voices Programme seeks to provide support for young singers from global majority backgrounds who are planning a career in opera; as part of the programme, National Opera Studio has convened discussions with stakeholders from across the opera and music theatre sector.

⁵⁴ Elsewhere in the arts sector there has been a growth of open casting initiatives, including, for example, at the National Theatre.

⁵⁵ For example: the Pegasus Opera Mentoring Programme run in partnership between Glyndebourne and Pegasus Opera Company; the Diverse Voices Programme, run by the National Opera Studio; the Orchestra of the Royal Opera House's Mentorship Scheme run in partnership with Black Lives in Music, for young musicians from underrepresented backgrounds.

⁵⁶ In Section 3.3.3 we discuss the experience of practitioners working in schools who experienced being the only music provision in schools.

5.1.2 How talent is developed

Many freelance and permanent artistic and creative workers in the opera and music theatre sector have unconventional routes into working in the sector, and both contingency and connections play an important role. The presence of music at home or in early school periods was cited by many consulted in this study as key.⁵⁷

Some consulted in this study had specific training at higher education (HE) level – through a conservatoire or a relevant degree course.⁵⁸ Some of our contributors feel that their HE training focused too exclusively on the artistic practice, and did not prepare students for all the non-artistic elements of working as a professional in the industry (e.g. managing finances, getting auditions, etc). They also feel that their conservatoire training was narrow in the range of prospective careers that it valued.⁵⁹ The one area in which some organisations recruiting talent felt that training was insufficient was in providing experience or knowledge of participatory work, or working in educational and community settings (which they described as then having to be learnt ‘on the job’).

Conservatoire training varies from institution to institution, and is not static in its practices; this study has heard from only a limited range of stakeholders on their conservatoire and training experience, and any further work considering training routes into the sector would benefit from a wider view. It also exists in an international marketplace, and we heard concerns from UK-based conservatoires that, particularly post-Brexit, international student numbers are being affected in conservatoires as they are across the HE sector.

Beyond HE training, much talent development in opera and music theatre focuses on singers.⁶⁰ The absence of a more strategic or sector-wide approach to wider talent development is an issue particularly for skills areas which are opera and music theatre specific, like training singers, with:

- The potential for duplication, particularly between talent development organisations and talent development activities in larger organisations.
- Talent development programmes from larger organisations being seen as a way for them to ‘hold onto’ young talent – specifically, not consistently supporting them to seek opportunities elsewhere and find a sustainable career beyond the programme.
- Not paying singers and other emerging talent properly, or sometimes at all, or recognising the need for participants to navigate around other jobs they need to pay their bills, thus appearing to be a way of obtaining ‘cheap labour’.
- At present, even where organisations may engage in supporting talent development for children and young people through participatory activities and then at later stages

⁵⁷ This is increasingly a common finding in studies examining the background and drivers for training and working in the cultural sector, for example see (Cox and Kilshaw, 2021).

⁵⁸ For the difference between a conservatoire ‘training’ and university ‘education’ see for example <https://www.bcu.ac.uk/conservatoire/acting/why-study-here/drama-school-or-university>.

⁵⁹ N.B. Some of our contributors would have undertaken their training 20 or more years ago and it should be acknowledged that education programmes will have changed or developed over the intervening period.

⁶⁰ There are examples of programme opportunities for répétiteurs and music directors, as well as examples of partnerships between organisations and HE institutions, e.g. supporting composers. These were, on the whole, less prevalent than programmes for singers, and often less established and well-supported. There are also programmes, both in HE and outside, to support opera directors to develop their work. There are also technical theatre training opportunities, including in specialist institutions focused on theatre or combined arts (e.g. at the Royal Welsh College of Music and Drama, or at Guildhall School of Music and Drama). On the whole, contributors in other creative roles (e.g. lighting and theatre design) tended to refer to opportunities generic to their discipline rather than specific to an opera and music theatre setting.

through professional training, it is unclear what the route-map might be from one stage to the next.

An earlier study commissioned by the National Opera Studio (Devlin, 2016) identified similar findings to those above, alongside these specific recommendations which remain highly relevant:

- The apparent growth of singers being trained, against a decline in large-scale opportunities for employment and decline of ensemble models, suggesting that most singers need to prepare for a portfolio career;
- The need to support mid-career singers, particularly where physiological changes mean that voices and available roles may change;
- The need for larger and smaller organisations to think about how 'emerging entrepreneurial organisations' can be supported;
- The lack of diversity of singers, and need for a sector-wide strategy to support greater diversity;
- That there were gaps in key skill areas for singers which needed addressing.

5.1.3 Building a career

Career progression for freelance workers in opera and music theatre is subject to contingency and connections, meaning that who you know – and who you are able to network with or access – plays a significant part in gaining career opportunities. This is not unique to opera and music theatre, but some of the key elements of freelancers and creative practitioners experiences included:

- The importance of building relationships, and difficulty in 'getting in' to closed circles.
- The limited opportunities for career progression for practitioners in roles including orchestral players and chorus singers.
- The role of competitions for young singers, which could be beneficial but were also seen as difficult and sometimes challenging or even damaging experiences for participants.
- Sustaining a career through physiological changes (i.e. changes to the voice and body of singers), and the necessary change in potential roles.

There is pessimism about the availability of work in the UK, in part related to the results of the Arts Council England NPO funding round in November 2022 and the perception that it will result in less work over time; and about the access to work outside the UK, related to Brexit and the increased paperwork and decreased opportunities which singers and other creative workers were experiencing. There is a discourse currently suggesting that singers may need to leave the UK altogether in order to seek a meaningful career in opera and music theatre, a view which we can also see from others thinking and writing about the sector (Walker, 2022). We also heard from other creatives, including directors, who are increasingly working in Europe and feel that more interesting and supportive opportunities are available there.

Singers and other creative practitioners often did, or wanted to do, other things alongside singing, and generally we heard from freelancers and some training providers about a 'portfolio career' being more common. This is because:

- In some cases it enables freelancers to earn a living, balancing more stable income with less regular sources.
- It provides variety in their careers
- It gives them agency, enabling them to determine their own creative work.

Not all of this kind of work helped to pay the bills, and some of it was precarious in its own way; however, some of this kind of work is considered important because it provides

meaning, and – in some cases – career progression.⁶¹ Singers and other freelancers also report finding it difficult to balance the range of things that they want to do and need to do in order to make a living; some kinds of work were relatively inflexible, whilst others could be fitted around different commitments.

5.1.4 Terms and conditions

The sector reports a ‘depression’ – or period of stasis – of fees and wages over an extended period of time for some parts of the workforce. This included:

- Singers fees lagging behind those in Europe and affecting the sector’s ability to bring talent to England.
- Fee rates for many freelancers, including directors and creative design practitioners, at a standstill.
- For permanent workers, including orchestras and choruses, salaries have moved only slowly in the last decade, some cuts in the Covid period were maintained or only reversed recently and more generally some ensembles have seen changes to contracts and reductions in the numbers of posts or contract sizes.
- Frustration at the gap between senior/high profile artistic salaries and fees and the earnings of the majority of creative workers.

Opera and music theatre practitioners span different artforms, and therefore different unions and expected working practices. There are questions about how these different practices relate to the context of a collective, creative endeavour (and we heard tangible examples of organisation, particularly smaller ones, finding it challenging to navigate different practices and expectations). There is also evidence of companies exploring alternative employment models, including flat pro-rata-ed salaries for all company members, regardless of their role; we identified two, relatively new organisations exploring this approach, and it would be valuable for any learning from these models to be shared widely in the sector.

Companies and individuals are engaging with questions about current employment practices: one company discussed their freelance community charter, and we heard from freelancers involved in self-organisation and advocacy through campaigns like Freelancers Make Theatre Work. Despite this, we heard a generally gloomy picture from a variety of perspectives about the terms and conditions for workers in opera and music theatre; this included workers seeking second jobs to supplement their income, being asked to step into roles without the appropriate training and support due to an absence of more experienced workers, and generally concern for the future of work in the sector.

These perspectives are mirrored in research relating to the wider music and theatre sectors, and elsewhere in the arts.⁶² The 2023 Freelancers Make Theatre Work Big Freelancer Survey finds that financial uncertainty and underpayment are widely reported concerns, alongside being asked to do more work for the same/less pay, or take on more roles/responsibilities for less pay. Post-pandemic freelancers remain under pressure, and Brexit remains a challenge, affecting the availability or accessibility of work (Freelancers Make Theatre Work, 2023). The Musicians’ Census found that for musicians earning all of

⁶¹ Research on freelance singers or ‘singer-actors’ developing their own work, suggests that there are tensions between seeking artistic agency and control and being able to earn a living (Walker, 2015).

⁶² For example, research into the impact of the pandemic on the livelihood of visual arts workers suggested not only that workers lost contracted work due to the pandemic, but that for almost half it had an effect on their ability to get future contracts and commissions (Earthen Lamp, 2021). More widely, income from visual arts practice is typically just over a third of the total income, which means that the majority of visual artists have a second (and potentially third) job or source of income; taking that into account, the mean average total income for visual artists is less than the national living wage (TBR, 2018).

their income from music, the average income was around £30k, which is below both the average median income in the UK and the average salary for a working-age person with a degree in the UK (Help Musicians and The Musicians' Union, 2023).⁶³ The Big Freelancer Survey estimates that the average (mean) income for freelancers responding to their survey is £22,900 (Freelancers Make Theatre Work, 2023).

5.1.5 Does the sector have the talent and skills it needs?

There is some evidence of talent leaving the sector, particularly in technical skills areas, and of skills gaps in key areas. Opera and music theatre – and the wider subsidised arts and culture sector - faces direct competition from other sectors, with some creative and technical workers having moved to work in areas like film and television. These moves have been partly prompted by the pandemic, when live work largely ceased, and partly prompted by better terms and conditions and better opportunities.

More generally we note that the wider theatre sector is experiencing a skills shortage in key areas, often related to working conditions and patterns (BECTU, 2022), including:

- Stage managers
- Staff in other areas of backstage, technical and creative work
- Prop and costume making

Skills gaps in some areas have led to reports (not only in opera and music theatre) that some workers are being asked to step into responsibilities for which they are not sufficiently experienced, trained or paid; recent research also confirms these experiences (Freelancers Make Theatre Work, 2023).

Accredited apprenticeships, are supported via the Royal Opera House and its work in Thurrock, but other potential employers in opera and music theatre are unsure that they can fulfil the educational element. At present there is no strategic, sector-wide response to these skills shortages, either within opera and music theatre or more widely in theatre; some contributors wondered if the sector could work together better in this area and be a bit more imaginative in its thinking.

There are also skills shortages:

- In fundraising and IT, which are both shortages we hear of broadly across the arts sector.
- In singers, directors, composers and other creative practitioners who have knowledge and training in participatory work, particularly with experience of practices like co-creation, though there is some evidence of partnerships between HEIs and organisations to address this.

One final issue is recruiting and retaining talent outside London, for large and small companies based outside London, as well as for companies based in major regional cities and out in rural locations. For some companies, only undertaking work in a limited period of the year exacerbated this issue, and can make occasional work outside London potentially very expensive – for example, attracting a repeteur for a short period of work to the North East could be very challenging. Some summer festival/country house organisations undertake rehearsals in London prior to moving the production on-site to try and mitigate this issue.

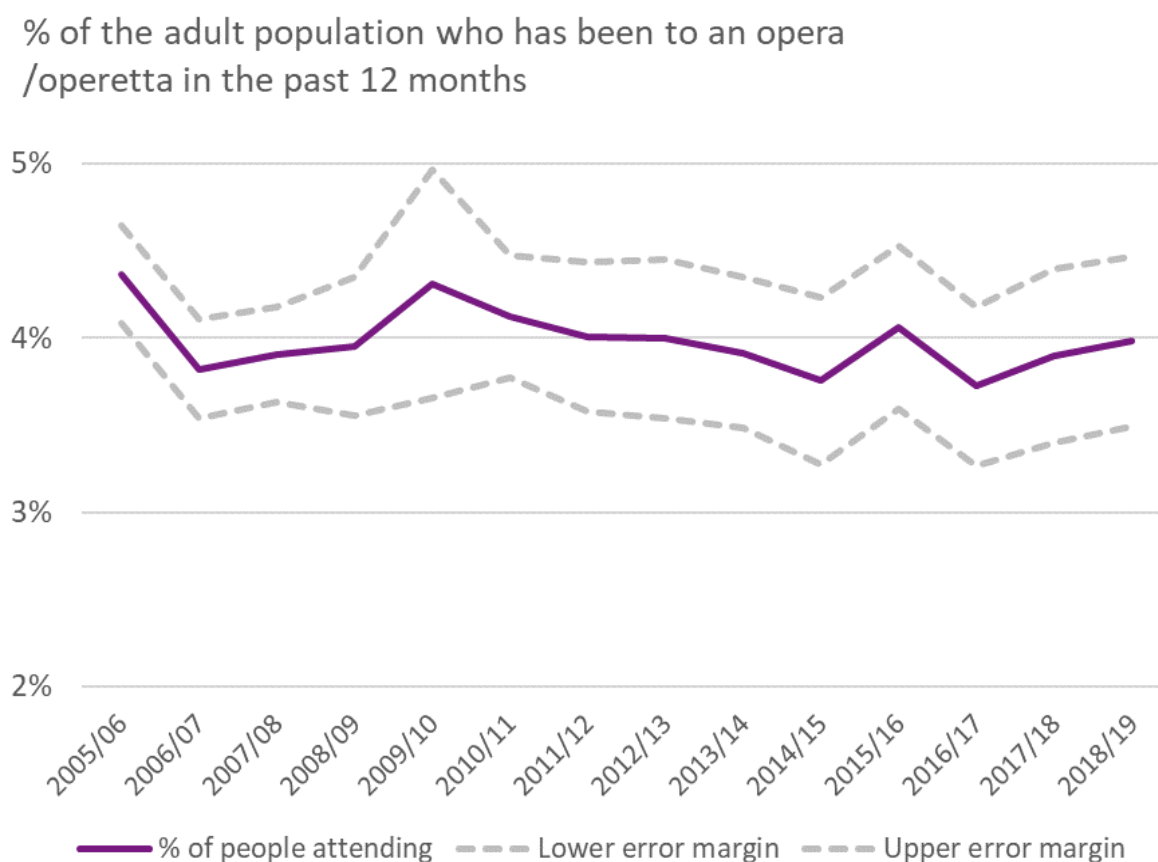
⁶³ The Musicians' Census project is substantial, and there are still further insights to emerge from the project. The findings referred to here relate to musicians across all genres, and there may be useful learning which are more specifically relevant to musicians working in the opera and music theatre sector from future reports.

6 Presentation

6.1 The size and overall trend of opera and music theatre audiences

Overall, the proportion of the adult population attending opera has stayed fairly constant at around 4% over recent years (this compares to around 22% for plays/drama, 8% for classical music, 4% for ballet, and 5% for jazz). Specifically, there is no strong evidence from the Taking Part survey that the number of people attending opera increased or decreased between 2005/6 and 2019/20. This is, however, in the context of an increase in the number of older, affluent people within the population, a group that have historically been more likely to attend opera (see section 6.2 on audience profile).

Figure 6: % engaged in opera



Source: Taking Part, 2005/6-2018/19: average = 4.0%

The Taking Part survey doesn't extend beyond 2019/20 and the Participation Survey that replaced it doesn't include opera as a separate category. However, we can compare individual organisations' audiences since Covid to develop that trend, based on figures based on NPO returns for nine opera organisations with consistent data. This data suggests (although with considerable variability) that sales dipped even in 2019/20 (at around 2/3 of 2018/19 levels). Although sales were only substantially down for London venues, this was a far bigger overall drop than would be accounted for by lockdown starting in the last couple of weeks of the year (though may in part reflect Covid's impact being felt in London earlier than the national lockdown). Sales were, of course, very low in 2020/21 and remained substantially lower in 2021/22 than they had been pre-pandemic (again at around 2/3 of

2018/19 ticket numbers) but had mostly recovered by 2022/23 (at around 90% of 2018/19 levels overall).

Despite that short-term drop and recovery, and the differences for specific audiences and organisations, the overall trend doesn't deviate far from the longer-term picture of flat engagement levels. Indeed, viewed against the backdrop of engagement levels in the United States, reported by the National Endowment for the Arts (e.g. a 34% drop in opera attendance from 2002-2012: www.cultureforhire.com/articles/82-22), this relatively flat trend is comparatively buoyant. But attending opera remains a minority pursuit, which may present a challenge for delivering against the Let's Create Investment Principles of Dynamism and Inclusivity and Relevance.

It is not just that only a minority of people *do* attend opera: only a minority (albeit a substantially larger one) are *interested* in doing so. In the summer 2023 wave of the Cultural Participation Monitor, respondents (representing a cross-section of the whole UK population) were asked to what extent a range of cultural activities appealed to them (e.g. a Shakespeare play, a new play, a ballet performance, a dance performance, an opera, a musical, a classical music concert, a rock/pop concert). Overall, live opera appealed to about 30% of respondents, who rated their level of interest as a 4 or a 5 (on a scale of 1-5, where 1 is not at all and 5 is very much). Opera screenings appealed to 16% and watching opera at home (online/TV) to 17%.

This was a little lower than other art forms: e.g. dance and ballet appealed to 32%, a Shakespeare play to 38%, a classical music concert to 40%. These differences in levels of interest between artforms are in some cases smaller than the those between levels of actual attendance. For example, the proportion saying they are interested in attending a classical music concert is only a third higher (40% compared to 30%), but in the Taking Part Survey (2019/20), *double* the proportion of the population had attended a classical music concert (8%) as had attended opera (4%) in the last year. This may in part be due to lower availability of opera compared to classical music in much of the country.

This figure of 30% of people rating their interest in attending opera as 4 or 5 out of 5 does not mean that 1 in 3 people are likely to actually attend live opera, or even want to do so more than once. For some, for example, opera may be a 'bucket list' item. But it does suggest it has at least some appeal for a sizeable minority. Moreover, although the appeal of opera varied to some extent across demographic groups and geographic areas, some respondents from all age and social groups and regions expressed an interest. In other words, opera does have appeal across age groups and social divides; the fact that some groups are very under-represented among actual audiences suggests that other factors may serve to exclude or put them off.

6.2 Who is in the audience

In this section, we focus principally on audiences for ticketed, 'main stage' opera performances, rather than participants in other opera-based activities – such as education or participatory experiences. For the most part, the number of people engaging with these other opera-based offers is much lower and data capture is variable. Anecdotally, because many are tailored for specific groups – e.g. schools, particular communities – we would expect the demographic profiles of those who engage in them to be very different.

Within each of the next four subsections — on affluence, age, ethnicity and geography — we see that, despite specific efforts and interventions to broaden engagement, the opera and music theatre sector super-serves some groups compared to others. This presents a challenge in terms of the 'Let's Create' Investment Principle of Inclusivity and Relevance and

the breadth of reach of work towards the strategy's Outcome 3: A Creative & Cultural Country.

6.2.1 Affluence

Overall, 'main stage' opera audiences tend to be more affluent than the general population, a tendency reflected across a range of sources (including several opera companies' own figures, the Taking Part survey, geodemographic analysis of box office data and more). For example, 66% of London audience are from the affluent Metroculturals Audience Spectrum⁶⁴ group ('Prosperous, liberal, highly-educated urbanites, passionately interested in a very wide cultural spectrum, concentrated in large metropolitan areas, particularly London'), compared to 31% of the London population. 36% of the non-London audience are from the similarly affluent (if different in profile, tastes and behaviour) Commuterland Culturebuffs group ('Affluent, professional, keen and well-informed people who are regularly and highly engaged, connoisseurs in the artforms they choose'), compared to 12% of the non-London English population. But it is important to note that opera is far from alone in the arts in this respect. In *Culture is Bad for You*, the comprehensive recent work on culture and inequality, the authors give comparisons for a wide range of art forms between engagement levels and Indices of Multiple Deprivation⁶⁵. In many cases (e.g. classical music, ballet, pantomime, plays/drama, film, musicals, jazz and more), the occupants of more affluent areas have substantially higher levels of engagement.

Those organisations with high proportions of sales to members and higher ticket prices, such as country house opera companies, also reported a more affluent profile of audience.

6.2.2 Age

The age-profile of audiences for 'main-stage' opera was a frequent theme in interviews. For organisations presenting opera and music theatre in a traditional way, with an emphasis on existing repertoire, we heard that in most cases, audiences are older than the general population. This is even true in the case of the London organisations (discussed later in this section) who reach a relatively younger audience than many other opera and music theatre companies. This regional difference is, at least in part, likely to reflect the background population: the population of London is younger than the rest of the country (e.g. 25% of the London population are 25-34 compared with 14% for England overall, according to the 2021 census). Similarly, London's population is, on average, more affluent, as well as having a higher proportion of people with degree-level qualifications (47% compared to 34% across England, from the same source).

However, several organisations place significant emphasis on attracting younger audiences and have targeted ticket schemes/prices and/or young members arrangements (for example with free or heavily discounted tickets available for younger age-groups) to support achievement of this aim. Other supporting activities (such as social media promotions, reservation of sections of the auditorium, specific performances for younger bookers) have also contributed to this success. Some organisations – most notably ENO and the ROH – reported that they were making progress in attracting younger audiences as traceable in their audience surveys and transactional data. ENO reported younger audiences increasing progressively since at least 2018/19; ROH particularly in the last two financial years, with the launch of the Young ROH scheme in 2021/22 (building on previous activity targeted at younger audiences) having a particular impact.

⁶⁴ For more about Audience Spectrum, the Audience Agency's audience profiling system, see www.theaudienceagency.org/audience-spectrum

⁶⁵ *Culture is Bad for You* by Brook, O'Brien and Taylor, chapter 4, fig. 4.10.

These increases are partly a response to particular schemes and approaches put in place by those organisations and are also influenced by a post-pandemic trend by which older audiences are returning in lower proportions and, especially, at lower frequency than before.⁶⁶ Beyond London, however, there is a range of anecdotal evidence to suggest that an equivalent shift towards younger audiences is not as yet taking place.

Relying heavily on discounting to reach younger audiences has limitations, however. Aside from the impact on the bottom line, discounting does not address deeper questions of relevance, nor shifting preferences in terms of the experience. There is long-standing evidence (e.g. from the 2012 evaluation of A Night Less Ordinary, the DCMS-supported under 26s free ticket scheme⁶⁷ and before it, from evaluation of Arts Council England's New Audiences programme in 2003⁶⁸) that while such subsidy may lower perceptions of risk, it rarely targets financial inequality as intended, or increases long-term engagement by those from groups that are less likely to engage, without predominantly benefiting highly engaged, well-off audiences.

In any case, despite this evidence among some organisations of significant proportions of younger bookers, for most, the highest proportion of bookers was from those 65+ and this age profile was often described as difficult to change.

6.2.3 Ethnicity

Regularly funded organisations reported audience profiles that were less diverse than their local populations, with a range of 75% to 94% White audiences (compared to 82% in the England and Wales population as a whole, according to the 2021 Census). This was supported more anecdotally by many interviewees. Organisations with higher proportion of Global Majority audiences were in cities (such as London and Birmingham) that have more diverse populations than the country as a whole: here, too, audiences were more likely to be White than the local population.

We know that the UK population is more diverse in terms of ethnicity among younger age categories, so that opera having a relatively older audience overall would lead us to expect it to be less diverse than the country as a whole. However, this does not explain all the difference. Even accounting for the age profile of the opera and music theatre audience, we would expect to see a more diverse audience if it was representative of the profile of the country within each age category.

The lower representation of Global Majority population within audiences may in part reflect the profile of the workforce (both on and off stage, see section 5.1.1), as well as the repertoire (section 3.2).

6.2.4 Geography

We have noted earlier (in section 3.1) the regional variations in opera provision, which leads to corresponding differences in regional engagement levels.

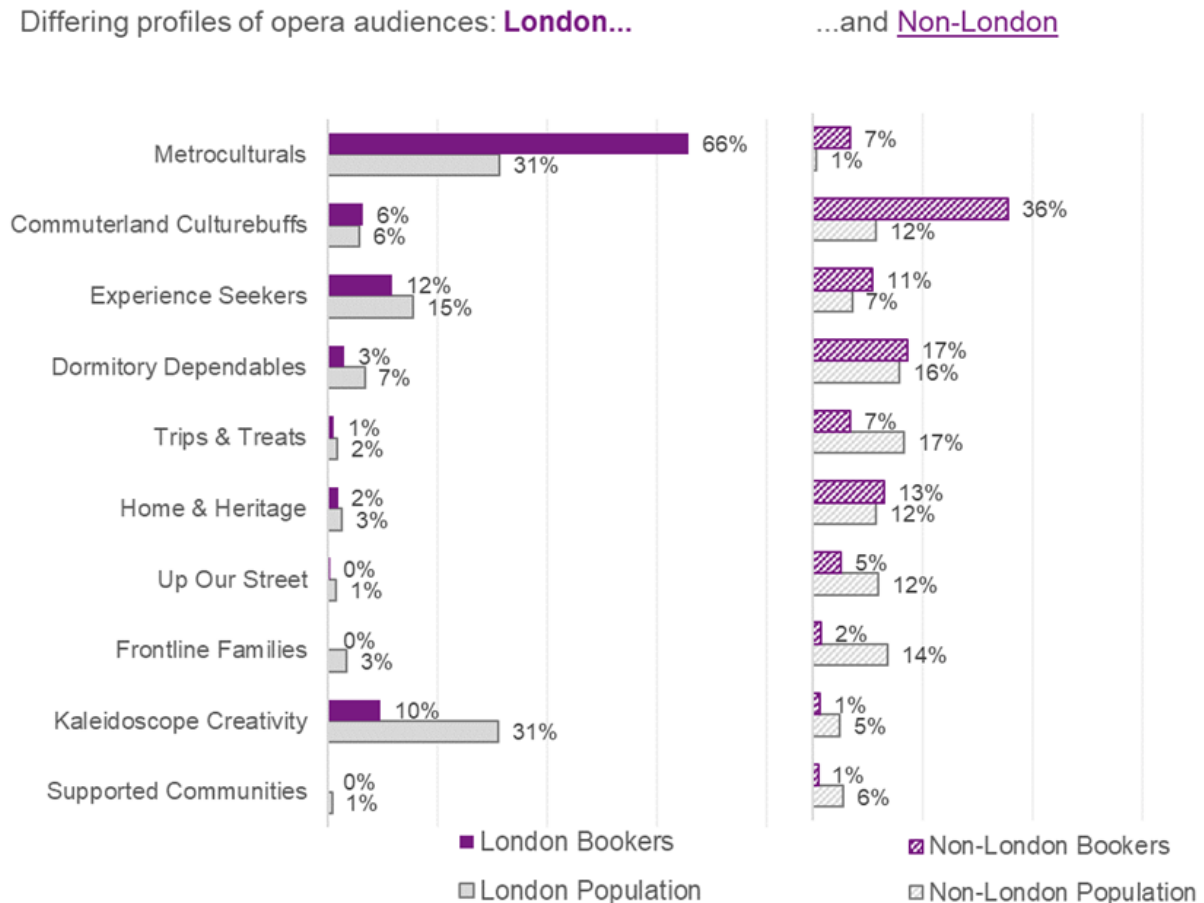
⁶⁶ See <https://theaudienceagency.org/evidence/cultural-participation-monitor/change-in-sales-post-pandemic> for example)

⁶⁷ https://www.artscouncil.org.uk/sites/default/files/download-file/Night_Less_Ordinary_evaluation.pdf

⁶⁸ "Whilst the programme found that factors such as price and access to information do have an impact on frequency of attendance, it seemed that other factors, such as cultural relevance and appropriateness of programming, timing and place can have a much greater impact.": <https://www.artscouncil.org.uk/sites/default/files/download-file/New-Audiences-Final-Report.pdf>

The profile of those attending also differs markedly by region, particularly between London and the rest of England. This difference in profile can be seen clearly using the audience profiling system Audience Spectrum.⁶⁹

Figure 7: London and non-London audience profiles, compared to population



Source: based on 2017-19 Audience Answers data, using Audience Spectrum segmentation model.

78% of London opera audiences come from two segments (Metroculturals and Experience Seekers); 66% of non-London opera audiences from three different segments (Commuterland Culturebuffs, Dormitory Dependables and Home & Heritage). These different segments tend to have different demographic characteristics, tastes, engagement behaviours and circumstances (which also affect their post-Covid behaviours, as described below). Overall, the most prominent segments both within and outside London tend to be moderately or highly engaged in culture more generally. The key non-London segments tend to be older and to have more traditional tastes.

6.3 Frequency, churn and loyalty memberships

We can extrapolate from Audience Spectrum analysis that opera audiences are relatively frequent attenders – of both opera and other cultural offers. In fact, going to see opera is a marker of being a frequent attender in analysis of the Audience Answers data, a finding further borne out in a number of studies by The Audience Agency for individual venues and

⁶⁹ For more details, see: www.theaudienceagency.org/audience-spectrum.

companies, which show that bookers of opera are among the most frequent and committed in each venue's audience.

Nevertheless, The Audience Agency's 2013 "*Audiences for Opera and Ballet*" study for Arts Council England suggested that 80% of opera audiences only book at one venue. This is broadly in line with the habits of bookers for other artforms, taking into account the scarcity of opera performances compared with more ubiquitous forms such as theatre.

In this study, we have not however carried out primary, up-to-date analysis of frequency, churn or cross-over in audiences across a comprehensive data-set of *all* the opera organisations and/or venues involved in this study. We cannot, for example, state what proportion of all opera audiences are first-time bookers. Nor have we scrutinised the profile and rebooking habits of these first-timers. Although some (not all) opera organisations were aware of their rate of churn, we did not hear of any systematic research and analysis designed to understand the reasons for many audience members not returning, or for variations in retention for different demographic groups. Such analysis would provide important clues of how to develop both new audiences and deeper commitment among the core audience.

Anecdotally, interviewees shared assumptions, for example that some first-time audiences have 'seeing a famous opera' on their once-in-a-lifetime "bucket-list". Another view was that new audiences were conservative in their tastes, preferring well-known operas and a traditional presentation. Although these assumptions are consistent with studies about new audiences, we would anticipate that the picture is more nuanced. Again, comprehensive, sector-level quantitative and qualitative analysis would offer much needed insight into the appeal of new work over "known product" among different potential audience-groups.

Membership/subscription schemes remain important, although we heard from some interviewees that the appeal of locked-in subscriptions was dwindling. This follows a general trend towards later booking among next-generation audiences. There were also suggestions that membership models risk prioritising the preferences of an exclusive 'club' (including attitudes to programme and pricing) and can make it harder for new audiences to access tickets. Some organisational business models – especially among the country house opera companies – have membership schemes at their core and members can make up the majority of their ticket-buyers. Subscribers tend to book regularly (e.g. seeing more than one production in a season/year), are committed to opera and music theatre, may also donate to organisations, and are knowledgeable about the artform.

Subscription models continue to hold up well elsewhere in the world – especially in the US – for certain kinds of audiences. Being able to identify which audiences for whom this remains true – and to adapt offers for them in new and appealing ways, as US researcher Alan Brown has described in his recent work⁷⁰ – could be a lifeline in terms of income. On the other hand, some traditional membership benefits do not speak to younger audiences (as we have seen in the Cultural Participation Monitor) and it will be important to develop differentiated loyalty ladders, with different appeal for different audiences. This would help to support efforts to deliver against the 'Let's Create' Investment Principle of Inclusivity and Relevance.

6.3.1 New audiences for new work

Interviewees described how some experienced opera attenders seek out known product (e.g. seeking out new productions and performances of known works), while others are

⁷⁰ e.g. the panel discussion *Interrogating Marketing Relationships: What Problem Are We Solving?*: <https://wolfbrown.com/insights/presentations/interrogating-marketing-relationships/>

hungry for newer or different kinds of opera and music theatre, perhaps in a different context or setting (and that these groups were distinct). A similar distinction was also made between the appeal of classic and new works for new audiences, however in this case, there was some indication that those that many who first attend for new work, may then return for more traditional opera. This could indicate that whilst for some new audiences, a production being opera is itself the main draw, for other people, different aspects of a production are the principal attraction (e.g. story, subject or familiarity through other media). Having then experienced opera, however, this second group may be as likely to reattend for more traditional operas as for something new which has different 'hooks' from the event that initially engaged them.

Some interviewees described these patterns of engagement confidently, although hard data of this happening at scale is limited. We did, however, hear of several examples where new work has connected with large, arts-interested "new-to-opera" audiences (e.g. ENO's staging of *The Handmaid's Tale*). Insight into which titles are best placed to achieve this reach to new audiences, which audience types are best reached through this approach, as well as what they attend next, would all be aided by more detailed production-by-production audience profiling and analysis, as well as sharing these insights within the sector. This would also help to identify more broadly how audiences for new, or unusual, work differed from audiences for more established repertoire. The ability to reach new audiences with new work, particularly when informed by data and audience insight, would demonstrate progress against the 'Let's Create' Dynamism Investment Principle, as well as of Inclusivity and Relevance Investment Principle, where these audiences also have a different profile.

We heard directly from producing organisations that productions of certain kinds of new work brought in audiences which looked and felt very different from mainstream audiences. Perhaps not surprisingly, some found working in the uncharted area of "new work for new audiences" to be a marketing challenge. The need to develop differentiated experiences and communications for one production for disparate audience groups was generally beyond organisations' resources or capacity. Despite these recognisable challenges, there were however also success stories of work which had initially been difficult to sell but had found new audiences, such as Opera North's *Orpheus Reimagined* (see Section 3.3.4 for a discussion of this project).

As might be expected, companies report that performances which have grown out of participatory work in a particular community are often popular with, and highly representative of, that community, regardless of whether or not the community includes a high proportion of people with a lower propensity to engage with mainstream arts.

What is less clear is whether opera and music theatre as an artform has played a significant role in driving interest and engagement in these events and activities. Some interviewees felt that because opera and music theatre is all about storytelling, it is a particularly effective and compelling vehicle for communities to find their own voice and tell their own stories. There is also an assumption that such embedded work stimulates new interest among those that take part and can begin a life-long habit as an opera-lover. Again, there are individual stories of such conversions but no studies at scale nor of a longitudinal nature. This dearth of evidence is not limited to opera and music theatre, as there is also scant evidence of the long-term impact of one-off participatory projects in the arts in general.

6.4 Connecting with audiences

For many contributors, the value of opera was described in terms of a distinctive, musically beautiful, emotionally-powerful and intense live experience. Similar themes emerge from research into highly engaged opera audiences (O'Neill, Edelman et al., 2014; O'Neill,

Edelman et al., 2016). Whilst the attendees in these particular studies were relatively demographically homogenous, they also highlight differences of tastes and sensitivities to issues like price among this core audience. The two studies also explore why audiences like opera, including the role of story, the effect of production choices and the social aspect of attending opera. This work suggests that there is diversity of taste among regular attenders, even where there isn't diversity of profile.

We heard from contributors to our research about different types of opera audience, including: those motivated by sensorially intense experiences of the most famous titles; aficionados seeking out particular titles, productions or performers' interpretation of roles; cultural omnivores for whom opera was just one part of a varied cultural 'diet'; those showing a strong crossover of interest with musicals; those with a specialist interest (e.g. in new music). Organisations had examples of productions which had worked very well with some sections of their audience, and not with others. Greater insight into these and other differing motivations of existing audiences would be valuable, but recognition of the variety of motivations amongst regular attenders helps to move beyond a sense of a homogenous 'opera audience'. Likewise, new or infrequent audiences should be expected to have a variety of motivations and be most effectively reached through a varied offer.

6.4.1 Segmented audiences

Some interviewees recognised the differentiated needs of different audiences and talked about ambitions or plans to develop new audiences in a systematic and segmented way. This included ideas for new and distinct offers, approaches and communications for different segments, to support both income generation and companies' intention to serve their diverse communities more effectively. The English National Opera Under 35s scheme (previously Access All Arias), is an example of this approach, along with other age-related discount schemes in operation across the sector. So too is Opera North's work to develop South Asian audiences, linked to *Orpheus Reimagined*, but also more extensive musical programming and community engagement (e.g. at the Howard Assembly Room and with The Lowry). There was also, across several companies, a strand of commissioning and programming operas for children (e.g. Opera Up Close's *Peace at Last*, for 3-5 year olds, and English Touring Opera's *Shh! We Have a Plan*, for children aged 2+ and *The Great Stink*, for children aged 7+).

From those working in marketing and audience development, we heard an appetite to take audiences on a journey, to build knowledge of opera as an artform, gradually introducing them to less well-known repertoire, or perhaps new work, over time.

Digging deeper, we heard that few plans of this type were fully operationalised, however, and there was little evidence of sustained, insight-informed strategic audience development across much of the sector, especially in relation to new audiences. Most marketing is currently product-led, production-to-production with little emphasis on relationship development outside the prestige memberships mentioned above. For organisations who produce opera but often as part of a wider element of their work – e.g. organisations focused on talent development – audience development has not traditionally been a key part of their work; however, we heard that they are now keen to begin to do more of this. It is a different picture for the large London companies with dedicated insight staff focused on optimising promotion and sales in a data-driven way.

Between touring opera companies and venues there was often a tension, which we heard described from both sides, whereby venues often lacked the marketing resource to focus in depth on understanding opera audiences (which often account for just a handful out of a year's performances), but where touring companies lacked the local knowledge necessary to

do so effectively either. There are some positive relationships that are attempting to bridge this gap and work to understand, and reach, audiences more collaboratively.

6.4.2 Audience experience

A common theme, across Executive Directors of opera companies and Heads of Audience (and equivalent roles), was an increasing interest in articulating and packaging opera and music theatre as an experience. This included the welcome, venue/location experience, the catering offer, or the way in which the experience is framed (e.g. offering more relaxed performances) and formats (shorter, after-work etc). Interest in visitor experience was shared across the board by large and small organisations, and from organisations offering very different kinds of opera and music theatre productions. Some contributors wondered if this was another area where the sector – and perhaps venues too – might work together, to build better and more compelling experiences, amplifying the innately immersive and experiential qualities of opera.

6.4.3 An image problem or an audience problem?

A challenge raised by some venues was a sense that opera and music theatre has an image problem, and that it struggles to compete with other product. Many contributors, from a range of perspectives, shared a concern that opera and music theatre is unfairly perceived by the general population as elitist. There was a commonly repeated view that if people had more exposure to opera, they would learn to love it, or recognise that it wasn't elitist.

These views could be an example of what Jancovich (2011, p. 272) describes as a “consumer deficit model, which sees the problem to be addressed as people’s lack of engagement in art rather than the type of art being offered to engage with”. This ‘consumer deficit’ model’ is at odds with the ‘Let’s Create’ Investment Principle of Inclusivity and Relevance, which places the onus on the cultural sector to:

“...build closer connections with their communities, particularly those that they are currently underserving... to mean more, to more people: to strengthen their relevance to the communities, partners and practitioners with whom they work”⁷¹

rather than on those people and to better understand ‘the type of art being offered to engage with’.

Nonetheless, there was a strong view that opera needs a rebrand, with a generic campaign to educate the public of its benefits. Some felt that running, or at least ensuring delivery of, this sort of campaign was Arts Council England’s role. Contributors talked more broadly about the absence of opera and music theatre from people’s everyday cultural experiences, for example being consistently broadcast, or available, on the BBC.

Although several contributors called for a campaign to shift public perceptions, few demonstrated an evidence-based understanding of what those public perceptions are. There is relatively little research on the perceptions of opera and music theatre among the general public and most of it is not in the public domain, although some organisations in the sector have done work gathering the perceptions of (usually culturally-engaged) non-attendees. A 2017 poll of the UK public by OnePoll, commissioned by Classic FM, suggests that almost one in three people who haven’t been to the opera would like to have the opportunity to attend (29%), however a sizeable proportion of respondents saw opera as intimidating.

⁷¹ Arts Council England Investment Principles: <https://www.artscouncil.org.uk/lets-create/strategy-2020-2030/investment-principles>

Other potential perceptual issues raised in the poll were whether it was too expensive, or whether people were put off by perceived etiquette, thinking opera was too intellectual for them, or performances in a foreign language (although the latter point has been challenged in recent research by Claire Booth, in Booth, 2024). However, whilst these perceptions were present, they were not reported by a majority (Classic FM, 2017).

Many contributors also thought that perceptions of elitism were present not only among the general public, but also among stakeholders like schools, music teachers and, significantly, those like Arts Council England who are tasked with making critical decisions about whether opera and music theatre is funded or supported. This is a source of resentment and frustration, although we heard few suggestions about a remedy for this situation.

6.4.4 Relevance & discoverability

Some contributors linked challenges around contemporary relevance, or lack of it, to the stories that opera and music theatre tells (see section 3.2). Some felt that “gatekeeping” around what is and isn’t ‘opera’ and how it should be programmed and/or staged was also alienating to people who might be less familiar with the artform. Similarly, too similar a social background between the profile of those working in the opera sector and the current core audience (e.g. similarities of class, educational background and ethnicity) may make it more difficult to recognise opportunities to engage other groups. This highlights the inter-connectedness of the two aspects of the ‘Let’s Create’ Inclusivity and Relevance Investment Principle. Nonetheless, contributors cited examples of how innovative, new work, including through new partnerships or in new formats, had overcome some of these challenges and resonated with different audiences.

Another practical issue raised was the ‘discoverability’ of much opera. Highly engaged audiences can, of course, find information and performances through relationships with individual organisations, search one-by-one across a range of organisations, or access to specialist press or websites (Opera Magazine, or bachtrack.com, for example). But for those who are less immersed, or who don’t know where to start (e.g. who are unaware which companies tour near them), greater cross-promotion could be helpful. This already takes place to some extent (for example English Touring Opera recently promoting a performance of a new opera commission at the Guildhall School of Music and Drama to their email list) but this could be done more extensively. For this approach to work, greater collegiality between companies may be required, as well as recognition that potential audiences are grown rather than diluted by more opportunities for engagement. Stronger formal collaborative networks (see section 6.1) and reliance on a slightly broader range of repertoire could also help (since companies are likely to be less willing to promote another company’s production if it is felt to be in competition with their own, whether through too great a similarity, or proximity).

6.5 The Impact of Covid-19 and the cost of living

Covid-19 had some effects on the opera sector that were different, in type or extent, to the effects on some other areas of the cultural sector. This was both because of distinctive business models (including particularly extended planning lead times and a large ‘minimum unit of risk’) as well as the audience groups most affected. The full details of how Covid-19 affected the sector are yet to be fully apparent and a detailed exploration of them is beyond the scope of this study. We note, however, several companies’ innovations which responded directly to the public’s needs and the pressures of lockdown, showing a capacity for rapid people-centred adaptation. Notable examples include ENO’s Breathe programme and manufacturing of Personal Protective Equipment for the NHS and Opera North’s Couch to

Chorus. This type of response shows the dynamism possible by large and complex organisations.

In relation to audiences, ticket sales in 2022/23 had recovered to pre-pandemic levels overall, although precise figures differ by method of analysis (reflecting the variability between years used as a baseline and the influence of a few larger organisations on the overall figures). Comparison of the Arts Council England returns for regularly funded organisations selected on a like-for-like basis (i.e. excluding Glyndebourne and English Touring Opera, which didn't have comparable figures) indicated a drop of circa 27% of ticket sales in 2021/22 compared to 2018/19-2019/20. This had recovered to show a 1% increase on 2018/19-2019/20 figures by 2022/23 (the corresponding figures for income are a 13% drop for 2021/22 and 16% increase for 2022/23, compared to the same pair of years, 2018/19-2019/20).

Recovery of audiences since the pandemic has been slower outside London. One reason is that the audience groups most likely to attend opera are also those whose attendance has been most reduced following the pandemic. In particular, in 2022/23 the Audience Spectrum groups Commuterland Culturebuffs and Home & Heritage, which had previously accounted for 36% and 13% of the non-London opera audience respectively in 2017-2019, were at only 58% and 45% of the number of opera bookers in that pre-pandemic period⁷². The two largest Audience Spectrum groups in the London opera audience however, Metroculturals and Experience Seekers, were at 71% and 67% of the number pre-Covid bookers by the same point.

6.6 Understanding and listening to audiences

Contributors briefly discussed which audience voices are heard within organisations, and the degree to which, more generally, organisations consider audiences in planning and programming. Some felt that regular and loyal audiences, including members, were best known by organisations and most heard. Whilst they feel that understanding these groups is important, they acknowledged that organisations needed to find a way to hear more from others, to help broaden their reach and relevance. More generally, we heard arguments that audiences should play a bigger role in the thinking and planning of organisations. In some cases, people felt that audiences were still seen largely as the sole responsibility of marketing and audience development teams, rather than as a key leadership and organisational concern.

Some organisations knew significantly more about their audiences than others. Opera companies inevitably tend to know their audiences less well when on tour than when based at a single location. Among touring organisations, they are most likely to know their audiences well when at their 'home' venue, if they have one, followed by their most frequently visited locations. Like other touring companies, opera companies on tour are reliant on venues to share insight and market intelligence with them. Those who run their own box office have privileged access to booking and booker data but, even this only provides a partial picture of audiences. The degree to which organisations acknowledge this and collect and use additional quantitative and qualitative insights varied greatly, with some smaller companies only collecting data as part of their reporting cycle.

⁷² For more details about Audience Spectrum groups, see here: <https://www.theaudienceagency.org/audience-spectrum>.

Some companies are open to engaging with the Arts Council England mandated audience insight platform Illuminate⁷³, but some smaller organisations were concerned by the reporting burden, particularly when they had limited access to audiences. Additionally, some who had engaged in the previously-mandated audience data platform Audience Finder were disappointed that the change in platform could disrupt the collection of a standardised dataset, which had been beginning to emerge. They stated that this change makes their jobs harder, not easier, in terms of understanding audiences. Organisations raised concerns about the limitations of relying on this kind of quantitative reporting and, in terms of methodology, the representativeness of respondent samples (as well as the size of samples required by Arts Council England). A concern about representativeness of responses was also raised about Audience Finder surveys.

Some organisations collect regular data on audience responses to performances, through the Impact and Insight Toolkit⁷⁴ and/or through audience surveys (including, for example, Net Promoter Scores). Based on these sources, some contributors noted that audiences who are coming to see work rate it very highly; as well as evidence that super-attenders (those who book a lot of tickets and know organisations well) can tend to be more critical (or perhaps discerning).

Overall, we heard little about how companies were carrying out analysis and evaluation targeted specifically at some of the strategic audience issues and challenges that were raised.

In conclusion, the lack, or incompleteness, of standardised data limits the ability to say understand opera and music theatre audiences overall. Although the Taking Part survey included questions about the proportion of respondents attending opera (and at what frequency), this has not been routinely published. Nor is opera included in disaggregated form in the Department for Digital, Culture, Media and Sport's replacement for Taking Part, the Participation Survey, instead being included alongside other performing arts within a single category. In any case, the low proportion of the population who attend opera within any single year (around 4%, as noted earlier) means that population surveys are unlikely to give a nuanced picture of the opera audience. Most critically, there is no analysis that both combines and disaggregates the overall opera audience into discrete groups, identifying and quantifying the opera audience in relation to both individual organisations and accounting for crossover between them.

Contributors felt that data about opera audiences would ideally be contextualised, through better and more systemic segmentation, as well as in comparison and relation to other artforms. They also wanted to know more, for actionable and practical reasons, about crossover between companies and venues, and about progression routes of audience-members over time. This could enable better collaboration and/or longer-term development of audiences.

In short, we did hear significant interest in putting together a more comprehensive and nuanced picture of opera audience behaviours, perceptions and trends at a sectoral level. Some contributors felt strongly that it was important for the sector to collaborate more to build a collective understanding of audiences. As well as helping individual companies thrive, they felt this could drive help to inform conversation about potential innovations and strategic

⁷³ An audience data collection platform, covering survey and ticketing data, commissioned by Arts Council England and built and delivered by PWC. For more information see: <https://www.artscouncil.org.uk/developing-creativity-and-culture/illuminate>

⁷⁴ A toolkit to enable evaluation of cultural organisations' work, funded by Arts Council England and delivered by Counting What Counts. For more information, see <https://www.artscouncil.org.uk/impact-and-insight-toolkit>

development of the sector with funders and stakeholders including Arts Council England. It would also help to deliver against the Dynamism Investment Principle, which champions ‘the development of a more informed and effective data culture within the organisations that we fund’, as well as the Inclusivity and Relevance Investment Principle⁷⁵.

⁷⁵ Arts Council England Investment Principles: <https://www.artscouncil.org.uk/lets-create/strategy-2020-2030/investment-principles>

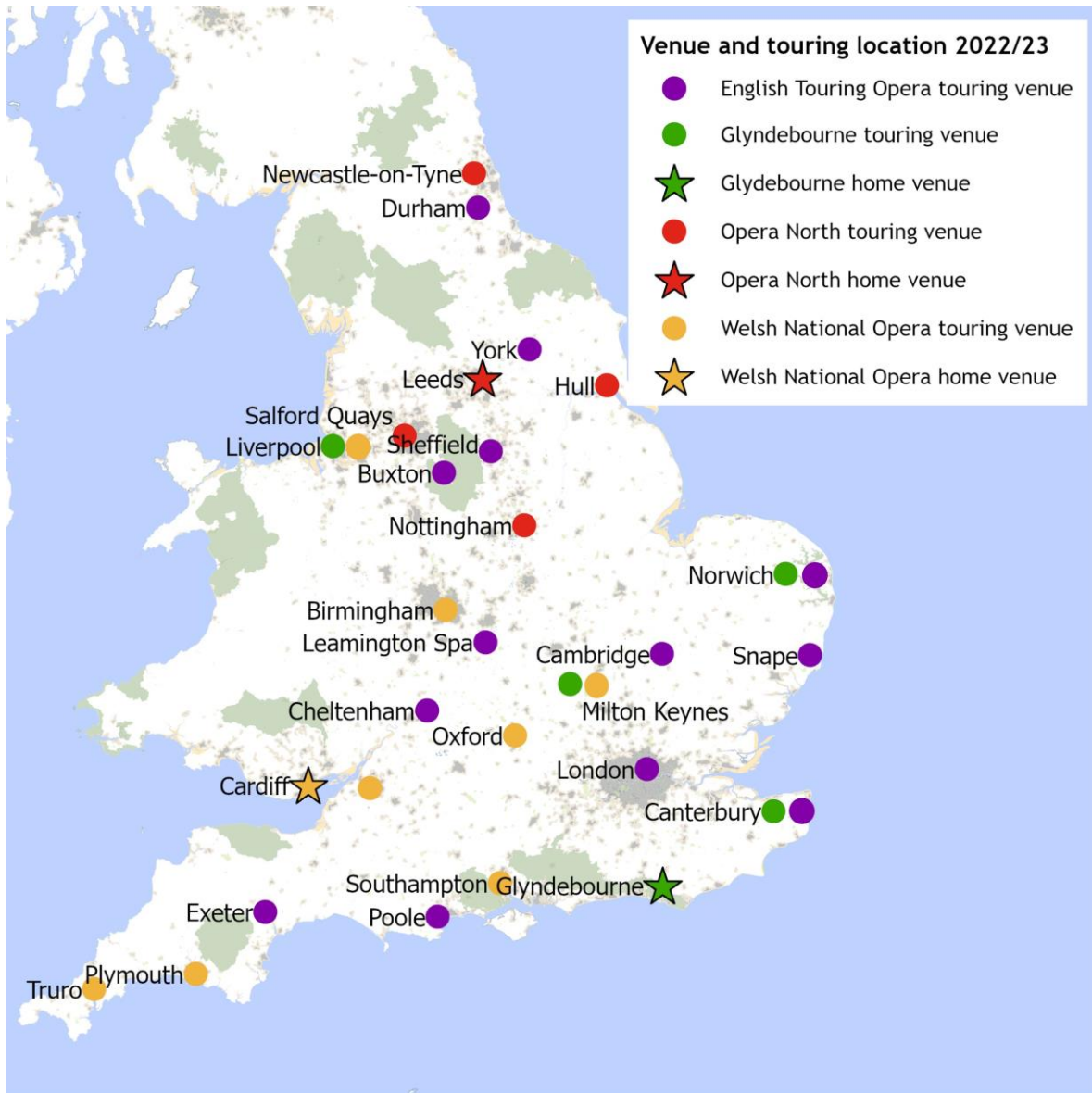
7 Distribution

This section looks at touring opera and music theatre, and the views of venues receiving product as well as organisations making it. It also looks at how the opera and music theatre sector is currently using digital streaming, broadcasting and cinema to distribute its productions.

7.1 Touring

Section 3.1 sets out what we know about where opera and music theatre organisations are based and includes a broad picture of the regional spread of performances of opera and music theatre across the UK, reflecting a significant geographical imbalance. Touring is one of the ways in which the opera and music theatre sector does and can contribute to a wider distribution of opera and music theatre, supporting 'Let's Create' Outcome 2 in improving access to a full range of cultural opportunities where people live, and Outcome 3 in bringing world-class culture to audiences. Some touring companies also deliver activities alongside main stage productions, including reduced-scale productions and learning and participation activities, to touring locations, contributing to Outcomes 1 and 2 in providing a wider range of opportunities for children and young people and communities in their local area.

The following map gives an overview of the key touring locations for the largest touring opera and music theatre organisations, between 2017 and 2023:



Source: Operabase

Touring is becoming more expensive and difficult to undertake, not just for opera and music theatre but also other artforms, because of the following pressures:

- Inflation in fuel, materials, accommodation costs and wages for touring companies
- Inflation in the costs of running buildings for venues
- Challenges gaining audiences back post-pandemic (though some venues report that robust audience levels have returned)
- Managing a commitment to environmental sustainability
- Wider pressures on venues, particularly where they are owned/run by local authorities.

Despite this, we heard from opera and music theatre organisations and venues who were ambitious for the touring offer, and who wanted to develop meaningful touring opportunities and partnerships in different locations, in order to reach different audiences and communities. Below we set out what organisations and venues told us they wanted from touring opera and music theatre.

7.1.1 What opera and music theatre organisations want

Organisations vary in their touring product and pattern. Some tour work which plays initially at a 'home' base and then tours to a range of venues with whom the organisations work regularly, and some touring organisations also have a range of venues with whom they have a regular relationship. Other organisations tour work which changes significantly from production to production, for example companies like Mahogany Opera, and therefore the venues and festivals which are appropriate for those productions may also change and organisations find that they constantly need to build new relationships with venues and festivals. Key to achieving what organisations want to achieve in both of these cases is the quality of the relationship between organisations and the venues to which they tour.

Opera and music theatre organisations say that they want to:

- Build relationships with venues which are meaningful, agreeing objectives and building audiences together
- Build relationships with audiences, and sometimes with the wider communities round those venues, which are meaningful.

Where organisations work regularly with venues, there are examples of relationships which both venues and organisations said worked well:

- Audiences had been developed, including for less mainstream repertoire
- The surrounding activities (e.g. with schools and communities) were generally felt to be high quality and complementary to the main performances, though there were also examples of opera and music theatre organisations not always engaging fully with the venue and local providers to ensure that any learning and participation offer added to, rather than duplicated, any local offer already in place.

Organisations touring in this way are ambitious to take this approach further, with 'residency' style relationships with areas to which they toured. In some cases, organisations were re-thinking their own production and ensemble models to consider how this might be achieved.

Organisations felt that venues knew their local audiences, and in some cases were able to market and engage well in audience development activities. In other cases, however, two challenges were identified by a number of organisations:

- The capacity of venues to undertake marketing and audience development for opera and music theatre. Some venues were felt to be under-staffed and/or under-funded to do this kind of work (especially in relation to local authority-run venues), particularly post-pandemic where expertise/knowledge had been lost due to cuts, or the venue was simply too small to have that capacity in-house. Some organisations also felt that, if they had a marketing function, there was an expectation that they, instead of the venues, would do that work.
- The availability of audience data. This issue was raised in the 2013 Opera and Ballet Review commissioned by Arts Council England (Arts Council England, 2014) and is still a major issue for many touring companies. Touring opera and music theatre organisations often do not know who the audiences they are reaching are and are unable to put together a meaningful picture of audiences across different venues, because the data is owned by the venues and not shared with the touring organisations.⁷⁶ There are no standards across venues about collecting and sharing data and managing GDPR permissions; those who are regularly funded by Arts Council England do have data sharing agreements, but opera and music theatre organisations tour to many venues outside this group.

⁷⁶ Contributors with experience of working in other artforms, particularly theatre and dance, noted that this issue affects other touring artforms also.

Beyond this, opera and music theatre companies felt that they were often competing for slots – as other touring product is – in venues, and that venues could be risk-averse to new or less well-known work, and not willing to prioritise opera and music theatre productions over other touring product, due to other product offering a better financial return.

Despite this, there are some potential opportunities which may be worthy of further consideration by the sector. Some smaller companies expressed a desire to tour beyond London but were unclear how they might fund it and on what basis it might be feasible to undertake touring. More widely, there is some interest in considering how mid-scale touring might be supported by collaboration across producing companies which might support a more exciting and strategic offer.

7.1.2 What venues want

Venues we heard from in this study were traditional lyric theatre venues, receiving mid- and large-scale opera productions, including organisations in receipt of regular funding by Arts Council England through the national portfolio, independent commercial venues and companies running multiple venues across the UK. Any further work exploring opera and music theatre touring may wish to consider engaging directly with smaller venues around England.

Several of the venues we heard from had recently lost or had reduced touring opera and music theatre product as a result of changes which organisations were making to their activities following the November 2022 Arts Council England NPO funding decisions, including Birmingham Hippodrome, Norwich Theatre Royal and the Liverpool Empire.⁷⁷ For venues, opera and music theatre has a place in their programme and contributes to the variety and quality of what they are able to offer their audiences, though they did not necessarily want more of it. It does not make significant money – in some cases it comes at a cost to venues – but as part of a balanced programme it serves a clear need. As a result of the reductions in funding, venues were clear that there are audiences whose interests are now not being met, and for whom there is no obvious alternative local access to opera and music theatre.

Venues also report there being less available product of other types (e.g. mid-scale touring drama) at present, and an ongoing challenge in providing their audience with a variety of good quality work. Some venues had been encouraged by Arts Council England following the opera and ballet review in 2013 (Arts Council England, 2014) to build upon their existing relationships with opera and music theatre companies; they had done so, enabling them to:

- Work together and with other local stakeholders to develop audiences and marketing approaches
- Connect work on stage with high quality work in schools and communities
- Find audiences for some less well-known repertoire, with a sense that the relationship between audiences, venues and companies had enabled those audiences to go on a journey and be confident in engaging with repertoire which might be new to them.

Some venues were frustrated by a perceived absence of direct consultation or dialogue from Arts Council England about cuts to opera and music theatre companies and the subsequent effect on touring; they were also, in some instances, frustrated by the lack of communication and engagement from opera and music theatre companies about changes to touring. More generally, venues did not feel that Arts Council England has a working understanding of the relationships which existed between them and opera and music theatre companies; and

⁷⁷ Overall, the proportion of venues listed on the map at the beginning of this section who are affected by changes in touring due to Arts Council England NPO funding decisions is relatively small.

more widely, that it does not have a sense of the distribution of the work that it funds, or how that distribution works through venues.⁷⁸

Beyond this, however, there are also issues in the quality of the relationships between venues and opera and music theatre organisations, despite what we heard from organisations about the kinds of relationships they wanted. This issue was also identified in the Opera and Ballet Review in 2013 (Arts Council England, 2014). Challenges which venues told us about include:

- The lack of equal partnership in the way that opera and music theatre companies approach venues, particularly no discussion of shared objectives, repertoire or acknowledgement of the venue as the local partner, with local knowledge of its own audiences and communities.
- The sector has been slow to modernise (in both its product and how it presents and advertises it), and to think about how it excites and engages audiences in different ways.

Some venues report that opera and music theatre lags behind other sectors/organisations in their attitudes towards partnership, and their ability to work together with venues (the way that some dance organisations and the Royal Shakespeare Company build relationships were cited as examples of good partnerships). Ultimately, however we heard that venues – like opera and music theatre companies – are committed to touring opera and music theatre as valuable both for the distribution of the artform and the variety and quality of product available in individual locations. Venues are ambitious for their programmes, and their place and contribution to the locations they live in and the communities they serve. There was some appetite for a more adventurous opera and music theatre offer, and for working together to support it to be developed.

7.2 Digital, broadcast and cinema distribution

7.2.1 Digital content

Production and distribution of digital content is now a regular part of what opera and music theatre organisations do, reflecting the part it plays in everyday life as well as the ambitions of the Dynamism Investment Principle which encourages the cultural sector to respond to the opportunities provided by new technologies, and Outcome 3 through collaborating with other organisations to support innovation, research and development, new skills and the use of new technologies.

The pandemic has accelerated this, enabling some organisations to build relationships with practitioners and companies using digital technologies, and to build their own capacity for producing and recording. The range of content produced includes:

- Fully-staged opera productions filmed for streaming/screening/broadcast.
- Productions/content created for digital distribution first.
- Supporting content for marketing (e.g. trailers, teasers and content designed specifically for social media).
- Material designed to add to the experience of a performance, including interactive content or ways to prompt audiences to make their own content, and content designed to support learning and participation programmes.
- Material for learning and participation programmes, and for talent development programmes.

⁷⁸ Some contributors extended a broader criticism to DCMS, which was seen as not understanding how commercial venues worked.

- Specialist projects to support digital engagement.

Not all the organisations who made digital content in the pandemic period have continued to do so; some cited the expense of equipping themselves to do so and to undertake any specific production work as prohibitive.

Some organisations were also extending their presence via social media and content sites, including TikTok, Instagram and YouTube (e.g. ENO's 'TikTopera' in partnership with Netflix and their show Tiger King), and podcasting, seeking new audiences and a more 'fun' and accessible way to reach them. A working paper for Creativeworks London explores the experiences of audience members at the Hackney Empire (including opera-goers and non-opera-goers) interacting with digital marketing and education materials from ETO, including a podcast, a short film, a season introduction, etc. The study finds that different demographic groups of audience members responded differently to these materials, and that elements such as the quality of digital production affected the audience response (O'Neill, Wise et al., 2016).

7.2.2 Streaming

Streaming opera and music theatre productions is now a more established part of larger organisations' outputs, including setting up bespoke streaming services and establishing their own platform and working with other online platforms, (e.g. OperaVision, supported by the EU's Creative Europe programme, or Marquee TV). Whilst streaming is seen as important:

- It is costly to record productions to a high standard
- Platforms can be challenging to use or become defunct quickly
- It does not make a significant income contribution - willingness to pay amongst consumers is very low.

It does enable organisations to:

- Build a relationship with consumers who are not otherwise known to them.
- Achieve broader geographical distribution of opera and music theatre content.

There are ambitions within the sector to consider more innovation in approaches to filming, and some interest in streaming more mid-scale and/or less well-known work as a way to build the knowledge of a wider repertoire amongst audiences. At present, though, streaming provides additional content for those already interested in opera and music theatre, and content which may be more accessible for those at a geographical distance from their organisations.

7.2.3 Cinema screenings

There is similar evidence in relation to the value of cinema screenings, from the Cinegi Arts&Film action research project supported by Arts Council England in partnership with the BFI, which found that audiences attending screened arts and cultural content as part of the programme demonstrated fairly high cultural attendance already and were therefore not new or limited in their engagement with the arts (Mitchell, Davies et al., 2018). Similarly, a study for Creativeworks London on attendees to screenings of ETO performances found an audience largely familiar with opera, both in the cinema and live.

The study suggests that audiences did not see a 'trade-off' between screened and live performances; those who attended frequently went to both. It includes some interesting audience reflections on the different experiences which live and screened work provides. There were some first-time attendees in the study, but the study did not find that first-time

attendees were likely to be motivated to attend opera in a live setting as a result of attending it in a cinema setting (Wise, 2014). On the whole, the available data suggests that cinema screenings are reaching audiences already warm to or engaged with opera and music theatre; there is relatively little research in this area, and it might be valuable to know more clearly the relationship between cinema attendance (or accessing streaming services with opera and music theatre content) and live audiences.

7.2.4 Broadcast

The sector would like to grow the presence of opera and music theatre on broadcast channels, both in the presentation of full productions and in working with broadcasters to present and develop different kinds of opera and music theatre content. Key broadcasters are the BBC (both radio and TV), the European Broadcast Union and SkyArts; the Space has been a useful partner in some work also. SkyArts particularly is seen as a flexible and engaged partner by a range of organisations and has produced work with opera and music theatre organisations which includes material aimed at children and young people (e.g. ENO's [Abracadopera](#)). BBC Radio 3 remains the key route to radio broadcasts of whole productions, whilst other stations like Classic FM and Scala include segments/opera shows and broadcast concerts which feature popular arias.⁷⁹

Organisations we heard from felt particularly that the role of the BBC, with the size and breadth of its work, was key in thinking about how opera and music theatre might be part of more people's everyday experiences. Some organisations had had experience of trying to work with the BBC and felt that the limitation was often the availability of slots on linear broadcast channels, both TV and radio, (we heard at least one example of an organisation offering high quality recordings of productions for almost no cost but finding it difficult to persuade the BBC to find a space to broadcast them). Other organisations had sought different ways into the BBC and were looking at the channels for children and young people (CBeebies and CBBC) and events like Comic Relief to explore how opera and music theatre might have a presence, and how different kinds of products might be developed in partnership with the BBC.

Despite this ambition, the sector feels unable to significantly influence broadcasters; individual partnerships can be meaningful, but more widely the absence of opera and music theatre from broadcast spaces is seen as part of a wider disinclination to carry arts content.

⁷⁹ There are a handful of radio stations around the world which are dedicated to playing western classical opera and music theatre exclusively or primarily, including Klassik Radio Opera (Germany), 101.ru Opera (Russia), Opera Radio (MRG.fm) (US), Met Opera Radio (via SiriusXM) (US), WQXP – Operavore (US) and Antena 2 Opera (Portugal).

8 Opera and Music Theatre as a sector

8.1 How the sector works

The opera and music theatre sector is not an ecology: it does not work together for the wider benefit of all its parts. This view was shared explicitly and directly with us through interviews and focus groups by larger and smaller organisations and individuals. It is evident in some specific findings, for example:

- duplication in areas like repertoire or talent development;
- the relationships (or absence thereof) between smaller and larger organisations;
- or the relationship between newer practices and more established practices, including some of the 'gatekeeping' behaviours which this report has identified.

We also heard very little about meaningful leadership at a sectoral level, although more recently senior leaders in the sector have been talking together more frequently and more generally there are a number of personnel changes taking place in some of the larger organisations. This does not mean that different parts of the sector don't need each other; but that the connections between them are not as good as they might be, or may need to be for the sector to achieve its ambitions and contribute to 'Let's Create' as a whole.

8.1.1 Networks

In thinking about how the sector does and might work together, the role of formal and informal networks is key. Whilst networks exist, and there has been some collective organisation over extended periods of time, there is no sector-wide, England or UK-based network which provides a space for meaningful knowledge exchange, collective thinking and action for all the elements of the opera and music theatre sector as a whole. The networks or spaces for collective action which contributors to this study identified as useful are:

- Opera Europa, connecting mostly larger organisations across the opera and music theatre sector in Europe;
- RESEO (European Network for Opera, Music and Dance Education) provides opportunities for sharing practice, though UK membership is currently quite small;
- Freelancers Make Theatre Work, I:Opera (for freelance practitioners) and MAX (Musicians and Artists' Exchange);
- SWAP'ra (Supporting Women and Parents in Opera) and PiPA (Parents in Performing Arts); and
- Engender, a network which is part of a wider programme run by the Royal Opera House, to address gender imbalances in opera and music theatre.

In addition, for individuals working in the sector the trade union Musicians' Union, Equity and BECTU and the membership body Independent Society of Musicians⁸⁰ all provide resources and are sources of intelligence about work and workers in the sector.

The National Opera Co-ordinating Committee (NOCC) is the longest-standing collective arrangement, which aims to co-ordinate the activities of the large-scale opera sector including repertoire planning and touring activities. It was not mentioned in any interview or focus group as part of this study; this may partly reflect who within organisations attends NOCC, but it suggests more generally that NOCC is not a key reference point for the sector as a whole.

The relatively recent cessation of the Opera and Music Theatre Forum (OMTF) (established to promote and support the work of the small and mid-scale opera and music theatre

⁸⁰ Formerly the Incorporated Society of Musicians, <https://www.ism.org/about/>.

companies) and the recently established Opera UK network (which currently lists more than 45 members from large to small-scale organisations in the opera and music theatre sector and set out its aim to be a strategic, sector support organisation) were discussed as evidence of the sector's inability to move beyond perceived hierarchies and find a structure in which it could engage collectively. The Association of British Orchestras (ABO) is seen by some as the kind of structure which the opera and music theatre sector needs, both in its wider advocacy for the sector and in the role that some contributors perceived it played in advocating for orchestras in the lead-up to the Arts Council England NPO funding decisions; some building-based organisations also mentioned a relationship with UK Theatre and the Society of London Theatre (SOLT).

At a senior level, some larger opera and music theatre organisations have met regularly in the pandemic in a group also including large-scale theatre and dance organisations and we understand there has been some continuation of this initiative. More widely, organisations or individuals from organisations sometimes engaged in other informal conversations, or engagement with movements like Devoted and Disgruntled. ABO also convenes a group of Opera and Ballet Managers which is attended by orchestral managers from UK opera and ballet organisations. In other cases, particularly from freelancers, we heard that some voices felt that they were not normally part of these (or perhaps any) sectoral conversations.

8.1.2 Relationships between different practices and types of organisations

Elsewhere in this report we have identified difficult relationships between large and small organisations, and between different kinds of opera and music theatre practice and focus; these difficulties are not unique to opera and music theatre as an artform. The key issue identified in this study is whether in addressing some of these issues about the way in which different practices and types of organisations relate to each other, the sector could better tackle some of the bigger challenges it faces.

The pipelines and developmental routes for new and different ways of working are fragmented and uneven. This is evidenced by:

- The limited relationships between smaller and larger organisations which often rely on personal connections and contingency, and the perception that larger organisations are often neither porous, nor that they think 'ecologically' about potential smaller partners.
- The challenges in more innovative or different types of practice in gaining interest and recognition from the wider sector (and, therefore, platforms with audiences).
- The perception (from some smaller organisations and from some working in larger organisations) that larger organisations feel that they need to 'do everything' to meet funding requirements – by which contributors meant that larger organisations needed to undertake main stage work, smaller stage and new work, talent development, participatory work, and so forth.
- An absence of co-ordination by the opera and music theatre sector in their engagement with other sectors, including venues, other distribution partners, education organisations and other parts of the third sector.

Despite this, there is a desire within parts of the sector to address building better connections, specifically to address gaps in mid-scale activity and to support better pipelines and developmental routes.

8.1.3 A common agenda?

Within the sector there are organisations and individuals who are very critical of and concerned for the current state of the opera and music theatre sector, suggesting it lacks the

vision and confidence to develop as an artform. Despite this, there are several areas for potential collective thinking and action, identified by contributors to this study, which the sector could take forward:

- Developing a stronger vision and ambition for opera and music theatre as an artform
- Advocacy for the sector and the value of opera and music theatre experiences
- New work in opera and music theatre, and the job of supporting creatives, including composers, artists and other creatives, to make new work for a wide variety of audiences, and with participants
- The development of the talent pipeline, including inclusive space for a more diverse workforce, a range of career pathways and terms and conditions which equitably value freelancers and permanent staff
- Innovation from the ground upwards, with the sector learning from and supporting new ways of working which smaller organisations and individuals are pioneering
- The consideration of both the artist and the audience/participant voice in decision-making
- Addressing specific skills and workforce gaps in the sector, and doing so in partnership with other artforms/sectors where appropriate
- Improving the collective insight into audiences, and the capacity for the sector to respond to that insight, both individually and together, and in partnership with other key parts of the infrastructure (e.g. venues)
- Generally improving the sharing of problems, practice and learning across the sector.

At present, it is not clear if opera and music theatre has the necessary structure(s) to take forward this agenda, or that current networks would provide the space for gathering the necessary range of perspectives and addressing some of the issues in connecting different parts of the sector.

8.2 Let's Create and Arts Council England

The sector's views of Arts Council England and its current strategy 'Let's Create' (2020-2030) reflect some significant divisions, often between how organisations and practitioners with different areas of focus and practice within the artform have responded to funding decisions and its current 10-year strategy. This section sets out the views of contributors on funding decisions, and wider views on 'Let's Create' and the Arts Council's processes.

8.2.1 Responses to funding decisions

For many in the opera and music theatre sector, cuts to grants for ENO, WNO, Glyndebourne, ROH and other classical and new music organisations – Britten Sinfonia, London Sinfonietta, LPO, LSO, the Philharmonia, Sound and Music and (the late) Psappha – have made them feel that Arts Council England no longer has faith in opera and music theatre, and in classical music; this is seen as a potential disaster for the sector. As the effects of cuts have become clearer, decisions to remove touring from areas like Liverpool (as a result of cuts to WNO and Glyndebourne) for example are viewed as actively damaging to the UK Government's levelling-up agenda, rather than supporting it.

There were conflicting views about the reasons for cuts, and the perspective that organisations had demonstrated complacency, or that the wider sector had been slow in seeing how practices and policies were changing more widely in the arts sector.

The subsequent campaign and public discussions about funding for opera and music theatre also prompted very different views:

- Those who felt the initial decisions had been wrong were grateful for the decision to offer more funding to ENO for the 2023-2026 period, and for the campaigners and supporting voices who had spoken out.
- Others felt what they viewed as an apparent semi-reversal of ACE's original decision, and the way in which supporters campaigned for it, reflected how 'out-of-touch' those voices were with the wider opera and music theatre sector, and with the wider arts sector.
- Whilst the views and support of opera and music theatre audiences were acknowledged as part of these discussions, we did not hear any reflections on how the general public might have perceived them.

There is a widespread view that the sector is vulnerable and under threat; from those who were critical of the sector's response to November 2022 decisions, however, there is also the view that the sector is failing to understand why cuts have taken place, and that it needs to in order to address its challenges.

8.2.2 Engaging with 'Let's Create'

Contributors to this study also reflected on 'Let's Create' and their perspectives on Arts Council England. We heard a variety of perspectives engaging positively with aspects of 'Let's Create', including:

- For organisations and individuals working in a community-centred way, or with groups who are marginalised and/or typically underrepresented, 'Let's Create' feels ambitious, and they feel empowered by it; this particularly extends to Outcomes 1 and 2 and Inclusivity and Relevance Investment Principle, though it was often a more general response to the strategy.
- In relation to the Environmental Responsibility Investment Principle, there is widespread acknowledgement of its importance, some enthusiasm for engaging with the Theatre Green Book, and some positive experiences of organisations and individuals working together and enjoying the challenges of addressing these issues. There was some concern about smaller organisations' capacity to engage.
- Acknowledgement of the importance of getting better distribution (e.g. via work in priority places), but some concern about how the sector should engage with this agenda strategically and how long structural change might take.

Some organisations and individuals were less convinced that they could see their work in 'Let's Create'. Things they thought were missing are:

- The meaningful experiences which audiences have in engaging with traditionally presented art, in spaces like theatres rather than in spaces owned by communities, and the agency which audiences might experience in listening and viewing work;
- The role and pathways of professional artists and creators;
- Innovation and experimentation within an artform;
- An acknowledgement of the value of 'excellence' in artform practice (though this idea is, itself, strongly contested by different parts of the sector).

These views were present in larger and smaller organisations and were directly cited by some smaller organisations and individual producers as a reason for not considering applying to Arts Council England for funding. More generally, it is clear that there are entrenched perceptions within the sector about what is 'fundable', including perceptions that more entrepreneurial or innovative approaches are not likely to be funded, and what kinds of requirements (e.g. monitoring requirements) might come with funding.

Where contributors had experience of being funded by Arts Council England, the following issues were reported:

- Application, monitoring and reporting processes were quite widely seen as unfriendly and sometimes specifically inaccessible for applicants with specific access needs.
- Navigating 'Let's Create' led to some organisations feeling that their reporting requirements were imbalanced, placing a lot of emphasis on relatively small parts of their programme.
- For organisations in receipt of, or considering applying for, regular funding via the national portfolio, concern about the pressure on boards to engage in monitoring and reporting in a way which did not reflect the wider needs of the organisation.

More widely, there is a view within the opera and music theatre that Arts Council England is not listening to the sector when it explains the challenges it is facing. The circumstances of this study being commissioned are seen by many as an attempt to explain the November 2022 NPO decisions after the fact. Some parts of the sector are also concerned about how the Arts Council plans to use this report. Despite this, and reflecting the discussion in 8.1 about how the sector works together, there are organisations and individuals who contributed to this study, who typically do not feel that they are known or acknowledged, either by Arts Council England or by the more 'established' parts of the sector. For them, they felt that this study gave them an opportunity to share their experiences, perceptions and practices with the wider sector, and Arts Council England.

Finally, the sector is also concerned about the views of government; this is an area in which it thought it should be working with and in support of Arts Council England to make the case to government for the value of investment in arts and culture.

9 Conclusions

The following sections bring together analysis from the material set out in this report, grouped into six themes which cut across the three outcomes and four investment principles of Arts Council England's strategy, 'Let's Create':

- Business models
- Who owns opera and music theatre
- Innovation
- Audiences and participants
- Talent and leadership development
- Place and geography.

We have used these themes to set out our analysis, and to identify some key questions and opportunities for the sector, funders and other stakeholders to consider. Where appropriate, we have also identified areas in which more evidence or exploration of feasibility may be of value.

9.1 Business models

Opera and music theatre is an expensive artform, utilising specialist talent on-stage, in the pit and off-stage in significant numbers. *How* expensive it is reflects hierarchies of value: costs vary according to what organisations view as important, and organisations with different specialisms or purposes have, as might be expected, different priorities. Despite this, contributors from a range of perspectives raised questions about:

- The costs and sustainability of sets, costumes and other areas of material production
- The fees for talent, particularly in relation to the international market
- The prioritisation of large-scale, traditionally presented work as the 'apex' of the artform, and the comparative devaluation of other forms of presentation.

Organisations within the sector are constituted through a range of business models, but as a whole are fundamentally underpinned by two key income sources:

- Committed opera and music theatre consumers who buy tickets and/or donate to organisations, underpinning organisations based in London and the rest of the South (predominantly, but not exclusively with a season-limited programme)
- Grants from arts councils, trusts and foundations and local authorities, underpinning organisations across England (including non-commercial touring companies).

Irrespective of scale, income streams are under pressure, with standstill or reduced public funding, trusts and foundations changing their priorities, and donorship and ticket yield recovering but with evidence of some flux. In this context the only really 'new' area of income in the last decade, creative tax reliefs, particularly Theatre Tax Relief, have helped to mitigate this pressure, and makes a significant contribution to the sector; by implication planned reductions in future rates will be significantly damaging for the sector.

The rising costs of running opera and music theatre organisations are outstripping income. As with other artforms, and the wider world, increases in the costs of materials, operating buildings, transport, accommodation, rising wages and fees (albeit below inflation) and other areas are having a significant impact. And, like other artforms and professions, there is also evidence of wage and fee depression in real terms across talent areas which is both unsustainable in the long-term and places a disproportionate burden on individuals, particularly freelance workers.

Reflecting on the Dynamism Investment Principle, there is limited evidence of changing or new business models in opera and music theatre. There is, however, evidence of larger

organisations maximising potential earned income through different capital capacities, via exploiting artistic assets (e.g. productions) and other subsidiary income opportunities, and of a few smaller and/or newer companies exploring different models including start-up funding and licensing productions in different ways.

There is widespread recognition in the sector of the need to be more environmentally sustainable (and, for those in receipt of funding from Arts Council England, to respond to the Environmental Responsibility Investment Principle), and organisations large and small – and individuals – are engaging with the Theatre Green Book. There is concern, however, about the resource implications of the obligations Arts Council England's Environmental Responsibility Investment Principle implies, particularly for smaller organisations.

Overall, there is an inescapable tension between current available income streams for opera and music theatre, the current balance of organisations and activities in the sector and the ambitions which the sector expresses to do the things it would like to do, and to engage with communities in the way it would like to, including where these fit closely with the Outcomes in Let's Create. This extends to the needs and expectations of the sector in relation to public funding, whether from Arts Council England, local authorities, or other public sources.

9.2 Whose stories are told, and who tells them

Whose stories are told, who tells the stories and who gets to make opera and music theatre are questions which have been important for a long time and are now imperative to the sector, particularly to enable the sector to contribute to the Arts Council's ambitions to:

- widen and improve creative opportunities for people, including children and young people (Outcome 1)
- support pathways towards sustainable careers in the creative industries (particularly for those who are under-represented), develop talent (Outcome 1 and 3), and reflect the Inclusivity and Relevance Investment Principle
- respond to the needs and interests of communities, and connect people and place (Outcome 2)
- and bring innovation into the sector (Outcome 3), reflecting the Dynamism Investment Principle.

The Arts Council wants to see a publicly funded opera and music theatre sector in this country that presents high quality innovative productions that engage a wide range of people - both as audiences and performers. Much of the sector presents high quality work but the progress on engaging a wider range of people is more limited. Parts of the opera and music theatre sector address Arts Council's ambitions very directly because they are audience and community-centred in their approaches, and there is evidence of work taking place in these companies to enable more diverse talent and leadership to come through over time. Parts of the sector which focus on more main-stream presentation of opera and music theatre also recognise these issues, but progress in key areas like a more inclusive and diverse workforce – particularly within leadership and decision-making roles – is slow.

Despite some recent changes in the most senior leadership of some of the larger, publicly-funded companies, across the sector those making decisions are largely demographically homogenous and are reflected in the overall majority of the sector's audiences for traditionally presented work. The relationship between repertoire, how representative talent is of the population and the appeal of the artform to a diverse range of audiences and communities is not always simple, but the absence of diversity in the repertoire and workforce is reflected in the audiences for opera and music theatre. There is also a business case for diversifying the artistic and creative voices and decision-makers in opera and music

theatre, in order to engage new audiences and to bring new thinking and innovation into the sector.

Many contributors to this study voiced the concern that music education has diminished in state schools, and particularly that there are fewer opportunities to learn Western classical instruments and engage with other activities which might introduce children and young people to opera and music theatre. The sector wants to contribute to better opportunities for children and young people – but it will also need to allow and enable a wider range of people to influence and develop the artform if it is to be meaningful to those it currently engages with least.

9.3 Innovation

9.3.1 More collaborative and open working

The opera and music sector also demonstrates an extensive range of partnership working. However further partnership, collaborative and more open ways of working could help the sector contribute to the overall delivery of 'Let's Create', and specifically to support:

- New types of creative practice, new forms of cultural content and new ways of reaching new and existing audiences and participants (Outcome 3);
- Innovation and research and development in the sector (Outcome 3);
- Innovating its business models and engaging with new technologies and new audience habits (Outcome 3 and Dynamism Investment Principle);
- and supporting the collective ambition and quality of the sector's work (Ambition and Quality Investment Principle).

Collaborative working may also be key to enabling the sector to address bigger structural challenges, to contribute to better diversity and inclusion (Inclusivity and Relevance Investment Principle) and to create a more sustainable approach to engaging with environmental agendas (Environmental Responsibility Investment Principle).

The sector could do more to invite more external influence and potential disruption or innovation into its practices and hierarchies by developing meaningful relationships:

- Between different partners within the sector, recognising different strengths and assets
- Between smaller and larger organisations, particularly where smaller organisations have specific expertise, knowledge or lived experience
- Between those trying out new ways of doing things and those in more traditional settings
- Between the sector and organisations and practices outside it – both in the wider cultural sector and beyond.

There are organisations in the opera and music theatre sector within whose work partnerships are fundamental to their identity, mission, vision and values; with other organisations, with individuals and sometimes with communities who are quite different from them. This typically reflects a vision or mission which makes space for different (often external) voices to be involved and/or acknowledged in setting the strategic direction of the organisation. Those organisations have a clear sense of their own artistic and creative practices, but they pay significant attention to the contexts in which they deliver their work and invite perspectives and practices into their organisation which may be challenging or disruptive from time to time. In doing so, this kind of work can challenge the traditional hierarchies of what is valued in opera and music theatre practice.

Both larger and smaller organisations demonstrate some of this practice, but within the sector as a whole we heard that:

- Audiences and participants do not always have a significant ‘voice’ or presence in strategic thinking
- Marginalised groups (in the workforce and society) can feel excluded from the sector, and discussions about what the sector values
- Smaller organisations and individual practitioners find that larger organisations are not porous, and that engagement with them can be challenging
- New ways of working in the sector, particularly in terms of making, presenting and sharing opera and music theatre, and including new uses of digital technology, are not always widely known, acknowledged, and learnt about.

There is evidence of some larger, more traditional organisations engaging in meaningful partnership and engagement with other organisations, including those who have brought some challenge and effected some change, and this is good practice upon which the sector can build. There is, however, the perception (from some smaller organisations and from some individuals working in larger organisations) that some larger organisations feel that they need to ‘do everything’ – engage in talent development, learning and participation new work, distributing work beyond their home base alongside main stage productions – potentially mostly because they believe that funders expect them to.

At present, there is no clear way for innovation which takes place in smaller organisations or at a smaller-scale to be scaled up or learnt from. Some organisations doing new things have accessed start-up funding, but typically either private philanthropy or personal liability underwrites much of the new practice contributors told us about. The existing funding system either does not provide funding for innovation to be tested, or the sector is unaware of where that kind of funding exists. If new models of working – either at the level of individual productions or activities, or at the level of new organisations – emerge, it is not clear how they might find space for developing proof of concept.

This study has identified areas where ‘gatekeeping’ takes place, both actively and passively excluding voices or practices from what is valued in the opera and music theatre sector. More widely, the opera and music theatre as a sector does not behave or understand itself as an ecology, in which the different roles and contributions of different parts of the sector are properly understood, appreciated and supported by the rest of the sector to thrive. There is also a view that the public funding system does not foster collaborative thinking, but instead puts organisations into competition with one another. Despite this, we found:

- Evidence of meaningful partnership and learning within the sector
- Ongoing, often informal conversations and knowledge exchange, particularly in areas like new work and learning and participation, and more recently amongst larger organisations at a senior level
- Many voices calling for more collaboration, more sharing of learning and more collective thinking and action as a sector to address particular challenges and advocate for the sector’s value and needs.

Underpinning this are some challenges and issues common across the sector (some of these are gathered together in section 8.1, under networking); here and elsewhere in these conclusions we have highlighted challenges – and some opportunities – which it is difficult for organisations to address individually in a meaningful way. Currently, however, the sector lacks a model for collective engagement and leadership; to address some of these issues, it will need to solve this problem, whether across parts of the sector or more widely.

9.3.2 New work

Many of the contributors we heard from, large and small, more traditional and more radical, feel that not enough new work is being produced in opera and music theatre. New work has the potential to contribute to both the ambition and quality of the artform, particularly as a living cultural practice, and to address questions of inclusion and relevance in the relationship between repertoire, practitioners, audiences and participants, and ultimately to contribute to all three of the Outcomes in 'Let's Create', as well as the Ambition and Quality Investment Principle and the Inclusivity and Relevance Investment Principle. Where new work is arguably more prevalent – in learning and participation contexts – it often becomes an act of collaborative creation, supporting individuals and communities to tell their stories in ways which are meaningful to them.

Current challenges in developing new work are:

- The financial risk/cost, particularly within larger organisations, where new work is expensive to develop and present, and there are challenges reaching a sufficient audience to justify the expense.
- The absence of a proper pipeline for new work: the gaps between existing opportunities are too large (e.g. from small to mid-scale), and there are insufficient opportunities overall.
- Work ideally needs a longer shelf-life beyond its initial performance(s), so that there is time for audiences to get to know it and to get a better 'return' from the initial investment for all concerned.
- Talent involved in developing new work needs more, better and more inclusive opportunities. There is a limited pool of composers and other creative practitioners who have an opportunity to create new opera and music theatre regularly, meaning that new work does not always support diverse talent, and other areas of talent – e.g. producers – are not sufficiently supported to develop the skills and connections required to take work from R&D to the next stage.

These challenges have no easy solutions, but there is energy within the sector to work together across existing champions for new music and explore whether there might be more opportunities to share risk and construct a better pipeline.

9.4 Audiences and participants

Audiences and participants are at the heart of the way in which the opera and music theatre sector can contribute to Let's Create's three Outcomes, and to the Inclusivity and Relevance Investment Principle. Although there are exceptions, overall audiences are more likely to be white, in older age groups, and relatively affluent compared to the general population. This is not a challenge unique to opera, but one which various aspects of opera's business models, repertoire and reputation make especially difficult to change. Many organisations spoke of their desire to diversify these audiences, without being clear about a sustainable way to do so. The pandemic has also been a particular challenge to opera organisations and their audiences, with the succeeding cost of living crisis also impacting the opportunities to broaden the audience further.

There are substantial amounts of excellent work with participants taking place, to which organisations are clearly deeply committed. These include in-school residencies by English Touring Opera, the ROH's Youth Opera Company, and Birmingham Opera Company's involvement of the local community in productions. There is, however, still the experience that in some parts of the sector, it is less valued than other types of work, and that there is a disjunct between what takes place on main stages and what takes place in participatory settings. Additionally, there are still issues in some areas finding talent which has come

through traditional training routes with the requisite skills to undertake this kind of participatory work. Organisations can see that there are opportunities to connect this work to other areas, like talent development and audience development, but there is limited evidence of strategic connections within organisations undertaking participatory work alongside other kinds of work, and across organisations undertaking participatory work.⁸¹

There is also a range of targeted activity aimed at broadening the opera audience in specific ways (by age, cultural background or various forms of social exclusion). What is less clear is how these initiatives are integrated within an overall model of audience relationships, or the extent to which there is a granularly differentiated understanding of audiences and their varying characteristics and preferences, within the organisations undertaking them. Efforts to increase the geographical diversity of opera and music theatre production and availability (e.g. via cinema screenings and online) also need to address the need to reach different audiences, rather than just reaching similar profiles of audience in a wider range of places.

Engaging a wider and differentiated audience would be supported by greater collaborative audience insight and consultees expressed an appetite for this. It would also support the ambition for a better sector-wide data culture under 'Let's Create's Dynamism Investment Principle, which needs to be more widespread within the sector. Partly, this is an issue of access to data, which is often insufficient at an organisational level (for both opera companies and touring venues) and not shared at a sectoral level. But it is also a challenge in terms of how audience insight is not always used as a key management planning tool, outside of marketing teams.

There were suggestions that the way the artform is perceived and communicated is a problem. One way to address this might be to recognise the different things that different groups might want from opera and to find ways to differentiate that offer. There is a demand for types of opera production which are luxurious, expensive and traditional. But this doesn't mean that all opera and music theatre needs to be perceived in those terms, particularly if there is a clearly different version of opera and music theatre clearly and consistently communicated to the public. It is perhaps delivery and communication of this vision that should be the focus, rather than the argument that the public has the wrong perception of opera.

9.5 Talent and leadership development

9.5.1 Strategic talent development

The opera and music theatre workforce is not diverse, and the sector recognises that it needs to do more to contribute to more people from underrepresented groups being given an opportunity to start and sustain a professional career, and to feel included in the sector, and particularly in decision-making (Outcome 3, and the Inclusivity and Relevance Investment Principle). This aspiration is, however, underscored by:

- Concerns about the perceived deficits in the creative education provision within schools, and the sector's limited ability to fill the gap.
- The absence of connections between participatory opportunities which may reach underrepresented groups and more traditional pipelines for talent development.
- Continued exclusionary behaviours and practices within the sector, coupled with the absence of diverse talent in key decision-making and leadership roles and elements of the repertoire or production practices which may be perceived as problematic by some groups and communities.

⁸¹ The Eyre Report, more than 25 years ago, recommended more collaboration between major organisations undertaking this kind of work (Eyre, 1998: 16).

There are examples of initiatives (by both organisations and individuals) which are supporting more diverse talent and better practices around talent development, and of a wider willingness by the sector to convene conversations and engage collectively on the topic of the sector's future workforce. On the whole, current initiatives focus predominantly on engaging with underrepresentation in gender and ethnicity; there has, to date, been more limited engagement with questions of inclusivity for disabled people, and for other protected characteristics and on the impact of intersectionality. Progress in many areas is slow and it seems that the sector may lack either the capacity or the willingness to bring in the necessary challenge and knowledge from outside the established sector to address parts of this more fully.

Overall, there is an absence of strategic thinking about talent development in the sector. This is evident in:

- The growth and multiplicity of programmes to support young singers, across which there is no coherence or clarity of offer.
- The absence of better talent development and retention in key areas, for example for producers, stage managers and other technical design and production areas.
- The generally gloomy outlook of individual creative practitioners in building their careers, and the need for a better understanding of and preparation for supporting the workforce to sustain their careers.

Greater collaboration on talent development has been encouraged in a previous study (Devlin, 2016), and there exists some formal structures for partnership working in this area (such as the National Opera Studio, for example, whose board of trustees includes senior representation from the 6 largest UK opera organisations). Nonetheless, the continued absence of more inclusive, coherent and strategic collective thinking in this area will prevent the sector from making significant progress in relation to diversity, and in addressing skills gaps and the needs of its workforce in the future.

9.5.2 Collective creative endeavour

At the heart of opera and music theatre's argument for its special contribution and unique audience experience as an artform is the multi-disciplinary nature of the work, and the way that specialist talent is involved and employed in that collective creative endeavour. The sector's approach to the engagement of talent relates directly to questions of:

- whether opportunities exist for people to start and sustain professional careers, especially those from underrepresented backgrounds (Outcome 3);
- how world-class culture is brought to audiences in England (Outcome 3);
- how the sector demonstrates and explores ambition and quality in its practices (Ambition and Quality Investment Principle);
- and how it tackles questions of inclusivity and relevance (Inclusivity and Relevance Investment Principle).

This study highlights a currently accepted set of drivers for the ways in which talent is engaged and brought together:

- the desire for high quality ensemble performance, based on talent working together over extended periods of time;
- the challenges of precarity if employment is less secure or freelance only, including the potential effects on both terms and conditions for individual workers, and on the diversity of the workforce where increased risk exacerbates inequitable practices and experiences;
- the limited opportunities for development which some permanent artistic roles offer;

- the desire for flexibility, agency and a work-life balance for workers (both employed and freelance);
- the differences between different specialist areas of work, and how payment and practices differ in these areas;
- and needs or desires of organisations to develop their business and activity models.

These drivers are in tension with each other; there has been sustained pressure on models of in-house employment for more than two decades, as well as advocacy for flexibility in ensemble models to support the need for organisations to evolve (e.g. Eyre, 1998: 14 and 49-51). What is clear is that some balance between a core commitment and flexibility (for both the employer and the employee) is already part of how many 'permanent' ensembles currently work, and likely to be so in the future. There is, however, evidence of newer companies trying out different models of company employment. Overall, it would be valuable for the sector to consider:

- How it might balance the tensions in its workforce practices in a way which considers the opportunities for talent to sustain and develop their careers alongside reflecting organisations' need to develop and respond to external influences;
- What might be learnt from newer models in England, other artforms or models outside England and the UK.

This study has engaged in a very limited way with the permanent artistic workforce in opera and the wider freelance workforce music theatre, and so future work would benefit from further thinking and engagement with the views and experiences of specialist workers.

9.6 Place and distribution

Opera and music theatre production and performance is heavily geographically skewed towards London and the South East. There is some indication that this reflects differences in demand, but these differences are not as great as the differences in provision (and indeed, may also in part be a consequence of that provision). The disparity in geographical provision is widely recognised as a problem in the sector, and clearly limits the capacity of the sector and the artform overall to contribute a better geographical spread of:

- creative opportunities in local communities, widening and improving opportunities inside and outside schools for children and young people (Outcome 1);
- the range of cultural opportunities wherever people live, responding directly to community interests and needs and connecting people and place through place-based partnerships (Outcome 2);
- and to bringing world-class culture to audiences in England (Outcome 3).

Despite a sector-wide acknowledgement of this issue, organisations in the sector are not clear what a better geographical distribution of opera and music theatre might look like. Consequently, the following issues are key to considering any future answer to this:

- How the sector might engage meaningfully with audiences, places and funders to develop better geographical distribution when opera and music theatre provision in some areas is already so limited, even amongst major urban centres outside London.
- The volume of specialist labour and skills required to make opera and music theatre, the likely availability of this labour in different parts of the country and additional challenges in recruiting for seasonal or short-term work.
- Differences in financial models reflecting wider geographical factors, for example the concentration of current and potential donors/wealthy individuals in London and the South.

Touring is currently a tool for addressing some of the problems of uneven geographical distribution. However, there is evidence of:

- Long-standing issues with the quality of at least some partnerships between opera and music theatre organisations, and venues (though there is also evidence of some work to improve these).
- A desire from both venues and opera and music theatre organisations to make these relationships work well; though it is not clear if the sector currently has the capacity in terms of planning and flexibility, or mutual understanding with venues of what each partner can and should bring to a strategic partnership.
- Confusion and some concern about the role (or perceived role) of Arts Council England, whether they have a clear understanding of how the current touring infrastructure works and how they might work with the wider sector strategically to support touring.

In relation to the specialist skills required to produce opera and music theatre, and as noted above, this study has already identified challenges in recruitment and retention outside London, as well as broader problems with the relationships between smaller and larger organisations and in supporting innovation and learning in the sector. There may consequently be value in thinking about geographical distribution not only from the perspective of audiences, but also from the perspective of skills availability and the potential for organisations to collaborate or support innovation. Other parts of the creative industries are, for example, addressing issues like skills gaps, job creation and economic development using geographical clustering as a key approach.⁸²

Where organisations currently undertake significant and meaningful place-based work, this is typically underpinned by long-term relationships with local communities and partnerships with local organisations (both within the sector and beyond), both contributing directly to help engage communities through place-based partnerships (Outcome 2). Whilst there are examples of shorter-term initiatives (e.g. engagement with areas through UK City of Culture programmes), ensuring that such relationships meaningfully endure beyond those initial arrangements can be challenging.

Across the country, there are examples of places which are thinking about their aspirations for culture, and in some cases this includes the potential role of opera and music theatre companies; for example a number of stakeholders in Birmingham and the West Midlands have been working together, both more informally and formally, to share learning, and consider what the vision for future provision in Birmingham might be. The relationship between Birmingham Opera Company and the CBSO has been cited by a few contributors as important, and the engagement between a wider group of stakeholders, including the Birmingham Hippodrome, indicates positive and ambitious discussions are taking place.

⁸² For example, in the film sector the BFI national and regional skills clusters programme (BFI, 2023) is supporting the development of place-based skills clusters which is reflecting in part challenges in the accessibility and representativeness of the industry; and the UKRI Creative Industries Cluster Programme which is exploring job and company creation in the creative industries through 9 research and development partnerships based around clusters (UKRI, 2023). Elsewhere there is significant interest in research and innovation clusters – geographical clustering of organisations with a shared focus on R&D in a specific field – as set of circumstances supporting innovation outcomes (e.g. The Royal Society, 2020). Factory International, which runs Manchester International Festival and operates Aviva Studios in Manchester, has been running the Factory Academy since 2018, delivering training for technicians, producers and other arts professionals, with an emphasis a theatre skills.

Place-based partnership working is increasingly part of widespread policy-making and funding.⁸³ Opera and music theatre companies who aspire to develop more work in this area need to do so with the knowledge that:

- Real place-based intervention takes significant time, and requires meaningful and strategic partnerships;
- That increasingly both evidence and policy-making suggests work in any specific place needs to be strongly led by local need and partners on the ground.

9.7 Future opportunities and challenges

We have identified a number of areas in which there are opportunities and prospects worthy of future collective exploration. Some of these areas require further data to be collected, and others may be more suitable for discussions within the sector and/or with other stakeholders, or for exploratory feasibility work. These include:

1. Reflecting the pressures on key income streams, exploring where there might be learning from organisations within opera and music theatre and outside the sector which have different business models, are trying out new approaches to generating income and where there are new or different emphasis within business models.
2. Building a collective understanding of the current impact and reach of creative industry tax reliefs in relation to the opera and music theatre sector, including consideration of whether more smaller companies might be supported to access them and collective advocacy around future relief rates.
3. Considering how the sector might foster more effective and varied approaches to collaboration: open and collective working which bridges specific divides, e.g. the relationship between smaller and larger organisations, the gap between audiences (particularly less frequent audiences) and decision-makers, the space between individual freelance talent and established organisations, etc.
4. Exploring opportunities to work collectively to address questions of diversity and inclusion with a view to widening the range of voices and influences which are heard in the opera and music theatre sector, not just in the direct workforce, but in the wider development of work, as well as in thinking about the future of the artform and how it engages with audiences and communities.
5. Extending and building on existing collaborations to support new work in opera and music theatre and consider how the sector might express its collective ambition and support for new work, including mapping the existing pipelines and developing a more strategic, collective approach.
6. Proactively seeking and sharing learning from innovation within the sector and beyond, including in presenting and producing opera and music theatre, the role of digital technologies, business models and funding streams, learning and participation, talent development, partnership learning and other areas. The sector could collectively consider how innovation might be shared and mainstreamed, and funders may wish to consider how any innovation might reach proof of concept in the context of current funding programmes.

⁸³ It is worth noting also the move towards place-based funding or putting place into policy agendas which extends beyond Arts Council England to programmes like the new National Lottery Heritage Fund programme Heritage Places, which involves strategic collaborations with local authorities, and is substantially underpinned by an evidence base which enables the funder to better understand those areas which were, on the whole, being less funded (National Lottery Heritage Fund, 2023).

7. Organisations have expressed a desire for more joined up audience insight, with more collaborative approaches. Several individual organisations have taken the initiative to carry out their own research into their audiences and their profile, attitudes and preferences. A joined-up approach would allow individual organisations' insights to be grounded in a coherent framework that recognises the differences as well as the potential crossovers between audiences for particular types of work and organisations. It could also make clear whether insight about specific audiences has wider applicability. Although this joined-up picture is desirable, we recognise (not least from our efforts to collect audience information for this report) that achieving a truly comprehensive picture of the sector's audiences may prove challenging. In any case, more informal sharing of insights (and audience data) between organisations, as part of wider cross-sector collaborations, would also be helpful. This would also be a first step to enable collaborative audience development.
8. Consider working together to develop a more strategic, sector-wide approach to talent development, addressing questions of coherence, skills gaps and sector needs and diversity. Any work in this area would benefit both from a greater engagement with specialist talent than has been possible in this study, and with a systematic review of learning to date from the range of work being undertaken on diversity and barriers to it in the creative and cultural workforce, both those specific to the opera and music theatre sector and the wider cultural sector.⁸⁴ This work is likely to require partnerships beyond the immediate opera and music theatre sector, and it would be valuable to build upon and widen some of the existing relationships between the sector and Music Hubs, specialist training providers and programmes in Higher Education and beyond.⁸⁵
9. Work is required by the sector and, potentially, by funders (probably across borders) to re-map and understand the current infrastructure for touring, and consider how the sector (not just regular touring organisations) might best support opera and music theatre to reach a wider range of communities, in larger and smaller venues. There is potential learning from other artforms, as well as a need to surface more clearly any challenges which are shared across artforms and which are indicative of bigger infrastructural issues.
10. There are a range of issues facing opera and music theatre organisations, particularly in the context of seeking more geographical reach, that require both individual and collective consideration of the business and operational models currently in place. This work cannot ignore questions of context: who future audiences and communities might be, and what they might want, what modes of distribution and transmission might be available in the future (influenced by broader developments in relation to digital technology, the environment, etc.), how specialist talent develops and what it needs to sustain careers. As the sector develops its place-based ambitions, it will be crucial to learn from work being done on skills and innovation clusters, the learning from other place-based programmes and approaches, and to listen carefully to and be led by the needs and ambitions of place-based partners and communities.

⁸⁴ Including the 'Fair and Inclusive Classical Music' work commissioned by Arts Council England, <https://www.artscouncil.org.uk/developing-creativity-and-culture/diversity/fair-and-more-inclusive-classical-music-sector> (Cox and Kilshaw, 2021).

⁸⁵ For example, the very recent *Making the Creative Majority* report and policy recommendations from the APPG for Creative Diversity in partnership with HEIs, the Creative Policy and Evidence Centre, YouTube and the Paul Hamlyn Foundation (Comunian, Dent et al., 2023)

In the course of this research we heard from many working in the sector who are passionate about opera and music theatre, and saw examples of excellent and high quality opera and music theatre being developed and performed on main stages, in touring venues and with communities around England, to audiences and with participants who enjoy and are inspired by those experiences.

The sector also has considerable ambitions, but there are significant challenges which may limit those ambitions. There are a range of views – some very different from each other – about the reasons for those challenges, and about what is – or might be – required to address the challenges which the sector currently faces. Despite this, we also heard considerable enthusiasm for tackling issues and developing opportunities collectively. We hope that this report, and the research it presents, provides a useful starting point for the opera and music theatre sector, funders and other interested parties to consider how those ambitions might be achieved.

10 Appendix A – contributors to this study

Name	Job Title	Organisation
Mehmet Ergen	Artistic Director	Arcola Theatre
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Name	Job Title	Organisation
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Polly Graham	Director	Longborough Festival Opera
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Name	Job Title	Organisation
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There were two further contributors who preferred not to be named in this report.

11 Appendix B – Organisations included in analysis

Organisation name	Audience Answers: all	Audience Answers: consistent orgs./full analysis	Audience Answers: audience surveys	Operabase	Maps: all England opera organisations	Maps: Expenditure and venue age	Companies House/Charity Commission/360Giving data (via MyCake)	NPO returns (performances, WF, L&P)
Royal Opera House	x	x	x	x	x	x	x	x
English National Opera	x	x	x	x	x	x	x	x
Opera North	x	x	x	x	x	x	x	x
Glyndebourne	x	x	x	x	x	x	x	x
Birmingham Opera Company			x	x	x	x	x	x
English Touring Opera			x	x	x	x	x	x
Tête à Tête			x	x	x	x	x	x
Welsh National Opera			x	x	x	x	x	x
British Youth Opera				x	x	x	x	x
Clonter Opera				x	x	x	x	
National Opera Studio				x	x	x	x	x
Streetwise Opera					x	x	x	x
Hackney Empire	x	x		x				
Longborough Festival Opera	x			x	x	x	x	
Barefoot Opera				x	x	x	x	
Cambridge Handel Opera Group				x	x	x	x	
Classical Opera				x	x	x	x	
Cumbria Opera Group				x	x	x	x	
Diva Opera				x	x	x	x	
Garsington Opera				x	x	x	x	
Gothic Opera				x	x	x	x	
Grange Park Opera				x	x	x	x	
HGO				x	x	x	x	
Hurn Court Opera				x	x	x	x	
If Opera/lford Arts				x	x	x	x	
Mahogany Opera Group				x	x	x	x	

Organisation name	Audience Answers: all	Audience Answers: consistent orgs./full analysis	Audience Answers: audience surveys	OperaBase	Maps: all England opera organisations	Maps: Expenditure and venue age	Companies House/Charity Commission/360Giving data (via MyCake)	NPO returns (performances, WF, L&P)
Nevill Holt Community Arts				x	x	x	x	
New Chamber Opera				x	x	x	x	
Northern Opera Group				x	x	x	x	
Opera Anywhere				x	x	x	x	
Opera Brava				x	x	x	x	
Opera della Luna				x	x	x	x	
Opera Holland Park				x	x	x	x	
Opera Rara				x	x	x	x	
Opera Ventures				x	x	x	x	
OperaUpClose				x	x	x	x	
Pegasus Opera Company				x	x	x	x	
Random Opera Company				x	x	x	x	
Regents Opera				x	x	x	x	
Shadwell Opera				x	x	x	x	
Surrey Opera				x	x	x	x	
The Grange Festival				x	x	x	x	
The Merry Opera Company				x	x	x	x	
The Opera Makers				x	x	x	x	
The Opera Story				x	x	x	x	
West Green House Opera				x	x	x	x	
Arcola Theatre				x				x
Birmingham Hippodrome	x	x						
Capital Theatres	x	x						
Edinburgh International Festival	x	x						
The Lowry	x	x						
Welsh National Opera @ WMC	x	x						
Britten Pears Arts	x			x				
Royal College of Music	x			x				

Organisation name	Audience Answers: all	Audience Answers: consistent orgs./full analysis	Audience Answers: audience surveys	OperaBase	Maps: all England opera organisations	Maps: Expenditure and venue age	Companies House/Charity Commission/360Giving data (via MyCake)	NPO returns (performances, WF, L&P)
Venue Cymru	x			x				
All Aboard Opera!					x	x	x	
Bampton Classical Opera					x	x	x	
Baseless Fabric Theatre					x	x	x	
Cambridge Youth Opera					x	x	x	
Constella Operaballet					x	x	x	
Dorset Opera					x	x	x	
European Opera Centre					x	x	x	
Flat Pack Music					x	x	x	
Green Opera					x	x	x	
Into Opera					x	x	x	
Kentish Opera					x	x	x	
Keynote Music					x	x	x	
Leeds Youth Opera					x	x	x	
London Youth Opera					x	x	x	
Lunchbreak Opera					x	x		
Music And Theatre For All					x	x	x	
Opera Dei Lumi					x	x	x	
Opera Loki					x	x	x	
Opera Omnibus					x	x	x	
Opera Prelude					x	x	x	
Opera Sunderland					x	x	x	
Opera21					x	x	x	
Outland Opera					x	x	x	
Oxford Opera Trust Cio					x	x	x	
Pimlico Opera					x	x	x	
Polaris Opera Cic					x	x	x	
Second Movement					x	x	x	

Organisation name	Audience Answers: all	Audience Answers: consistent orgs./full analysis	Audience Answers: audience surveys	OperaBase	Maps: all England opera organisations	Maps: Expenditure and venue age	Companies House/Charity Commission/360Giving data (via MyCake)	NPO returns (performances, WF, L&P)
Swap'Ra (Supporting Women And Parents In Opera)					x	x	x	
The Early Opera Company					x	x	x	
The London Early Opera Company					x	x	x	
The Music Troupe					x	x	x	
Waterperry Opera Festival					x	x	x	
Wedmore Opera					x	x	x	
Winslow Hall Opera Development Trust					x	x	x	
Devon Opera				x	x			
Instant Opera				x	x			
Kent Chamber Opera				x	x			
National Gilbert & Sullivan Opera Company				x	x			
Saffron Opera Group				x	x			
Silent Opera				x	x			
The Barrandov Opera Company				x	x			

This table includes all organisations which appeared in more than one source used. In addition, there were 141 other organisations included in only one source (4 in Audience Answers, 114 only in the OperaBase data, 22 only included in mapping and 1 only in NPO returns) who are not listed in the table above.

12 Appendix C – Arts Council England regular funding to opera and music theatre organisations

Table 9: Arts Council England regular funding to opera and music theatre organisations, 2015/16 to 2023/24

	2015/16	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22	2022/23	2023/24
Birmingham Opera Company	£327,644	£327,644	£327,644	£477,644	£477,644	£486,433	£486,433	£486,433	£586,433
British Youth Opera	£42,621	£42,621	£42,621	£42,621	£42,621	£43,405	£43,405	£43,405	£50,000
Buxton Arts Festival Ltd	£120,000	£120,000	£120,000	£120,000	£120,000	£122,208	£122,208	£122,208	£122,208
English National Opera	£12,380,000	£12,380,000	£12,380,000	£12,380,000	£12,380,000	£12,607,792	£12,607,792	£12,607,792	£12,000,000
English Touring Opera	£1,743,322	£1,743,322	£1,743,322	£1,743,322	£1,775,399	£1,743,322	£1,775,399	£1,775,399	£2,130,478
Glyndebourne	£1,629,055	£1,629,055	£1,629,055	£1,629,055	£1,629,055	£1,659,030	£1,659,030	£1,659,030	£800,000
Mahogany Opera Group	£330,602	£330,602	£330,602						
National Opera Studio	£168,221	£168,221	£168,221	£168,221	£168,221	£171,316	£171,316	£171,316	£171,316
Opera North	£10,386,000	£10,386,000	£10,386,000	£10,386,000	£10,386,000	£10,577,102	£10,577,102	£10,577,102	£10,677,102
OperaUpClose									£195,000
Pegasus Opera Company									£200,000
Royal Opera House	£12,386,000	£12,386,000	£12,386,000	£12,014,420	£12,014,420	£12,235,486	£12,235,486	£12,235,486	£11,134,292
Streetwise Opera	£100,580	£100,580	£100,580	£100,580	£100,580	£102,431	£102,431	£102,431	£102,431
Tête à Tête	£100,580	£100,580	£100,580	£100,580	£100,580	£102,431	£102,431	£102,431	£102,431
Welsh National Opera	£6,123,000	£6,123,000	£6,123,000	£6,123,000	£6,235,663	£6,123,000	£6,235,663	£6,235,663	£4,000,000
Total	£45,837,625	£45,837,625	£45,837,625	£45,285,443	£45,430,183	£45,973,956	£46,118,696	£46,118,696	£42,271,691

Source: Arts Council England

13 Appendix D – Research Team

Tamsin Cox has led on a wide range of mixed methods research and evaluation studies. She led the ACE-commissioned study ‘Creating a More Inclusive Classical Music’. Her expertise includes studies, evaluations and consultation on workforce and sector support and development for a-n, ABO, National Lottery Heritage Fund, PHF and Arts Fundraising and Philanthropy. She has extensive experience of mixed-methods studies and analysis, including a European Parliament-commissioned study on the longitudinal effects of European Capitals of Culture, AHRC-funded culture in regeneration critical literature review, Cultural Olympiad evaluations for LOCOG and Creative Scotland and work with Renfrewshire Council on their major cultural investment.

Sarah Gee, DHA Associate, trained as a classical musician and has worked in the arts sector, initially with orchestras, then as co-founder and managing partner of Indigo-Ltd where she worked on marketing, fundraising and organisational development with hundreds of organisations over fifteen years. Since 2019 she combines consultancy work and sector training with her role as CEO of Spitalfields Music. She is currently Vice Chair of the British-American Project, and a trustee of the Royal Philharmonic Society and Motionhouse.

Hazel Province, DHA Associate, has a long track record of success as a violinist, artists’ manager, cultural strategist, leader and mentor, spending a large part of her career at the Royal Opera House, Covent Garden, (where she led considerable change through periods of intense stakeholder scrutiny) first as Director of the Orchestra and then Director of Planning.

Passionate about music and music education she now works independently holding a portfolio of chair and non-executive roles in the cultural and higher education sectors, alongside running her own consultancy business. Hazel is a governor of the Royal Northern College of Music and chairs the board of the Dorset Music Education Hub and of The Arts Development Company. She has led business development projects for a number of national opera and dance companies. Hazel is an alumna of the Royal College of Music, Guildhall School of Music and Drama and Cranfield School of Management and is a member of the Women on Boards network. She remains well networked in the opera industry internationally.

Oliver Mantell is Director of Evidence & Insight for The Audience Agency, leading on strategic and sector-wide evidence, including the Cultural Participation Monitor and summary analysis of audience data by sector, region & nation. He has worked on a range of opera analysis, including development of a bespoke segmentation for Opera North, collaborative analysis of online audiences for opera companies, profiling and geographic analysis for Arts Council England’s opera and ballet review and investigation of The Lowry’s post-Covid audiences and future potential. His experience of advising on the strategic use of audience data includes supporting developing of Arts Council Ireland’s Data and Evidence Framework and supporting the agency’s academic partnerships, including leading on development of the Centre for Cultural Value’s Evaluation Principles.

Anne Torreggiani is founder and Chief Executive of The Audience Agency, the national charity providing specialist advice and research on audiences and engagement. She is a specialist in audience research and strategy and has a long track record as a trainer, adviser and commentator on these subjects. Recent research projects include an arts leadership programme based on human-centred design (Creative Europe), facilitating the codesign of the Cultural Evaluation Principles (Centre for Cultural Value), developing a new resource promoting Everyday Creativity (Arts Council England), and research/peer-learning

programme on people-centred practice in heritage worldwide (British Council). She is Co-Director of the Centre for Cultural Value at University of Leeds and a trustee with Tamasha and Europeana.

Patrick Towell is Commercial Innovation Director of The Audience Agency Group and CEO of its international enterprise arm. He directed *What is Resilience, anyway?* for ACE. As ACE Financial and Business Advisor he has supported the leadership and boards of a variety of funded cultural organisations through significant changes in business model, governance and/or use of digital technologies, and assessing NPO/emergency funding applications. He led, with Hazel Province, a programme of digital change at the Royal Opera House to make more effective use of creative knowledge assets. He led the development of Opera North's 'Digital Plan'. Recently he has been supporting Orchestras Live to change their business model.

Dr Steven Hadley is an academic, consultant and researcher working internationally in arts management, cultural policy and audience engagement. He is currently based at Trinity College Dublin. Steven is an Associate Consultant with The Audience Agency, and previously worked as Chief Executive, Audiences Northern Ireland and Director of Marketing and Communications, Northern Ireland Opera. His recent published work has focussed on cultural democracy, audience engagement and cultural leadership. His book, *Audience Development and Cultural Policy*, is published by Palgrave MacMillan.

Sarah Thelwall is a strategic partner at TAA and MyCake Founder/Director. Over the last two years Sarah has led the extension of MyCake's databases to combine the harnessing of machine-readable data at scale with the ability to manually add detailed and nuanced information. She is skilled in setting out approaches which enable systems of classification and filtering to be layered on top of a robust set of raw data. Sarah led the work for DCMS on the analysis of the potential for and challenges of harnessing financial and cultural sector data to support policy making.

14 Appendix E – Summary of the Project Scope, Arts Council England Invitation to Tender

Introduction

In January 2023 Arts Council England (ACE) announced that it would be commissioning an independent analysis of the opera and music theatre sector in England.⁸⁶ The expressed purpose of the research was to enable the Arts Council to better understand how the sector currently operates, including the opportunities and challenges it faces in relation to production, presentation and distribution. The opportunity to tender for the research – and details about the tender process - were posted on Arts Council's procurement site, Delta.

The tender outlined the Arts Council's aspiration that the analysis will help inform its future investment in opera and music theatre and help the Arts Council and the sector understand how the sector can maximise the contribution it makes to the delivery of Let's Create. The following text is drawn directly from the Arts Council's Invitation to Tender (NB throughout the tender document, the opera and music theatre sector is described as 'The Sector'). Details of the tender process and a copy of the full Invitation to Tender can be found on the Let's Create: Opera and Music Theatre Analysis page on Arts Council England's website.

Background

There has been an ongoing debate about public investment within The Sector for a number of years. Particularly at the large scale, it requires large creative and technical forces to produce and present work and therefore often correspondingly large levels of public subsidy. At a time of growing demands on the Arts Council's resources and shrinking real terms budgets, this has led to debate about how best to understand and communicate the value of public investment in The Sector. Public interest in this topic has grown over the recent months as a result of the decisions made within the context of the Arts Council National Portfolio 2023-2026 funding programme.

While the Arts Council has some insight into the current profile of the opera and music theatre organisations within its National Portfolio, we recognise that these organisations do not operate in isolation from the wider opera and music theatre sector, nationally or internationally. The landscape for opera and music theatre in England has begun to undergo some substantial shifts, compounded by wider environmental factors including the post-Brexit European operating environment, pandemic-related pressures on philanthropic giving, organisational and local authority budgets and other sources of public investment and support, cost-of-living inflationary pressures and changing patterns of live event attendance post-Covid.

In order to develop a shared understanding of the realities of the current operating environment for The Sector and present a balanced picture of the opportunities and challenges for The Sector as it seeks to maintain and diversify its talent pipeline, retain and

⁸⁶ In this instance the term 'opera and music theatre' should be understood to encompass a range of staged dramatic work primarily oriented around music. Whilst recognising that boundaries can be blurred, this research should consider the full range of musical activity developed, produced and performed by 'opera' and 'music theatre' companies, including their musical (vocal and instrumental) and theatrical resources (people, venues, etc.). However, the production and presentation of musicals and musical theatre is outside the scope of this research. By 'sector' we mean all those organisations, regardless of scale, operating professionally or semi-professionally and whose primary business is the production and live presentation of opera and/or music theatre. For this analysis, we are not including organisations whose operation is primarily voluntary nor those whose main focus is production for recording or broadcast. It is expected that further consideration will be given to definition of the parameters for this work by prospective suppliers in discussion with the Arts Council.

upskill its workforce, and engage and develop its audiences across England, the Arts Council believes the time is right to gather together a range of data and other evidence including stakeholder perspectives. Building on previous work undertaken including the Opera Music Theatre Forum Sector Survey Report (2010), ACE Opera and Ballet Review (2013) and ACE Fairness and Inclusivity in Classical Music report (2019), this work will help inform Arts Council policy and decision making in relation to future investment in the opera and music theatre sector.

It is intended that the final report produced by this research and analysis will be published alongside an Arts Council response setting out how it intends to work with The Sector to respond to the findings of the analysis.

Purpose of the research

The purpose of the research is to enable the Arts Council to better understand how The Sector in England currently operates, including the opportunities and challenges it faces in relation to production, presentation and distribution. The research will therefore need to prepare and analyse the following:-

- *An up-to-date map of opera and music theatre activity across England, tracked over the last 10 years. This should include detail of the range, scales and distribution of both producing and promoting organisations, with an indication of how this varies across geographies and any identified gaps or opportunities.*
- *An analysis of the challenges and opportunities faced by The Sector in relation to production, including access to appropriately skilled and diverse talent (including performers, creatives and administrators and leadership). It is not intended that this phase of research will include consideration of the effectiveness of current training and skills providers in higher and further education, but we would welcome thoughts on how this issue might best be analysed through further research.*
- *An analysis of the challenges and opportunities faced by The Sector in relation to presentation. This will include reviewing all available data on audiences for live presentation over the last 10 years to understand as far as possible their profile (including age, diversity (including socio-economic status), geographic distribution) and segmented by location, scale and type of work – and how these may have changed over time. The report should set out suggestions for what collective action might be taken to develop and engage audiences nationwide for opera and music theatre.*
- *An analysis of the challenges and opportunities faced by The Sector in relation to distribution. This will include reviewing current touring patterns for The Sector, to understand how these have changed and are likely to change going forward, opportunities and patterns for cinematic presentation, and new avenues for distribution via streaming and other digital methods. This will need to be informed by surveying of venues who regularly present opera and music theatre as well as opera and music theatre companies who tour regularly and will need to include headline information on how the audiences and financial arrangements for touring companies and operatic cinematic broadcasts have changed and how these might change in the future. The report should set out suggestions for what steps might be taken by whom to improve touring and distribution of opera and music theatre in England.*
- *An analysis of any other challenges that are particular to The Sector and which may be impacting on the immediate and future viability of business models, including*

relevant regulatory and compliance frameworks. The report should set out suggestions for how these business models might be strengthened and, in the case of Arts Council supported organisations, how public value might be improved.

- *The research should also set out opportunities for how opera and music theatre organisations seeking future investment from the Art Council can play a full part in delivering Let's Create. The report should therefore set out examples of how opera and music theatre organisations are delivering against each of Let's Create's three Outcomes (and their Elements) and what steps these organisations have taken to embed the four Investment Principles in their ways of working. The report should set out suggestions for what steps might be taken by opera and music theatre organisations seeking future Arts Council investment to strengthen their contribution to the delivery of Let's Create and what, if any, potential there is for organisations not currently in receipt of public funds to be encouraged to engage with these agendas.*

The research should also provide a few international and UK-wide examples of opera and music theatre companies that are demonstrating innovation in the way they are approaching production, presentation and/or distribution and which might act as initiatives that the Arts Council and The Sector in England might learn from.

We would propose a methodology including:

1. ***A literature review of existing evidence.*** *We propose that the chosen supplier undertake a review of available literature within a scope to be defined at inception stage in order to build a base of existing evidence and inform subsequent stages of the research. This should also include the identification of organisations associated with The Sector and consideration of relevant materials from related disciplines (e.g. classical music, theatre, etc.).*
2. ***An audit and analysis of existing data sources.*** *We propose that, in addition to a literature review, the chosen supplier conduct an audit of available data within this area from the last 10 years. This should include publicly available data, but also data not publicly available, such as relevant audience data derived from The Sector. Proposals should consider implications for access to and use of such data, including any anticipated costs, although these costs will not need to be covered within the chosen supplier's budget.*
3. ***Stakeholder engagement.*** *A key element within this project should be direct engagement with stakeholders within the opera and music theatre sector. Proposals should indicate a view on the optimal approach to such engagement and should take account of all relevant organisations included within The Sector as defined above (including relevant 2023-2026 National Portfolio Organisations, as well as organisations not in receipt of regular Arts Council funding such as opera festivals, 'country house' opera companies, and other smaller scale companies, presenting venues, etc.). Consideration should be given as to how the interests of freelancers within The Sector can be represented in this analysis. Proposals should also indicate how a small number of relevant international companies will be engaged with to generate useful case studies for this report. The content of the stakeholder engagement will be discussed with the chosen supplier at inception but proposals should include details of the proposed approach to be used and an estimation of the number of engagements with stakeholder and other relevant respondents.*

When thinking about the various research elements, the following should be considered within the scope of the project:

- Professional organisations and companies working predominantly in the fields of opera and music theatre in England
- Venues that present a regular programme of opera and music theatre in England
- Organisations and companies working in opera and music theatre outside England that might provide useful case studies
- Singers and other relevant opera/music theatre practitioners at different stages of education and training (through conservatoires, opera and music theatre companies, etc)
- Musicians (e.g. répétiteurs, orchestras – see also below) and the wider opera/music theatre workforce (administrators, managers etc).
- Composers, in particular the number and scales of new opera and music theatre works being commissioned and the frequency of performance of such works. NB consideration of the wider current environment for composers may be more suitably explored as part of wider research we may commission in future on the current landscape for the creation of new music in a range of musical genres including opera and music theatre.
- Other specialist technical theatrical roles specific to, or requiring specific skills and experience in relation to, the production of opera.

The following should not be considered within the scope of the project:

- Amateur or voluntary organisations working in the fields of music theatre and opera
- Venues that do not currently (and have not) present(ed) a regular programme of opera and music theatre
- The education of singers, musicians or other relevant practitioners prior to Higher Education level, or Higher Education programmes beyond those directly focused on/targeted to progression into the opera and music theatre sector.
- Conductors; although an important part of the classical music ecology, this may be more suitably explored in further research following the completion of this initial study.
- Librettists; although an important part of the opera and music theatre ecology, consideration of the current environment for librettists may be more suitably explored alongside wider research we may commission separately on the current landscape for the creation of new writing in theatre.
- Orchestral musicians; the focus of this research should primarily be on singers and other opera/music theatre specific practitioners not including orchestral instrumentalists (but inclusive of répétiteurs). We would consider any focus on orchestral instrumentalists to be largely outside of the scope of the project given the ongoing focus on these through the follow up actions to the [Fair and Inclusive Classical Music](#) project. However, if there was capacity for consideration of any specific implications for opera/music theatre orchestras/ensembles to be included this would be of interest.

The expected outputs of the research are:

- A final written report outlining the key findings and a clear set of suggestions for further action. All suggestions should be made on the assumption that Arts Council's total investment in opera and music theatre, through its NPO, NLPG and development funds, will remain at 2023-26 levels for the immediate future
- A list of literature and data sources reviewed for the report
- A list of interviewees and other contributors to the report
- An executive summary report
- A presentation of findings to ACE and key sector stakeholders (i.e. NPOs)

15 Appendix F – Bibliography

The bibliography below reflects references which are specifically cited throughout the text; as noted in section 2.1 there is a broader literature about opera and music theatre which is not mapped below, but which was briefly reviewed to check for relevance to this study.

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agency

