Let’s Create: Opera and Music Theatre Analysis Executive Summary

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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 to give a more comprehensive picture than has previously been available, or clearly and openly articulated. It looks at how production, presentation and distribution takes place, the range of business models used by the sector, how audiences and participants are engaged, how talent and leadership develop occurs and where innovation (in its widest sense) is happening, as well as how the sector currently contributes and might contribute in the future to 'Let's Create', Arts Council England's strategy.

This study uses the current Arts Council England strategy, 'Let's Create', as a key reference point. That strategy sets out a vision that by 2030 England is a country where everyone's creativity will be valued and everyone will have access to a range of high quality cultural experiences. Let's Create is built around three Outcomes that the Arts Council wishes to achieve. It also features a set of four Investment Principles which are intended to act as development tools for the cultural sector.

With the time and resources available, this is not a complete study of the sector and its activities; areas which have not been investigated in detail are set out in the full Analysis Report and include: education; the full range of work types and roles in the sector; smaller venues; and the impact of the climate crisis. Amongst the key questions and opportunities noted elsewhere as arising from our work, such gaps may suggest areas where consideration of further evidence or exploration might be merited.

The Arts Council appointed an independent Reference Group – Fiona Allan, Anthony Blackstock and Jan Younghusband – 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. For more information about the delivery team, see the full Analysis Report.

2 Methodology and approach

The brief for the project asked us to look at opera and music theatre[1], with a focus on England, though acknowledging the work of some organisations who undertake activity beyond this geographic focus. The study involved four areas of research:

1. A brief literature review of existing material, focusing on material which helped contextualise or interpret the other areas of data.
2. Data collection and analysis from a range of largely quantitative sources, including a mapping of opera and music theatre organisations in England, data on audiences and participants, and charity commission accounts for organisations in the sector.
3. Engagement with stakeholders through interviews and focus groups, including opera and music theatre organisations regularly funded by Arts Council England, organisations not in receipt of regular funding, venues receiving touring opera and music theatre,

[1] The term 'music theatre' was used in this study to recognise some modern/contemporary work which goes beyond the mainstream canon of opera and/or work which experiments with the artform. It does not include commercial or mainstream musical theatre, where produced/presented by a non-opera company.

conservatoires, unions, freelancers including singers, directors, creative designers and producers.[2]
4. Case studies of practice outside England, focusing on three themes: co-creation, partnership working, and approaches to developing new work.

We analysed the material this research generated using six themes which cut across the three Outcomes and four Investment Principles of Arts Council England's strategy, 'Let's Create':
- Business models
- Whose stories are told and who tells them
- 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. This Executive Summary also sets out the main conclusions from the research and, where appropriate, we have also identified areas in which more evidence or exploration may be of value.

3 Business models

Opera and music theatre is an expensive artform, utilising specialist talent on-stage, in the pit and off-stage in significant numbers.[3] *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 where singers and other talent work globally
- The prioritisation of large-scale, traditionally presented work as the 'apex' of the artform, and the perceived comparative devaluation of other forms of presentation, including smaller-scale opera and music theatre and concert 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, particularly 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), and specifically ensuring the presence of mid and large-scale opera outside London and the rest of the South.

[2] This study reflects a focus on decision-makers in opera and music theatre, and 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. There is also a wider workforce which is important to the sector and, for example, this study does not include substantial engagement with orchestral musicians, or those in technical stage roles, or a range of administrative roles. Where we identify potential for further work, we have also suggested key groups with whom engagement might be valuable.
[3] Typically, the most commonly performed repertoire in opera and music theatre requires an orchestra, a chorus, and soloists, as well as a range of design and technical specialists 'backstage'; this is similar to ballet, but considerably more performers than would be typical in, for example, theatre or a full symphony orchestra concert.

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. It makes a substantial contribution to opera and music theatre in the UK; 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 in the wider world) increases in the costs of materials, operating buildings, transport, accommodation, rising wages and fees and other areas are having a significant impact. And, like other artforms and other professions, there is also evidence of wage and fee depression in real terms across talent areas which is both unstainable in the long-term and places a disproportionate burden on individuals, particularly freelance workers.

As part of this study we were able to map 108 opera and music theatre organisations in England, spread across the country but with a significant concentration in London and the rest of the South. 14 organisations currently receive regular funding from Arts Council England for opera and music theatre activities, which supports large-scale, mid-scale and some smaller and newer organisations.[4] Many of the smaller organisations who do not receive Arts Council England funding operate on a project-by-project basis and have few or no salaried staff.

When considering the sector's prevailing business models in the context of 'Let's Create', and in particular 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 set out 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.

4 Whose stories are told, and who tells them

Contributors to this study talked about opera and music theatre as a story-telling artform. Within this, however, there are concerns about how the artform connects to contemporary society. Bluntly put, the repertoire of opera and music theatre (whose stories are told) is focused on a relatively narrow collection of works; around 20 works make up more than 40% of performances. The workforce in opera and music theatre (who tells the story) is unrepresentative of the population, and not diverse. Whose stories are told, who tells the stories and who gets to make opera and music theatre are questions which have been important to the

[4] These 14 are 13 national portfolio organisations plus English National Opera which is currently in receipt of regular funding outside the portfolio.

sector for a long time and are now imperative, particularly in enabling the sector to fully 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.

5 Innovation

5.1 More collaborative and open working

The opera and music sector 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 meaningfully in partnerships 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 places 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.

There is evidence in this Analysis of areas where ‘gatekeeping’ takes place, both actively and passively excluding voices or practices from opportunities or validation 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, with several areas for potential collective thinking and action which the sector could take forward, including:

- 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
- Generally improving the sharing of problems, practice and learning across the sector.

Here and elsewhere in this study 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.

5.2 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 in collaboration with existing champions for new music and explore whether there might be more opportunities to share risk and construct a better pipeline.

6 Audiences and participants

Opera and music theatre, like other art forms that the Arts Council England supports, will need to diversify its audiences and participants if the Outcomes in 'Let's Create' are going to be achieved. 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 and music theatre, but one which various aspects of its business models, repertoire and reputation can make 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 retention and development of their audiences, with the succeeding cost of living crisis also impacting the sector's opportunities to broaden the audience further.

There is a substantial volume of excellent work with participants taking place, to which organisations are clearly deeply committed. There is, however, still the experience that in some parts of the sector, participatory activity 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, traditional training routes produce too few people with the specialist skills required to undertake this kind of participatory work. Organisations can see that there are opportunities to connect participatory work to other activity, such as talent or audience development, but this often appears to happen intermittently, rather than strategically, and there are also limited strategic connections between organisations undertaking participatory work.[5]

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 they are based on a granular and differentiated understanding of the organisations' audiences and their characteristics and preferences. 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 data culture under the Dynamism Investment Principle in 'Let's Create'. Partly, the challenges of establishing a sector-wide data culture are due to difficulty accessing data, which is often insufficient at an organisational level (for both opera and music theatre organisations and touring venues) and not shared at a sectoral level. But it is also due to audience insight not always being used as a key management planning tool, outside of marketing teams.

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[5] The Eyre Report, more than 25 years ago, recommended more collaboration between major organisations undertaking participatory work (Eyre, 1998: 16).

Some contributors to this research suggested that the way the artform is perceived and communicated is a problem. One way we suggest to address this might be to recognise the different types of value and experience that different groups want from opera and to find ways to differentiate the offer further to accommodate these. There is a demand for opera productions which are luxurious, expensive and traditional. But this doesn't mean that all opera and music theatre has to be perceived in those terms, particularly if there is also an alternative version of opera and music theatre clearly and consistently communicated to the public. It is perhaps delivery and communication of this plurality of offer that should be the focus, rather than the argument that the public has the wrong perception of opera.

7 Talent and leadership development

7.1 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.

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.

7.2 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, including:

- the desire for high quality ensemble performance, based on talent working together over extended periods of time;
- the challenge of precarity if employment is less secure or freelance only, including the potential effects on both the 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 and the wider freelance workforce in opera and music theatre, and so future work would benefit from further thinking and engagement with the views and experiences of a wider range of specialist workers.

8 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 a 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 is it 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 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.[6]

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[6] 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

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; 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.

Place-based partnership working is increasingly part of widespread policy-making and funding.[7] 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 Future opportunities and challenges

This study has 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.

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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.

[7] It is worth noting that the move towards place-based funding – or putting place into policy agendas – 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). The devolution deals in place for combined authorities, including for example Greater Manchester, West Yorkshire and West of England, are also enabling different approaches to place-based planning and activities.

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.

7. Organisations have expressed a desire for more joined up audience insight, including 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. Considering 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.[8] This work is likely to require partnerships beyond the immediate opera and music theatre sector, and it would be valuable to build upon

[8] 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).

and widen some of the existing relationships between the sector and Music Hubs, specialist training providers and programmes in Higher Education and beyond.[9]

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.

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.

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[9] 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)

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