UK Opera Association

New Work Research

Final Report - October 2026

Executive Summary 1
Introduction and Background 4
Appetite for change 5
Studio/Lab/Incubator/Catapult 10
Opera Makers 12
Presentation options for new work 15
Other Sector Analysis 17
TV & Film 17
Theatre 19
Audience Engagement and Marketing Alignment 21
Recommendations: 23
A - Opera Companies: 23
B - Recommendations for the UK Opera Association (UKOA) 23
C - Recommendations for Arts Council England 24
D - Recommendations for Opera Makers 26
Conclusion 27
Addendum 1 - UK Opera Repertoire Survey 28

Funded by UK Government

Supported using public funding by ARTS COUNCIL ENGLAND

Executive Summary

Funded by Arts Council England and produced by the UK Opera Association, this report outlines findings from a dual-strand research project focused on the commissioning and development and presentation of new opera. This report combines a quantitative study of repertoire and box office trends by Data Culture Change with qualitative sector interviews, roundtables and wider discussions.

This research takes place within a uniquely challenging operating environment for opera companies, dominated by financial contraction and structural retrenchment. Above all, the sector faces an acute crisis of resources, driven by soaring production costs and a marked dwindling of public funding at both local and national levels. Meanwhile, private relief is scarce, with trusts and foundations increasingly pivoting toward competing priorities. These fiscal pressures collide directly with volatile earned income, as long-term shifts in audience behavior, spurred in part by the pandemic and deepened by the cost-of-living crisis, continue to impact box office.

The quantitative data strand establishes a comprehensive repertoire survey baseline, providing vital metrics across a 3 year timeline. This dataset highlights a pressing need to reverse declining production and audience attendance trends. While new operas are being produced, their public exposure and overall ticket sales remain markedly limited when compared to contemporary plays in theatre, underscoring significant growth potential. The challenge is stark with new work representing 26.8% of productions vs 2.4% of box office. The full breakdown of this research, including geographic reach, composer analysis, and three-year box office trends, can be found in the standalone appendix accompanying this report[1].

On the qualitative side, the research demonstrates a sector-wide appetite for change among companies and creators alike. Key exploratory initiatives such as WNO Boilerhouse and RBO New Opera Works exemplify this shift toward innovation. Crucially, there is strong momentum behind establishing dedicated incubator models to cultivate new pieces, and the UKOA will publish an options paper in early 2027 to explore how such frameworks may be structured and sustained. However, this data project cannot provide a complete picture of the UK opera sector, as both known and unknown data gaps remain. It serves as an initial baseline for the UKOA to build upon, acknowledging that while macro trends offer valuable analytical insights, significant nuance lies within these gaps - especially in mapping where missing data from even 1 or 2 companies might make a significant contribution to the whole.

The findings highlights some core challenges facing the sector:

Presentation platforms for new work: The opera sector is unbalanced in terms of scale and this can leave creators marooned between small scale, or self produced projects and large-scale commissions (the so-called missing middle). To bridge this gap, the opera sector needs to shore up and then expand its touring provision, partnering with organisations like the

[1] Addendum 1 - UK Opera Repertoire Survey

Local Theatre Touring Alliance (LTTA) and National Rural Touring Forum (NRTF) to build dedicated collaborative audience development initiatives, supporting both new and existing repertoire across regional and mid-scale venues. This process will not be quick but will, in time, create a wider audience base for new work at different scales, creating more opportunities for opera makers and a culture of innovation and freshness.

Improving how companies make new work: Non new work specialist companies frequently lack the repeatable administrative and artistic systems needed to guide new pieces. Creators face acute financial insecurity, low pay, and prolonged development timelines. Addressing these issues requires companies to adopt structured, repeatable development approaches alongside an industry-wide pay and career development framework. Furthermore, the sector must invest in continuous professional development (CPD) for both opera makers and producers to build core creative management skills across all scales of production.

How we talk about new work: The way the sector and wider public talk about, celebrate, and review new opera requires a fundamental shift. Currently, there is a lack of a thriving, visible public scene to get excited about, as compelling new work is frequently obscured by standard repertoire staples (such as La Traviata, The Marriage of Figaro, and Tosca) prioritised to meet commercial box office demands. This stands in stark contrast to live theatre, where new plays are regularly framed as premium, must-see cultural events and the hottest tickets in town. To transform this dynamic, the sector must cultivate a more positive and ambitious narrative around a collective push for innovative opera, fostering what Brian Eno terms a 'scenius', an ecosystem that collectively nurtures, celebrates, and amplifies creative innovation.

The UKOA's conference on July 15th 2026 provided a number of discussion points following the release of the interim report of this work. The findings of those discussions and of those at the *Past is Prologue* event at Tête à Tête: The Opera Festival 2026 have been incorporated here. I would like to thank everyone who gave their time to sit for an interview or participated in the events which contributed insights and ideas to the research, Arts Council England for their support of the UK Opera Association and funding for this research and the UKOA New Work Group for the support and guidance in setting the initial parameters of the work.

The evidence gathered here provides a clear starting point for collective action. Real progress on the missing mid-scale, creator pay, and commissioning pipelines cannot happen in silos; it requires companies, independent artists, venues, and funders to align priorities and share the practical risks of change. These challenges are systemic, but they are solvable through deliberate, joint effort. With a common baseline established, the responsibility now falls on the whole sector to pick up these findings, challenge familiar ways of working, and build a more resilient ecosystem for contemporary opera.

Bob Willard Watts
Chief Operating Officer
UK Opera Association

Introduction and Background

This research project is funded by Arts Council England (ACE) and produced by the UK Opera Association. The study consists of two main strands: a quantitative data project examining repertoire and box office figures to track what work is being performed, where, and how often; and a qualitative project investigating the actual process of commissioning and developing new work.

Project Objectives

The quantitative research has three aims:

- Understand what opera is being performed where and by who.
- Compare opera's repertoire data with that of the British Theatre Consortium
- Create a base line data point to measure against in the future.

This research was undertaken by Data Culture Change on behalf of the UK Opera Association.

The qualitative research has four main aims:

- Map the project lifecycle of new work commissions from the first idea to opening night across different companies and scales.
- Identify the bottlenecks, weaknesses, and difficulties in the current UK commissioning setup.
- Look at how other art forms and international systems handle new work.
- Look at the commissioning and developing process from multiple angles - including producers, makers and publishers.

Methodology

The project used over 20 hours of semi-structured-interviews with composers, directors, librettists, producers, artistic directors, executive directors and others. To broaden the scope, the research also includes other art forms: interviews with experts from film, high-end television, musical theatre, and literature to compare how they develop ideas. The UKOA held a day long conference in July 2026 which included a working session around the themes established in the interim version of this report. In September 2026 Tête à Tête and the UKOA hosted a working day *"What's Past is Prologue"* looking at the future of contemporary opera within the context of the work undertaken on those days informed both the research direction and recommendations included here.

Terms:

- Producers - A wrap around term used for personnel within opera companies who participate in the commissioning and development of new work.
- Opera makers - I have used the term opera makers as a wrap-around term for composers and librettists and directors (sometimes) involved in the pre-rehearsal making process.
- Opera - Our working definition of opera is any work that uses music and the voice to create worlds or tell stories.
- New Opera - Our working definition of new opera is any premiere that features newly created music and text, including major re-workings of the existing works.

Appetite for change

There is a clear appetite for change within the current UK opera commissioning system.

Our interviews show that opera companies, both large and small, want to change and improve how they work. Many leadership teams spoke openly about past commissioning failures and the urgent need to do better in the future. Similarly, opera makers are keen to explore innovative ways of creating work and diversifying commission opportunities. Many agreed that more new work was desirable. Obviously this desire exists within a difficult funding and cost environment - yet the clarity and broad agreement in principle and process is welcome.

What is clear from the interviews with opera companies is that many are aware that change is needed to reenergise their own new work process. Indeed, some have changed their commissioning model and development process recently, others are on the cusp of doing so. This research and the conversations it has sparked will hopefully play a role in shaping these systems for the future.

Some opera companies have begun to explore collaboration networks and partnerships specifically for new work commissioning and R&D. Others are hopeful of forging similar connections in the near future. The UK Opera Association could and should play a larger convening and facilitating role here to ensure these conversations can be wide ranging and inclusive.

There is a clear opportunity for commissioners and publishers to build a closer working relationship, as both sides currently seem to find it challenging to fully navigate each other's operating realities. An open and supportive dialogue between these two keystones of the ecosystem is long overdue. By developing a more mutual understanding of their respective business models, both parties can work together to ease friction, manage project risks more effectively, and ultimately help more new work reach wider audiences.

Complexity and cost

One of the most common phrases that came up in the interviews was “it depends on the project” and it’s worth acknowledging that the creating of work in any genre - perhaps especially a new opera - is complex. I use the word complex intentionally and instead of complicated.

Complicated things may have many stages and many different parts, but they are the same every time. Creating new opera is complex, and following the same steps that have worked before may not bring the same result for a myriad of reasons.

Complexity however cannot and shouldn’t preclude the opera companies from having some defined guides and systems in place to ensure commissioning success. Some opera companies that I spoke with have very clear structured ways of working when commissioning and producing new work; others had no system in place at all. I have attempted to map the process as it was most commonly described and highlight some repeated risk moments and opportunities for better working practice that some creatives and companies highlighted as specifically useful for them. The phases may not be universal, and as such may or may not be applicable to different companies' commissioning process.

Similarly the financial risk of new commissions was an often cited reason for limited commissioning generally and for R&D specifically. One of the often repeated themes was the idea that because opera is more expensive to make we cannot afford the systems and R&D scaffolding that other art forms have. In reality the opposite is the case - because opera is more expensive to create, because the risk is higher, is exactly why we need to ensure robust research and development scaffolding is in place. As one contributor who migrated from theatre to opera put it:

> *“The stakes are higher in opera...it felt odd that you'd have something where the risk was substantially greater with **less** scaffolding”*

Commissioning Process and challenges

Many opera companies find it exceptionally difficult to manage the complex process that runs between the initial commission and final delivery. Because these companies commission new opera infrequently, they do not possess the necessary institutional knowledge or repeatable systems to guide creators through the writing and development phase.

In contrast, companies that function as new-work specialists approach this creative process differently. For these specialist organisations, navigating the unpredictable writing and revision phase is viewed simply as their core business, summarised by one participant as: "that is the work". This sharp disparity in creative management skills across the sector has two negative consequences. First, it actively limits the number of new commissions that some companies feel confident enough to take on. Second, it directly harms the development and the quality of the final operas being produced in some settings.

This skills gap is made worse by a lack of standard professional roles and titles within UK opera administration. The sector uses a confusing variety of job titles to describe this creative management, with little agreement on what these roles actually do. Some companies assign these tasks to Producers, while others operate with no producing staff at all. A few organisations rely on individuals who happen to have personal experience with new work, and only a tiny minority have dedicated new-work departments.

Currently, the opera sector does not have a defined, industry-wide skillset or a clear job description for the producing work required to develop a new opera. This is a significant administrative weakness. Without a standardised understanding of what a development producer does, companies are left to invent management structures on an ad-hoc basis for every new project.

To build a more resilient commissioning ecosystem, the sector must treat new-work production as a specialised, learnable administrative and creative skill. The opera sector could learn from the TV and Film sectors and focus on providing dedicated training for artistic administrators and general producers, focusing on:

- Managing the delicate writing and revision loop without stifling creative risk.
- Working alongside publishers to implement rigorous score and script auditing before rehearsals begin.
- Building a shared, standard language to negotiate realistic delivery timelines between publishers, commissioners, and writing teams.
- Sell a project at development stage to attract co-commissioners and co-producers

By professionalising the production and development side of commissioning, the sector can give non-specialist companies more confidence to program new work more regularly.

Alternatively there is a tradition in theatre where smaller more specialised companies are brought into larger institutions for specific projects, for example the National Theatre did not become puppetry specialists to produce War Horse, they brought in Handspring. There is scope for opera companies who specialise in new work to be brought in as co-commissioners within larger companies who produce new work less frequently.

Similarly, some opera companies may not even need to look outside their own resources for these skills and systems. Learning and participation teams are frequently the most active and innovative commissioners of new work and their process and skills could be being more frequently utilised for wider commissioning endeavours.

I asked all the opera producers I interviewed to sketch out their commissioning process from ideation through to opening night and what “greenlight” moments existed. I have endeavoured to corral the various responses into a phased map, which I do not hold up as the best practice, merely as a description of current working methods.

Commissioning Phases

Phase -1: The ether - for many opera makers and commissioners there was a sense of this pre-commission phase where ideas were floating around and conversations were happening about themes or stories, and potential partnerships. These were sometimes played out over a number of years before gathering momentum into a commission.

Phase 0: Pre-commission brief setting - Producers, opera makers & publishers all highlighted that the creation of tight briefs at this stage was critical to project success. Whether preparing an open call, or a direct to makers commission, or taking an idea from the ether into a commissioning process, time and skill invested in this phase pays dividend in all the phases to come. By being direct and clear about delivery timeframe, expected development milestones, forces available, budget, co-commission and co-production requirements and the core theme or idea of the piece.

Phase 1: Commission - For some companies this moment is a greenlight right through the writing process to opening night, for others it is a smaller commitment to a first treatment or synopsis. In all other genres I have researched the idea of a single greenlight on a project through to completion was unheard of, with more project gateways and greenlight moments especially at the beginning.

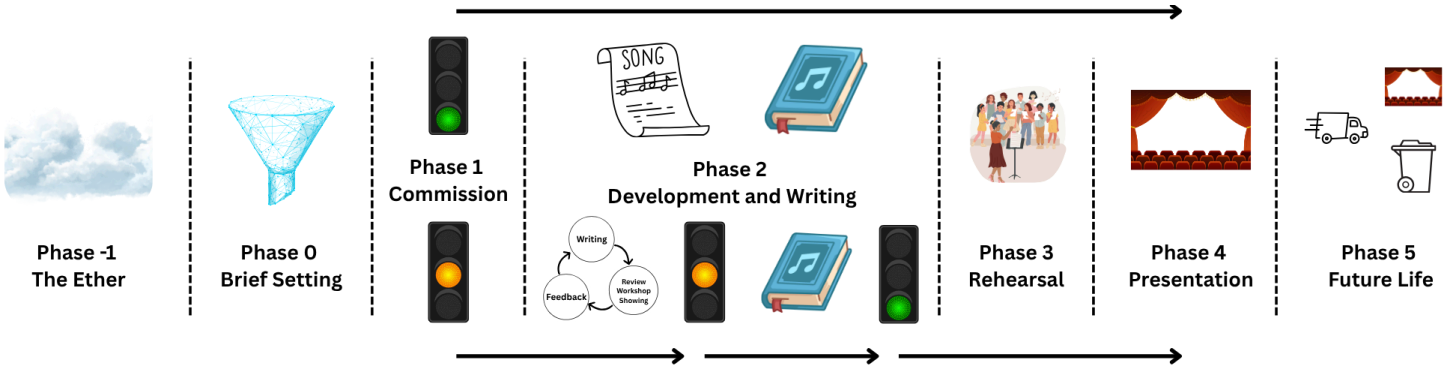
Phase 2: Writing - This phase varied significantly from company to company and project by project. There was an element of composer led process here, which companies may wish to examine and determine what is appropriate for the commission overall, rather than a composer preferred way of working.

Phase 2a: - Workshop
Phase 2b: - R&D Showing
Phase 2c: - Revision

Phase 3: Rehearsal

Phase 4: Presentation

Phase 5: Future life - we often consider the future life of a new work to be a false dichotomy between entering the canon and the often cited wheelie bin of history. However in reality there is a large middle ground where works have a limited but fruitful future life. Indeed if the ecosystem was functioning successfully and audiences were suitably engaged and excited by new work - the focus on entering the canon would diminish. Importantly though, new work almost always requires further development time post premiere - and this needs to be suitably planned by commissioners and co-commissioners.



As you can see from the graphic, the process diverges at the commissioning stage, with one track green lighting at this stage with a production slot allocated and a fixed timeline for delivery and performance. In the second track, the commission is broken down into smaller chunks, and whilst the commissioner likely has a performance slot in mind for the production it is not locked in. Obviously there are externalities to this process for example the availability of venues, singers, conductors and directors which may influence a commissioners decision making.

Ultimately, establishing greater clarity requires opera companies to rigorously document and interrogate their commissioning processes. Feedback from both opera companies and makers across other art forms since the interim report has shown that critically examining these developmental steps is an invaluable exercise for refining future practice.

Studio/Lab/Incubator/Catapult

When asked for a single important step the sector could take towards a more robust new work ecosystem the idea of some sort of incubator, studio, or laboratory was repeatedly mentioned, either in a single geographical location or a more distributed network system, some sort of new work hub. A place where work could be cultivated and then shared with the sector at an early stage, creating a market place for future projects and breeding ground for ideas.

Successful incubator models exist in other creative sectors, though they are typically driven and funded by a single large institution:

- **The National Theatre Studio:** Operating entirely away from the pressures of public openings, performance schedules, or ticket sales, the NT Studio serves as a private, dedicated space for playwrights, directors, actors, and designers to collaborate and experiment. Housing the theater's New Work Department, it provides creators with the time, space, and finances to test complex ideas, develop scripts from both established and emerging artists, and deliver career development. Groundbreaking productions have begun life as experimental workshops within the NT Studio.

  NT Studio has significant impact outside of the National Theatre and within the wider UK theatre sector both in terms of talent development and with actual work being developed at the studio alongside regional venues who then go on to produce the work.

- **The Sundance Institute Labs:** Established in 1981 as a creative sanctuary for independent filmmakers, these intensive residencies remove box office and executive pressures to allow artists the freedom to experiment and fail. Through dedicated directors' workshops (using cameras, crews, and professional actors to test visual scenes), screenwriters' script sessions, and non-competitive creative mentorship, the labs have directly supported some of the most critically acclaimed cinematic releases of recent decades.

This developmental model has direct precedents within the international opera sector:

- **The American Opera Project (AOP):** Operating in a similar way to the Sundance model, this dedicated New York incubator has a permanent building, but like the NT Studio is does not house a performance space - instead it focuses on R&D testing for contemporary creators and partners with opera companies to take projects to public performance.

- **The European Network of Opera Academies (ENOA):** This continent-wide network pooled the resources of 12 prestigious opera houses to incubate over 2,000 artists and launch dozens of world premieres. Although it lost its central European Union funding in 2024, it persists as an informal network.

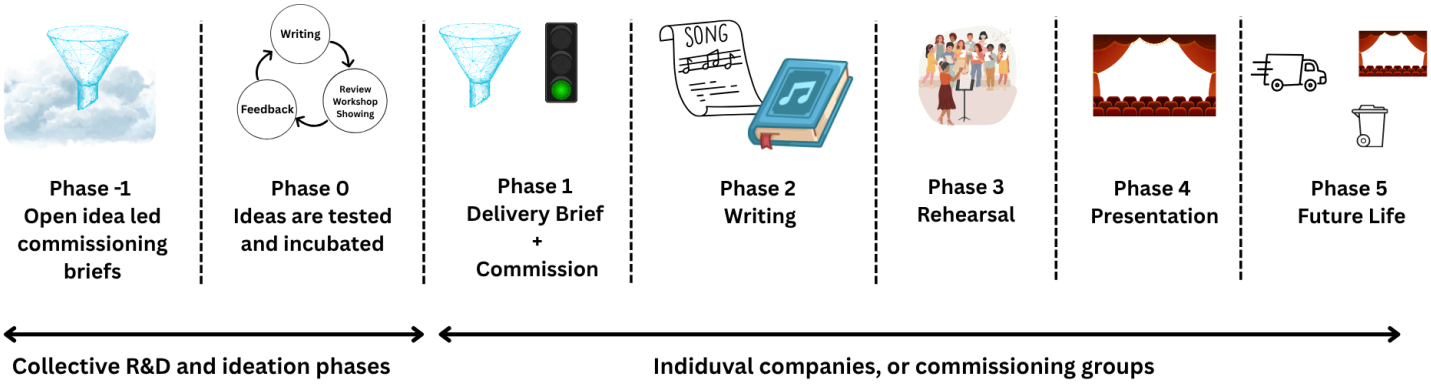
- **Opera America R&D Lab**: In September 2026 Opera America announced the beginning of an R&D lab to help the opera industry test ideas, accelerate learning, reduce experimentation risks, and turn concepts into practical tools shareable across the sector.

While the UK offers various opportunities for artists to learn about opera making or participate in short-form experiments, these initiatives are predominantly structured as introductory skills development or postgraduate education schemes. The UK ecosystem lacks a dedicated laboratory where existing, professional opera makers can cultivate new work for the purposes of seeking a commission.

Creating a standalone, centralised, laboratory building is a major financial undertaking that the current funding environment may not support. However, creating a networked system remains a highly feasible alternative.

By using the UK Opera Association to coordinate and connect existing regional assets, workshops, and residency spaces, the sector can build a shared, decentralised incubator network. This collaborative model would support professional creators, reduce individual risk, and provide a clear pathway toward production without requiring a single, high-cost physical hub.

Looking at the commissioning diagram in the previous pages, what might this look like if the sector had such an incubator model in place?



The UK opera sector is not approaching an R&D laboratory from a standing start: we have a festival for new opera which welcomes experimental works and works in development. Tête à Tête: The Opera Festival represents a crucial piece of sector infrastructure that, if fully embraced, could play an even more transformative role in the new work ecosystem.

The sector could and should work collaboratively with Tête à Tête to build out the festival from its current form into something that better serves the eco system. The festival offers a playground and platform for artists and opera makers - indeed many of the opera makers interviewed for the research references the festival by name as crucial to their work. However,

industry attendance is minimal and as such the festival is not able to act as a springboard for work or artists into future commissions, nor is it being used as an R&D opportunity for established companies who are preparing their own work.

By building on the Tête à Tête festival to integrate formal industry pitching sessions, co-producing marketplaces, and structured R&D feedback loops, the festival could bridge the gap between early experimentation and commissions, serving as an essential engine for development and cross-sector collaboration. Some companies may wish to go further and include Tête à Tête and audience feedback as an integral part of their commissioning process.

Opera Makers

The biggest risk listed by commissioners was the fear that writing teams may not deliver on time. With the exception of publishing - this was not a fear in any other genre. Similarly one of the most frequently cited pain points by composers was lack of sufficient composing time generally, and late delivery of libretto further squeezing this. Many composers said that they had never worked on a project with sufficient time to complete the work to their liking. Further exacerbating this was the need to take on other work (e.g. teaching) because commission fees are not sufficient on their own.

Similarly composers reported too few opportunities to hear their work played before rehearsals and then the knock on of late changes either during rehearsals, or between the first and second productions of the work. This is interesting because opera companies suggested they are composer led on when and how commissions are workshopped before delivery - yet composers are not getting the time nor process they would ideally have. Of course financial and logistical limitations will govern what is possible, but a clear conversation around expectations and possibilities at the outset may be desirable for all parties.

Commissioner-led matchmaking can play a highly positive role in expanding creative networks. Many artists welcome these introductions because they broaden creative horizons and open up unexpected avenues for future commissions. However, one often cited pain point for creativity was when matchmaking is used to artificially balance out a team. Experienced composers express deep frustration when asked to work with novice or first-time librettists. This strategy operates on the assumption that a composer's experience can somehow neutralise or compensate for a writer's lack of operatic training, ignoring the fact that they hold interdependent and very different skill sets.

It is critical to understand these pain points not merely as administrative or funding complaints, but as direct threats to the viability of new opera. Rushed timelines, insufficient development periods, and forced creative partnerships compromise the artistic cohesion of the work. When a composer lacks the time to properly refine a score, or when a mismatched creative team fails to find a unified narrative voice, the resulting opera reaches the stage underdeveloped. In a

marketplace where audiences are already deeply hesitant to take a financial risk on unknown repertoire, presenting such work damages audience trust and directly depresses box office returns. Therefore, addressing creator fees, protecting realistic delivery timelines, and fostering organic creative teams must be treated as a strategic investment in the product's ultimate market success, as well as a very real HR or funding concern.

Many composers spoke openly about the profound struggle of making their careers financially viable. Splitting standard commission fees over the extended timelines required to write an opera often results in unlivable wages. One composer calculated their composition earnings at roughly 80p an hour. Faced with an industry that offers few regular commissions and minimal safety nets, artists are adopting two distinct, though occasionally overlapping, career strategies to survive:

1. Portfolio Career - Composers frequently sustain themselves by taking on teaching roles, conducting, or writing music for other artforms.

2. Entrepreneur - A growing cohort of artists are circumventing the traditional gatekeepers by self-starting and producing their own work[2]. These composers form their own collectives or independent companies out of sheer impatience and a lack of institutional opportunity.

These are not mutually exclusive - many of the entrepreneurial composers also have portfolio careers outside of opera making - but there is a distinction with composers who do and do not wish to produce their work themselves.

In both strategies, creators feel ill-prepared by their formal education for the realities of the industry. Whilst many on the entrepreneurial side enjoy the producing element to their work - all said it was a necessity rather than a choice. This is something that the UKOA and the sector could look at as in terms of initial training and CPD opportunities for artists.

Composers note that mid-career is precisely when they face the greatest personal financial pressures, making the insecurity of the profession harder to weather. Despite having built a strong reputation, the financial reality for mid-career artists is often more fragile than when they first started.

This is partly because of a lack of opportunity to graduate from writing successful self produced or fringe projects to a mid-scale or large commission. Furthermore, pitching new ideas directly to institutions frequently results in complete silence, creating a bottleneck where talented mid-career composers simply cannot secure the commissions needed to progress nor the feedback they need to develop their practice.

Many composers actively engage in Learning and Participation (L&P) projects, writing operas for youth companies or community ensembles. However, they report a pervasive institutional snobbery that views writing for non-professionals as inherently "lesser" work. Composers doing

[2] Most of these opera makers reported creating this work with partners in Europe - not the UK

highly successful, critically rigorous community work find that they are rarely considered viable candidates for mainstage professional commissions.

This segregation unfairly pigeonholes creators, ignoring the fact that those who succeed in L&P work often possess the exact dramatic skills and audience-engagement expertise that are required for successful commissions.

Presentation options for new work

Scale is an interesting concept in UK opera, and many opera companies consider themselves to be small. I think it is useful to be clear about this because it opens up the conversation as to where companies might be able to work together at similar scales and across scales.

Looking purely at turnover - because it is publicly available information, the UK opera sector has:

1x Extremely large company £50million+ in turnover.
6x Very large companies £10+ million in turnover
8x Large companies £1m - 5m in turnover
12 - 20 x medium opera companies £500k -1m turnover
20 - 30 x small opera companies sub £500k turnover
Many - micro and unincorporated opera companies and pop up producers.

At the smaller end of this scale it is hard to be accurate with numbers because reporting requirements are less rigorous.

Oftentimes when the term “large scale commission” was used in the research interviews it was referring to a commission for the main stage of perhaps 4 of these companies. Accepting the language of the participants, there was a sentiment from many about lack of opportunity in the “middle”.

Many research participants praised the existence of new opera festivals, specifically and repeatedly mentioned the Tête à Tête festival as a foundational place for their work and practice. However, many felt frustrated at the gap between this usually self funded work and “next step” on their journey.

Many commissioners recognised this gap too - and expressed the need to have opera makers build trust and credibility before they could consider them for a commission, whilst simultaneously acknowledging the opportunities to show that credibility and build that trust were limited. A vicious cycle where those who manage to break through to the large and very large companies are seen as credible for those commissions, and those who haven’t have an increasingly narrow path to achieve that status.

Rural and small scale touring has been a major driver of new work and innovative practice in theatre and dance, with schemes like Create Tour Connect[3] creating the scaffolding to support new work and bring it to new audiences. Opera touring, of course, faces its own significant challenges, but at a very small scale there is perhaps something to explore here as a next rung on the ladder for opera makers and to feed into a wider audience development piece for opera as an artform.

[3] https://applause.org.uk/about-us/projects/create-tour-connect/

Another interesting comparison that came up repeatedly in the research was the lack of summer festival opportunities for new work in the UK - in contrast to Europe[4]. These European models successfully integrate the research and development phase into their public programming. For example, creators can present "work-in-progress" showings to audiences who are explicitly invited to evaluate and provide feedback on whether an idea has the potential to become a full opera.

The absence of a mid-scale, experimental festival circuit presents a structural challenge for career progression. The UK boasts a vibrant but small grassroots fringe scene (such as Tête à Tête or Grimeborn) which provides vital space to try things out. However, without a well-resourced next step, emerging and mid-career creators struggle to develop further. Artists can find themselves marooned between underfunded fringe platforms and the immense financial and artistic pressures of a 2,500-seat mainstage commission.

The sector recognises a need for a collaborative space, similar to a fringe or mixed-arts festival that can act as a "hotbed" of creative energy, bridging this gap and allowing audiences to comfortably take a risk on the unknown. If the UK sector could cultivate an experimental festival environment, perhaps by partnering more closely with existing arts festivals or by pooling resources to create a shared summer R&D platform it could provide the exact scaffolding needed to nurture new operas.

Overcoming this "missing middle" and building a sustainable ecosystem for new commissions cannot be achieved by relying solely on existing opera infrastructure nor through the creation of new systems. To erect the necessary scaffolding for creators to scale their work, the opera sector must look outside its traditional ecosystem to understand how other art forms successfully nurture and transition new projects to the stage.

[4] Munich Biennale, O Festival - Rotterdam, Holland Festival - Amsterdam, Opera Forward Festival - Amsterdam, Festival Aix en Provence etc

Other Sector Analysis

An examination of other creative industries reveals distinct approaches to managing new work. Television and film offer vital lessons in structured commissioning and development, while the live theatre sector provides a proven model for framing and positioning contemporary work to the market. While these fields rely on structured frameworks with rigid gateways, highly defined professional roles, and transparent commissioning briefs, the UK opera sector rarely uses a uniform format.

TV & Film

The TV commissioning process has significantly more greenlight moments than even the most segmented approaches I encountered in the research. One phrase that a development producer shared with me about their company's project development was:

“Do we love it, can we sell it?”

This was the guiding mantra of their development work because no one wants to make work they don't love, but crucially in TV no one gets to make work they can't sell. The phrase is emblematic of a development rigour which is required to get a project through the process to be commissioned.

One might argue that this is too commercial a framework for opera commissioning, that opera commissions exist in an entirely different system, and for different purposes, but accepting the first half as a given - what might that mantra look like for different companies?

Do we love it? Will we revive it for years to come?
Do we love it? Will it change minds or move people?
Do we love it? Will it bring a new audience?
Do we love it? Will co-commissioners love it?
Do we love it? Can we sell it on tour?
Do we love it? Will our members love it?

Having this clarity of **why** may be a useful shortcut to thinking about what goes into the brief in Phase 0 detailed above.

Dedicated skill sets
Roles are more clearly defined in almost all other artforms I interrogated. TV and film have especially rigid formulas for who works on a commission and at what stage, as well as rigid gateways that projects must pass through for each greenlight.

Development teams were specifically skilled to take a project from concept to greenlight, mostly then handing over to a production department to deliver. Some specific roles though carried right through to the shoot and the edit:

Exec Producer - Usually shepherding the project from concept right through to the edit, guarding the central idea for the project as it moves through each stage.

Script Editor - For scripted work a script editor might move through the project, acting as the link between the production team and the writing team to ensure continuity of voice, story and character.

Development Producer - reporting into the Executive Producer, these roles are specifically skilled up to work on the early phases of the project, pulling in creatives, working up ideas, ensuring saleability and alignment with the commissioner's brief and pitching the idea and reacting to feedback. The Development Producer might then work with production colleagues to fully cost the project AND pull the finance together.

This clarity in role and skill set is something that was broadly missing in the opera sector (with the exception of new writing specialist companies) where roles often get smushed together or even worked out ad hoc as the process hits various stumbling blocks.

TV commissioning is a jigsaw of legacy media and streaming behemoths - they are commissioning from a pool of tv production companies, who in turn are working with pools of writers. The commissioning process varies by platform or channel, but there are more clearly defined briefs around the type of work a channel is looking for.

Channel 4 for example has a commissioning brief for every genre of work they commission, openly available on their website with the commissioning teams names and email address below.[5]

An illuminating contrast was drawn with the television and film industries. In TV, commissioners publish clear briefs detailing exactly what topics, formats, or genres they are looking to buy, and production companies act almost as "sales" teams pitching tailored solutions. In opera, this market communication is virtually nonexistent.

Companies rarely tell the sector what they actually need, leaving composers to blindly pitch ideas that may not align with a venue's strategic, artistic, or financial realities. A few companies are beginning to adopt open, thematic briefs, but this remains the exception rather than the rule

Many opera makers I spoke with as part of the formal research and in other settings describe a lack of clarity about when and how and whether they should pitch ideas to opera companies. Similarly I have heard opera company leaders express disappointment at not being asked by opera makers what type of ideas they want to pursue for their companies goals.

[5] https://www.channel4.com/4producers/briefs/drama#some-of-the-things-were-looking-for

The ether or phase -1 as I have called it plays a significant role here. Some creatives have greater access to commissioners to discuss ideas at their infancy, or understand where a company might see itself in the coming years whilst others are locked out of and invisible to those conversations.

Theatre

While television and film offer valuable lessons in structured development gateways, the wider theatre and dance sectors provide an immediately applicable model for how live performance can successfully scaffold new work for a sustained future life. Rural and small-scale touring have been major drivers of new work and innovative practice in theatre and dance. By observing how theatre makers cultivate, pitch, and tour contemporary productions, stark differences emerge in how the opera sector interacts with its wider presenting ecology.

Industry-Wide Events and Collaborative Schemes
The theatre and musical theatre sectors rely heavily on established, sector-wide marketplaces and showcase networks that actively unite makers with producers, venues, and investors. Initiatives such as the new Local Theatre Touring Alliance (LTTA) MidScale[6] event, as well as the more established BEAM[7] (the UK's largest showcase of new musical theatre), House network[8], and Create Tour Connect[9] all function to create the scaffolding needed to support new work and bring it to new audiences. These events serve as vital intersections where early-stage projects can secure the co-commissioners, venues, and touring networks required to guarantee a production's future life long before the first rehearsal.

Commercial Fluency and Producing Language
Within these theatrical networks, there is a pronounced fluency in commercial and audience-focused language. At events like LTTA's MidScale, theatre makers demonstrate an acute awareness of their market. Project pitches explicitly define the target audience demographic, outline the methodologies for reaching that specific audience, detail the physical scale and size of the work, and articulate clear ambitions for its geographic reach. Furthermore, these creators deploy highly strategic approaches to identifying the types of presenting and producing partners their work requires. The creative vision is inextricably linked to a viable producing strategy.

Addressing the Opera Deficit

[6] https://localtheatretouringalliance.com/midscale

[7] https://www.mercurymusicals.com/beam/

[8] https://housetheatre.org.uk/

[9] https://applause.org.uk/about-us/projects/create-tour-connect/

Currently, the UK opera sector completely lacks these communal, industry-wide pitching moments. The sector does not connect with regional or mid-scale venues in this structured, market-driven manner, nor does it typically cultivate new commissions specifically with future touring capabilities built into the core artistic brief. This leaves creators marooned without a clear pathway to scale their work beyond one off festival performances.

To bridge this gap, the opera sector does not need to build this infrastructure - instead we must engage with wider industry commissioning events, such as LTTA's MidScale, to integrate opera into the broader performing arts pipeline. By partnering proactively with organisations like the LTTA and the National Rural Touring Forum (NRTF), the sector can begin building dedicated, collaborative audience development initiatives that support new contemporary repertoire across small, mid-scale and larger regional venues.

There are, of course, inherent differences in scale. What the opera sector frequently considers a "small scale" production - often involving six or more singers and musicians - is still considered too large and financially risky for a mid-scale theatre touring market dominated by three and four-handers. To navigate this and successfully access the "missing middle," the sector must adopt a dual strategy. First, companies and independent makers must begin explicitly commissioning and developing highly agile work designed to fit this market. Second, parallel to creating these smaller works, the sector must collaborate with regional venues on long-term audience-building initiatives that can slowly cultivate the market demand and financial resilience required to eventually support touring larger chamber works

Encouraging more small- and mid-scale opera performances at Brighton and Edinburgh Fringe festivals would also be a highly effective way to get regional theatre bookers to see our product as a viable option for their venues. By showcasing contemporary works in a major festival environment alongside standard theatre offerings, regional programmers can witness firsthand how audiences engage with agile, modern opera.

Bridging the gap between opera and theatre requires active engagement with broader performance networks, targeted audience development, and agile production models suited for regional venues. By utilising platforms like the Mid Scale, fringe festivals and adapting commercial marketing fluency to contemporary opera, the sector can cultivate more sustainable touring opportunities and make new work accessible to wider audiences.

Audience Engagement and Marketing Alignment

As established in the repertoire data and mentioned in the Executive Summary, the quantitative data reveals a severe drop-off between the volume of new opera being created and its eventual box office yield. This stands in contrast to the wider live theatre sector - which successfully converts a comparable volume of new plays into a sustainable commercial return. The opera sector struggles to monetise its contemporary repertoire.

This disparity proves that the sector's primary challenge is not an absence of commissioning ambition, but rather how that work is positioned, packaged, and sold to the public once it is created. The sector is currently fighting two compounding problems: an existing opera audience's reluctance to take a risk on unknown repertoire, and a general consumer market driven primarily by "bucket list" booking

Qualitative feedback indicates that the language used to describe new opera frequently hinders wider audience engagement. Internally, terminology often reflects institutional skepticism; the creative process is rigidly framed by both producers and opera makers as "work" rather than theatrical "play," and contemporary scores are sometimes characterised by dismissive language 'squeaky wheel' etc.

Externally, companies report a tendency towards commercial "shyness," where new commissions are frequently obscured by standard repertoire staples rather than being confidently promoted as premium, must-see cultural events. Furthermore, the word "opera" itself is sometimes treated as a barrier to entry, triggering assumptions of elitism rather than acting as a compelling hook.
To address this imbalance and translate commissioning activity into sustained audience attendance, a shift in communication strategy is necessary.

The following section examines the communications and visual gap between new UK theatre and new UK opera, detailing how the theatre sector approaches new work and outlining actionable strategies the opera sector might adopt to broaden the audience for contemporary repertoire.

The Communications & Visual Gap
Synthesising the marketing data and visual aesthetics of UK theatre and opera reveals distinct friction points that currently hinder opera's market reach:

- Friction Points & Accessibility: British theatre actively dismantles the perceived risk of a ticket purchase by leveraging familiar cultural anchors (recognisable IP, star casting, pop-culture parallels). In contrast, opera marketing frequently relies on the pedigree of the composer or the prestige of the venue, assuming the prospective audience already possesses the operatic literacy to take a blind risk.

- Visual Tone & The Elitism Gap: New British plays utilise a "cinematic blockbuster" aesthetic, bold, highly legible sans-serif typography, saturated colors, and direct eye contact from the actors, that subconsciously signals accessible, urgent entertainment. Opera defaults to a "conceptual art exhibit" visual language, utilising minimalist fonts, vast negative space, and abstract metaphors that inadvertently reinforce perceived elitism and exclusivity.
- Narrative Hooks: Theatre frames its relevance squarely within the immediate British cultural zeitgeist, marketing new work as urgent commentary on modern politics, sports, or true crime. Opera tends to pitch new work through universal, timeless themes (existential grief, mythology), which lacks the immediate, FOMO-inducing urgency that drives modern consumer ticket sales. It's not the newness itself that sells a show; audiences connect with what the piece is actually about and the human stories it explores, rather than its novelty alone.

This is a topline analysis reacting to the data and interview feedback - it has only scratched the surface of a comparative analysis of messaging. This is an area that requires further study - something with the UKOA comms group should consider.

The sector must dismantle the perception that contemporary opera is an obligatory, "eat your greens" addition to a season. Currently, compelling new work is frequently obscured by standard repertoire staples like *The Marriage of Figaro* or *La Bohème*, which are heavily prioritised as the commercial main course. If opera houses expect audiences to invest their time and money in unknown repertoire, they must market these new commissions with the same absolute conviction, premium placement, and enthusiasm as canonical classics, rather than treating them as a secondary, niche offering.

While this shift will necessarily be an incremental process for many companies, given the economic reality that new work is often subsidised by core repertoire revenue, it presents a distinct opportunity. For organisations willing to embrace contemporary work as their primary mainstay, boldly messaging this commitment to both the sector and the public offers a unique market position to advance the art form and cultivate entirely new audiences.

Recommendations:

A - Opera Companies:

Recommendation A1: Website Submission Transparency & Open Policy Statements
Every UK opera company should include a statement on its website outlining its policy on new work submissions. This policy should include:

- Acceptance Status: Whether or not the company accepts unsolicited submissions, pitches, or proposals.
- Contact & Format: If submissions are accepted, whom they should be sent to (e.g., named Development Producer or dedicated email address) and the required format (e.g., 1-page synopsis, sample score, audio links).
- Stage of Development: At what point in the creative lifecycle ideas should be submitted
- Timeline & Feedback Commitments: The expected response timeframe and whether editorial feedback will be provided.

Recommendation A2: Interrogating Greenlight Gateways & commissioning process
Opera companies should actively review and articulate their internal greenlight process for new work. This review should ensure that gateways & review points are set and transparent, and that there is a focus on the future life of the commission at the very start of the process.

Recommendation A3: Interrogating Creator Fees, Timeframe & Workload
Opera companies should review their fee structures and project timeline to ensure compensation is fair, transparent, and accurately reflects the total workload. This includes setting realistic, sequential delivery timelines for all creators.

B - Recommendations for the UK Opera Association (UKOA)

Recommendation B1: Convene a UKOA New Work Group
The UKOA should establish a dedicated New Work Group to share good practice, coordinate sector-wide initiatives, and ensure that commissioning programs across member companies are aligned, collaborative, and sustainable.

Recommendation B2: Options Paper for a Centralised R&D Process
The UKOA should draft a comprehensive options paper exploring models for a communal, decentralised R&D process, such as a networked studio or incubator, to provide creators with safe experimentation spaces without requiring a single high-cost physical building.

Recommendation B3: Support Existing Infrastructure & Sector Engagement
The UKOA should actively support and build upon existing new-work platforms, such as the

Tête à Tête festival, while encouraging member companies to embrace these grassroots ecosystems. Additionally, the UKOA should drive sector engagement with wider industry commissioning and showcase events, such as LTTA's MidScale, to integrate opera into the broader performing arts pipeline.

Recommendation B4: CPD Pathways for Creative Producers
The UKOA should develop targeted Continuous Professional Development pathways for creative and development producers, focusing on specialised commissioning skills and cross-artform learning from film, television, and theatre.

Recommendation B5: Continued Data Gathering & Analysis
The UKOA should establish the repertoire survey as a sector baseline and commission ongoing quantitative data collection and analysis. Future research should broaden its scope to measure the economic footprint, social impact, and audience demographics of opera, tracking long-term trends to provide robust evidence for public advocacy and sector investment.

Recommendation B6: Theatre Marketing & Comms Comparative Study
Through the UKOA Comms Group, the UKOA should conduct a comparative study examining marketing, audience development, and communications strategies around new work within the theatre sector. This research should focus on identifying best practices for messaging, campaign timing, ticket pricing strategies, and audience risk-mitigation to help opera companies build broader, more resilient audiences for contemporary repertoire.

Recommendation B7: Facilitate Strategic Publisher Partnerships
The UKOA should actively facilitate stronger, more transparent relationships between music publishers, opera companies, and commissioners. Fostering an open and supportive dialogue will help both sides navigate each other's operating realities, ease friction, and manage project risks more effectively to support the creation of new work.

Recommendation B8: Create a Digital Marketplace for Independent Work
To support entrepreneurial composers and artist collectives circumventing traditional gatekeepers, the UKOA should develop a digital "shop window" platform specifically designed for non-published contemporary work. This centralised database would allow creators to showcase their existing pieces directly to regional venues, mid-scale touring networks, and co-producers, providing a clear alternative route to secure repeat productions and extend the future life of independent repertoire.

C - Recommendations for Arts Council England

Recommendation C1: Guidance for Independent Opera Makers

ACE should share clear, structured guidance and advice specifically tailored for micro companies and independent and entrepreneurial opera makers, outlining when and at what developmental stages they should approach ACE for project grant investment.

Recommendation C2: Investment in Creative Producing and Skills Development
To address the critical lack of standard professional roles and creative management skills within UK opera administration, ACE should actively support continuous professional development for creative producers. This could potentially be achieved by utilising streams like Develop Your Creative Practice (DYCP) funding to build specialised commissioning and project management skills across the sector.

Recommendation C3: Prioritise Live Music in Touring Initiatives
Recognising that rural and small-scale touring have been major drivers of new work in other disciplines, ACE should explicitly include opera (and other art forms requiring live musicians) as a special area of interest for future touring initiatives. Providing ring-fenced or additional funding for schemes similar to Create Tour Connect will help offset the specific additional costs of touring live musical ensembles to mid-scale and regional venues.

Recommendation C4: Sector Development via the UKOA
ACE should continue to support the UK Opera Association in delivering the numerous recommendations outlined in this report, and funding test and measure projects based on the research.

Recommendation C5: Collaborative R&D Options Paper
ACE should proactively engage with the UKOA in developing and reviewing the forthcoming options paper that explores models for a communal, decentralised R&D process. Collaborative funding and policy support at this exploratory stage will be critical to establishing safe experimentation spaces or incubator networks for creators without requiring a single high-cost physical building.

D - Recommendations for Opera Makers

Recommendation D1: Adopt Theatre-Style Commercial Fluency (Self-Producing Artists)
For the growing cohort of entrepreneurial artists circumventing traditional gatekeepers by self-producing their own work, there is immense value in adopting the commercial pitching language used in the theatre sector. When building a new project, independently define the target audience demographic, the physical scale of the piece, and its touring viability from the outset. Pitching with this "producing fluency" makes the work substantially more attractive to regional venues and non-traditional co-producers. UKOA will aim to provide appropriate CPD with this recommendation in mind.

Recommendation D2: Engage with Cross-Sector Marketplaces
Rather than waiting for the traditional opera commissioning networks to open up, independent artists and collectives should proactively seek out cross-disciplinary platforms. Bringing agile, smaller-scale operatic work to theatre-focused marketplaces, fringe festivals, and mid-scale touring networks presents an opportunity to test work directly with paying audiences, and build new partnerships outside the traditional opera ecosystem.

Conclusion

This research demonstrates that while the UK opera sector possesses a strong artistic drive to commission new work, the underlying structures required to develop, distribute, and market these pieces are currently failing to translate creative output into sustained audience engagement. Bridging the gap between a 26.8% share of productions and a 2.4% share of box office revenue cannot be solved by simply commissioning more pieces.

By adopting the rigorous development gateways of television and film, integrating into the collaborative mid-scale touring networks of the wider theatre sector, and embracing bold, unapologetic marketing strategies, UK opera can build the necessary scaffolding to support its creators and de-risk the experience for its audiences.

To maintain momentum and translate these findings into sector-wide change, the UKOA will immediately focus on the following next steps:

- Establish the UKOA New Work Group: Convene this dedicated group to facilitate cross-company collaboration, share best practices, and oversee the implementation of transparent, standardised commissioning guidelines across the sector.
- Publish the R&D Options Paper: By early 2027, the UKOA will draft and release a detailed options paper exploring viable models for a decentralised, sector-wide incubator to address the current deficit in developmental scaffolding.
- Initiate the Marketing Comparative Study: Task the UKOA Comms Group with executing a deep-dive comparative study into theatre marketing and audience development tactics, equipping opera houses with actionable strategies for repositioning contemporary repertoire.
- Formalise Ongoing Data Collection: Establish the repertoire survey as a permanent, recurring baseline to accurately track the sector's programming trends, audience penetration, and the long-term performance lifecycles of new commissions over time.
- Broker Cross-Sector Touring Conversations: Begin formal dialogues with Arts Council England and organisations like the LTTA and NRTF to identify practical pathways for integrating opera into existing mid-scale touring networks.

While it may appear that the UKOA bears the bulk of the recommendations in this report, it is vital to recognize that the UKOA is fundamentally a collective process rather than a standalone institution. Although we will actively serve as the facilitator and convener for these initiatives, the true work of the UKOA is the work of its members. The successful implementation of these strategic recommendations relies entirely on their ongoing commitment and collaborative action.

The appetite for change among opera makers, producers, and institutional leaders is clear. By embracing these structural and communicative shifts, the sector can ensure that new opera is not only commissioned, but is given the framework it needs to find its audience and thrive in the continuing repertoire.

Addendum 1 - UK Opera Repertoire Survey

Use link above or scan the QR code below for the full UK Opera Repertoire Survey.