

Opera Training for Singers in the UK

How should it evolve to meet the changing needs of the profession?

A study commissioned by

national *opera studio*

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1. Brief & Methodology

1.1. The Brief

This report has been commissioned by the National Opera Studio, supported by Arts Council England and Help Musicians UK. This is an opportune moment for such an initiative as the last formal review of this subject took place 23 years ago and the NOS, now approaching its 40th year, has a new Chief Executive in place.

The brief for this work is summarised as:

- Opera is arguably the most complex and collaborative of art forms, involving many different disciplines, skills and people. There is a large body of existing repertoire to interpret and reinvent and an increasing focus on the production and presentation of new work. The sector at present faces some significant challenges. In addition to the wider government budget cuts and pressures on Arts Council England (ACE)'s funding in general, opera is coming under increasing pressure to justify the large amount of public money that is invested in this expensive art form.
- There is also an increasing focus on devolution and the redistribution of funding around the country and away from London. The Chief Executive of Arts Council England has spoken about how culture will be integral to the economic growth of the Northern Powerhouse, and organisations such as the NOS with the word 'National' or 'British' in our titles must work harder than ever to ensure they are indeed fulfilling a national remit.
- We must also ask how we can achieve better diversity within our talent development programmes, in order that the diversity of our talent better represents the demographic of the UK. Along with all funded organisations, we must ensure we are doing all we can to reach those who may have had less access to opera; this includes interrogating how we find and nurture artists who may have had less traditional routes into opera so that our artists can be more representative of the diversity of talent that exists in the UK. Are the training organisations that feed the profession adapting quickly enough? Is the training that we offer broad enough? Are we providing for the future of opera?

It should be noted that, whilst the focus of this study was clearly the training of singers, the consultation process also revealed a number of issues about training in other artistic disciplines (e.g., directors, répétiteurs). Some observations on these subjects are offered in Section 5.5.

1.2. Methodology

This review was undertaken by Graham Devlin Associates (Graham Devlin and Fanny Martin). We began by establishing an advisory group, all of whom were interviewed as part of the consultation process. We then undertook a review of existing literature¹ and

¹ See Appendix A for a list of reference documents
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meetings with the six major opera companies who sit on the NOS board. This was followed by visits to, or telephone phone meetings with, UK conservatoires, individual interviews with 40+ individuals and representatives of other organisations² – both in this country and with experience of opera training overseas; this included visits (not at this project's expense) to Opera America in New York and the Banff Centre in Canada. Further small-group meetings were held with:

- Devoted & Disgruntled Conference: “How can we change opera for the better?”
- Small Companies
- Singers
- Agents
- ACE (two officer groups)

In parallel with this, online questionnaires were prepared on the experience of and range of opportunities available for singers. These were circulated through existing data-sets and extended networks to a wide range of individuals and groups, including:

- Singers in the early stages of their careers
- More experienced singers
- Composers and Conductors
- Coaches and Teachers
- Agents
- Opera Companies
- Directors & Producers
- Media, Funders and other interested parties

A total of 226 responses were received.³

Pro formas were also issued to all conservatoires and major companies⁴ aimed at scoping:

- The profile of students at different levels within colleges and NOS
- Destination profiles of leavers
- Young Artists Programmes and other less formal training arrangements in larger companies

We should also record our gratitude to Emily Gottlieb, Chief Executive of NOS who, in addition to being a most engaged client, made comprehensive notes on the Opera Europa conference in June 2016 which we were unable to attend.

Regular progress reports were provided to the NOS board and interim presentations were made to ACE and Help Musicians UK in April/May 2016.

² A full list of contributors is included in Appendix B

³ These are summarised in Appendix C

⁴ Key indicators are summarised in Appendix D

It should be noted that, although the consultation process sought to reach out to as many potential contributors as possible, we are aware that a large number of individuals and organisations are committed to this area of activity and that, inevitably, it has not been possible for us to speak to all of them. We hope, however, that those who have not been able to contribute to the shaping of this report through verbal or written submissions, will be keen to engage in it during any implementation phases.

1.3. Report Structure and Style

Each main section discusses issues around particular themes, sub-divided into sub-sections. Conclusions and recommendations are attached at the end of each main section.

All interviews were conducted on a confidential basis in order to ensure that the voice(s) of the sector can inform the report in a way that is direct but not exposed. We have, therefore, drawn on this very rich base of qualitative evidence without — in almost all cases — identifying individual speakers or surrounding them with formulas such as “contributors said”. Rather, I have inserted unattributed direct italicised quotations where appropriate. We should also note that the consultation revealed a number of very commonly shared views and perceptions which helped shape this work. In the very few cases where an outlier opinion (i.e. voiced by only one or two contributors) is included, that status is noted.

2. Background - Previous Reviews

There have been a number of reviews of opera training in Britain over the last 55 years. These began with a report from Lord Bridges in 1960 which recommended that specialist postgraduate opera training should be available and resulted in the establishment of the London Opera Centre (LOC) in 1963. Thirteen years later, a further review, chaired by Sir Hugh Willatt, the then Secretary-General of Arts Council of Great Britain, led to the closure of LOC and its replacement in 1977 with the National Opera Studio, envisaged as having functions “somewhat different from those of the London Opera Centre, and without the heavy ... establishment costs of that organisation”. A significant difference in this new model was the de-coupling of the Studio from the Royal Opera House and the forging of a relationship between NOS and all of the major opera companies which remain on its board today.

In 1992/93, the third formal review of opera training was conducted by a review team led by Professor Janet Ritterman; this excluded qualitative comment on NOS as the organisation was at that time subject to an ACE appraisal (a process then regularly applied to all funded organisations). Like Willatt, Ritterman dealt with both formal education and “guided experience of work under professional conditions” as does this report. However, as a result of changes in the landscape (e.g. the introduction of Opera Schools at

conservatoires and Young Artists' Programmes within companies) this document does not adopt a strict separation of those categories. More recently, in 2008, an informal review of the sector was carried out through the NOS-convened Singers of Tomorrow conference.

The remainder of this section summarises these last two exercises, both of which identified a number of issues to be addressed, some of which were also noted in the earlier reviews.

2.1. A summary of the principal observations from the Ritterman Review

- In the 30 years since the establishment of the LOC, “The number of singers receiving their basic training at home and subsequently enjoying international careers has steadily increased [and] professional opportunities have expanded”.
- “The closest possible liaison between the profession and the training providers is essential”.
- In the 1980s there was a noticeable increase in the number of small-scale companies in Britain, providing reduced or re-scored versions of the ‘classic’ canon, 20th century repertoire and the expansion of staged work from the Medieval, Renaissance and Baroque periods. As a consequence, “the volume and range of work now available in Britain for young singers [was] noteworthy... The companies provided just over a thousand performances in 1991/92.” This was seen as an indication of a buoyant and diverse professional environment whilst noting that “there have been significant [non-beneficial] changes in the ways in which companies are now able to support the development of young singers”.
- By 1993, “it [was] not unusual for an aspiring opera singer to spend six or even seven years at college before attempting to enter the profession” compared with a maximum of 4 years in 1976. This remains the case in 2016.
- “There has historically been no single path to becoming an established opera singer”. This is perhaps less true in 2016 (see Section 3).
- Many of the staff associated with the National Opera Studio were regularly employed by the main companies in 1993 which, it was suggested, should “ideally” position the Studio to prepare students for the profession and to ‘fine-tune’ already well-developed skills.
- Of 192 singers who passed through the studio in 1977-92 approximately 89% “[were] working regularly with recognised opera companies in Britain and abroad”.⁵ However, Ritterman noted some evidence suggesting that since the introduction of longer courses at Music Colleges, some talented singers chose to bypass the Studio.

The strengths and weaknesses of young singers in 1993 and the pressures on them were identified as follows:

⁵ Updated figures can be found in 4.2.
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Strengths:	<ul style="list-style-type: none"> - The vocal abilities of the best young singers - Open-mindedness and flexibility - The ability to handle contemporary work
Weaknesses:	<ul style="list-style-type: none"> - Overall levels of musicianship (although not for those who had been choristers or were advanced performers on another instrument) - A lack of knowledge of other artforms and general education - Most producers would have liked...more advanced dramatic skills - Facility in foreign languages (although improving) - Poor diction in sung English - Audition technique, presentation and choice of repertoire
Pressures on young singers:	<ul style="list-style-type: none"> - The lack of early career support that enables career development (including less coaching) - The pressure on young voices – pushing too far too fast - The perception of a need for ‘instant success’ leading young singers to accept work for which they are not ready - Over-protective teachers who are not connected with the current profession

To address all the above, Ritterman’s recommendations included:

- An ongoing dialogue between companies and colleges: from the consultation for the present report, it is clear that, whilst lines of communication do exist between individual companies and colleges, there is no formal structure for regular cross-sectoral discussion.
- In-company training schemes for young singers: Young Artists’ Programmes and other initiatives now exist in several guises. They are discussed in the present report.
- An ACE bursary scheme for young singers in their first five years post-training. Whilst the current constraints on public funding may make it difficult for ACE to respond to this suggestion, it remains a desirable mechanism and is discussed later.
- Addressing the need for carefully-paced development and the avoidance of early over-exposure. This is referenced in this document.

Despite Ritterman’s recommendations, many of the above concerns have re-surfaced repeatedly through the consultation for the present report, twenty-three years later.

2.2. The Singers of Tomorrow conference

In 2008, NOS convened a conference about opera training which identified the following challenges:

- A lack of transparency about access to the profession, perhaps linked to the decline of the amateur scene which once provided pathways into professionalism;
- Individuals only coming from “*the conventional music college route*” and an associated narrowing of the social and cultural groups going into training and a lack of nurturing of ‘less obvious’ prospective talent;

- Associated with this, a failure to provide role models by nurturing and promoting BAME singers — and a possibly linked under-development of BAME audiences. (In response to this recommendation, a pilot scheme was initiated in 2012 by Glyndebourne which sought to identify a small group of exceptionally talented singers who had “*fallen through the gaps*” and provide them with intensive instruction in operatic vocal technique and performance. More than half of the participants in this programme moved on to further training). NOS also responded to this challenge by establishing its Singers of Tomorrow training scheme which offered training to four artists ‘from beyond the mainstream’, including those from different ethnic and social backgrounds those coming into the profession via a different route (e.g. music theatre) and those whose voices might not be susceptible to development within the usual timetable. This programme is currently paused awaiting the findings of this report;
- Too many students going through postgraduate courses who are unlikely to have significant careers within a declining job market (in the major houses);
- A lack of understanding of voices on the part of some in the sector;
- The time it takes to develop the voice to sing the heavier repertoire — and the risk of pushing ‘too far too soon’;
- Some singers not able to sing comprehensibly in English and others unable to read music;
- A lack of good singing teachers;
- Financial challenges with a lack of funds for bursaries for economically disadvantaged students and a prioritisation of overseas students for financial reasons.

Again, all of these observations re-surfaced during the consultation process for the present report as did some of the suggestions for addressing them e.g.:

- Talent scouts to diversify the participant base⁶;
- More regular company-college dialogues (cf. also Ritterman);
- National summer schools;
- ‘Blind’ auditions to improve equality of opportunity.⁷

2.3. Conclusions and recommendations from Section Two

Ritterman estimates that, in 1991/92, “just over” a thousand opera performances were given in the UK based on a selection of the companies then working.⁸ Appendix E analyses how that approximate figure compares with the situation today (with the caveat that the exact methodology of the Ritterman analysis is not known so any direct comparisons must be undertaken cautiously). This demonstrates that there has been an overall decline in performance numbers by the “Big 6” opera companies over this period, largely mitigated by those given by the Festival opera companies that have emerged in

⁶ This was initiated at the conference but has not been continued.

⁷ See 3.5.

⁸ ROH, ENO, ON, WNO, SO and Glyndebourne (Festival and Tour); ETO, CBTO, Opera Factory, Opera Northern Ireland, Pimlico and Buxton

recent years⁹; overall this has resulted in a small net loss (c. 65-70) in the number of performances across this whole sample. However, this conclusion carries the proviso that the scale and seasonality of the festival operas does not allow them to provide the sort of development and security that was historically offered by the major companies and is noted in this report.

Based on the current research, I endorse Ritterman's findings and, to support them, recommend that:

- The Chair of Conservatoires UK should be co-opted to the board of NOS to help facilitate the dialogue between companies and colleges and any other actions that arise from the current review;
- A regular (perhaps biannual) forum of colleges and companies, chaired either independently or alternately, should be established to discuss progress on the issues discussed in the present report — and any others as they arise. NOS might take a role in convening this;
- A group of appropriate charities which might be interested in this area (e.g. Help Musicians UK) should be convened by NOS and Help Musicians UK to consider how best to support socio-economically challenged students and early career singers (e.g. through bursaries¹⁰).

I also recommend that the sector re-affirms its recognition of the issues of access and diversity referenced by The Singers Of Tomorrow and the present research. As part of that, NOS should consider re-activating its Singers of Tomorrow programme, seeking to extend its reach and address some of the challenges identified in this report. Further consideration of Diversity and Access is contained in Section 3.4.

3. The Current Context

3.1. Political and Financial (Brexit & Austerity)

As this report was being drafted, the referendum on the UK's membership of the EU returned the verdict of Leave. This will have major repercussions although at the time of writing, they are unpredictable. Whatever the final shape of any emerging outcome, it is well-nigh certain there will be significant impacts on the cultural sector, possibly including:

- Changes in arts funding priorities due to new UK Government leadership, including at the Treasury;
- The loss of direct European funding for programmes (e.g Horizon 2020, Erasmus+, Europe for Citizens and Creative Europe which run to 2020) and Structural & Investment Funds; The possibility of some of these continuing will depend on which UK-

⁹ Garsington, Grange Park, Holland Park and Longborough

¹⁰ See sections 3 & 4 for other recommendations about bursary support

Europe model is agreed on a spectrum running from a “Norway-type” relationship in which the country is an official member of the single market (paying roughly the same as now and accepting freedom of movement for EU workers) to complete independence with no formal arrangements, only able to participate in EU funding programmes as a “third country” associate partner;

- Possible ineligibility for the European Capital of Culture programme, next due to be in Britain in 2023 with several UK cities now beginning their campaigns;
- A weaker pound which may make touring internationally more lucrative for UK companies whilst increasing the costs of bringing work and artists into the UK. In the first post-referendum week, organisations were reporting a rise of 15% in sterling fees required;
- The ‘free movement’ of artists across borders with more complicated travel arrangements training and touring (in terms of visas, reciprocal healthcare, tax implications and employment regulations). This may be particularly challenging for smaller and middle scale organisations, colleges and individual artists, including young artists in training;
- These last two factors will have a complicating impact on the possibility of European students training in the UK: they may find the cost less onerous but visa issues more challenging. British singers wishing to train abroad will also be affected, both financially and, possibly, in their ability to access European training places on the same basis as mainland peers.

The detailed consequences of this decision will only become apparent over the next two years of exit negotiations. The cultural sector may well convene working groups to track — and input to — these developments. It will be important that the opera training sector involves itself in any such developments.

In addition to the issues raised by Brexit, the arts are continuing to operate within the parameters of the Age of Austerity with reductions in grant-in-aid across the UK. Reductions in local authority funding to theatres has also fallen (by more than 50% in the six years up to 2014/15): this is likely to further affect both small-scale organisations not in receipt of revenue grants and local authority owned venues. In England, all this must be considered in the context of a re-balancing of funding between London and the English regions.

3.2. The Artform

The consultation clearly identified a number of artistic developments that are becoming more influential in a continually evolving operatic landscape:

- An increased level of internationalism with greater movement across borders for many singers at all levels of their careers. Whilst this is, in many ways, welcome and brings international opportunities, it has also increased domestic competition for roles with

other European nationals. This may, of course, be affected by the consequences of the referendum, noted above;

- A broader range of work being presented within opera companies' repertoire, including — in addition to the categories identified by Ritterman — 'classic musicals', sometimes with theatre co-producers (e.g. Opera North's and West Yorkshire Playhouse's joint *Into The Woods*), and more 20th / 21st century music-theatre with new ways of writing which make new demands on singers (including, sometimes, microphone usage). This variety of needs is not yet fully reflected in opera training which "*is still overly focused on the 17th-early 20th centuries*";
- "*A requirement for today's singers to sing, act, dance, analyse text, take on roles with significant physical demands, interact with colleagues from around the world, and work with designers and directors with unconventional design concepts*¹¹", leading to an ever-increasing emphasis on stagecraft and acting ability, allied to an expectation of good musical skills. This is reflected in a shift from conductor-led to director-led work (regietheater) and the demand for singing actors who are responsive to directors' requirements. Any approach to this demand for "*the perfect performer*" must be achieved through co-operation across the whole sector. Training institutions, companies — and the artists themselves — all have responsibilities for fostering professional development¹²;
- An associated expectation of greater visual verisimilitude (e.g. looking the right age). This arises from a number of sources including an increase in live screenings and the emergence of entrepreneurial small-scale companies, both of which offer the audience a more up-close experience with a consequent shift in emphasis on the skills required. It is important that singers' training reflects these developments as this area of work is likely to continue to provide work, especially in the portfolio career world referenced in 3.3 *et seq.*;
- New developments in technology also affect other technical elements of production (e.g. video inclusion in performances); the possibilities for distribution (streaming etc); and the demands on performers to reconcile a performance for the camera with the practicalities of performing in a 2,000 seat auditorium. All these have implications for the training of singers;
- An increased commitment at a variety of scales to new work makes increased demands on composers, directors and conductors to work together to understand each others' disciplines — and to engage with singers at an early stage. The Opera Europa conference in June 2016 discussed examples of good practice in this area such as Washington Opera's American Opera Initiative, aimed at developing teams of early stage composers and librettists through a workshop process and Guildhall's doctoral composer-in-residence programme in partnership with the ROH;
- A decline in amateur opera risks a loss of certain pathways into the profession, a consequent 'funnelling' of training and increased homogeneity within it. This relates to other issues such as the decline in music education in schools;

¹¹ From the Juilliard prospectus for its Voice and Opera Programme

¹² See also sections 3 and 4

- The tendency in many artforms for an erosion of traditional distinctions between audience, creators, performers and participants e.g. immersive or site-specific theatre companies like Punchdrunk (sometimes combined with technological developments such as individualised soundtracks through headphones) reflects the expectation amongst many 'digital-native' audiences that they can have a direct influence on the experience, as they do in games or in the "rip, remix and post" culture of online music. It is likely that in the next decade or so this phenomenon will impact increasingly on all artforms, including opera.

3.3. Employment & Career Progression

A successful opera singer needs a clear idea of the building blocks for career progression — but this has become increasingly challenging due to changes in the industry, some of which were noted in 3.2 and others later in this section.

One of the principal challenges noted in the consultation is the widely perceived imbalance in the supply and demand sides of the industry. Data supplied by eight British training institutions¹³ indicate that they deliver about 210-220 young singers to the market each year with others arriving through alternate mechanisms such as less established schools or from overseas. This figure (which includes both domestic and overseas students whose premium fees have become increasingly important to the sustainability of some colleges) is perceived as being an increase over past (even recent) years.

Whilst it is not possible within the scope of this research to make an accurate assessment of the size of the employment market into which those singers are emerging¹⁴, the data noted in Section 2.3 strongly suggests that the mainscale domestic market is contracting with fewer large-scale productions and long-term employment opportunities although this is mitigated to a certain degree, by the rise of work at smaller scales, in particular in the growth of 'summer festival' opera. Reports from European colleagues, both through Opera Europa and independently, suggest that this decline is not a UK-specific phenomenon. Nevertheless, the relative size of the UK, European and (to an extent) the US markets suggests that UK singers should be actively encouraged to develop their international careers.

These changes in the market have been accompanied by other developments reported through the consultation, several of which are related to the characteristics discussed in 3.2. and have an impact on employment and career development e.g.:

- A more risk averse approach in some companies with high fixed-costs, resulting in a narrowing of repertoire and a reliance on 'names' (titles, directors, star singers);

¹³ Birmingham Conservatoire, Guildhall, RAM, RCM, RCS, RNCM, RWCMD and Trinity

¹⁴ This is for two reasons: (i) the market is currently an international one with UK opera productions constituting less than 10% of the EU total and (ii) the definition and practices of "employment" are not consistent even within the UK (e.g. lengths of contract, whether or not rehearsals are included, payment methods, the relationship between chorus memberships and covers etc)

- An increased pressure on singers to be “fast learners” which is often the consequence of a particular type of education (see Section 4) and “good-to-go” from the first rehearsal — with less remedial work during rehearsals and increased stress on voices. This can lead to “*now only casting exactly the right person for each role rather than — as previously — coaching every singer on every production*” and developing them;
- A consequent tendency for employers to ‘move on’ from a singer to the “*cheaper, next big thing*” which can risk or damage careers;
- A risk of over-exposure through, for example, “*Youtube, cinema — the pressures are huge and there are thousands more people watching. Young people don’t have an arena where they can make the mistakes that they need to*”;
- A remuneration structure for guest artists (i.e. performance fees rather than rehearsal salary) which disincentives their attendance throughout rehearsals thereby restricting the development that is unanimously felt to arise from working together in the rehearsal room and, ideally being part of an ensemble of diverse experience and talents;
- Financial pressures on individuals which, it is reported, limits their capacity to take advantage of (even free) musical coaching due to travel and subsistence costs;
- The ‘too-far too-fast’ issue (cf Ritterman), re-confirmed as a Europe-wide issue at Opera Europa: “*The average length of a career is [very short]. If we waste the talent of this art form to the extent that we do right now, the quality will diminish to an unacceptable standard. It is extremely important that we take care of our talent and nurture it*”.

The imbalance between a growing supply of singers and a possibly shrinking demand¹⁵ leads some to claim that too many singers are being trained to post-graduate level — and that the thinner elite training is spread, the less effective it can be. However, some contributors were more sanguine about this issue: “*most post-graduate students don’t have full-time singing careers and this isn’t necessarily a bad thing. Education is not just preparing for a single career path — it’s also about learning to learn.*” It must also be noted that some of the colleges’ business models are dependent on their current level of throughput so any radical reduction in overall student intake and output is unlikely to be easily achieved. A more constructive approach may lie in asking “What are singers being trained for?” and adjusting expectations accordingly so that students are not encouraged to develop unrealistic career expectations but are introduced to a range of opportunities within — and allied to — singing professionally.

In practice, all this suggests that, while some singers will continue to make successful careers on main stages, many will increasingly need to develop their professional and personal resilience through portfolio careers including operatic work (at character and chorus levels), education/outreach expertise (which several companies increasingly value and for which singers need to be trained) and other career options within the industry.

¹⁵ as discussed in 2.3

Many contributors see the current culture within the industry as being overly focused on the development of principals, rather than for the full range of job opportunities within the sector, with singers being trained for an 'old-fashioned' market model which privileges the idea of the most worthwhile career being that of a 'star' principal and all other options being second best. As a result, some students are encouraged to strive for careers they will probably not achieve which can result in the potential downside of leaving a would-be singer of thirty with significant debt and a 'failed' career. Some contributors from training institutions stressed that students are now encouraged to consider chorus membership as a valuable career option and that the success of students in a range of employment opportunities is celebrated. This is to be welcomed; however, it will require increased effort to persuade students who are focused on playing Susanna or Rigoletto on main stages that alternative careers within 'the business' — such as being a music-in-education specialist, music therapist, agent, teacher, coach or chorister — are equally valued and that they should be prepared to explore a range of possibilities.

To facilitate that change in attitude, training should emphasise the variety and value of all careers in opera and offer guidance in exploring them. However, it should be noted that attendance at 'employability weeks' is reportedly often thin — as it can be at sessions on, for example, audition technique. Two individuals, who give occasional talks to students, asserted that they had (separately) been discouraged from being honest about the challenges of a career in opera because "*we must not spoil their dreams*". This — which was reflected in other contributions — suggests that the colleges should more strongly emphasise the essential value of such course elements, making attendance at — and learning from — them part of the student's core course (and assessment). In doing that, colleges can learn from each other's good practice such as RCM's individual career planning sessions or RWC's students developing long and short term goals and plans.

In recent decades, there have also been significant changes in how companies operate, particularly with respect to the decline in 'contract singers' who used to provide an ensemble at their core, enabling singers to learn 'on the job' and undertake a variety of increasingly demanding roles in a nurturing environment. ("*Companies don't have ensembles anymore. They used to sing a very wide range [and] get more exposure and develop versatility. Now, we cast for each role*"). Such artists would often have acted effectively as mentors or role models providing a self-sustaining training system (as still occurs — and is greatly valued — in some mainland European companies). In such a system, "*A singer would enter a house scheme for two years then on to either a junior principal or out into the world*".

In the new environment, this is rarer although it is a function that, to an extent, is being partially re-created through the emergence of Young Artists Programmes: "*YAPs [can be] like a light-touch ensemble [doing] a range of things. You become a great artist by doing a lot of work — failing occasionally. Otherwise you become typecast*".

Choruses too have a role in this. Despite the suspicion that singers are not encouraged to think of choruses as a positive career option, their general standard is high and membership is very competitive. In the months prior to this research, Opera North auditioned 300 singers (some of them freelance principals) for twelve chorus places while Garsington had 400 applications for less than 20 places. This level of competition is not unique to the UK.

This high quality enables chorus members at Opera North — which has recently reinstated its chorus to 36 members, casting individuals in productions (including at the time of writing in their co-production of *Into The Woods*) — to fulfil some of the functions of an ensemble. Glyndebourne has long operated a similar structure, nurturing chorus members into cover roles and small parts on tour. ROH too casts some roles from its chorus and some of the smaller summer festival companies (e.g. Holland Park, Grange Park, Buxton and Garsington) also hire young choruses whose members, sometimes students, can play small roles, fulfilling some of the functions of the ensemble. Some of them (e.g. Holland Park) also offer chorus members a package of career advice and several also present showcase presentations in which understudy casts perform. This helps them attract a higher quality of understudies who get the experience of singing part of their role with full orchestra in a safe environment. Notwithstanding these initiatives, there remains an ensemble-shaped hole in parts of Britain's operatic life.

These changes in employment practice beg a further question about the needs of mid-career artists who experience a faster 'churn' in employment with singers peaking and being seen to decline too quickly "*before they've developed their 'dramatic chops'*". This relates to the '*too far too soon*' pressure identified by Ritterman and confirmed at the Opera Europa conference. The mid-career artist's challenges may arise from a number of sources — a change in the voice, declining employment (as noted above), changed personal circumstances or a desire to re-train, either within or outside the opera world. At present, such individuals often go through a period of uncertainty before drifting away.

The small-scale sector which includes a number of artistically strong and innovative companies is generally appreciated for artistic and entrepreneurial reasons (and because it creates demand for singers). It should, therefore, be part of the mix of career progression. It is, regrettably, not well remunerated so few — bar the very entrepreneurial — can carve a lucrative career from it. Nevertheless, the benefits of involvement in such initiatives are clear (e.g. professional experience, collegiality, exposure). These productions often use light instrumentation and consequently can put more emphasis on theatricality and, in small spaces, on a more subtle theatrical performance rather than one aimed at reaching the back of the house.

Young singers are sometimes told that working for small companies is not good for their career, in terms of the challenge of developing a 'big' voice in small spaces or the difficulty of 'stepping up' in scale ("*Singers think that because they've done Butterfly at the Kings*

Head, next step for them is Butterfly at ENO. It's not. The ones that are spotted in these small productions are the exception"). The reality, however, is that, in an environment where it is now harder for many to sustain a career over a long period solely by working with big companies, most of which can no longer invest in people as they once did, these performances are an opportunity for singers to work through roles.

So how can training value be added to these performances? Might there be mechanisms for large and small companies (perhaps in conjunction with NOS, BYO, colleges and agents) to identify singers for development and co-operate in placing them in appropriate opportunities, using a combination of resources to nurture them strategically, providing (from the most appropriate source in the partnership) coaching, acting, singing and/or other training?

When discussing career development, the topic of entrepreneurialism must be acknowledged. In the competitive world of 2016, would-be singers cannot just wait to be offered roles. *"The good ones have self-initiated motivation. They learn in between roles, they don't wait. They practice movement, learn new repertoire"*. And they have to be increasingly entrepreneurial. As one director of a small-scale company said, *"There are 130 primary schools within a few miles of my house — and hospitals, prisons. If I did one day a week in these, it's over 2 years' work to do them all"*. Small businesses, however, need development support which could be accessed by Government schemes or through the involvement of larger sector companies (as the ROH does with ROH Connections) in keeping with ACE's new proposals for encouraging its larger NPOs to adopt this sort of responsibility.

This section has focused largely on career development within the UK. It is clear that some of the same financial issues faced here are now confronting mainland European opera institutions. Nevertheless, as noted earlier, Germany - with c. 83 publicly funded opera houses (and an estimated 60 others) — presents nearly seven times the number of opera performances as the UK and so continues to have the potential to offer a significant number of employment opportunities. These are actively promoted by some colleges; they are, however, sometimes limited by the reservations about some English singers' facility with languages, as discussed in 4.2, by the development of Young Artists Programmes in Europe which can *'make it harder'* for older singers and by intensifying competition: *"there are now more and more Russian, Ukrainian and Belarusian voices in our [European] opera houses than ever before, some speaking four or five languages"*. In that context, Brexit, may also affect the opportunities in Europe. The earlier observations about mid-career singers are relevant here as are comments about linguistic capacities in 4.2.

3.4. Diversity and Equality

The issue of diversity was one of the most discussed through the consultation process — both in interviews and online — as an area in which classical music is seen as being behind other arts sectors. Several contributors were passionately vocal about this, referring to opera as “*shockingly mono-cultural*”. In these discussions, particular emphasis was placed on issues of ethnicity and socio-economic disadvantage (i.e. class).

The need to address this issue is acute and can be summarised under three headings:

- a. The ethical responsibility to broaden access and opportunity to those currently denied it
- b. Good business sense which demands that training institutions and employers avail themselves of the best possible talent from every background
- c. The risk that opera — often seen as the most elitist branch of the elitist arts — will become increasingly unable to make the case for itself if its subsidy is seen as effectively regressive taxation whereby poorer people pay for the entertainment of the better off and opportunity to ‘the many’ is denied.

This is a concern at both employment and training levels, with companies and training institutions similarly acknowledging the issue but observing that they can only select from “what is offered” to them. This might be seen as an overly passive attitude that is unlikely to significantly ameliorate the current situation (“*people always say it’s further down the development chain — but you can’t kick it down the path to post-natal classes*”). It was also noted that colleges will, perhaps naturally, tend towards a preference for those successful in formal education as they are seen as being more adept at learning quickly. This again tends to perpetuate a status quo and reinforces the importance, noted elsewhere, of complementary training pathways.

Further factors may be that:

- The education system is currently seen as devaluing the arts through its emphasis on STEM subjects (rather than STEAM). This is suspected of discouraging some parents from considering arts careers for their children; and
- The decline of music education in schools, as a result of which young people seem less familiar with ‘the classics’ than previous post-war generations. This is likely to be a significant barrier to people being aware of — or considering entering — the profession.

3.4.1. Socio-economic disadvantage (class)

There are a number of historic examples of singers from under-privileged backgrounds achieving successful careers. However, several contributors suggested that the development of a Rita Hunter or an Alberto Remedios would be much less likely now as “*we seem to be going back to a pre-war system of privilege*” ... “*everybody seem to come from private education and Oxbridge*” (e.g. boy choristers and opera directors emerging from Universities with music societies). One singing teacher reported that all her paying students are privately educated.

This may, in part, be a function of the educational factors noted above; it is also an outcome of economic circumstance. *“You can’t get into college [as a singer] unless you’ve invested big time and money”* And, once a young person without access to private means has been accepted at a music college, she may be understandably disinclined to commit to seven years of scholastic costs in a context where the average debt accrued on a first degree course is £44,000. Even if bursaries are available (and colleges do try to access funds to support students), awareness of them may not be: opera itself is invisible to many. There is a need to intervene early in childhood to raise awareness of music, through initiatives such as In Harmony projects or (as a first step) Scottish Opera’s Baby O. To further address this need, however, will require pro-active interventions.

3.4.2. Ethnicity

The paragraphs above deal with issues around disadvantage arising from class backgrounds, most of which are also relevant to disadvantage arising from ethnicity. However, these categories of inequality, whilst often intersecting, are not precisely congruent. The following, therefore, focuses on particular challenges facing BAME singers.

The lack of opportunity for black artists has long been a general problem for many of the arts. It is now being actively addressed in, for example, theatre and dance, through — amongst other initiatives — policies of colour-blind casting and establishing role models. This approach is designed to create a virtuous circle in which the presence of people of colour on stage (in shows that speak to relevant experiences) can attract more diverse audiences and, in some cases, encourage people to explore careers in the arts who might not have done so otherwise. Much still remains to be done in these areas — but far more in opera. *“There are loads of [black] Americans and South Africans coming through”* but these do not necessarily provide role models for young British-born people. By contrast, the world of musical theatre (often fed by the Arts Educational School) has been successful in developing emerging talent from diverse backgrounds.

The urgency of this issue was highlighted by the many contributors who identified that the situation has not improved, indeed has probably deteriorated, over the last 10-20 years and that the sector has not had conspicuous success in a gradualist approach towards rectifying its equality imbalance. There is a strong sense, supported by the argument at the beginning of this section, that radical action is now required. Any initiatives developed in response to this challenge should involve training institutions, agents and funding bodies as well as the companies which (as employers) have the capacity to make demands down the supply chain to colleges and beyond.

NOS could develop a specific role in this, in collaboration with other organisations and projects, by identifying and working with role models who can promote diversity in opera

and act as advocates (as was done in a BIS initiative that placed successful female scientists in schools to talk to girls about careers in science).

Finally, a further issue raised about inequality in the field of opera (and classical music more generally) concerns the lack of female conductors and music staff. Whilst outside the principal business of this review, this should be noted and any initiatives to redress this imbalance should be supported.

3.5. Conclusions and recommendations from Section 3

From 3.1

The implications of Brexit will become clearer over the next two years (2017-18). It will be important that the culture sector is fully engaged in discussions about how these impact on the arts, in terms of funding, international deals and exchanges and training.

I recommend that the opera training sector should take a pro-active approach to ensure its particular concerns are factored into any discussions around these areas.

From 3.2

The ongoing developments in the artform over recent years — both in terms of the diversification of scales and new technological opportunities — are placing new demands on singers which are not yet fully reflected in the training for opera. It is important that this is addressed in order to give singers maximum flexibility, especially in the portfolio career world.

From 3.3

There seems to have been an increase in the number of singers being trained in recent years and a decline in large-scale opportunities for employment (although it is hard to be precise about the numbers on either side of the equation). While some singers will continue to enjoy ‘traditional’ careers on opera house main stages, most will need to embrace portfolio careers in the future. This will require their training to make explicit the range of career options potentially available across the operatic world including small-scale work, entrepreneurialism and opportunities beyond performing. Mid-career artists may be in particular need of support to address challenges both external and (in terms of their voice) personal. I recommend that:

- The importance of — and skills necessary for — a portfolio career should be re-emphasised in singers’ training from the point at which a professional singing career becomes a clear objective;
- Students should be more exposed to visiting professionals explaining to them the details of the professional singer’s life, that a full range of options should be laid out for them; and that the training institutions develop further their pastoral packages to assist them in evaluating these;

- Given the decline in company ensembles and the continuing importance of direct learning from peers, the sector should consider establishing a mentoring network which matches emerging and established artists. This might be a role that could be undertaken by NOS;
- To support mid-career singers, bursaries for refreshment or re-training (within or outside the sector) should be made available to those with financial need. In addition, NOS should explore developing re-training programmes for singers who wish to keep singing but with a different voice type or role range. As with this report's other references to this type of support, I recommend that NOS and Help Musicians UK convene a meeting of potentially interested charities to discuss a joint approach¹⁶;
- The larger organisations in the sector should discuss between themselves and with smaller companies how they can best offer developmental support to emerging entrepreneurial organisations. This could be initiated through a discussion between the National Opera Co-ordinating Committee, NOS and OMTF.

From 3.4

There is a widespread recognition that Opera — in its performance, its training, and its ethnic and socio-economic make-up — remains (and is perceived to be increasingly) a non-diverse area of the arts. This is highly undesirable in ethical, business and public policy terms and should be addressed as a matter of priority. I recommend that the opera training sector should develop a sector-wide strategy to prioritise the issue of Diversity.

Key issues which any such approach should consider would include:

- Addressing perceptions of elitism;
- Highlighting visible role models (from performers to producers to crew);
- Making work that is relevant and appropriate to diverse audiences;
- Prioritising the inclusion of culturally diverse creators and artists in teams;
- Developing singers from outside 'traditional (i.e. white, middle-class) backgrounds including by reactivating the Singers of Tomorrow conference initiative to deploy "talent scouts" to diversify the participant base (e.g. through collaborations with Music Hubs and Bridge organisations). NOS and other initiatives unrestricted by academic frameworks¹⁷ might have an important role in this alongside the educational institutions;
- Addressing the cost of training as a barrier to entry;
- Operating affirmative action at first-degree level;
- Offering bursaries and CPD opportunities for identified practitioners (as discussed elsewhere);
- Engaging with community organisations including schools in disadvantaged areas to raise awareness of music in general and opera in particular — as an artistic experience to be enjoyed and as a potential career option.

I further recommend that training institutions should also review their selection processes to ensure the targeting of a broader cross-section of potential trainees (e.g. by auditioning

¹⁶ see 2.3, 3.5 and 5.6 for other references to bursary support

¹⁷ e.g. those referenced in Section 4

selectively outside London) and also publicise more widely the possibility of means-tested bursary systems targeted at promising students from disadvantaged socio-economic backgrounds. This might be based on a version of the Government's (ACE-supported) Music & Dance Scheme, perhaps piloted on a regional basis.

In addition, NOS (with partners as and if appropriate) should consider developing a programme of Summer Schools designed to attract people from disadvantaged backgrounds. The sector (perhaps co-ordinated by NOS) should also discuss with the Arts Educational School how it has successfully developed emerging talent from diverse backgrounds. It might also wish to explore a model currently under consideration by Battersea Arts Centre with others of inaugurating an Academy or Free School with an arts focus.

To develop greater ethnic diversity — in addition to the points above and any initiatives arising from discussions with Arts Ed — the sector should:

- Seek to develop (and commit some resource to) active partnerships with black-led organisations or others in different artforms who have championed black artists such as Theatre Royal Stratford East or Eclipse;
- Adopt a more active policy of colour-blind casting and positive encouragement to prioritise the engagement of singers of colour¹⁸;
- Develop creative relationships with organisations that might help source and develop potential singers (e.g. Gospel choirs);
- Consider establishing diversity targets for college and NOS intakes.

4. Training Today

There has been an expansion in the training institutions with the creation of Opera Schools, some of which are run effectively as reflections of a working company with rehearsal and production taking up much of the year (in addition to coaching and singing lessons). Some are funded by scholarship so are free of the financial pressure of having to generate income from the students and can make selections without being limited to those able to pay. This development has affected the options for the period between acquiring an MA and entry to the profession — a space also occupied by NOS and, to an extent over recent years, by Young Artists Programmes. As a result, there is some lack of clarity about the most appropriate relationships between NOS, YAPs and the Opera Schools (compounded, possibly, by the development of small companies which offer development and where singers can also acquire professional experience). There is naturally some direct competition for singers between these various opportunities so it is important that each has a clear purpose and relationship with the other elements in the ecology.

¹⁸ cf. the SPHINX programme for young black artists in the USA (https://en.wikipedia.org/wiki/Sphinx_Organization)

4.1. Training Institutions and the Companies

As part of this review, contributors, speaking in confidence, offered illuminating opinions about the relative strengths and weaknesses of opera training in the UK compared with overseas. The majority considered British training to be generally better than most in Europe (although positive comments were made about some individual European institutions) but lagging behind the USA (*“British singers are 2 years behind US equivalents and 4 years ahead of Europe”*) with particular admiration expressed for Juilliard in New York and Curtis (and the Academy of Vocal Arts) in Philadelphia. The American system was felt by to be *“more professional — they don’t think good technique is enough to get work but constantly test the [whole] audition package”*.

The Curtis model, in particular, was referenced as a vocationally focused, high-cost (although supported by bursaries) approach, untrammelled by qualifications or targets on entry requirements. In the words of Mikael Eliassen, Artistic Director of the Curtis Opera Theatre, *“We can go through the whole audition process and not accept anyone”*. That rigour is reflected in a competitive internal culture with students asked to leave if they fail to *‘make the grade’*, an approach which is seen as preventing them from wasting time and money. Eliassen defines Curtis as a *“luxury, elitist”* institution (in terms of its standards, rather than exclusivity). An ex-student observed: *“It has a singing student body of about 30 in total who do 4-5 shows a year; as soon as you start there you are in complete productions. You only learn by developing complete roles whereas [in London you] might get two full roles during your whole training”*. A further aspect of the Curtis approach is that the college prides itself on offering rigorously honest feedback. In Eliassen’s words: *“a lot of lying takes place [elsewhere] — tell them they can’t do it if that’s the truth”*.

In the UK, the training system for opera is largely predicated on a formal education model with singing students often spending seven or more years in their training process (four years of a first degree and a two-year MA in singing, possibly attendance at a Conservatoire Opera School, sometimes followed by a further year or two at NOS or in a Young Artists Programme). This has increasingly become the norm. As a result, the variety of pathways into becoming a professional opera singer has reduced over the last c. 25 years as the training has become increasingly *“academicised”* and singers who do not have a Masters degree have become comparatively rare.¹⁹ This narrowing of diversity is compounded by the cost of Higher Education in 2016.

Attitudes towards this development are mixed but there is some dissatisfaction with the practical implications — ranging from an absolutist *“training should be vocational, not academic”* to *“I’m a great believer in tertiary education but an academic framework is not [necessarily] the best environment to develop singers”*. It is also recognised that any framework to develop singers needs to be flexible as different voices take different periods

¹⁹ Over 80% of 117 singers surveyed on-line had been music undergraduates and 75% had studied singing at post-graduate level

of time to develop and individual singers have different sets of priority needs (singing, acting etc). For all these reasons ‘non-academic’ training initiatives such as NOS or some others referenced in Section 4 are likely to remain important complementary models, sometimes linked to professional companies. There is also a need for alternative approaches for those for whom the ‘academic’ route is not appropriate or viable for financial reasons.

The pattern described above co-exists with increased pressure on teaching time due to a growth in student numbers.²⁰ One senior professional reported that her college which used to contain 12 singing students has now expanded to 60 with an accompanying decline in its capacity for regular one-to-one training, which most singers regard as the most valuable aspect of their development. A more recent expansion at a London Conservatoire was from 5 in 2006 to 25 in 2015/16. *“They have less time for each”*. A senior member of a UK opera company supported these arguments: *“Students have very good natural talent, but because there are so many of them they don’t get the finishing — they all fail on language preparation.”*²¹ *There probably isn’t the time for it. Fewer singers, better prepared, would be better — but that might not work economically for colleges”*.

The companies and the training institutions are naturally locked into an interdependent relationship of supply and demand. They also enjoy a significant overlap in the Venn diagram of staff. Notwithstanding this inter-dependency, there has sometimes been a disjunction between what the companies say they want and what they see the colleges as currently providing. Historically, representatives of both communities described the other as having been ‘closed books.’ However, there are indications that this is changing, attested by examples of creative collaborations such as RNCM’s provision of the chorus for Buxton Festival already referenced or intermittent collaborations between the Conservatoires in Glasgow and Edinburgh and their respective national companies. Most training institutions invite company representatives in to speak to — or run sessions with — their students and this should continue and be grown as a way of enhancing the mutual understanding.

Collaborations across the various elements of the opera training sector could be further developed in line with the Ritterman review recommendations about dialogue — e.g. through more regular meetings (which might be facilitated by NOS) between training institutions, companies (both large and small) and other interested parties such as those organisations discussed below to discuss matters of mutual interest such as:

- The proper balance — and priorities — in training between creative skills development (e.g. acting and singing), other business needs (see 5.4) and productions;
- Options for nurturing individual singers and the appropriate repertoire for them to be exploring (noting that colleges generally choose repertoire to suit their students’ voices);

²⁰ see 3.3

²¹ see 5.3

- Possible work experience placements in companies as part of courses (including coaching, acting as covers and mentoring programmes through a chorus as with RWC/ WNO) or other ongoing relationships such as the RCM's with ETO and Tête à Tête;
- Co-ordinating planning schedules to ensure students can be more fully available for professional rehearsal processes in collaborations;
- The need for singers — as artists — to have a cultural hinterland. Currently, many students do not engage sufficiently with professional arts practice: they do not see enough, in terms of either visual or performing arts, to understand the context in which they are working. They should be encouraged to do so more by the colleges and, where possible, encouraged with deals for cheap tickets and study trips to galleries etc.

Moreover, the colleges and companies could develop further collaborations on creative projects e.g.

- Co-productions such as have been undertaken by SO and the RCS whereby SO provides the orchestra for a student production — or more radically, as has happened in the theatre with Bristol Old Vic Theatre and Theatre School co-producing *King Lear* with a cast of students acting alongside major actors (Timothy West, Stephanie Cole and David Hargreaves);
- Extending the practice of directors' working with students as an 'r and d' process for professional productions, as has also happened in theatre and, for example, at Trinity where Annabel Arden worked with students to develop production ideas to feed into her Glyndebourne production of *Barber of Seville*;
- Co-commissioning for appropriate voices which could be shared across colleges.

4.2. The National Opera Studio

The National Opera Studio partners with the six leading UK opera companies²², which sit on its Board, to provide intensive and bespoke professional training for a small group of 12 singers and 4 répétiteurs of exceptional promise, through an annual programme designed around their particular vocal and developmental needs. The intention is to develop singers who have the capacity to develop major careers in the largest houses. In the last five years 48 of the 80 singers involved in this programme have been British.

Since NOS's inception in 1977²³:

- 94% of the singer alumni have worked in at least one of the 'big 6' companies;
- NOS alumni make up a significant proportion of current and former Jette Parker Young Artists (27% of the singers and 43% of music staff);
- 45% of all NOS alumni have been employed by the Royal Opera House in roles;
- 60% of music staff at ENO are NOS alumni as are 73% of ENO Harewood Artists in 2014/15;

²² English National Opera, Glyndebourne, Opera North, the Royal Opera House, Scottish Opera and Welsh National Opera

²³ Source: NOS Alumni Research Project 2015. Cf. also Ritterman observations in 2.1 *Opera Training for Singers 2016*

- 75% of singer alumni have worked internationally at major festivals and opera companies.

In 2015, NOS also introduced two other elements to its training programme:

- A pilot Artist Resilience programme which aims to ensure that NOS Young Artists are prepared for the non-musical demands of the profession, physically, mentally and professionally. It does this through visits from artists and other industry professionals who offer workshops and talks on all aspects of the business, including the engagement with community and education work which is now part of every musicians' professional life;
- Opera Roots, an initiative which supports NOS Young Artists in organising and presenting a recital back in their home town for the benefit of advancing production, marketing, fundraising and presenting skills of artists, and for the benefit of new audiences.

The most valued aspects of the current NOS offer are:

- The relatively small size of the cohort and the consequent intensity of the experience with a focus on 'the best', chosen on merit alone, offering a professional training programme individually tailored to each Young Artist with no requirement to fill roles in a production;
- It is not an accredited course; its timetable focuses on in-depth practice and individually tailored training so singers can develop at their own rate / pace;
- The programme is free at the point of activity so does not present a financial barrier to participation;
- The programme includes dedicated periods of sustained activity in which the young artists undertake 2-3 residencies each year with the regional opera company partners, involving their orchestras, staff and their stages. These are widely seen as beneficial for singers and companies alike;
- The opportunity to study and prepare a full core role, giving students a rigorous testing of character and musical development, as well as stamina. In the past, students undertook three such exercises which proved too onerous alongside all the other elements of the programme. It may be appropriate to reconsider the optimal level for this activity;
- Contemporary opera scenes with established directors;
- The relatively small size of the cohort and the consequent intensity of the experience;
- NOS's geographical proximity to London's two major opera houses and a wealth of other cultural opportunities (which, as recommended elsewhere, young people should be strongly encouraged to experience).

The challenges currently facing NOS include:

- Maintaining its brand value in the face of a potential dilution of quality, due to the external competition from other talent development opportunities in the UK and YAPs in Europe (although this may become less challenging post-Brexit);

- The length of time that singers are spending in college may lead to highly talented artists deciding to just ‘get out there’, bypassing the Studio;
- Balancing the views of its stakeholder companies in the selection/audition process;
- Defining its role as a national institution (see below under Opportunities).

The opportunities potentially available to NOS include:

- Taking a leading role in implementing some of the recommendations of this report;
- A reconsideration of its future role in light of a new operating environment eg. what does National mean? How should it balance the training of singers from the UK alongside the best of their international peers?
- Broadening its access (through new initiatives and a pro-active reaching out to potential students from disadvantaged communities) whilst retaining its commitment to ‘gold standard’ excellence;
- Developing collaborations — and possibly some formal partnerships — with some of the other ‘informal’ training initiatives identified in this report and others;
- Maintaining and developing relationships with international partners (opera houses, schools and YAPs);
- Continuing and developing support to alumni;
- Judiciously diversifying its offer by e.g.
 - Creating new products (e.g. courses for stage directors or in score-reading)
 - Developing a mid-career programme
 - Targeting young artists with 2-3 years professional experience
 - Pro-actively seeking — and tailoring courses for — individuals from different backgrounds
 - Exploring (with others) the potential to sponsor an Academy or ‘free school’ with an arts/music-theatre focus, as referenced in 3.5.

4.3. Young Artists Programmes

In recent years, a number of opera houses around the world have developed YAPs designed to select and train a small number of singers with the potential to develop into major artists. These can develop their skills whilst also providing the company with an informal resource from which it can draw for some casting (much as an ensemble company might have done previously). The Jette Parker programme at the ROH and the Harewood at ENO are described as YAPs and all the other major companies (and some of the smaller ones) operate some sort of model for talent development. Information on these is contained in Appendix D.

Contributors had mixed views about the desirability and role of these programmes in the opera ecology with some contributors suggesting that such programmes in mainland Europe do not offer significant developmental benefit. Other contributors suggested that YAPs were providing experience that should be delivered by the conservatoires. On the positive side, however, it is recognised that YAPs can help nurture ‘big talents’ who are not

yet ready for large roles in major houses and provide a version of the ensemble approach of mutual learning that has been described so positively throughout the consultation. This is, of course, an area that may be affected by Brexit.

The YAPs and NOS are not the only unaccredited models of training development for opera. Other initiatives which provide intense targeted training in a different environment include:

4.4. British Youth Opera

British Youth Opera provides professional rehearsal and performance opportunities for emerging singers, musicians and technical trainees at the beginning of their careers. The annual programme of workshops, masterclasses and operas consists of a number of elements including:

4.4.1. Summer Season

The Summer Season re-creates the production processes of a major professional opera company, bringing together professional artistic staff with trainee creative and production teams to work on a show selected on the basis of the singers chosen. Singers, most studying on graduate or postgraduate courses at one of the UK's music colleges, receive a full range of professional coaching during the rehearsal period with principals and understudies also taking part in a session with a distinguished singer who has performed their role in major opera houses. The production week includes open dress rehearsals before a week of performances played by the Southbank Sinfonia. This includes shortened and adapted versions of the productions given by the understudies, led by the trainee directors and conductors. Depending on the repertoire, BYO involves around 40 to 60 singers and around 30 further trainees annually. Around 35 players from Southbank Sinfonia, which is also a training organisation, also benefit from the opportunity each summer. Currently BYO are running seven workshops per year.

4.4.2. Easter and Summer workshops

These give an opportunity for singers to explore and develop aspects of their technique such as character, the relationship between text and music, creativity and interpretation in an intimate, closed setting. Seven workshops take place over these two periods, each involving twelve participants and led by experienced directors and coaches.

4.5. Samling Foundation

Samling, based in the North East of England, supports talent in classical singing and piano accompaniment through two core strands of work: the Samling Artist Programme and Samling Academy.

4.5.1. Samling Artist Programme

Samling Artist Programme offers week-long residential masterclasses led by artists of international standing, to six singers and two pianists as they are entering the profession. Each week is tailored to individual need and includes public masterclasses and concerts at Sage Gateshead. Participants learn intensively about performance — in both song and operatic repertoire — in preparation for their life as a professional artist. Selection is through recommendation followed by a competitive audition process. Samling currently offers two residential weeks annually and an annual Showcase at Wigmore Hall.

4.5.2. Samling Academy

Since 2012 Samling Academy, in partnership with Sage Gateshead and the Universities of Durham and Newcastle, has extended this model to young singers aged 14-21 who live or study in the North East of England. Through two intensive weekends of masterclasses and workshops at the start of the academic year, twenty-five young Academy singers experience tuition in a range of skills culminating in live performances at venues including Sage Gateshead. The programme is led by leaders from the Artist Programme and by Samling Artists, passing on their knowledge to the next generation. Samling Academy also offers training and performance experience through its biennial opera productions, led by Samling Artists and further development work with coaching and performance opportunities throughout the year.

4.6. Aldeburgh Music

Aldeburgh Music has been putting considerable emphasis on talent development for some years, including training for emerging singers. It currently runs two programmes of relevance to this study:

4.6.1. Jerwood Opera Writing Programme

The Jerwood Opera Writing Programme, aimed at those with little or no experience of writing an opera, is designed for composers, writers and directors who want to equip themselves to create contemporary music theatre. It consists of two stages: Foundation and Fellowships.

The Foundation offers a series of workshops for 20 participants (10 composers and 10 writers and/or directors) to develop their skills through three week-long workshops at Aldeburgh, led by an Artistic Director. Participants are paired up for creative tasks and create small pieces or extracts to specific briefs. A wide range of industry professionals give seminars on their own fields and a group of singers and instrumentalists are engaged for each week to workshop the piece that is written during the week. All tuition and travel costs are covered by Aldeburgh, which also provides accommodation.

Fellowships provide tailor-made support over two years for individuals or creative teams (up to 3 people) who wish to create a new work. Each round includes four projects. A bursary buys the time to write the work and Aldeburgh provides a collaborative environment, as well as financial and practical support and expertise (e.g. workshops and mentoring). The support can be bespoke to the needs of individual projects which all include some residency time and workshops at Aldeburgh. At the end of the Fellowship participants will normally have a well-developed chamber opera piece, with all (or most) of the text complete and a substantial amount of music (usually around 30 minutes minimum) written.

4.6.2. Singing Britten

Singing Britten is a talent development programme in which distinguished tutors, all experienced in Britten's song repertoire, lead a small group of emerging artists (6 singers and 3 pianists) in an intensive week of coaching. Through this collaboration between the Britten–Pears Foundation, Britten–Pears Young Artist Programme and the British Council, Britten's Songs are used to explore the challenges of singing in English. Conservatoire teachers from overseas observe the week, with a view to creating interactive, online tools to help singing teachers and students abroad with singing in English and to promote Britten's songs.

4.7. Independent Opera

Independent Opera began as a producing opera company in 2005, establishing a relationship with Sadler's Wells in the following year. Recognising the need for more formalised support for opera practitioners, it has, since 2007, developed a programme of mentoring and financial support — including scholarships and fellowships — to those involved in the staging and production of opera at the outset of their careers. The awards offered include the Wigmore Hall / Independent Opera Voice Fellowship and, from 2015, an annual Director's Fellowship, which provides for an emerging director to stage a chamber opera at Sadler's Wells's Lilian Baylis Studio. Nominations for this are made by senior directors and assessed through interviews and workshop auditions.

4.8. The Wales International Academy for the Voice

Based at the newly formed University of Wales Trinity Saint David, under the direction of the tenor Dennis O' Neill, WIAV aims to address some of the challenges identified in this report, i.e. *"The new generation of opera singers face a faster, more demanding commercial profession than in the past... with changed dramatic expectations and requirements, artists are often cast in the most exacting roles at an earlier stage and are under pressure to succeed more quickly"*.

To address this, WIAV concentrates on stylistic issues and advanced vocal technique for a small number of exceptional singers at the early professional stage, benefiting from on

individual, bespoke tuition, master classes, group teaching classes and participation in public events and professional placement.

4.9. Conclusions and recommendations from Section 4

From 4.1

It appears that more opera singers are being trained now than a few years ago and that most emerge through an 'academic' route that takes up to 7-8 years. This supports the perception that pathways into the talent development process for opera singers have narrowed (which risks increasingly limiting access to the profession to those from particular social and academic backgrounds, leading to an increased homogeneity of artists and, consequently, of experience and artistic expression).

This suggests a need for alternative approaches for those for whom the 'academic' route is not suitable or viable for financial reasons. Hence, training initiatives such as NOS and the other initiatives referenced above are likely to remain an important complementary model to the formal training institutions.

I recommend that the sector (including companies, formal training institutions and independent initiatives), should actively consider initiatives such as those discussed in Section 3.4 to develop alternative approaches to the profession for those whom the current model is not readily accessible.

I also recommend that collaborations across the various elements of the opera training sector should be further developed, as noted earlier — through (e.g.) more regular meetings (which might be facilitated by NOS) between training institutions, companies (both large and smaller) and other interested parties such as BYO, Samling and Aldeburgh to discuss matters of mutual interest such as:

- The proper balance — and priorities — in training between creative skills development (e.g. acting and singing), other business needs and productions;
- Options for nurturing individual singers;
- Possible work experience placements in companies as part of courses;
- Co-ordinating planning schedules to ensure students can be more fully available for professional rehearsal processes in collaborations;
- The need for singers — as artists — to have a cultural hinterland;
- Collaborations on creative projects e.g.:
 - Co-productions between training institutions and companies;
 - Extending the practice of directors' working with students as an R&D process for professional productions;
 - Co-commissioning work which could be shared across colleges.

From 4.2

The field of opportunities for young artists between completing an MA and entering the profession has become more crowded in recent years through the development of Opera Schools at training institutions and Young Artists Programmes at companies. Nevertheless, the ‘valued aspects’ of the NOS offer suggest that it should continue to play an important role in the ecology. NOS is designed to be an ‘elite’ institution in terms of talent: its charitable objectives emphasise that it is designed to provide “*individually designed, high quality professional training for singers and répétiteurs who have the potential to become the leading artists of their generation.*” That role could be re-honed to emphasise its distinctiveness, perhaps by drawing on elements of the Curtis model referenced in 3.3 and working in partnership with some of the other initiatives discussed later in this section. I recommend that the NOS board should discuss, in the light of this report, where it wishes to place its priorities and negotiates with the other training institutions how best the various offers can complement each other.

NOS could also take on a further role in professional training and development beyond its current remit. *Singers of Tomorrow* could be the basis of a developed offer that seeks to attract those not currently ‘in the system’ (in some of the ways discussed in this report). This could run alongside the ‘main’ training programme for those of exceptional promise/ talent programme. NOS may wish to explore how and to what extent it wishes to develop its activity to meet the opportunities identified above and other recommendations in this report.

From 4.3-4.8

Each of these programmes (and there may be others) has an individual character with particular strengths. I recommend that they open an ongoing conversation, including with NOS and any other comparable initiatives, to explore how best to work together to address the opportunities outlined in this report. In particular, how transferable are certain aspects such as:

- inviting distinguished senior singers to talk through roles with young artists who may be essaying them for the first time;
- deploying alumni of their programmes to pass on their knowledge and experiences;
- inviting international conservatoire teachers or other opera leaders to observe programmes.

I recommend that collaborations across the various elements of the opera training sector should be further developed through more regular meetings (which might be facilitated by NOS) between training institutions, companies (both large and smaller) and other interested parties such as BYO, Samling and Aldeburgh to discuss matters of mutual interest such as those set out in this section.

5. The Skills Needed

All of the consultation discussions considered what skills are required for opera singers to be successful and where there are currently shortcomings. The following bullet points summarise the main needs identified.

- *“The first requirement is a good voice and vocal technique — singing is the centre of the artform”* (although the absolute primacy of this is now less universally agreed than once it was — *“purely voice-centred work is passé”*);
- Musicality and musicianship (e.g. understanding the full score);
- Acting and physical skills allied to stage presence; including the ability to communicate and balance emotional and musical information;
- Confidence (including ‘presentability’ at auditions), Collegiality and Castability (now including ticking the necessary physical boxes for particular roles);
- An appropriate repertoire;
- Language skills including the ability to enunciate clearly in English;
- Business Skills and Resilience (e.g — in addition to performance skills — realistic expectations, stamina, a strong work ethic and appropriate support from a mentor, coach and/or teacher).

This topic was also discussed at the Opera Europa conference which raised the question: *“Do we demand too much? We want them to have perfect technique, look great, be fantastic actors, have languages, do every kind of repertoire? The pressure is enormous.”* This question was framed in the context of a highly competitive employment pool in which *“30 years ago it seemed to be that you should find a niche — you were encouraged to do so. Now young singers are in and out within 5-10 years and don’t have time to specialise.”*

Some of the skill-sets referenced above have already been noted in this paper, This section will focus on those which are probably the most susceptible to training:

- Singing and Musicianship
- Acting and Stagecraft
- Languages
- Business Competencies

5.1. Singing & Musicianship

Many contributors paid tribute to the quality of singers in the UK and their international reputation. They are generally seen as being:

- Well regarded across the world — prepared, knowing the score and ‘doing their homework’;
- Musical and collegiate; ready to take direction; and — in most cases — work as ensembles;

- Good musicians (although a minority of opinion has reservations about this issue: *“Younger singers are sometimes not sharp enough musically”*);
- Hard workers with good discipline (although some suggest that singers are not always willing to take on repertoire they do not ‘like’ and so are not equipped to meet fully the needs of the market);
- Committed, quick learners and good sight readers;
- Flexible and versatile (although this is not an unanimously held view — and an outlier reservation is that this is not always an advantage: *“When it comes to singing a big role, that’s all you should be doing. [It requires] absolute focus”*).

This overall positivity led several contributors (including a European training institution) to say that the British training system is highly regarded (cf 3.7 above). However, the overall tenor of consultation interviews presents a more nuanced picture, reservations being:

- *“We are not making world stars in opera like the theatre does: we have maybe 6 or so who are contenders”*;
- The UK system produces many good singers mainly for baroque and contemporary work but not the big Verdi voices that the US develops. *“Companies have to do ‘big’ works with public appeal and singers cannot always reach over the orchestra to communicate”*;
- Singers should have a greater voice in the creative process and, ideally, have time to work with other creatives: *“I wish singers would... stand up for their own artistry and contribute [more]”*.

The following sub-sections discuss aspects of singing training in more detail.

5.1.1. Singing Teaching

Many contributors suggested that whilst UK vocal coaching is often very good, there is a dearth of good singing teachers (especially compared with the US where *“there are many stellar ones”*). This concern is linked to a belief that *“it’s hard to learn in this business — there is a master-apprentice system. There are too many Svengalis [some of whom can damage voices]”*. Many personal experiences of this phenomenon were given confidentially in the consultation process e.g. *“I had a vocal collapse a few years ago because of the technique I had been taught: I was told... I couldn’t act. In fact I was straining so much on my technique that I could only focus on my voice, not my acting skills”*.

The quality of singing teachers is variable *“I’ve seen good students get worse year after year, and no one says anything... Sometimes there need to be interventions to move students from particular teachers... They don’t think there’s a problem; they’re teaching as their teacher taught them”*. There is also a belief that teachers can sometimes lack a current connection with the profession as it is today.

Singing teaching is effectively an unregulated profession with neither systematic continuing professional development (CPD) for teachers nor incentives (e.g. pay enhancement) for them to undertake that which is available. It is suggested that the ongoing development of scientific approaches to the understanding of the voice and the body — and the potential for a holistic approach to their interplay — is still not widely realised. In that context the work — and potential — of the British Voice Association was widely noted, as was AOTOS.

Teaching also needs a better balance between encouragement and realism — an injection of expectation management. This relates to the need (noted by Mikael Eliassen) for honest critical feedback.

A number of contributors observed that “*directors and singing teachers never meet each other. I think [they are] telling singers very different things*”. NOS may wish to convene a discussion between these two groupings (and vocal coaches) to exchange views about the suitability of training for the profession. If fruitful, this could develop into a regular cross-sectoral dialogue.

5.1.2. Technique

It is widely agreed that singers must be as technically secure as possible and that they need to “*turn up thoroughly prepared with the work learned and having sung it into the voice*”. This must be accompanied by a level of physical fitness and training as well as emotional intelligence and understanding. The balance of these elements is critical. Training establishments are seen by some as tending to focus on technical ability, rather than the ‘softer’ skills of communication and understanding. However, these are also vital to the fusion of drama and music that makes great operatic performance. “*A singer has to reach the stage when you don’t need to think about the technique anymore: ‘Correct’ is only the beginning*”. As noted elsewhere, questions remain about whether singers’ voices are being pushed too far, too fast thereby leading to vocal strain.

A further question raised by a minority of consultees concerned the need and/or desirability for training institutions to include microphone technique as an option in courses, given the broader range of work now being undertaken within the opera sector.

5.1.3. Repertoire & Auditions

Most colleges stressed that repertoire should be chosen (in consultation with their teachers) to fit the singers on the courses. However, some contributors questioned whether the choice of roles and audition pieces was always optimal. As part of this concern, two directors of smaller opera companies suggested that the selection of audition pieces is not always relevant to the role being recruited (and sometimes are from parts for which the auditionee will not be a dramatically credible candidate for some time).

Many contributors observed that a greater prominence is now given to new music in the opera sector. There is, accordingly, a need to continue to expose students to this sort of work, including by encouraging them to have a contemporary piece in their arsenal for auditions. To that end, more new work suitable for young voices could be developed. The joint commissioning initiative between colleges and companies (as suggested in 3.6) could help address this.

Finally in terms of auditions, audition technique and self-analysis is often seen as lacking: US singers record and listen to all their practices. This could be adopted more broadly in the UK, allowing the singer to analyse her performance alongside teachers or coaches.

5.1.4. Academic Structures & Curricula

As noted earlier, there is a body of opinion that believes opera training should be vocational rather than academic as singers develop at different stages, not according to a common time-table. Nevertheless, the UK educational system has moved towards an increasing emphasis on qualifications — and growth in student numbers — over the last twenty years. This is, at least in part, driven by economic conditions — in contrast to, for example, fully funded US training models (like Curtis) which can afford not to set targets for student numbers.

As a result of these pressures in the UK, many suggested that students can no longer receive enough practical one-to-one teaching which is so valuable. The bel canto tradition was based on many lessons a week (*“In my days there were 3 singing lessons a day — and a second study — piano”*) but now singers practice much more on their own.

It is unlikely that a relatively small discipline such as singing can totally buck these national educational trends; nevertheless, opera training can — and is seeking to — be more flexible in how it approaches the challenge of developing high-quality musicians whose instrument is themselves. In doing that, the curriculum should encourage singers to understand more about interpretation and have practice at working with conductors who may only attend a limited number of rehearsals which requires singers to be able to pick up the conductor’s style and working methods very quickly.

In the context of the above, the companies and training institutions should jointly consider:

- How singers can best be trained alongside other artistic disciplines to understand and learn from each other;
- Creating more opportunities for singers to work with orchestras. The cost of this might be defrayed by working from good reductions. The Opera Europa conference also identified this issue, pointing out that the ‘old’ ensemble model allowed singers to work with an orchestra 40-50 times in a conducive developmental environment;

- How to encourage young singers to pursue a broader based cultural education in order to develop as artists. As noted earlier, singing students are thought to rarely attend performances or exhibitions outside their immediate field of study;
- Sharing productions that are particularly appropriate for developing learning. This might also entail co-commissions for production in college, perhaps collaboratively with companies;
- College assessments which cover the full range of singers' potential career elements — including all aspects of performance; the principles of teaching and awareness of a range of arts management careers. Before graduating they could be required to do a personal business plan (as do students at London Contemporary Dance School);
- How students can best understand how to deal with sometimes conflicting advice.

5.2. Acting & Stagecraft

The question of the most appropriate relationship between the many constituent elements of opera (principally, vocal and orchestral music, text, drama and visuals) has long been debated — as it was in this consultation. Opera has always been a multi-faceted artform and audiences and opera-makers are now becoming more demanding in what they expect of performers in order to achieve a true Gesamtkunstwerk requiring excellence across all its constituent disciplines.

Contributors repeatedly noted that opera now requires a more 'complete' performer and that this requires a more holistic approach to training, fully incorporating voice and body. Notwithstanding this ambition, the over-separation of voice and physicality remains a challenge, risking a dissociation between musicianship/voice and whole-body performance. This is artistically undesirable and professionally a drawback: *"20 years ago, you could have a career just with [just] a great voice. That's not the case anymore."* This emphasis on achieving a balance of both acting and vocal skills was echoed strongly at the Opera Europa conference (*"I would choose a better actor over a young singer who looks good"*) whilst a company director who contributed to this study said: *the feedback we have from our audience is never about singing. It's about the emotions, credibility, the clarity of the story.* A commonly held view was summarised as *"We [in UK training] have deified THE VOICE at the expense of languages and acting."*

However, not everybody is convinced about this shift: for one senior singer, *"It's fundamentally about the Voice — languages acting movement are good things, but not at the expense of singing. Maybe we've gone too far the other way".*

There is, of course, no reason why someone in possession of a wonderful voice should automatically have the skill-set required to be a powerful actor. Students from a music background are often unlikely to have the same level of understanding of drama as they have of music. Indeed, *"Most singers coming to opera have no primary interest in theatre. Singers come to it through singing in choirs or classical singing... all the [dramatic] stuff"*

that needs to be taught is left to the final stage. You can end up being a professional singer not knowing how to negotiate the stage space or work with colleagues... Training should be much more integrated."

Nevertheless, given that expectations (and tastes) have changed, higher levels of skills in acting are now required: *"I came into the business when it was 'stand and deliver'; the new business is drama. Students don't take that on board enough — there's not enough dramatic energy. That's a big missing of the point. [They need] the physical vocabulary to be on stage"*. A contributor at Opera Europa said: *"Sometimes they are super educated on the singing side but have to figure out the acting by themselves"*.

A strong consensus emerged through the consultation that (a) theatricality has become increasingly important and will continue to do so; (b) the acting capacities of singers have improved markedly over recent years; and (c) they still have some way to go. Contributors pointed to opera (particularly through directors with a background in non-lyric work) moving towards "theatre attitudes" with a much greater emphasis on verisimilitude (age-specific casting etc); as referenced earlier, this has probably been exacerbated in recent years by a combination of big-screen HD relays at the large-scale and more intimate, therefore exposed, performances at the small. *"You have to look right for the part so a singer can't hang on to roles for as long as before: you can't sing Susanna into your 40s"*. In the past, traditionally recognised voice appropriateness has been the principal driver of casting but often now *"as long as s/he can sing it"*, that criterion is less dominant.

At present, training institutions provide separate classes in acting and voice which, it is commonly reported, are often not fully synthesised, leaving the performer to work out for herself how to relate them to each other. Given the increased acting demands noted throughout this report, opera training courses might find it helpful to draw on the practice of leading drama colleges through a more thorough integration of the disciplines: *"a couple of hours of acting a week (based on my own experience at postgraduate level) isolated from other disciplines, is not enough"*.

The emphasis currently put on the voice often puts time-table pressure on the development of dramatic skills (and on language learning as discussed in the next section). The lack of *'primary interest'* reported above is reflected in the observation that students cut acting or movement classes in favour of additional singing sessions, sometimes encouraged by singing teachers who regard their discipline as more important. As a result, singing actors often *"don't have enough stage miles under their belt; they're not ready for the rough and tumble of production schedules and so forth"*.

As suggested earlier in this section, acting is often 'fitted in' at a late stage in training, rather than from the outset, which would enable music and drama to be developed in parallel over time leading to a more holistic approach, the better to deliver an integrated performance. Moreover, as already noted, operatic success now requires a high level of

physical fitness and stamina; this reinforces the suggestion that singers need to understand and train their whole body as much as they do their voice: *“I didn’t go to Conservatoire, I went to drama school. First day, we were told we would get the tools to have a career. We learned to dance, to keep fit, improvisation... Opera is also hugely physical. I wish I had been told how physical it would be!”*

In these circumstances, I would suggest that drama (and movement) should be integrated more fully with music — through a compulsory daily (or, at least, thrice weekly) class as soon as it is clear that dramatic singing will be part of a particular student’s career objectives. This might require a re-orientation of colleges’ timetables and even, perhaps, the inclusion of a foundation year (perhaps in conjunction with a drama school) for singers with no dramatic experience in order to enable them to work through scenes for all the elements that go into building a character (e.g. intensity, sub-text, physical fluidity and motivation) and integrate them with their singing practice. This would be enhanced by enabling students to work with experienced stage directors on a regular basis, including on non-lyric texts.

Other theatrical areas identified for development in the training of singers were:

- improvisation which is an increasingly important element in an actor-singer’s arsenal if she is to make a full contribution to a creative rehearsal process; and
- the deep comprehension and communication of text which contributors observed can be inadequate, especially if a director’s style is primarily visual and the singer is not equipped to ‘do it for herself’. Some colleges — such as RWCMD — address this by beginning their course with text analysis rather than singing for the first two weeks. Several contributors noted the value of singers working with actors to mutual benefit.²⁴

Some colleges have drama practitioners within their student body which offers the potential for cross-artform collaboration. Other, which do not, have, in the past, forged relationships with specialist drama institutions (e.g. RNCM with RADA) to ensure that they are in touch with a range of current non-lyric theatre practices and their students can experience different directing styles.

All the above suggests strongly that singer training should have an increased emphasis on acting and rigorous body work / movement skills alongside developing singing ability. To achieve this most effectively, students need to be exposed to experienced professional performers with a range of skills. In this context, it is noteworthy that the teaching model favoured by several consultees is based on a cadre of core staff who, enjoying a long-term relationship with students, can identify needs and develop technical skills which can be ‘topped up’ by specialists with particular areas of expertise.

²⁴ In the early days of ENO’s Young Artist Programme, for example, distinguished actors such as Fiona Shaw would work with participants on text only while Complicité performers would explore movement.

The “rise of the director” is widely acknowledged (although not always welcomed) but it is unclear whether this new dynamic is, as yet, adequately reflected in the Conservatoires’ approach: *“Directors are coming more and more from theatre and TV. This isn’t really reflected at Conservatoire level. They’re still working with old-style directors. We were taught to come into rehearsal as blank canvas, the director will direct. Now you’re expected to create character.”* Acting singers now need to come to rehearsals having thought deeply about their character and then be prepared to develop and change that thinking through the rehearsal process, whilst developing a more collaborative attitude towards the development of a performance. This is, in practice, a reflection of a broader trend within the arts towards a more participatory and engaging approach — both to the development of professional work and to learning and participation.

The Opera Europa conference suggested that, in many countries, the casting process is still very strongly led by the music imperative without much involvement from the theatre side. In the UK, however, directors are increasingly involved, alongside the conductor and intendant (although some directors feel their involvement is still not sufficient). This is having an impact on the nature of the skills prioritised (e.g. the understanding of text and the psychology of character development) and on both the audition and rehearsal processes as well as the ‘look’ required.

Audition technique is a critical aspect of the performer’s essential toolkit. There is a widespread sense from directors that *“lots of singers don’t know how to audition well... They are not showing me who they are as individual artists. This is an intimate thing - I’m not sure you can address this if you’re [teaching] it in a class. They need to reach into who they are. When I got into opera I was told that acting and opera singing were very different: they’re not, it’s [all] storytelling.”* One director reported that: *“We’ve done auditions with singers doing exactly the same thing, same voice. But you can separate them on their acting ability. We work with singers who can think on the spot. We ask it in the audition. In 30 seconds, we know who’s in [with a chance]. People who can’t do that will have problems down the road”.* This suggests that the audition process can benefit significantly from the director’s involvement. This skill-set, too, could be more developed, perhaps in conjunction with a drama school.

Singers in the UK sometimes audition with pieces outside the repertoire of the hiring company which is a major disincentive to their being engaged. American training, by contrast, is regarded as being more thorough in developing singers’ presentations. The colleges and companies may wish to discuss how, jointly, they might help singers develop their self-presentation skills, drawing on actors and experienced public speakers

5.3. Languages

There are concerns about the (perceived as worsening) quality of English singers' language skills. For foreign languages, this centres on two linked issues — pronunciation and comprehension (by the singer and so by the audience). This state of affairs is variously ascribed to a number of contributory causes — the emergence of (American) English as the dominant world language; not starting early enough; insufficient (or unrigorous) teaching; a too-high student/teacher ratio when what is required is one-to-one contact; a disinclination — or inability — on the part of many to learn by living and immersing themselves for a time in another culture; and a reliance on surtitles leading to imprecise diction. Some also claim that libretti are being learned by rote and supported by literal on-line translations with a loss of comprehension, rhythm and poetry.

All colleges include languages in their curriculum to a greater or lesser extent: RAM, for example, offer lieder and chanson lessons. However - given the internationalism of the opera market, the volume of potential international employment opportunities, especially in Germany, the already noted prevalence of polyglot Russian and other Eastern European singers and the possibility that, post-Brexit, many UK singers may find it more challenging to get employment in mainland Europe — this would seem to be an area for prioritisation if UK singers are to continue to make an impression on the international market-place. One approach — in addition to more and earlier language teaching — might be encourage and enable singers to live, study or work in the countries and cultures where the main operatic languages are spoken: “*They need to speak [the languages], not just sing them.*”

There is further concern about a lack of clarity in much operatic singing in English (particularly in certain vocal ranges). One director observed that he has had numerous comments from his audience on this subject and several others also raised this topic very forcefully in their contributions. It is suggested that “*nobody teaches how to sing in English or coaches the technique*” (although Aldeburgh Music has developed a model based on singing Britten to address this issue²⁵) — perhaps, on the assumption that when English is a singer's native tongue, there is no need to work explicitly on how to sing it. However, vocal coaches “*deal in sounds, not words*” and changing English vowel sounds for mellifluity can have a deleterious effect on comprehensibility. BYO noted that all its performances since 2011 have been in English but that singers have comparatively little experience of this practice.

5.4. Business Competencies

The economic and cultural landscape in the UK is in a considerable state of change. In addition to the political and financial complexities, referenced in 3.1, public sector funding challenges are compounded by insecurity about future audiences. Across most artforms, attendance patterns are volatile and box-office income often unpredictable. This may, in part, be due to a “*high level of risk aversion with audiences not wanting to try the new*”; instead, playing safe with their cultural choices. In addition, private sector contributions

²⁵ see 4.6

have been generally weaker than in recent years — either because businesses are in difficulty or because they are loath to be seen to be spending on anything that does not seem to offer obvious shareholder value. Similarly, Trusts and Foundations may also be contributing less as historically low interest rates reduce their disposable income at the same time as the demand on their arts and social programmes rises steeply. Against this, there is a hope that high net worth individuals will take up some of the slack. However, it is unclear how much of the public sector deficit can be met through this source — or what conditions may be attached to it.

In addition, there is the potentially ‘seismic’ consequence of Brexit which (as this report was being finalised) was bringing new developments on a daily basis. These factors are compounded — and complicated — by a range of particular characteristics, some general, some more culture-specific, including:

- Demographic shifts (in terms of diversity and age)
- A greater awareness of global opportunities
- The casualisation of many areas of the workforce and the growth of portfolio working
- The growth of digital media and social networking with an accompanying shift away from the traditional producer/consumer paradigm
- Diversification of leisure/entertainment option/platforms and an increase in major events
- A new emphasis on entrepreneurialism in the arts
- Changing patterns of private giving
- The need to balance artistic imperatives and organisational efficiencies

In this environment, the opera singer of tomorrow (or even today) is unlikely to be able to rely on the same sort of nurturing career structures and building blocks as her older sister. Instead, she will need to re-define herself as a small business who constructs an independent career with her own, customised business model.

The implications of this were discussed frequently through the consultation with some clear conclusions:

- *“Resilience is critical.... You have to know you’re a product — so you need to shape up as a business & present yourself properly”.*
- *“Artists have to make decisions for themselves before leaving conservatoires; they don’t leverage benefit [at present] because they don’t have the business skillsThey need to be taught entrepreneurship”.*
- *“ This generation of young singers are more confident and entrepreneurial. They might form a company, set up a festival... they’re doing it themselves. That’s probably the only way to survive!”.*

The changing environment will continue to make new demands on singers. If they are to have the best chance of succeeding, they will need to acquire effective business

competencies. Some training programmes are beginning to address this. However, I suggest that this aspect of training should be pursued more rigorously.

As noted elsewhere, London Contemporary Dance School requires all its students to prepare a three year business plan to follow their graduation. Guildhall School requires its students on Performance and Creative Entrepreneurship to produce an event and NOS has instituted a new Artist Resilience element to its programme that focuses on physical, mental and professional resilience for solo artists.²⁶ It might be helpful if all opera training bodies included elements such as these in their provision for would-be singers with practical experience of how their industry works, its risks and challenges. Such an initiative could also open other avenues for creativity.

Such a course should include — in addition to generic business practice, financial management and areas such as audition technique or repertoire choices which are already included in courses — other areas of professional development relevant to singers e.g. presentation and self-promotion, social media, SoundCloud usage, funding applications, CV and website development and self-management. These modules should be taught by experts in these fields and given full value by the training institutions rather than being seen as of secondary importance as — it is reported — some are now. To that end, it would be worth considering making them a part of the core curriculum.

5.5. Répétiteurs & Directors

The main focus of this research has been on singers; however, the interview process also provided the opportunity to discuss associated professional disciplines — stage management, répétiteurs and directors. The feedback on stage management was unequivocally positive with several offering the opinion that Britain produces the best in the world and no suggestions for its improvement. In the light of that level of satisfaction, this section focuses on the other two areas.

5.5.1. Répétiteurs

Positivity (with some reservations) was also expressed about British training of répétiteurs compared to elsewhere.

- *“The training of répétiteurs here is fantastic — tough, perfectionist.”*
- *“Répétiteur training doesn’t exist [in many places overseas]. They have one or 2 places in the whole country... You need choice, more than one institution.”*

Despite this general approval, contributors had mixed opinions about British répétiteurs. Some were very positive (with one describing these too as ‘the best in world’). However, others considered that not enough of them were of the highest standard and that at the

²⁶ discussed in 4.2

'top end', there is a very small pool (almost all of whom are white men). It was noted that the majority are privately (and often Oxbridge) educated with much early experience of working with singers and a conductor. As in other areas, there are now fewer opportunities for répétiteurs to gain extensive experience as there are fewer full-time music staff posts in companies and not many programmes designed to develop them. As a result, most supplement main-scale work by playing on short-term contracts for small companies or choral societies. In this environment, NOS is considered to offer useful experience for répétiteurs as it enables them to work with the same group of singers with different coaches across a period of time, combining a developmental approach with a variety of ways of working.

To address the needs of répétiteur development, RAM is creating a répétiteur 'pathway' in the keyboard faculty which will be integrated with the opera school. This is to be applauded.

It was noted by some contributors that more musicians of quality might be attracted to training as répétiteurs by promoting and publicly valuing the importance and creativity of the profession with an emphasis on the various career paths open to these highly skilled practitioners.

5.5.2. Directors

This report has noted the 'theatricalisation' of opera in recent years and the concomitant growth in the importance of the director — a role that requires all the technical expertise of a theatre director plus some additional qualities, the most important of which are musicality (the ability to understand a score and its sub-text), an understanding of — and respect for — the genre ("*Don't deconstruct the form before understanding it*"); sophisticated storytelling abilities ("*They need to direct more than just the words*") and a recognition of what singers need over and above actors' requirements.

Some directors move into opera from working in non-lyric theatre, some begin with opera at University and segue into a professional career, some set up their own small companies and others have developed from careers in stage management or design. In many instances, this progression involves working as an assistant or covers director before — sometimes — having the opportunity to mount a mainstage production. From whichever route they emerge, there are far fewer opportunities for early career opera directors than for their equivalents in non-lyric theatre. This is due to a number of factors:

- Fewer productions;
- Less formal training opportunities;
- A level of risk-aversion in hiring inexperienced directors due to the potential financial and reputational downside;
- The habit of recruiting 'name' directors from the 'straight' theatre (including from overseas) and from other disciplines (e.g. film/video).

There would appear to be a need for some additional support to encourage emerging directors (from whatever background) to gain more experience and skills. This might be an opportunity for NOS to explore.

5.6. Conclusions and recommendations from Section 5

From 5.1

I recommend that — in addition to discussing other issues raised above — the sector should place a greater emphasis on developing training for singing teachers (as Guildhall is currently considering) and that it explores the potential of a voluntary accreditation system. With reference to this latter recommendation, the Dance sector has developed a system linked to establishing National Occupational Standards for dance teaching and an online register of independent teachers. That experience should be explored.

From 5.2

I recommend that:

- Colleges should review their approach to the curriculum with the aim of integrating drama (and movement) more fully with music — through a compulsory daily (or, at least, thrice weekly) class as soon as it is clear that dramatic singing will be part of a particular student's career objectives. This might include collaborations with drama (or Dance) schools.
- The colleges and NOS should re-emphasise both audition technique and textual analysis as important elements of their offer.

From 5.3

I recommend that:

- Consideration should be given to establishing a bursary programme to enable singers (especially from financially disadvantaged backgrounds) to work and study abroad to perfect their language competency. As with this report's other references to this type of support, I recommend that NOS and Help Musicians UK convene a meeting of potentially interested charities to discuss a joint approach to this question.
- Colleges — and the informal group of training providers referenced in Section 5 — should review how they can best address the issue of singing in English.

From 5.4

I recommend that all opera courses designed to enable singers enter the profession should contain a business module which should be evaluated as part of the degree.

From 5.5

I recommend that NOS should explore the potential for developing a short course to address this need for opera director training, perhaps drawing on the practices at Opera Philadelphia where the directors' training programme puts directors to work in parallel on a

series of scenes before sharing with each other (allowing for peer advice and critique) and a public offering. Such a course should aim particularly to diversify the profile of those becoming opera directors, especially in terms of gender, ethnicity and socio-economic background.

6. Conclusion

The majority of opinion through the consultation indicated that British opera training is relatively strong in comparison with other provision in Europe. However, the cultural, educational and economic climate is changing rapidly and it would be timely to address those key challenges and issues that have been identified as holding back British training in the global market, particularly in comparison with (some) American provision. These can be summarised as the need for:

- Greater dialogue across the sector;
- Most singers to be equipped to pursue portfolio careers;
- Mechanisms to compensate for the decline of ensembles in the UK;
- Addressing diversity in the sector — both ethnic and socio-economic;
- Addressing gaps in some skill sets.

It is hoped that the analysis and suggestions in this document will stimulate discussion of these issues in the sector and facilitate developments to strengthen further the profession of opera in the UK for the benefit of the artform and audiences.

APPENDICES

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Appendix A: Background Documents

Beggar's Opera (1992), a report on small-scale opera and music theatre: Gulbenkian Foundation.

Arts Council of Great Britain (1993), The Ritterman Review: National Review of Opera Singer Training, Arts Council of Great Britain.

National Opera Studio (2000), NOS Future Strategy: Redefining the Studio.

Opera & Music Theatre Forum (OMTF) (2001), Opera For Now.

National Opera Studio (2008), The Singers of Tomorrow?: Summary of the Seminar at the National Opera Studio.

Opera America, Annual Field Report 2014-15.

National Opera Studio (2015), Alumni Research Project.

Devoted and Disgruntled (2015), Discussion Reports: What are we going to do about opera? Royal Opera House, 6-7 June 2015.

Various ACE reviews of Opera, Opera Touring and Lyric Theatre, 1995-2012.

Appendix B: Contributors

n.b. Several contributors have multiple professional roles e.g. singer/teacher, composer/conductor or company leader/director. Each is listed below under only one category.

<u>'Big Six' Opera Companies</u>		
ENO		
Martin	Fitzpatrick	Head of Music
Natasha	Freedman	Head of ENO Baylis
Bob	Holland	Programming Director
Sophie	Joyce	Head of Casting
John	McMurray	Senior Artistic Advisor
Jane	Robinson	Head of Training
Glyndebourne		
Steven	Naylor	Director of Artistic Administration
Mary	King	Vocal Talent Consultant
Opera North		
Christine	Chibnall	Planning Director
David	Cowan	Head of Music
Richard	Farnes	Music Director
Richard	Mantle	General Director
Megan	Nelson	Casting & Scheduling Administrator
Steven	Phillips	Chorus Manager
Royal Opera House		
Sarah	Crabtree	Senior Producer
John	Fulljames	Associate Director of Opera
David	Gowland	Director of Jette Parker Young Artist Programme
Kasper	Holten	Director of Opera
Peter	Katona	Director of Casting
Cormac	Simms	Administrative Director of Opera
David	Syrus	Head of Music
Scottish Opera		
Derek	Clark	Head of Music

Alex	Reedijk	General Director	
Stuart	Stratford	Music Director	
WNO			
Matt	Broom	Head of Planning	
Kathryn	Joyce	Casting Administrator	
Russell	Moreton	Head of Music	
Isabel	Murphy	Director of Artistic Administration	
Sophie	Rashbrook	Dramaturg	
<u>Training Institutions</u>			
Guildhall School of Music and Drama			
Julian	Phillips	Head of Composition (MA Opera Making & Writing)	
Dominic	Wheeler	Head of Opera	
Armin	Zanner	Head of Vocal Studies	
Royal Academy of Music			
Nicola	Candlish	Company Manager	
Gareth	Hancock	Head of Preparatory and Vocal Faculty (Opera)	
Royal College of Music			
Michael	Rosewell	Director of Opera	
Nicholas	Sears	Head of Vocal Studies	
Royal Conservatoire of Scotland			
Timothy	Dean	Head of Opera	
Royal Northern College of Music			
Lynne	Dawson	Head of Vocal Studies	
Royal Welsh College of Music and Drama			
Hilary	Boulding	Principal	
Angela	Livingstone	Head of Vocal Studies	
Trinity Laban Conservatoire of Music and Dance			
Linda	Hirst	Head of Vocal Studies	
<u>Opera Companies, Festivals</u>			
Roger	Wright	Chief Executive	Aldeburgh Music
Graham	Vick	Artistic Director	Birmingham Opera Company

Vincent	Osborne	CEO	Black British Classical Foundation
Stuart	Barker	Director of Training and Productions	British Youth Opera
Stephen	Barlow	CEO / Artistic Director	Buxton Festival
Leo	Geyer	Music Director	Constella / Khymerikal
Kate	Flowers	Artistic Director	Co-Opera
James	Conway	Artistic and Executive Director	English Touring Opera
Laura	Canning	Director of Artistic Administration	Garsington Opera
Ella	Marchment	Artistic Director	Helios Collective
Alison	Porter	Executive Producer	Mahogany
Mike	McCarthy	Joint Artistic Directors	Music Theatre Wales
James	Clutton	Artistic Director	Opera Holland Park
Dickon	Gough	Trustee	OperaUpClose
Lloyd	Newton	Artistic Director	Pegasus Opera
Robin	Pietà	Director of Productions	Secret Opera
Jack	Furness	Artistic Director	Shadwell Opera
Lynn	Binstock	Artistic Director	Unexpected Opera
International			
Laura Lee	Everett	Director of Artistic Services	Opera America
Brenda	Hurley	Director	International Opera Studio, Zurich
Nicholas	Payne	Director	Opera Europa
Julian	Sleath	Executive Director of Performing Arts	Banff Centre
Composers & Directors			
Annabel	Arden	director	
Shirley	Thompson	composer	
Errollyn	Wallen	composer	
Keith	Warner	director	
Singers			
Nadine	Benjamin	singer	
Susan	Bullock	singer and teacher	
Adrian	Clarke	singer	
Donald	Maxwell	singing teacher + ex-NOS director	

David	Butt Phillip	former Jette Parker Young Artist	
James	Platt	Jette Parker Young Artist	
Matthew	Rose	teacher	
John	Tomlinson	singer	
Jessica	Walker	singer	
Jeremy	White	ROH Company Principal	
Independent Singing Teachers & Training Sector Professionals			
Nicholas	Cleobury	Head of Opera / Young Artist Programme, Conductor	Queensland Conservatorium
Debbie	Lammin	teacher	Burntwood School
Veronica	Lewis	Principal	London Contemporary Dance School
Kathryn	Harries	Director	National Opera Studio
Mark	Shanahan	Head of Music	National Opera Studio
Jeremy	Silver	Assttant Head of Music	National Opera Studio
Karon	Wright	Artistic and Executive Director	Samling
Independent Sector Professionals			
Rupert	Christiansen	Critic	
Henry	Little	CEO Opera Rara (and Chair of NOCC)	
Brian	McMaster	ex-chair NOS	
Jean	Nicholson	Diversity Project Consultant, ROH	
Elaine	Padmore	Freelance	
Sarah	Playfair	freelance casting director	
Agents			
Patrick	Allen	Director	Connaught Artists
James	Black	Director	James Black Management
Christopher	Carroll	Director	Christopher Carroll Artists
Kieron	Cooke	Senior Artist Manager	Askonas Holt
Ben	Rayfield	Managing Director	Rayfield Allied
Nicki	Wenham	Artist Manager	Ingpen & Williams
Mary	Craig	Partner	Helen Sykes Artists
Helen	Sykes	Partner	Helen Sykes Artists

Arts Council England

Ian	Anstee	Relationship Manager	
Chloe	Brookes	Relationship Manager	
Louise	Cleverdon	Relationship Manager	
Ben	Lane	Relationship Manager	
Jonathan	Mayes	Relationship Manager	
Harry	McIver	Relationship Manager	
Simon	Mellor	Executive Director, Arts and Culture	
Helen	Sprott	Director of Music	

Appendix C: Notes from Online Surveys

It should be noted that the online surveys returned very consistent results which are also highly congruent with those from the interviews and group discussions and with the findings and recommendations of this report.

1. COACHES & TRAINING PROFESSIONALS

A. Composition of survey participants

33 respondents consisting of (some more than one discipline)

- 22 Coaches (including Language)
- 10 Singing Teachers
- 20 Répétiteurs
- 5 Other (e.g. osteopath)

Of these:

- 33% trained as singers
- 27% trained as pianist - 27% as répétiteur
- 24% trained as linguist, organists, accompanist, flute player, movement director/choreographer and osteopath.

Just over 50% did not undertake further training as coach or teacher.

Across all categories, a wide range of experience is represented: from 2 years of coaching to 38 years as a vocal teacher.

Most coaches / teachers to see their students on a weekly basis, or less often for private and one-off clients. Over 90% see their students in one-to-one sessions. 50% also lead group sessions, and 50% support their students at performances. 66% spend up to 50% of their time exclusively teaching or coaching opera; however it was noted that Conservatoire students have to learn all classical singing styles (e.g. oratorio). At least one respondent spends 50% of his time performing, and another is also an administrator.

B. Changes in the sector / environment

(20 respondents to this question)

Only 1 thought that “nothing” had changed in the profession, another one commented “very little: the basics are still more important than anything - reliable and informed technique for sustainable vocal development, beauty and health, languages, musicianship, stagecraft, ensemble skills, being able to be conducted, resilience and fitness, fun”.

The other 18 highlighted the following areas for enhanced training needs, most of which are reflected in the main report:

i. General

- A number of contributors referenced the need for more all-round training to meet the developing needs of the profession: “a lot of singers who train classically maybe need to be more versatile now... the demands of contemporary opera can be very different to more traditional opera. Also improvisation etc. may be a more necessary skill now”
- This is accompanied by references to the need for stamina to support “the healthy musician” and an increased emphasis on the relationship between anatomy and singing.

ii. Artistic and technical demands

- The importance of diction, the art of recitative and communication as well as diverse genres of music
- Broader repertoire skills and marketing
- The need to know what is stylistically correct and what is not: how much (and what) “freedom” can be taken; the musical sense of the piece, the text (contextualized)
- A greater emphasis on acting skills...the emphasis is shifting more in the direction of dramatic intention in singing...more physical awareness and training in dance/movement... More sense of text
- Reacting quickly to direction
- More language finesse (“better command of languages to express text” ...”opera houses require a higher level of linguistic ability without always providing adequate linguistic support”)
- Non-performing professional skills (networking, collaborating, self-evaluating needs...)
- It was frequently pointed out that singers need time to develop, but they are expected to be ready too soon, because “funding cuts mean that courses are hothouses [with] many more young singers from the international community [creating] greater competition than ever”...”Singing students don't necessarily have the time to develop at the pace that each individual voice needs”.

iii. Changes in the market

Factors identified include:

- Many more small companies
- The need for entrepreneurial skills, and the ability to make work rather than to wait for it
- “It is clear that singers of an operatic persuasion need to be much more cynically geared to target the specific interest of their prospective employers. Thus, there is a risk of musicianship falling by the wayside while we focus - in vocal coaching sessions - on presentation”

iv. Training Needs

The principal needs identified were:

- Increased collaboration between training institutions and companies
- Involving (more) current professional practitioners in conservatoire core curriculum
- Making sure that training course leaders are aware of current developments, in the UK and abroad
- Exposing students to a wider range of styles, periods, genres... encouraging them to gain familiarity with the work of contemporary composers and to collaborate with them.
- “Providing earlier stage experience to avoid singers suddenly having to adapt their singing style for large spaces”

- “Allowing enough time in training for adequate vocal development and embracing different needs, backgrounds, ages... instead of only focusing on voices who are already ‘finished’ and ready to start their career”

v. The current balance of skills taught

Respondents, when asked whether various activities were adequately covered in their training, were satisfied with provision for vocal technique (70% think it’s “just right”). A majority (59%) also thinks that expert external coaching with industry professionals is adequately delivered. However clear majorities expressed the wish for more emphasis on four skill areas: Ensemble coaching (62%); Language coaching (78%); Stagecraft / acting (72%); Movement (65%). In addition, 76% expressed a need for more comprehensive preparation for the profession.

The issue of singing in English (a major theme of interviews) drew mixed responses: 57% think it is “just right”, 29% would like to see “more” and 14% think it could be “less”.

C. Diversity

67% of respondents in this category think that the sector is not sufficiently representative. Some respondents feel personally concerned by the lack of diversity in the opera sector: “it doesn't reflect the evolving culture I am part of”; and more broadly: “[it] is still a massive issue, not just in opera, but in the arts and public life in general. Visible role models... are crucial as are pathways to helping increase representation and diversity”.

Conservatoire staff commented on their institution’s outreach activities and collaboration with local Music Hubs and music services to reach students from different socio-economic backgrounds, noting however that adequate ethnic representation was still a long way off. Other respondents raised the cost of training as a barrier to entry, also noting that the current lack of diversity of backgrounds in the profession results in “a certain one-dimensionality in the work done and opportunities open to those not traditionally accessing opera”.

A large majority of respondents suggested that college students and staff could be more involved in outreach and community work¹, and that opera should (a) feature in schools’ curricula; (b) be offered to children across the county through touring subsidies and (c) be devised by children and teachers in collaboration with composers and singers.

The cost of tuition was noted again as a barrier to entry, resulting in intakes to colleges being increasingly from a restricted social, economic and ethnic background. Some suggested scrapping tuition fees, others offering bursaries and grants to disadvantaged students.

Two respondents (out of 17 responses to this question) saw no need to change anything in the system, because “anyone who is sufficiently talented will succeed”.

¹ With just one respondent seeing outreach, and the task of diversifying the sector, as the role of the companies, not the training institutions.

2. COMPOSERS & CONDUCTORS

A. Composition of survey participants

7 respondents covering a broad spectrum from those working 100% in opera to under 25%. Most are working as coaches and conductors for student singers. 6 out of the 7 think that the singers with whom they work are “good”, 1 “satisfactory” whilst none chose “outstanding”.

B. Changes in the sector / environment

Changes to the profession noted by this group of respondents were mainly of an artistic nature - the increased multi-disciplinary approach to performance, more demanding modern scores that require better reading skills and higher musical standards - as well as one mention of the need for singers to market themselves and “get better at audition techniques and self-promotion”.

To address these changing needs, the respondents think that training should provide more emphasis on workshops and devising processes, a better integration of acting and musical skills, greater adaptability and better awareness of genres and styles - from musical theatre to lesser known and contemporary works, and a better and more consistent preparation for the profession.

C. Diversity

Suggestions from this group for increasing diversity in the sector are of two types:

- in production: supporting the creation of opera by minority groups and including culturally diverse performers and creators within mainstream productions, possibly with scholarships for students from disadvantaged backgrounds;
- in promotion, introducing opera to communities other than “the white middle-classes”, especially in disadvantaged schools, community centres and diverse arts groups.

One respondent also commented that training should be rigorous in quality and not ‘dumb down’ on repertoire, and that students’ expectations should be managed so that they can still feel that they can contribute “even if their dreams are not all fulfilled”. This contributor also emphasized that “Tertiary training is vital and the fruits of that can flourish everywhere”

Another suggested that living composers should be commissioned to write operas that are relevant to today’s students with libretti written by the students.

3. MEDIA, FUNDERS and OTHER INTERESTED PARTIES

3 respondents

A. Changes in the sector/environment

i. General

Perhaps reflecting their different perspectives this (albeit small) group offered a range of considered responses, including:

- “Opera participation through community opera is creating a sea change’ as a catalyst for new ways of making and performing opera.”

- “The revitalised Opera Europa [enables] and encourages the sharing of knowledge, expertise, experience and productions, amongst its 40-odd membership: and with its links to Opera America.”
- “The decrease in BBC televised productions & loss of studio productions specifically created for TV.” [but by contrast] many manifestations of change in the media - the introduction of live & delayed cinema screenings....the availability of opera online..., streaming, youtube, individual websites and social media generally.”
- The reduction of 'big label;' recordings: a loss to a small degree replaced by self-financed and sponsored opera recordings.
- The increase in the number of fee-paying foreign students to UK conservatories.

ii. Artistic and technical demands

- ‘The rise of the director’ often from film or theatre, making new ‘dramatic demands’ , allied to more 'adventurous' and theatrical approach to styles of production, ... pioneered in the UK by ENO & WNO, but now generally common.
- Innovation ‘across the board’ writing, scoring, staging and performances
- [All this means that] “Singers must have well-rounded skills... excellent voice, excellent actors and dancers” – “opera singers need theatre, acting, movement and dance to the same extent as do musical theatre artists [and also] the ability to articulate their art, develop themselves as rounded musicians and connect and communicate with audience. And this [should be] supported by meaningful and ongoing engagement in participatory artwork alongside the other technical facets of opera training”.
- Again, many raised the issue of over-stretch: “the danger ...of inexperienced singers, straight off a training programme, being tempted and pushed into taking on unsuitable roles, which can lead to serious vocal problems”..... “From my previous experience of researching Young Artists programmes (i.e. one step on from the NOS), the opportunity of observing, rehearsing and performing on stage with professional singers is invaluable and exciting”.
- In addition, contributors in this category rated ensemble coaching, languages, singing in English and movement as less effective than other components of UK training.

iii. Changes in the market

Contributors identified that the market is now highly competitive with singers needing to be fully prepared (“essential for their reputation”). There has been a growth in summer country house opera seasons and in the number of small companies of varying styles (“and quality”) but this has been accompanied by the disappearance of others (some of which are perceived to have commissioned new work. The removal [for now] of restrictions for EU artists has led to an expansion in opportunities with the opening up of Russian and Eastern European economies, adding to the pool of talent and competition.

iv. Training needs

These contributors emphasised that the aim of opera training should primarily be to produce fully-rounded, excellent singers who have acquired the professional and entrepreneurial skills, knowledge and capability to become high achieving 21st century musicians and that this should come out of a whole-industry approach that recognises the changing face of the industry and the demands this places upon singers as well as the needs of the opera companies: “In other words, opera training and progression routes in general are an issue for the industry as a whole.” They also recognised “a need to encourage a broader range of career choices in opera training, to look for different space to perform to different audiences. Training needs to account for the needs of a

Opera Training for Singers 2016 - Appendix C: Notes from Online Surveys

diminishing audience and look at how singers can create new interest from presenting opera differently, in different settings”. In doing that, “the leadership at the NOS, professionals and advisors working with the trainees “should keep abreast of 'trends' and developments and adjust their training judiciously. The trainees likewise should take responsibility for keeping themselves informed”.

It was also noted that singers: “need business skills to lead their career development and manage a portfolio career and manage being freelance - how to make opportunities happen, from project planning to making a network, for those moments when 'in between' roles”.

B. Diversity

Contributors were unanimous in expressing concerns around the lack of diversity. “Sector diversity has not changed (performers and audiences) - still a predominantly middle class pursuit with many barriers for people to be able to access” Changing this will require the opera institutions “to encourage trainees from a more diverse background, to be representative of the communities around venues not just of a white middle class audience who can afford the ticket price”. Further views expressed on this topic included that:

- Previous research [in London] demonstrates that opera (like other 'high' arts) is not regarded as a suitable profession, like that of doctor, accountant etc. Therefore young people are not encouraged or supported by their families to enter the world of opera
- The reduction in grants for all sections of society has made it more or less impossible for the less financially fortunate to undertake post-school/university training - unless scholarships/ bursaries etc. are available - to enable students to embark on a career in the performing arts
- There are many school educational projects in the UK but there can come a time when there is a gap between school and the next step, at which point young people lose the connection or possibly interest. Youth opera companies can play a valuable role.

Glyndebourne was praised for its initiatives in this area, specifically the Glyndebourne Academy focused on the progression of talented young singers who have not come up through the usual pathways and who have faced barriers to developing their singing careers. Other suggestions included:

- “Subsidies for trainees from lower socio-economic groups, from more diverse ethnicities to make the sector more naturally inclusive”
- Work with local Music Education Hubs to develop local area singing strategies to address the gaps in provision for aspiring young singers
- A holistic approach to training, progression and talent development to address the dwindling opportunities for young people in state schools to access classical vocal tuition
- Role models and gatekeepers –“who gets to commission and create opera as well as who gets to sing it. Diversity is an issue at every level of the opera industry”.
- Start younger, in primary and secondary school... Create opportunities for people who haven't the financial support of parents to help them realise their ambitions by studying. Take opera to different places and remove some of the barriers by carefully selected programming and 'relaxed' performances. More diversity on stage will be reflected in the audiences.

4. COMPANIES

A. Composition of survey participants

21 respondents across a wide range of scale and styles, from one staged production every two years to 200 a year.

Many respondents attend auditions and performances at colleges, Young Artist Programmes and other training schemes (including BYO and NOS). Some respondents or their colleagues are also coaching at colleges and give reports to the casting team. One company organises occasional co-productions with conservatoires.

B. Changes in the sector/environment

i. Artistic and technical demands

There is general agreement that it is now more necessary to master a broad range of skills - from movement and acting to media training and professional conduct.: “Singers (indeed all musicians) need to gain a rounded view of the art form - alongside performing, an understanding of how to get a project off the ground will hold them in good stead for the future (e.g. funding, marketing, audience development, industry networking)”. Contributors see an increasing need for:

- An increased focus on languages, knowledge of repertoire
- More input from other disciplines e.g. dance and acting
- A return to fundamental principles of sound vocal technique

ii. Changes in the market

“It is a more competitive field that doesn’t forgive any weakness. This leads to a need to be self-starters and entrepreneurial”. In this context, some express concerns about quality: “Singers are more celebrated than ever thanks to social media platforms and quality is slipping.”

iii. Training needs

Contributors argued for:

- More engagement with the professional sector
- [Encouragement to] students to attend professional productions [and] to observe the work of opera companies, especially diverse work from smaller companies
- Making students more aware of professional options, providing more training to work in a variety of (e.g. community) settings
- Being honest with students about the financial implications and what “success” means for someone with a performance degree

iv. The current balance of teaching

Respondents were asked to rate how well the training currently offered equips singers for the profession on a scale of 1 (very poor) to 4 (outstanding). All of the 10 responses received to this particular question fell in the middle two scores with 70% scoring it at 3 (“well equipped”) and 30% at 2 (“not very well equipped”).

A similar process was applied to companies' views of singers; again all responses fell into the two central score ranges when asked to rate the "general standard of singers who audition for you?" 40% scored them at good (score 3) and 60% at 2 (poor).

11 respondents replied to a question about the strengths and weaknesses of training thus:

- Opinions were split on Vocal Production and Communication with roughly even numbers regarding them as being strong and weak.
- Languages and Musicality were both considered, on balance, to be strengths (by a margin of 5 to 3 in the former and 7 to 3 in the latter)
- Stagecraft, Movement and Preparation for the Profession received seven responses, all of which considered these activities to be areas of weakness

One respondent commented: "5% of singers are employable at the highest level - these are strong in all areas."

7 companies also chose to respond to the question: "Are there any essential skills that you think should be emphasised more for young artists, during their training and their early career?" The areas identified were:

- Hard work and a goal-oriented approach to learning their craft, a better understanding of what it takes to be a successful professional
- Practical skills to survive as a freelance professional
- Vocal technique and understanding of text
- Theatre training with actors, characterisation, stagecraft and movement
- An interest in the wider world of performing arts few enough young singers go to opera performances, let alone theatre or dance

When asked about their employment of singers, 90% of respondents reported regularly employing NOS students, 81% had employed YAP participants in large company programmes and 72% had employed individuals who had worked with BYO. 36% of companies had employed singers from mid-scale YAPs, and the same number from overseas YAPs.

C. Diversity

11 out of 12 respondents who answered this question were of the view that the UK opera sector is not diverse enough (1 chose "I don't know"). Comments included:

- The need for diversity to be understood in terms of social class inequalities and barriers to access, especially the cost of training
- The fact that audiences are not diverse
- Perceptions of elitism and companies not being able to present diverse artists and conductors because performers all come from a very narrow pool: "As an ACE NPO, we have to think about diversity in our casting. At the moment, there is a shortage of singers from diverse backgrounds. Opera is often regarded as elitist... In order for this to change, we all need to create more opportunities for artists from a range of background".
- "The issue is not [just] around ethnicity or nationality...there is clearly an issue in terms of socio-economic background because of the question of student debt and the expectation that singers will need to undertake a series of postgraduate training which are less than fully funded"
- Reference to "a flawed education system which shows young children that the arts are not as valued as other subjects", thus discouraging "lower-income parents from investing in extra-curricular tuition"; and "the hugely high 'entry costs' for those aspiring to enter the profession"

- “It worries me greatly that young people from less advantaged backgrounds just cannot afford the long training required for an opera singer. In the later stages funding will often be found for them by their college/YAP, but that still leave 4-6 years of training which is not affordable for most people. The result is that the profession is becoming more and more the province of the privileged, which is deeply depressing”.
- “It requires more effort from Conservatoires to diversify their intake”

Suggestions to address the lack of diversity and access to barriers are of three main types.

- Cultivating an interest for opera outside its traditional audience with outreach activities and subsidised ticket costs
- At selection level, combatting unconscious bias by holding blind auditions
- Diversifying intakes by making training affordable and flexible including by:
 - ▶ Scholarships for singers from lower socio-economic backgrounds
 - ▶ Ensuring that diversity in training institutions covers the teaching and administrative staff as well as students
 - ▶ Building flexibility in training programmes to accommodate disabilities, different age groups, different family circumstances
 - ▶ CPD opportunities (including more short-term ones) for lower income groups, those coming to the profession later in life, workshop leaders who didn't go through college education

D. Additional Comments

Three respondents offered additional comments, highlighting the “poverty of music provision in school” and calling for more collaboration between training institutions and the professional sector, to increase the involvement of opera companies with conservatoire training and to help both students (and their teachers) gain awareness of “what is really required if they are to succeed in the operatic world”.

5. AGENTS

6 responses

A. Engagement with the UK training sector

Respondents were generally very engaged with the training sector - through attending auditions, student shows, college masterclasses and Young Artists Programme showcases, as well as responding to word of mouth from established singers, accompanists and conductors to spot new talent.

B. Changes in the sector/environment

Contributing agents also stressed the highly competitive nature of the marketplace (and the un-readiness of some entries) as well as the complex demands on the performer:

- “There are too many young singers who are insufficiently prepared to enter a more competitive and demanding market”... “Fewer singers should be encouraged to pursue opera training. [For those who do], the process should be much more rigorous and selective, taking into account a young singer's potential to earn a living and not just their singing ability”. ... “There needs to be greater emphasis on the technical aspects of singing (too many college leavers are not ready to survive the demands of the profession)”
- “A good voice is not enough to sustain a career”... “Alongside vocal prowess, a singer needs to be an excellent actor, a linguist, a social media expert, and they need to be physically credible in their vocal fach”... “They must have ‘the full package’ but also an additional edge in terms of personality, intelligence, vocal tone and looks. The standard is much higher - everybody is multilingual and has solid technique, but only a few can survive the demands of the profession”
- “So many British singers do not have the first clue about how to converse in any other major European language.”
- Careers are difficult to fund and sustain... “a singer has to be responsible for every aspect of their business”... “singers can no longer afford to train for years without an income”
- The new type of directors add to these demands: “The type of directors they will end up working with in the business are coming more from the theatre and film world - the singers need to be able to act and be prepared to work in a different way.”... “(singers need) greater emphasis in training on stagecraft”.

Contributors in this category suggested other skills that should be developed:

- How to make the most of publicity and social media
- Technique. Learning to speak as well as sing in other languages. Repertoire classes. “Classes in style of music, there are different styles for each composer, let alone each period”.
- “[Being] prepared to take all kinds of jobs (covers, etc) - sometimes they have unrealistic expectations and expect lead roles before they are ready for them vocally. They need to be aware that the voice develops over years and if they want a good long lasting career they need to choose their rep carefully and not push too soon”.

C. Diversity

Again, this is an issue of importance for most respondents who think that the sector is not representative of the UK population (although they do not see this as directly affecting their own work): “We work with the people who come out of the colleges and training programmes. It would be wonderful to have more diversity but that needs to start many years before”... “We do represent

a diverse range of singers, and continue to look for ways to broaden our roster - but it is only one consideration among many when we sign a singer". It was also noted that: "the diversity [in the UK] isn't great because music is still largely a white middle class privileged upbringing thing to do. Most singers come from money".

In order to address this challenge, respondents expressed a wish for earlier opportunities for all children in the UK to discover opera and classical music: "It has to start at the grass roots stage. Children are no longer given the opportunities, and music has become an afterthought in education"... It needs "more opportunities (and funding) for ethnic groups and socio-economic backgrounds currently not exposed to opera"... "inner-city state primary and secondary schools must have the same opportunities to access opera and learn about classical music"

6. DIRECTORS

A. Composition of survey participants

39 respondents

Respondents are generally quite active in the field, with 70% working exclusively in opera, just under 30% spending 50 to 75% of their time in it and none working less than 25% of their time.

B. Changes in the sector/environment

Again the issue of increased competition was frequently raised: “There is much less work and far more singers. It's no longer enough to have a good voice and be nice” as was the “bifurcation” of the profession into a thriving fringe and experimental scene alongside the expansion of country house and prestige opera.

i. Artistic and technical demands

It is generally agreed that the expectations of quality of movement and acting are now much higher with smaller-scale, intimate productions (and screen work) requiring more sophisticated skills. This has been accompanied by “a move away from naturalistic acting to requiring singers to be more physically engaged like a dancer or more conceptually aware of the dramaturgy”. Several contributors noted that, through the rise of multi-disciplinary work, many performing artist are becoming more multi-disciplinary and that singers need to be aware of this.

Many directors now expect singers to have greater stagecraft and bring ideas to the rehearsal room. This means that singers need to be better prepared with strong skills in connecting acting with music. Some directors have a limited technical understanding of this complex process which places an additional onus on the singer who, therefore, needs more training in how to work with a director, adapt to different approaches, and take responsibility for generating ideas.

ii. Changes in the market

The implications of the emergence of the portfolio career were frequently noted – “real basics like how to write an application & show enthusiasm for a job, planning auditions – the Importance of resilience and creating links into professional careers”.

iii. Training Needs

When asked how opera training should evolve in light of the above analyses, respondents suggested:

- “By ending the divorce between musical preparation and dramatic preparation that currently exists in most institutions that are training young singers.... If we teach young singers that there is a separation between music and text/drama in opera, they will continue to emerge from their training unprepared for the "real world" of an operatic career where dramatic demands are frequently greater than musical demands.... Separate classes are currently barely synthesised, leaving the performer to attempt this alone through trial and error. In addition, more practical application of how to approach a rehearsal room... to enable singers to work with directors and with one another”... “Include space in the curriculum from the start, where singers can explore how they can bring all the threads of their training together, a playful environment, where the emphasis isn't on getting it right, but on process, possibility and FUN!”

- Opera training courses need to look not only to the requirements of the industry, which have changed, but also to the provision for actors in leading drama colleges and training courses - singers need this level of attention to acting skills now, and a couple of hours a week of 'acting', isolated from other disciplines, isn't good enough"... "[there should be] equal emphasis on learning how to perform in character as much as vocal training"... "to compensate for the years of one-on-one tuition that comes with pure vocal training"... "Include movement and performance skills earlier in training"
- "More audition advice and coaching... sessions/coaching/scenes with working opera directors... and a range of mentoring for bridging the gap between college and the houses/companies".

Overall, the responding directors were not over-enthusiastic about the standard of singers they work with: over 50% rate them as "poor" (8%) or "satisfactory" (49%); with 43% thinking that they are "good" and none thinking that the general standard is "outstanding." When asked to rate a number of skills characteristics, there is a clear difference between how respondents assessed musical, and vocal skills (strong) and acting and movement (weak). In summary, they identified the relative strengths of various components of training as follows:

- Strengths : Vocal production (89% positive/11% negative); Musicality (71/29)
- About 'par': Communication & languages (45/55%); Preparation for the Profession (43/ 57)
- Weaknesses: Acting (17/83), Movement (14/86)

Different contributors cited audition techniques as both good and bad whilst other comments included "a lack of resilience and stamina, mental as well as physical" and "a cultural hinterland is often lacking"

When asked which other skills should be emphasised during training and throughout singers' careers, respondents referenced singing technique and singing in English without offering great detail. They did, however mention the following areas:

The artistic dimension

- Developing themselves as creative and critically thinking artists who have a responsibility to shape and contribute to the opera of the future, offering ideas and taking artistic risks and responsibility for artistic decisions. "Singers are constantly being told what is right and they are aiming for this abstract highest good rather than searching for their own voice and style"
- The theatrical use of the body. "Their movement is restricted because they do not have the licence to be creative in this field and the training is so limited in comparison to the time and focus they spend on their voice"
- Background reading and [thorough] research about the piece and their character
- Building and sustaining a character that inhabits both the words and music at all times during the performance
- Respecting the composer and the musical dramaturgy
- Stamina, ensemble ethos, emotional openness, psychological toughness

Acting and stagecraft

- Acting in both naturalistic and non-naturalistic styles, including working with dialogue ("young artists should have to work with text more and perform scenes from plays"), acting through movement, dramatic improvisation, devising, physical theatre techniques, comedic timing, interpretation, dramaturgy and the connection between text, intention and line
- Attitude and ensemble commitment
- Good stagecraft, discipline, communication
- Diction, particularity when singing English language.

Professional, “portfolio” and other skills

- Fringe work, contemporary music... community and outreach work,
- Life skills like writing an invoice... knowing what it means to be freelance.
- Rehearsal room etiquette/best practice, collaboration, and physical health... fitness and stamina.

C. Diversity

Yet again, this topic exercised almost all contributors significantly:

- “I am still shocked by the lack of ethnic mix in most opera companies... I think it is absolutely a priority to diversify in terms of ethnicity on stage and off. I also think diversity should be in terms of privilege and opportunity... there is no opera chorus with a mix of able-bodied and disabled singers, as far as I am aware... there are fewer singers from disadvantaged backgrounds (or from 'The North'), so opera becomes intrinsically less connected with the population as a whole.... More young singers are coming from comparatively privileged backgrounds, are more likely to be bright, well educated, musically trained from early in life. Not being in that club leaves a big gap to fill”.
- “A better ethnic mix of performers which better reflects the society we live in - both for developing new work which is accessible and relevant to twenty-first century audiences as well as for making established rep more relevant for contemporary audiences. Opera as a form will die unless new audiences come to it and one way to do this is to better reflect their own lives on stage”.
- “As a half-Pakistani ...I would like to create work that engages with class and race ...It is hard to do this with any sincerity when almost all singers that audition are from wealthy white backgrounds, with no experience (or, often, any real concern for) of issues to do with class and race”.
- “I feel I am always working with young singers of similar backgrounds. They even sound similar. There is a lack of individuality in their voices, and the way they present themselves despite being very capable and sophisticated”.
- “I feel frustrated with how white opera is... There is not enough support and encouragement for young singers from poorer backgrounds and from varied ethnicity”.
- “[There are] Poor casting pools of BAME artists... it currently stands, [most] non-Anglo-Saxon auditionees often fall at the first hurdle (musical competence) before even making it into the audition room to work with a director”.

To address these issues, respondents focused on:

i. Early-stage and community interventions

- “This needs to be addressed at a much earlier stage in education generally....Start them young. Get as much singing and theatre in schools as possible. Create a new raft of work that relates to people.....producing work in a way that is inclusive and brings everyone involved to the present moment”
- “As many forums as possible for introducing opera at a primary level. Workshops for children that banish myths about opera being elitist”
- “Take all kinds of children to good productions and not just productions for children. Defend music in schools”
- “More work with grass roots communities to break down the perception of opera as elitist, bringing in new audiences and ensuring that people feel opera is for them”

- “Doing more to provide progression routes for young people with talent/interest in singing/ performance and financial support through to college/conservatoire”

ii. Financial support

- “More bursaries for low income students of promise”
- “Funding to support individual singers through college/training; more education work to inspire/ engage young people into the industry”
- “Continuing financial incentives for [BAME] students to seek tertiary education will continue the growth potential of this sector”

iii. Developing Relevant Work

- “Tell stories people want to be told and in ways that people can relate to”
- All levels of the opera world should present work that is diverse in storyline (think Porgy and Bess, rather than 'Otello's black! That's our quota for this decade, even if the singer's white), even if this means commissioning new work that incorporates people from non-traditional backgrounds”
- “Imaginative casting and commissioning. More colour blind casting and inclusivity would be a very good thing”

iv. Role Models

- “You need to check that the people selecting newcomers and making decisions are [diverse]. If the top seats are filled in a diverse way, it's more likely to get a fair treatment”
- “We need some opera arts leaders who are not all white. Opera houses could be encouraged to hire associate artistic directors and diversity officers”

v. Colleges and Companies

- “Colleges need to take in more non-white singers to BMus courses. I don't know how many apply, but positive discrimination is needed here in some form”
- “Opera companies doing more to promote work in all ethnically diverse areas (like Birmingham Opera and Graham Vick)”

One contributor in this category dissented from the majority opinion:

“Diversity is a side issue. Talent is the supreme point. Opera has always been diverse - Marian Anderson, Jessye Norman, Shirley Verret, Paul Robeson”.

7. SINGERS

A. Composition of survey participants

The singers' survey received the largest response by a considerable margin with 117 responses drawn from every voice type, mainly sopranos (37%) followed by tenors, baritones and mezzos (all about 18%).

When asked about their ethnicity, 91 respondents self-identified. - 63 as White - English/Welsh/ Scottish/ Northern Irish/British and 17 as 'other White'; the remaining 11 respondents were spread over 8 categories with none containing more than two individuals. Of 87 who responded to a question about whether or not they had a disability, 4 responded yes (significantly below the percentage of people in the national population with a disability).

When asked if they thought the sector was sufficiently diverse, 60.4% said 'no with 14.3 saying 'yes' and 25% 'don't know'.

Respondents have worked across a full range of opera opportunities:

	Small-scale opera	Mid-scale opera	'Big 6' UK opera companies	Opera House-International
	40.91%	53.03%	43.94%	22.73%
Chorus / ensemble work	27	35	29	15
Named role - unpaid	25	2	3	3
Named role - paid / minor role	27	33	34	29
Named role - paid / cover role	20	30	43	22
Named role - paid / mid-large role	25	32	37	33
Named role - paid / title role	32	20	25	26

When asked what proportion of their income was earned from singing opera, 96 responded of whom:

- 28 earned 100% of their income from that source
- 19 earned about 75%
- 15 earned about 50%; and
- 34 earned under 25%

When asked how long they had been singing, professionally, the sample divided pretty evenly across three categories:

- 41 up to 5 years
- 41 between 5 and 15 years
- 35 over 15 years

This may be an indicator of the attrition level in the profession (i.e. a reduction in the workforce after 15 years) or of a disinclination amongst longer-serving singers to participate in this sort of exercise.

The educational characteristics of the sample confirmed the findings of the consultation: 80% had received undergraduate and 76% post-graduate musical training; 64% had private tuition and there was a substantial take-up of opportunities at NOS (26%), BYO (29%) and YAPs (34%).

91% of respondents study regularly under a vocal coach /singer teacher. The frequency of their sessions ranges from once a week or fortnight (the majority) to (rarely) once a quarter. The barriers to taking more advantage of facility are, unsurprisingly: distance (with coaches sometimes being abroad), money and time (with these last two representing the perennial artists' dilemma – “if you're working you have the money but you don't have the time and if you're not, vice versa”).

B. Experience of Training

When asked about the most useful training experiences in terms of their professional career (from a basket of 11 activities), respondents principally identified:

- Performance experience in staged productions (87%)
- Vocal technique (78%)
- One-to-one coaching (65%)
- Language coaching (52%)

The training elements regarded as least beneficial were:

- Ensemble coaching (15%)
- Singing in English (16%)
- Movement (22%)
- Preparation for the profession (24%)

These findings are consistent with the information that emerged from the consultation with perhaps the slight exception that language coaching, criticised by many in interviews, received a comparatively positive rating.

When asked what elements of training they would have wished to experience more, respondents noted two main areas:

i. Artistic

- Acting, stagecraft, movement
- More productions
- Performances with orchestras
- Languages (“Italian, French and German to GCSE standard”)
- A greater integration of artistic disciplines
- Outreach and community
- Voice and vocal technique which “should not be an afterthought”²
- Audition technique
- Age appropriate performance opportunities

ii. Professional Practice

- Forging better connections - between training and the profession and between music and business skills

² This is an outlier opinion, given that a large majority of consultees suggested that all other performance disciplines were ‘afterthoughts compared to the vocal dimension’

- A greater emphasis on the realities of an opera singer's career – “cease building dreams for those who are less talented (like myself)”
- Strengthening professional development routes
- Change thinking about age – more welcome to older starters
- Moving earlier from the conservatoire to the opera house
- Technology training

C. Diversity

When asked how the sector could become more diverse, most respondents focused on the potential of education (playing instruments and music appreciation) and outreach. Other suggestions included:

- More transparent interview/audition processes including screened auditioning (perhaps as a first round, after which the process is face-to-face)
- Audition panel accountability (with feedback from panels)
- Avoiding possible conflicts of interests on audition panels (including by employing panel rotation)
- Reviewing the sector's scouting system (Cf. Sport's Talent Development Initiatives) including the potential for unconscious biases
- Learning from other industries (e.g. Sports psychologists to help in tackling the mental side of the profession)
- Less focus on tall, beautiful and fit performers
- Helping under privileged children to learn about opera
- Creating works that explore the stories and experiences of more diverse demographic groups
- More means-based funding, to facilitate people from lower socio-economic backgrounds
- More women directors
- Decision makers being trained to take risks
- Casting directors being encouraged to have diversity in mind when choosing singers
- Affirmative action to actively employ non-white singers in diverse roles.

Four respondents were dismissive of the very idea of seeking to improve the diversity of the sector. One said: That's a stupid question. Opera is elitist in its professional integrity. You have to be good. If you are, hopefully, you'll work, no matter what age/sex/religion/sexuality etc”.

Appendix D: ‘Big Six’ Opera Companies’ Talent Development Programmes

This appendix summarises key data submitted by the six largest opera companies about their training activities. Other, smaller, companies also make contributions in this field, as referenced throughout the main report. Garsington is included at the end of this section as an example of that activity.

ENO

Harewood Artists programme

1. Number of people receiving training in opera performance per year:

In 2016/17, eight official participants are receiving training for their performances in the operas at ENO with three others associated with the programme whilst not ‘official’ Harewood Artists. A similar number (11) were trained in 2015/16 (all Harewood Artists).

2. Application / Selection method:

Invited by ENO’s Head of Casting having been heard in audition at ENO; or in performance in UK, or one of the colleges, or NOS, or BYO.

3. Training and development opportunities offered:

Coaching, mentoring and audition masterclass (not open to the public).

4. Development programme relationship with core performing activities:

The programme supports the singers for the roles the company is engaging them to perform, or for roles which the company is considering for them / repertoire the company thinks it might be important for the singer to explore.

Opera Works

1. Number of people receiving training in opera performance per year

The 2016/17 season expects to have between 12 and 14 on the course.

2. Application / Selection method:

Open audition. Everyone who applies is heard.

3. Training and development opportunities offered

Coaching, small classes, stage training and audition masterclasses followed by a small-scale performance at the end of the course.

4. Development programme relationship with core performing activities:

Members of the Opera Works Course have gone on to perform as extra choristers, covers and small roles as well as guidance for auditions elsewhere.

Glyndebourne

1. Number of people receiving training in opera performance per year:

29 choristers – through being given small roles and/or covering roles. Chorus numbers vary depending on the repertoire for each season.

2. Application / Selection method:

Through CV and sound file (all having been professionally trained at an established conservatoire/ or study with teacher of note). Successful applicants are then invited to audition. This autumn 10 days of auditions are held for between 300 - 350 singers. The majority of successful applicants are postgraduates who have trained at the major British, other European and, occasionally, American conservatories. The company will recruit 31 choristers to join 17 permanent seasonal choristers for the 2017 Festival.

3. Training and development opportunities:

In 2016, 5 Jerwood Young Artists development opportunities are being offered to young Glyndebourne choristers of exceptional talent and promise. In addition to their contractual commitments, these receive weekly, or bi-weekly, 90 minute coaching sessions for the duration of their contract (five and a half months). This includes vocal and language coaching (with professional coaches active in opera houses), one to one sessions, and two days of dramatic work.

4. Development programme relationship with core performing activities::

The activities described in points 2 and 3 are essential to Glyndebourne's core activity.

Opera North

ON does not have a formal young artist programme but has started having a couple of Associate Artists each year. 2016/17 will be the first official year of this, but it may not necessarily run in the same way each year depending on the repertoire. The Associate Artists in 16/17 are younger professionals who may have been out of education for a few years so it is not considered training “as such” – more as a continuation of nurturing relationships with singers that the company is already working with, or has known in recent years.

1. Number of people receiving training in opera performance per year:

In 2016/17, 3 Associate Artists for varying lengths of time.

2. Application / Selection method:

largely based around the repertoire & opportunities that are on offer and whether the company has identified an artist it would like to nurture who would fit the packages that might be offered.

3. Training and development opportunities:

Coaching with ON music staff, language coaches & conductors. Coaching also takes place throughout the season with most artists that are employed.

4. Development programme relationship with core performing activities:

Associate Artists in the 16/17 season will take on a variety of mainstage roles & covers alongside working with other departments within the company (e.g. Education projects). For example, the mezzo Associate Artist for 16/17 will cover Octavian, Hansel (including performing in 4 schools’ performances and in a small scale touring version) and the role of Lel in *Snowmaiden*. She will also perform in Viennese concerts with the ON orchestra and lunchtime concerts, patrons events and Education workshops.

Royal Opera House

Jette Parker Young Artists Programme

1. Number of people receiving training in opera performance per year:

Ten singers, all of whom are currently within the first five years of their career; also one or two répétiteur/conductors, one stage director.

2. Application / Selection method:

Annual auditions/interviews: application online via YAPTracker; initial selection by David Gowland/ David Syrus (singers, music staff), David Gowland/Amy Lane (directors). For singers, three rounds of auditions: one panel audition (David G, David S, senior singer), one audition combining one-on-one coaching with David Gowland with panel audition (as round I plus Peter Katona, Opera Director), final audition on stage for the best 12 (Round II panel, Antonio Pappano, John Fulljames). For music staff, two rounds of audition, first for David G/David S/member of Royal Opera music staff, then for the same plus Antonio Pappano and JF. For directors, interviews with David Gowland, Amy Lane, Opera Director or Associate Opera Director, then practical session for shortlisted candidates with all the above attending.

3. Training and development opportunities

For singers coaching in all opera disciplines, including music, sung and spoken language (including not only the main opera languages but anything from Hebrew to Serbian for specialist repertory), stagecraft, movement and dance, audition and recital practice, performance psychology, Alexander Technique, media skills, etc.; one-on-one working sessions with visiting senior artists (singers, conductors, directors); auditions for visiting agents, artistic directors, casting directors, etc.; public recitals, Development and Learning & Participation events at the ROH and elsewhere; annual Meet the Young Artists Week of recitals and workshops, annual chamber opera and annual showcase.

For music staff, same coaching offers as for singers (if relevant), coaching and playing for coaching of the singers, playing for auditions, Development and Learning & Participation events, mentoring by Antonio Pappano, Royal Opera music staff, David Gowland and visiting artists.

For directors, same coaching offers as for singers (if relevant), assisting main stage directors, directing annual chamber opera and summer showcase, leading workshops during Meet the Young Artists Week, for Development and Learning & Participation, mentoring by Opera Director, Associate Opera Director and Amy Lane (Head of Staff Directors)

4. Development programme relationship with core performing activities:

The development programme prepares the Young Artists for their performances on the main stage (or equivalent activities for music staff and director) as well as for their future career after leaving the Programme. The Programme aim is to provide a balance of formal coaching and learning through singing small roles and covering larger ones in, playing for or assisting the directors of Royal Opera productions alongside world-class singers, conductors and directors.

Scottish Opera

1. Number of people receiving training in opera performance per year:

c. 2-4 singers depending on repertoire and suitability. There is also a composer in residence (3 year term), wardrobe trainee and répétiteur as available.

2. Application / Selection method:

For Singers, the Music Director, Head of Music and Artists' Manager look at the overall picture of Scottish Opera's next programmed season and where they can seek to create a year-long programme for singers, including the roles and covers available between main scale and small scale operas and also education and outreach work. Once the company knows the type of voice it is looking for, it invites suitable candidates to come to sing. It does not advertise as "*we generally attend the music college performances alongside the NOS and hold a lot of general auditions throughout the year: so a general advertisement would lead to us re-meeting the people we have heard already that year. We do, however, audition all the final year RCS Opera School Students*".

The company also says that "*in an ideal world we would have 2 emerging artists from Scotland each year as we are keen to develop Scottish talent, although this is not always possible due the roles available. We don't advertise*".

3. Training and development opportunities:

Artistic: Coaching with Scottish Opera Staff; Singing Lessons and covering the costs (generally in London.); Language Coaching; Masterclasses – Singing, Movement, Directing, Make-Up, Fight.

Non-artistic: Finance Meeting and advice on Tax. Providing a marketing meeting – including photo shoot and head shots. The Artists' Manager manages the singers and looks after the individual requirements: some need help setting up auditions and finding an agent whilst others have an agent before they join the program. This varies depending on each programme and individual.

4. Development programme relationship with core performing activities:

All the singers' core performance activities, roles and covers are recorded along with Education and Outreach work, Recitals, Fundraising Events, Workshops, Masterclasses and Singing lessons across the year, as appropriate.

WNO

1. Number of people receiving training in opera performance per year:

Based on the year's schedule, "packages" are individually developed for young artists involving a mixture of singing and covering roles.

2. Application / Selection method:

WNO makes offers. There is not an application process as the repertoire determines the individual singer packages that might be available.

3. Training and development opportunities:

Coaching/mentoring and some recital opportunities. Normally the singers get a generous bursary which can be used for singing lessons/external coaching/buying scores/CDs and travelling (for Italian courses etc.).

4. Development programme relationship with core performing activities:

The singers have to be suitable to sing or cover roles.

Garsington

1. Number of people receiving training in opera performance per year:

c.40

2. Application / Selection method:

One 5-minute audition plus possible follow-up working session when a big cover is to be assigned.

3. Training and development opportunities:

Most training is on the job, but the Festival also offers private coaching and masterclasses from some of its solo singers: other events are also organised e.g. a chance to film an aria, 'q and a' sessions with experts on the business, and seminars on tax in the performing arts and vocal health.

4. Development programme relationship with core performing activities:

Almost all young artists are in the chorus, many also cover roles.

Appendix E: Changes in the ‘supply’ of opera

Ritterman estimates that in 1991/92, “just over” a thousand opera performances were given in the UK. This was an approximate figure, based on a selection of companies then working. As the current report stresses, the opera ecology had changed in the quarter century between Ritterman and now. Nevertheless, it is still instructive to try to compare her estimate with comparable activity today. This must however be accompanied by the caveat that the exact methodology of the Ritterman analysis is not known so any direct comparisons must be undertaken cautiously.

Of the twelve companies that make up the Ritterman database, one (Opera Factory) no longer operates in the UK. CBTO has evolved into Birmingham Opera Company, a site-specific participation-based organisation which cannot be directly compared with its predecessor. Pimlico Opera is now also a participation-based sister company to Grange Park Opera and, again, is not an appropriate comparator for the six larger-scale companies. Opera Northern Ireland has become NI Opera, currently presenting c. 7 performances per year. Buxton mounts three productions (a total of c. 14 performances) as part of a broader Festival programme and ETO remains a touring opera company on a different scale to the others in the sample. Given the changed — and disparate — nature of this group, it would seem that the most reliable measure of how supply has changed over the last quarter century is likely to be the performance numbers of the six major companies.

The following table analyses the main-stage performances by the Royal Opera company, ENO, Opera North, WNO, Scottish Opera and Glyndebourne (Festival and Tour);

Company	1991-92	Data source	2014-15	Data source
ENO	219	ACE Lyric Theatre Review 1994	130	Operabase 2016
Glyndebourne	117	Internal company review 1999	120	The company 2016
Opera North	107	ACE Opera Touring Review 2001	103*	The company 2016
Royal Opera House	149	ACE Lyric Theatre Review 1994	157	Operabase 2016
Scottish Opera	80	The company 2016	43	The company 2016
WNO	133	ACE Opera Touring Review 2001	85	The company 2016
TOTAL	805		638	

* of which 31 were of Carousel

This indicates that, at the main scale, there has been an overall decline in the number of large-scale performances by these companies as a group. This has, however, been partially mitigated by the summer opera festivals that have emerged since 1992. According to Operabase, set up in recent years to provide the most comprehensive record of opera in the UK, the four principal such providers — Garsington, Grange Park, Opera Holland Park and Longborough — offer c. 100 performances in the summer.

From the above, it would appear there has been a small net loss in the number of performances across this whole sample (c. 65-70). However, this conclusion carries the proviso that the scale and seasonality of the festival operas does not allow them to provide the sort of development and security that was historically offered by the major companies.