

Adaptation



A comparative study of the activities and impact of 13 regional producing theatres in England across five years – 2012/13 & 2017/18

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BROWNLEE
CONSULTING

CONTENTS

1 Introduction	2
2 Methodology.....	4
3 Findings	5
3.1 Audiences and Income	5
3.2 Focus on Diversity.....	7
3.3 Productions and Artistic Investment	10
3.4 Collaboration	12
3.5 Innovation and Resilience	14
3.6 Supporting Creative Talent.....	16
3.7 Supporting the Freelance Ecology	19
3.8 Local Leadership	20
3.9 Economic Impact.....	22
3.10 Children and Young People.....	24
3.11 The Cost of Cuts.....	27
4 AUTHOR'S CONCLUSIONS AND RECOMMENDATIONS	29

1 INTRODUCTION

The operating conditions for England's major producing theatres in the last five years have been extremely challenging. Arts Council England received major cuts to its Grant in Aid while Local Government funding for the arts has reduced disproportionately to overall funding. Grant funding has always been secondary to the importance of earned income from ticket sales. For a decade wages have not grown in line with inflation, putting pressure on households' discretionary spend on leisure activities.

This gloomy picture would suggest a period of retrenchment and decline for major regional arts organisations. Analysis of data supplied by 13 of England's major producing theatres (theatres funded principally to create their own productions rather than present touring shows) demonstrated that as a sector this was not the case. Collectively there is an impressive story of growth both in revenue and in cultural, economic, social and educational impact. For example, over the study period there was:

- 7% rise in ticket sales
- More than a doubling of both Disability-focused and BAME-focused programming
- 41% real terms increase in artistic expenditure
- 20% real terms increase in overall income
- Exponential growth in artists and companies supported in artist development programmes
- 99% increase in numbers participating in Learning, Education and Participatory activities

The 13 arts organisations in this study operate with widely varying business models in very different markets. What unites them is their commitment to producing their own work that allows them to represent and explore their communities and the issues that face them on stage. It makes their work 'relevant'. They are the nation's civic spaces that give the greatest opportunity for a plurality of voices to be heard.

This study clearly demonstrates the increasing leadership role being played by producing theatres beyond staging plays:

- **Centres for artist development** – there has been a huge increase in the number and range of companies and individuals benefiting from access to the stages and facilities of the theatres. Theatres themselves are taking a leadership role in pro-actively supporting the creative and professional development of a more diverse new generation of theatre makers.
- **Providers of creative learning** – as cuts and changes in national policy priorities have had an impact on the ability of children and young people to access high quality cultural experiences, theatres have responded not only by increasing the opportunities to access provision in their buildings but also have increased the amount of their direct delivery of arts education services in schools.
- **Partners in place making** – as local government has had to focus diminishing resources on increasing pressure in statutory services, theatres are playing a greater leadership role in helping to ensure all communities have access to quality cultural opportunities and that the cultural sector makes the maximum possible positive impact on the social, educational and economic development of our communities.
- **Cultural connectors** – producing theatres are the fulcrum of both local and national networks. Locally they work both formally and informally to support cultural organisations of all shapes and sizes and degrees of maturity. Nationally they work together to share learning and good practice. There is the potential to achieve more from this connected 'grid' by sharing innovation and building new partnerships across England.

The pressures of stark trading conditions have impacted on them in different ways. Aggregate and average statistics across the cohort do not illuminate the specific challenges facing individual theatres. While generally there is a broad range of opinion on the changes witnessed in the last five years and their positive or negative impact, there is agreement that new financial realities are having an impact on the ability to take risks and innovate. There was also universal agreement and alarm at the major changes witnessed at the scale and quality of engagement with publicly funded secondary education.

Postscript – June 2020

This report was completed in February 2020 and due to be published in March.

The impact of COVID-19 on the theatre sector has been profound and the future looks complex at best and potentially extremely bleak. One of the theatres in this study has ceased to trade. The ongoing and increasing existential threat to the other 12, and to the future of the entire sector, is starkly apparent.

In many ways it seems a strange time to be publishing a report that describes the changes during what felt at the time like an unprecedented time of challenge. I hope it will serve to do two things:

- i) Remind readers what an irreplaceable asset England has in its world-renowned regional producing theatres
- ii) Give hope to all. This is a sector that is remarkably creative and resilient. It has adapted not just to survive but to radically increase its impact before. With the right support, I have no doubt it can do so again.

David Brownlee, June 2020

2 METHODOLOGY

This study compares two years of trading and activity (2012/13 and 2017/18) for 13 theatres:

The participating theatres were:

- Birmingham REP
- Bristol Old Vic
- Chichester Festival Theatre
- Curve, Leicester
- Leeds Playhouse
- Liverpool Everyman and Playhouse
- Manchester Royal Exchange
- Northern Stage
- Nottingham Playhouse
- Nuffield Southampton Theatres
- Royal & Derngate, Northampton
- Sheffield Theatres
- Theatre Royal Plymouth

Whilst their scales and business models vary, these major regional theatres all are funded to produce a significant amount of their own productions rather than simply present work that is touring. They have worked as a national network on a variety of projects for more than 15 years.

Where possible, this study has analysed previously published data. The principal source is data provided by the participating organisations to Arts Council England (ACE) for their Annual Data Survey of National Portfolio Organisations. The data from 2012/13 was downloaded from ACE's website. As the 2017/18 dataset had yet to be published by ACE, participating theatres forwarded their individual submissions to be aggregated for the study.

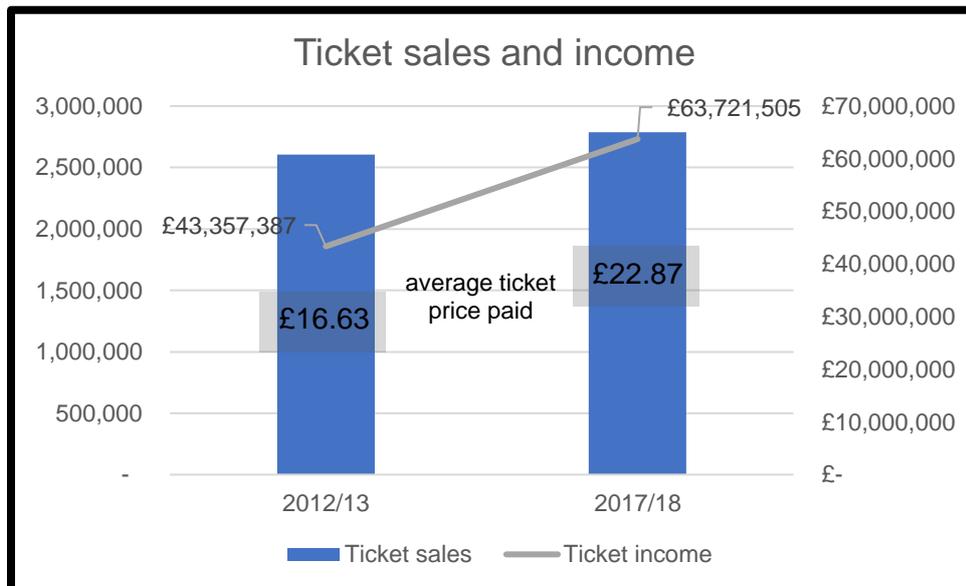
Participating theatres sanity checked individual comparative figures for 2012/13 and 2017/18 and (due to changes in business models and one-off events) some small adjustments were made to the baseline figures for specific theatres to allow like-for-like comparisons.

ACE data was supplemented by further primary quantitative and qualitative research in the form of an online survey completed by all participating theatres in December 2018. A follow-up survey, focusing on the impact of reduced public funding, was completed in February 2019.

The study was jointly commissioned by the 13 participating theatres. Independent analysis was undertaken by David Brownlee of Brownlee Consulting. Conclusions and recommendations by the author conclude the report.

3 FINDINGS

3.1 AUDIENCES AND INCOME



Source: Arts Council England Annual Data Survey of National Portfolio Organisations

Cumulatively the 13 theatres achieved growth in both audience numbers and the ticket prices they achieved.

Almost 2.8 million tickets were sold in 2017/18, an increase of 7% from 2012/13. Income generated by ticket sales rose by £20 million and the average price paid per ticket increased by more than £6. Adjusting for inflation (CPI), these increases are less dramatic: a rise of 31% in ticket revenues and 22% in average ticket price paid.

Average price paid should not be confused with the general affordability of tickets: six of the theatres reduced the standard cost of their lowest price tickets across the study period. On average the most affordable ticket price was £11.62 in 2017/18, a real term fall of 15% on what was offered in 2012/13.

One respondent summarised their strategy: *‘Thanks to a multi-faceted approach, we have increased box office income by 98% without reducing the range of ticket prices or the numbers of tickets available at low ticket prices.’*

There has also been purposeful change in business practice: *‘In response to a growing trend of very late booking from our audiences we have worked hard to introduce schemes to reward early booking and loyalty.’*

Audience Development initiatives, activities aimed at growing and diversifying audiences, have also been a priority area for the 13 theatres.

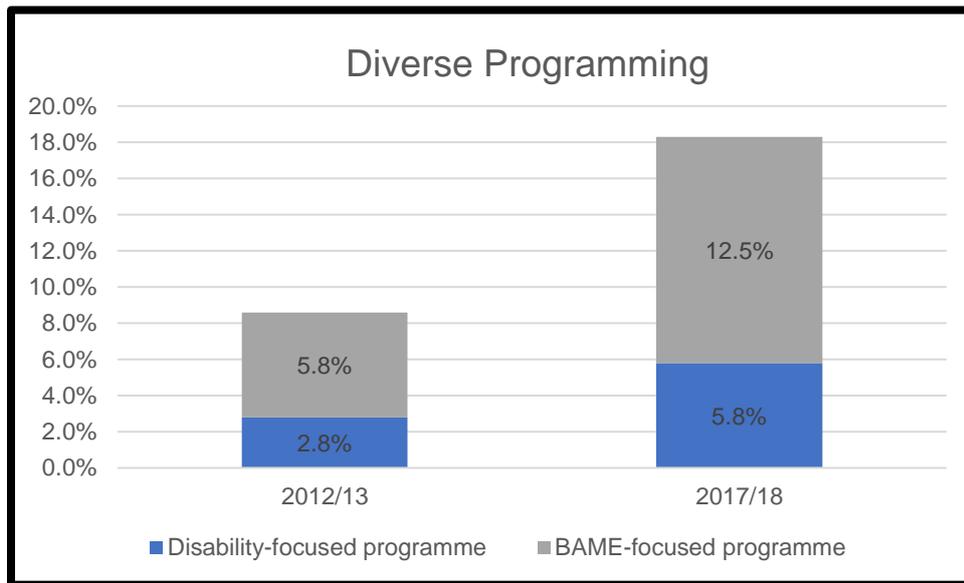
Chichester Festival Theatre have introduced a number of accessible pricing schemes during recent years including Prologue offering £5 tickets for 16-25 year olds, over 20,000 tickets at £10 in the Festival Theatre and family tickets giving half-price access to children under 16. ‘A New Everyman for Everyone’ used the campaign for re-building and re-opening of Liverpool’s Everyman as a catalyst for award-winning activity to increase and broaden audiences with a particular focus on young people through the Young Everyman Playhouse which now has over 5,000 members.

Sheffield Theatres also offers tickets for those under 26, called Live for 5, and in addition offers any one studying GCSE English or Drama a free ticket for them to see the produced work of the theatre.

Nottingham Playhouse has offered 'Pay What You Can' performances since 2015. Analysis has shown these reach a different audience, largely of local residents on low incomes in areas of higher unemployment in some of the most deprived wards in Europe. Average price paid for tickets is just £2.20. For productions designed for children, The Playhouse partners with the Literacy Trust and Dolly Parton Imagination Library to circulate free books and information on free library activities.

Manchester's Royal Exchange Theatre's 'You, The Audience' programme began a conversation with audiences, not rooted in the usual quantitative feedback questionnaires, but a creative, open dialogue. It led to the creation of their 'Audience Manifesto', made over two years by 2,150 audience members.

3.2 FOCUS ON DIVERSITY



Source: Arts Council England Annual Data Survey of National Portfolio Organisations

Cumulatively the 13 theatres reported more than a doubling of both Disability-focused and BAME-focused programming between 2012/13 and 2017/18.

Some major national initiatives (involving leadership from beyond the 13 theatres in this study) were cited as being fundamentally important to supporting the emergence of diverse talent:

'Being able to re-emerge as a Director is 100% thanks to the work of The REP and the Regional Theatre Young Directors Scheme Intro to Directing and Ramps on the Moon Directors Residency.' - Sam Holley-Horseman, Introduction to Directing Programme for D/deaf and Disabled Directors.

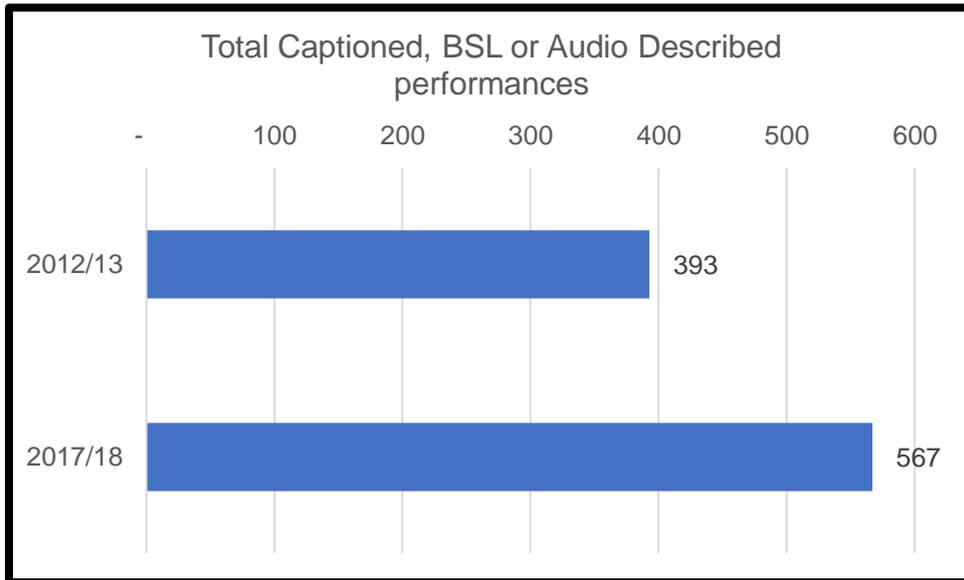
Local initiatives are also valued by both artists and audiences:

'Our relationship with Curve has enabled the notion that work which is 'Made in Leicester' is seen everywhere around the world' - Aakash Odedra Company

'We come here because we feel safe, you are so creative with the projects you come up with and she clearly loves it. I don't go to many other things with her as we don't feel as accepted' - Imagination Playground (Sheffield Theatres dementia friendly project) participant

'In recent years Bristol Old Vic has programmed shows of Black interest with such frequency and whilst simultaneously deepening its community engagement that audiences are returning to the theatre across the season. Moreover, what I have found most inspiring is the presence of non-traditional Black theatre goes in shows which whilst marked by a diversity of the ensemble are not produced by Black practitioners or reflect ostensible themes of Black interest.' - Dr Edson Burton (writer, historian, curator and performer)

'Having grown up nearby in Rwanda at the time of "Mary's Visitations" I watched "Our Lady Of Kibeho" at Royal & Derngate through different emotions. The show drove me through my forgotten memories of dormitory routines as a growing child to the way I first heard about the visitations on the only radio station we had at that time. For once, I have a feeling of recognising my life other than in genocide context. From my heart, thank you.' - Lili Reddrop



Source: Arts Council England Annual Data Survey of National Portfolio Organisations

There was a 44% increase in the number of performances made accessible through captioning, signing or audio description.

On and off stage, respondents reported seeing the creative and business benefits of making their work more diverse and reflective:

'Through our approach to Creative Case, we've added considerably to our programming resources: bringing in new voices to help us select the work we put on our stages.'

'The impact of a more diverse approach to quality programming is seen in the growth of attendance figures.'

'Between August '18 and July '19, all but one of our in-house produced shows were written wholly or partly by a woman, including two women of colour and one trans woman.'

'Our audiences over the last 5 years are younger.'

'The number of BAME actors on our stages rose from 10% in 2016/17 to 25% in 2017/18, and to 32% in 2018/19.'

Throughout the 13 theatres there are numerous and growing examples of inclusive engagement leading to artistic innovation. Programmes ranging from Leicester Curve's New Theatre Talent (creative opportunities for 18-25 year olds in the UK's most culturally diverse city) to Leeds Playhouse's Every Third Minute (a Festival of Theatre, Dementia and Hope) to Liverpool Everyman & Playhouse's work with the Confucius Institute (to reach the Chinese Community on its doorstep) to Chichester Festival Theatre's Creative Leaders of the Future (helping to break glass ceilings) to Theatre Royal Plymouth's Funky Llama Project (large scale inclusive music & performance events for adults with learning disabilities) highlight the range and depth of initiatives taking place around the country to ensure society is better reflected on stage, off stage and in auditoria.

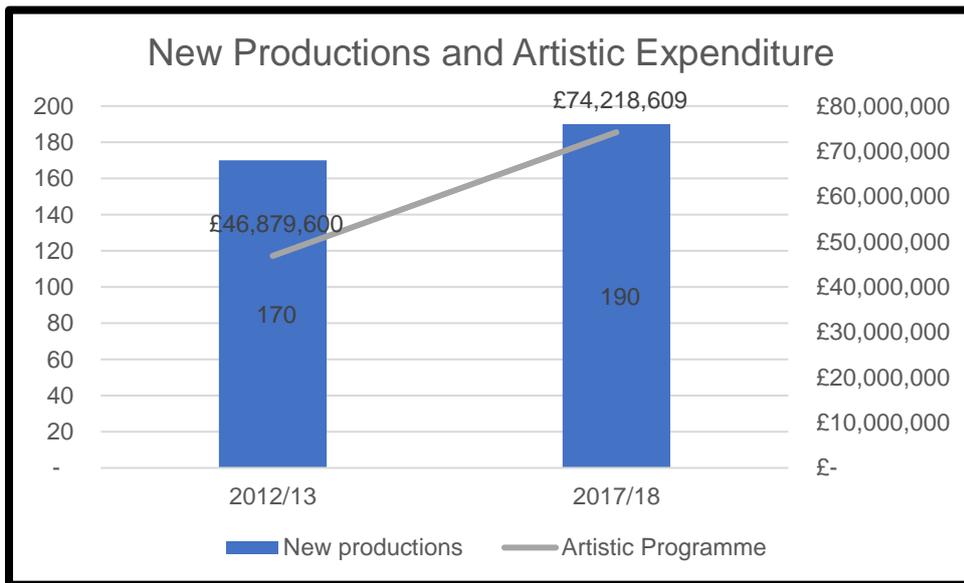
Nuffield Southampton Theatre's Out of the Shadows set out 'to reach a new generation and a wider range of people' with the real history behind The Shadow Factory. The project brought together a partnership between Hursley House, Solent Sky Aviation, Southampton City Archives and Southampton & District Transport Heritage Trust. It utilised pop-up theatre "interventions" to reach 1,875 students at 12 Southampton secondary schools and a cross sector partnership to help contemporary Southampton remember a neglected and proud part of its history.

Sheffield Theatres is a founding partner in Stage Sight, a national initiative to create an off-stage workforce that is more reflective of our society today, inclusive of ethnicity, class and disability. All their show programmes feature an article offering insight into backstage roles and they open technical rehearsals to enable people to understand more about the process of theatre making.

While the Boards and management teams in these 13 theatres are clearly taking steps to be more inclusive, this focus on diversity is not yet reflected in their own make-up. In 2012/13, six of the venues' Boards were entirely White. In 2017/18 three organisations still reported no BAME Board Members. Only two theatres stated they had a Disabled person serving on their Board in 2012/13. This figure had not risen by 2017/18.

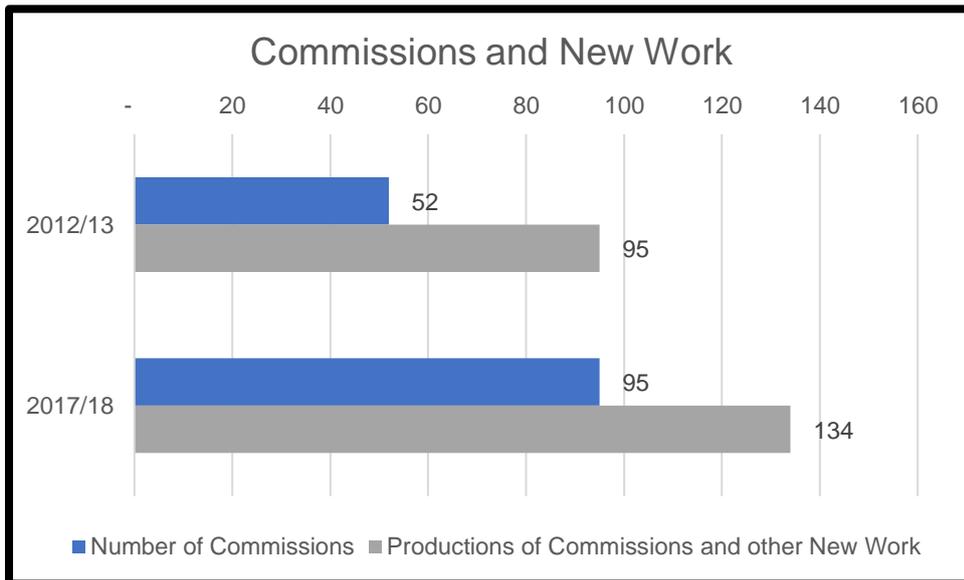
In 2012/13 only three organisations reported having BAME Managers and only two stated they had Disabled Managers. Progress had been made by 2017/18, with the number reporting BAME managers rising to ten and Disabled Managers rising to three. But across the 13 organisations in 2017/18 there were over 120 managers of whom approximately 94% were White and 97% non-Disabled.

3.3 PRODUCTIONS AND ARTISTIC INVESTMENT



Despite a cumulative reduction in public funding, both the number of new productions (up 14%) and spend on artistic activities (41% real term increase) have risen during the study period.

Artistic spend had risen from 52% of total expenditure in 2012/13 to 62% in 2017/18. Average production budgets have risen by 14% in real terms across the study period.



This increased investment has fuelled a growth in both new commissions and in the production of new work as a whole, with each theatre on average producing three more commissions or other new work in 2017/18 compared to 2012/13.

A major catalyst for this increased investment in theatre 'R&D' has been the introduction of Theatre Tax Relief (TTR). Respondents commented:

'As public funding steadily declines, TTR is now essential to our income planning'

'TTR has enabled an increase in permanent salaried roles in the production team that have been pivotal in our ability to pursue other opportunities to drive income and raise investment in projects that would otherwise be too great a risk.'

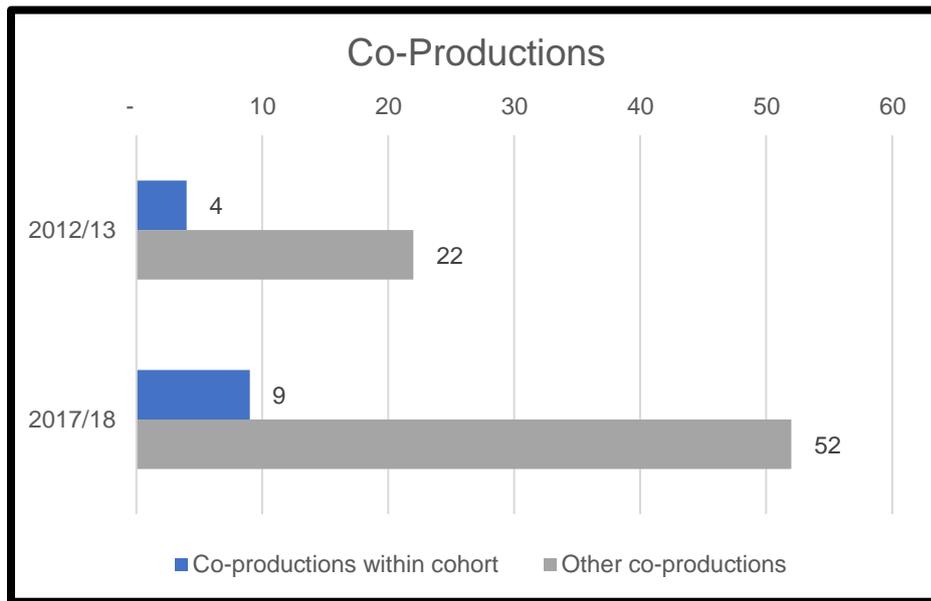
'TTR has allowed us to invest in practitioners and production values: 13% more on Production costs, 15% more on Actors and Musicians and 40% more on creative teams.'

'TTR has enabled us to programme some more adventurous work and to invest further in artists and talent development, as well as assisting in building up our reserves in order to ensure long-term financial sustainability.'

Theatre Tax Relief has facilitated new business practice and increased exports. An example is the NST (Nuffield Southampton Theatres) production of Fantastic Mr Fox which was mounted through an innovative hybrid model combining public subsidy with investor funding. Thanks to the security provided by TTR, the charity took the risk on its most ambitious tour ever, visiting all the UK's number 1 venues and travelling internationally to Abu Dhabi and Dubai. Its eventual success contributed over £1m in box office income.

Another example of international touring that would have been difficult to deliver without TTR was the Chichester Festival Theatre tour of The Judas Kiss to Toronto and New York. The benefits of TTR are not only cementing the global reputation of UK theatre, but also investing in the pipeline of new talent. For example in Manchester TTR is being used to fund the new Open Exchange programme which provides support for emerging artists by offering masterclasses, free rehearsal spaces and opportunities for collaboration with other artists. In Liverpool the Everyman & Playhouse has used TTR to fund a Community Catalyst post which has a dual listening focus externally; top down consultation and dialogue with senior strategic leads and a specific focus on 'grass roots up' listening with local communities.

3.4 COLLABORATION



Source: Brownlee Consulting Survey 2019

Respondents reported substantial increase in the number of co-productions both within and beyond the study group, including commercial collaborations. Overall the number of co-productions grew by 136% between 2012/13 and 2017/18. Regional producing theatres are seen as key facilitating partners, supporting the development of regional, national and international talent and product:

'For many years I've chosen to open my touring productions at the Theatre Royal Plymouth. The quality and scale of the facilities, support and enthusiasm of the staff and the wonderful reception we are always given by the audience in Plymouth – I just can't imagine opening any of my tours anywhere else' - Matthew Bourne, Artistic Director, New Adventures

'We have always loved working with the Exchange; co producing is built on professional mutual trust and respect, enabling us all to produce great work.' - Michael Buffong, Artistic Director, Talawa

'It's always been a terrific experience visiting Royal & Derngate Theatres with our touring productions. But working in the building on a new show was a revelation. Every department and every single member of the production staff, technical teams and stage management shared and matched our passion for the production. They all went, not just the extra mile, but many extra miles. Nothing was too much trouble. The midnight oil was burned on many occasions. And the show has benefited from a great home in which to be birthed, with huge attention to both the bigger picture and the finer detail.' - Mark Bentley, Producer.

'The chance to work with a world class theatre company was as inspiring as it was practically useful. We learnt skills, developed our craft and were given new ways to think about approaching devising. It was brilliant to have this opportunity and make those connections on our doorstep.' - Letter Room on working with Gecko at Northern Stage

'In order to make new work it's important to "take leaps in the dark". At this time of such uncertainty and anxiety it has become very difficult to do. There is a demand for tried and tested formula but we must all look beyond this to an exciting future (with hope). The wonderful Liverpool Everyman team celebrated and endlessly supported with care, enthusiasm and expertise our hunches and "flights of fancy" and I remain forever indebted to them as individuals and to their collective generosity.' - Mike Shepherd, Artistic Director, Kneehigh on working with the Liverpool Everyman & Playhouse

Co-productions help limited budgets go further, but sometimes at a cost. One respondent cited a show which was not viable without a complex partnership of four co-producers. Bristol Old Vic has more recently done a co-production with 9 partners. It is logistically challenging to look after the interests of all partners and proves significantly more unwieldy than a two-way co-production or a self-produced show.

Respondents highlighted the importance of strategic, long-term collaborative approaches for specific types of product and audiences. For example, Chichester Festival Theatre has been working with commercial producer Fiery Angel for almost a decade touring theatre aimed at 8 to 16-year olds. Their last tour visited 15 English venues. Bristol Old Vic has also started collaborating with Fiery Angel and transferred their 2017/18 production of *Touching The Void* into the West End, with an international tour looking likely.

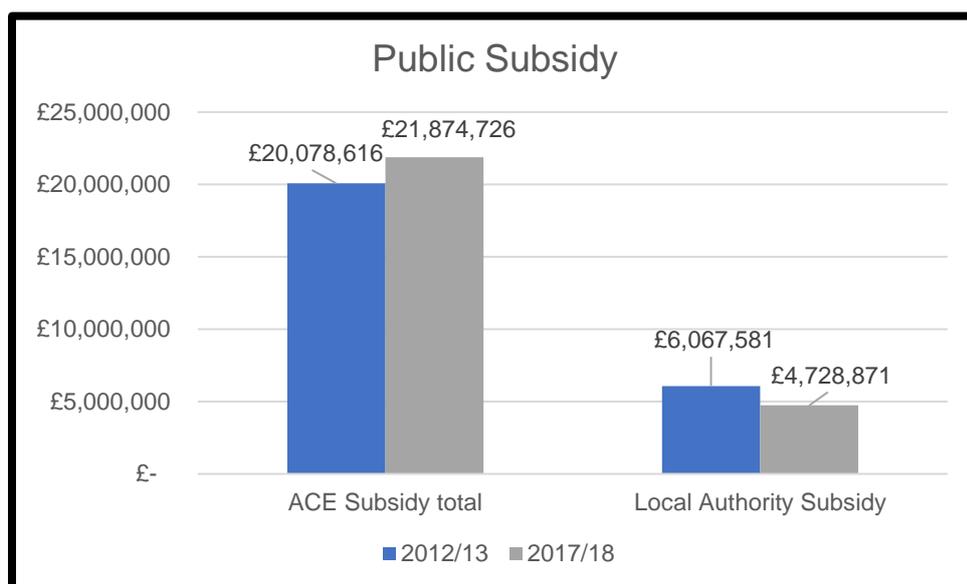
There have also been long-standing partnerships within Engagement and Learning. These include Playhouse, which has been operating for over 15 years with founding partners Theatre Royal Plymouth and York Theatre Royal. This is a partnership that has created an enormous body of short, large cast plays for children and young people aged 8-12 and worked with thousands of children from some of the most deprived parts of the country. It includes plays from some of the foremost playwrights of the last 20 years including Bryony Lavery, Julia Donaldson and Philip Ridley whilst also providing young playwrights with the opportunity of a first commission.

Liverpool Everyman & Playhouse & Liverpool Targeted Services for Young People (LTSYP) has worked in partnership since 2014 with significant impact in young people who have never experienced theatre or the arts. The partnership delivers intensive educational projects designed for what are deemed to be high risk young people on Detention and Training Orders (DTOs) and/or are subject to Intensive Supervision and Surveillance (ISS). The partnership has achieved a 100% positive progression for every young person who has committed to the programme and the partnership was recognised in 2017 when shortlisted as a finalist in the North West Cultural Education Awards.

Some theatres have prioritised working with non-venue-based partners. Sheffield Theatres has chosen to work more with co-producers from non-building-based companies such as Out of Joint, fingersmiths, English Touring Theatre, Headlong and Eclipse to produce work of a larger scale.

Although out of scope for this report, it is evident that as well as staging co-productions, regional producing theatres are increasingly presenting other touring theatre companies as well as other art forms. Business models and figures vary considerably, but one 'producing' theatre reported that 75% of its performances had been toured in. For the majority, presented product is secondary to their own work, but the dates, audiences and revenues they provide are vital to the companies they promote and in turn to the freelance ecology of actors, creatives and technicians contracted by touring companies.

3.5 INNOVATION AND RESILIENCE



Source: Arts Council England Annual Data Survey of National Portfolio Organisations

While total cumulative investment from Arts Council England has risen during the study period in cash terms, it has not kept pace with rising prices. Adjusting for inflation (CPI), national grants have fallen by 3%. Local Government funding has fallen by 33% in real terms.

Respondents reported new local partnerships and the development of new ways of working to adapt to the new financial realities, including closer engagement with local business:

'Curve is a major asset for Leicester with an international profile that makes us more attractive to new investors and in holding on to graduates who might be thinking about leaving after university' - Corin Crane, Former Director, Leicester and Leicestershire Enterprise Partnership

'Over the past 10 years of our partnership, working closely with the Playhouse has given us the opportunity to experience the value of culture to our business; from national PR exposure and bespoke hospitality to exclusive insights and opportunities for staff.' - Paddy Sturman, Banking & Finance Partner, Irwin Mitchell Leeds

Other theatres have taken a range of approaches to diversifying and growing sources of income.

In Birmingham The REP created a new wholly owned subsidiary (Unique Venues Birmingham) to develop new events & conference business across the whole of their building shared with the Library of Birmingham. After just 18 months it was on target to produce an annual net profit of c.£450k.

Bristol Old Vic's recent capital development was designed to provide new commercial opportunities, including a street-fronting Café Bar, and a dedicated multipurpose event space located within the refurbished Coopers' Hall. Food and drink is now a major attraction, developing Bristol Old Vic as a destination venue whether or not you are attending a show.

Alongside a thriving wedding business, the Everyman & Playhouse has utilised its traditionally non-theatre spaces for commercial activity including cabaret events, stand-up comedy and curated murder mystery evenings.

Northern Stage has successfully grown an income stream from skills training for businesses, originally responding to approaches and developing bespoke content. In 2015 Northern Stage formed a collaboration with local independent theatre company Mortal Fools to expand the offer beyond

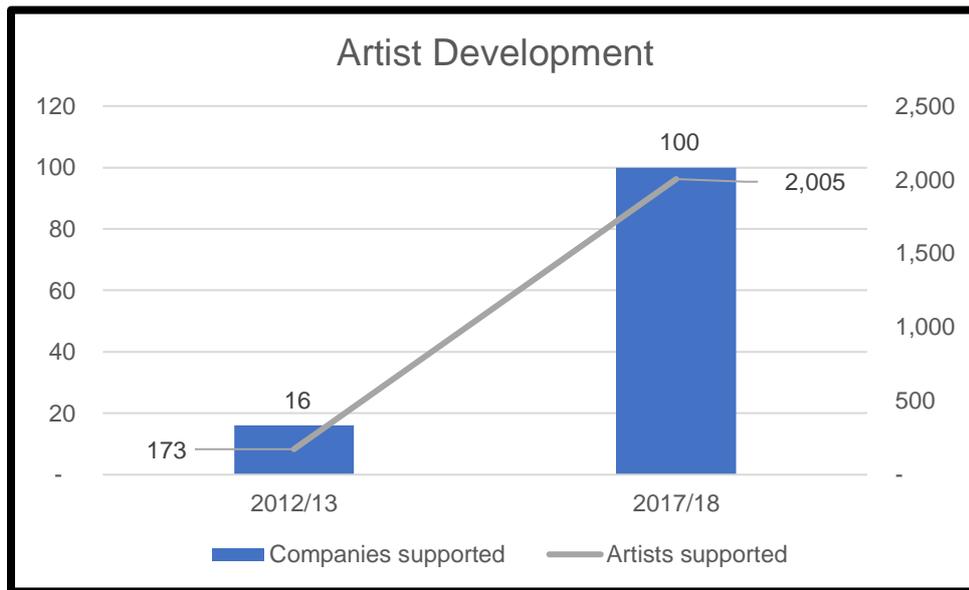
communication and presenting skills to incorporate leadership and resilience training. Through this partnership they have increase revenues from training by over 500%, creating a vital income stream for both Northern Stage and Mortal Fools.

The Charity that operates Northampton's Royal & Derngate (Northampton Theatres Trust) created a new legal entity (Northampton Arts Management Trust) to enable collaboration between arts organisations in Northampton and Corby, reducing costs and increasing impact. The shared service company provides shared management, development, marketing, HR, IT, Box office, programming and financial services.

Sheffield Theatres has become one of five arts organisations internationally to work with Bain's world-renowned business strategist Fred Reichheld on the integration of the Net Promoter Score system into customer and employee loyalty in the cultural sector.

These examples give a flavour of the diversity of approaches taken to react to and thrive in the new financial reality. Every theatre has a different story to tell about how it has looked deeply at its business model in the last five years and reinvented it in a unique and appropriate way to suit the organisation's mission, its physical and creative assets and its place.

3.6 SUPPORTING CREATIVE TALENT



Source: Brownlee Consulting Survey, 2019

Perhaps the most dramatic change highlighted in this study is the growth in the number of artists and companies being supported in development programmes between 2012/13 and 2017/18.

All participating theatres have numerous examples of artists and companies crediting their support as being fundamental to their development and advancement in the sector. These give a flavour:

'Working as the Trainee Director at Leeds Playhouse was pivotal in my development as a theatre director, writer and creative engagement officer. Leeds Playhouse is a joyous place to learn how to work.' – Matt Woodhead, Trainee Director at Leeds Playhouse in 2017, Artistic Director of Lung Theatre Company

'Having that all-important Nottingham Playhouse stamp of approval helped raise our profile and opened up many opportunities to us.' – Fifth Word

'Over the past 4 years, The Rep have really helped RKDC grow from the small, to the mid and onto the large scale, and with that our ambitions as a company. They are an outstanding organisation, putting new work at the heart of what they do and we've been very proud to have this association with them.' – Rosie Kay, Artistic Director Rosie Kay Dance Company

'If anything has been a game changer in the trajectory of 2Magpies, its being a Curve Breakthrough Company.' - 2Magpies Theatre Company

'Royal & Derngate were integral to the success of our first mid-scale show, Education, Education, Education; their support (organisationally, artistically and most crucially, financially) pushed us to find other co-producing partners and make it happen. At a time when it feels like theatres are scared to take risks, their investment in a young company allowed us to make our most sophisticated and critically successful piece of work to date. It introduced our work to new theatres and gave us a place on the mid-scale touring circuit. We are now making a second show in co-production with Royal & Derngate, this time partnering with Complicite.' - Hannah Smith, Producer, The Wardrobe Ensemble

There are some examples of new initiatives solely led and driven by a theatre. For example, Northern Stage's North programme began as an opportunity for six graduates, emerging artists or actors to form a new theatre company. Over a three-month paid placement, the North company would make work, receive training in new skills and take the next step in their career with the full support of a

regional producing theatre. Over the years, several companies have formed through North, including The Letter Room, Camisado Club and Kitchen Zoo. Actors trained on the programme have gone on to professional work or moved into directing. The programme has now evolved to provide an offer to a wider group of emerging artists through actor training, bespoke company development, and regional small-scale touring.

In Liverpool, a monthly Scratch Studio at the Everyman & Playhouse provides a forum for local artists to share work in progress and receive facilitated feedback from the audience. Alongside this activity, a Spare Room scheme allows local theatre makers to take advantage of rehearsal and meeting space for free on a week-by-week basis and Seed Commission allow early stage artists to take a piece of work to the next stage.

The majority of new programmes are the result of partnership working within and beyond the cultural sector.

In Plymouth, the Theatre Royal works with Plymouth University and Barbican Theatre Plymouth on Plymouth Fringe Festival, an important part of the emerging artist scene, allowing local theatre makers to access a state of the art facility to experiment and grow their practice. The festival has worked with a large number of companies many of whom have an extended relationship with TRP. Alumni include Narwhal Ensemble, Beyond Face, Jane Spurr and Chris White, who all subsequently became Lab Associates; a year-long paid attachment to TRP where artists and companies can make full use of the theatre's resource and expertise, culminating in a new work performed in the Drum.

Splash! is a new participatory arts programme held around the waterways of the East Midlands region, led by the world-renowned inclusive street performance company, Extraordinary Bodies, with partners including the Mighty Creatives, Lincoln Drill Hall, Deda, Nottingham Playhouse, the Royal & Derngate in Northampton and Leicester Curve. The project is led by D/deaf and disabled artists and will feature performances in a different outdoor space in each partner location.

Bristol Old Vic has been running Made in Bristol since 2009. This is a group of twelve young people aged 18-25 on some sort of gap year – be it having graduated from university, finished school or being in part time employment – who become resident at Bristol Old Vic for two days a week for one year. Made in Bristol is designed to give young theatre-makers an opportunity to train together, to become workshop leaders, facilitators and theatre makers, creating work that can reach out across Bristol and the South West, engaging with other local arts organisations as well as performing their own piece of work at the end of the course. The group get the opportunity to work with freelance directors and arts practitioners (previously Tom Morris, Melly Still, Sally Cookson, Mike Shepherd and Emma Rice) to participate in the wider Bristol arts scene through collaborations and touring work nationally.

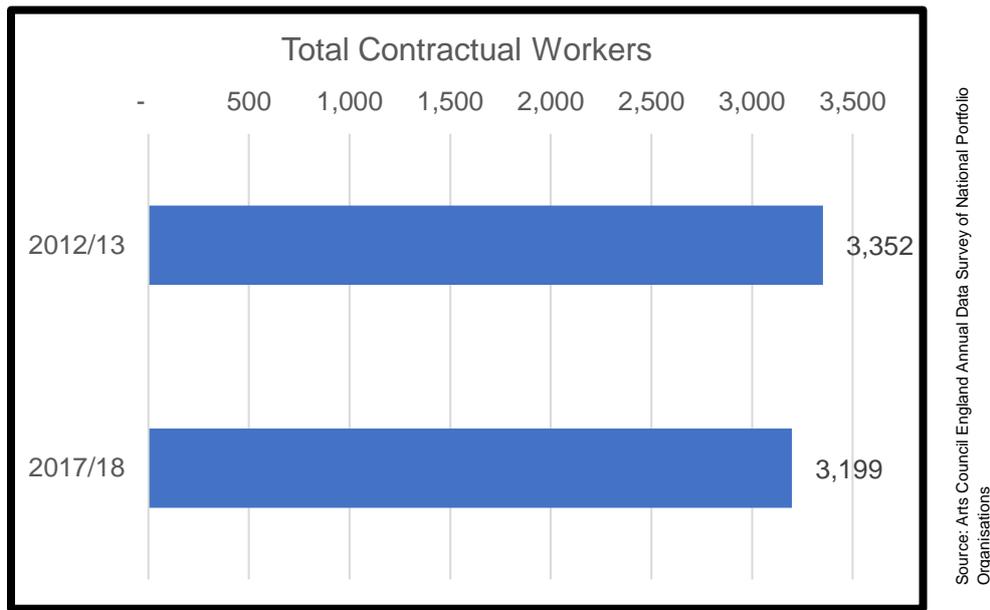
Nuffield Southampton Theatres are about to launch their fifth consecutive year of the Laboratory Associates programme, funded by trusts and foundations, which is the only programme of its sort in the country, offering a cohort of director, set designer, lighting designer, sound designer and producer a year-long attachment. During their tenure, they assist on various projects in the theatre and also collaborate on their own studio production.

In recognition of the vast talent that exists within the region, and the central role Nottingham Playhouse plays in the artistic ecology, it created its Artist Development programme Amplify which offers a range of opportunities and resources to local theatre makers. The programme has over 270 active members benefitting from the building's resources and expertise. Since 2018 Nottingham Playhouse has presented 29 new shows by local artists in its Amplify festivals of New Work, given over 150 hours of advice and mentoring in Artists One-on-Ones, and gifted over 200 hours of rehearsal space to local theatre makers.

In November 2019 Sheffield Theatres opened The Bank, a building with space dedicated to artists and the development of creative work. The Bank will become home to the Making Room programme, a network of over 900 local artists which is led by Sheffield Theatres, Third Angel, Theatre Deli and The Bare Project.

Venues North is a network of venues from across the North of England who are committed to supporting artists to create new work. Led by ARC Stockton, the network extends across the Greater North, with 44 venues including Northern Stage, Live Theatre, HOME, Sheffield Theatres, Manchester, Royal Exchange and Leeds Playhouse. The aim is to work together as venues to support new and emerging artists from the North to get their work more widely seen regionally, nationally and internationally. Venues North meets three times across the year to discuss issues and strategies around artist development. It also provides a platform for artists to pitch new pieces of work, at varying stages of development, providing an opportunity for venues to provide cross venue support to artists in the development of their work.

3.7 SUPPORTING THE FREELANCE ECOLOGY



The success of regional producing theatres relies on a national and international exchange of talent and ideas and they are huge supporters of and investors in the freelance sector.

On average each one of the 13 theatres engages with around 250 'contractual' workers every year. The small dip in contractual workers is explained by a change in reporting methodology (the 2012/13 approach was open to double counting) and one theatre contracting an unusually high number of freelancers in 2012/13. Most theatres in the study are working with more freelancers than they did in 2012/13.

Contractual workers perform all sorts of different roles in producing theatres. Actors are engaged on contracts as are the majority of creative teams on most productions. They are generally supported by freelance stage management teams, a high proportion of freelance technicians and freelance specialists from scenic artists to puppet makers. New work involves commissioning of writers. Contractual workers bring specialist skills beyond the stage: significant portions of learning and participation work is delivered by freelancers.

Most theatres in the study report that their expenditure on contractual staff exceeds their annual grant from Arts Council England. Investment in freelancers now amounts to an average 20% of turnover, an annual investment estimated to be more than £19 million.

This truly is an investment. Whilst the English pool of freelance theatrical talent could not survive without the support of regional producing theatres, the continued success of these venues would not be possible without drawing on the depth and range of talent of our world-leading independent creatives.

3.8 LOCAL LEADERSHIP

Ten of the 13 theatres are now playing a major role in a local cultural partnership (up from eight in 2012/13). These venues are taking a cultural leadership role in their communities, shaping policy and working in partnership with others in the cultural sector to provide opportunities for everyone to benefit from high quality culture.

The civic role of England's producing theatres continues to be recognised by community leaders:

'For almost 50 years, the Playhouse has been a cornerstone of culture in Leeds, bringing the city's communities together and generating huge cultural, social and economic benefits for the people of Leeds.' - Councillor Judith Blake, Leader, Leeds City Council

'The Festival Theatre runs a vibrant youth theatre of over 800 people of school age. Its workshops for young people and adults with special needs represent a remarkable achievement of social inclusion'. – The Bishop of Chichester's House of Lords Maiden Speech

'Many organisations talk about community involvement – Nottingham Playhouse puts that into practice and does it well. I'm proud to be associated with it.' - Councillor Steve Battlemuch, Nottingham City Council

'The Everyman and Playhouse have been part of the cultural fabric of Liverpool for generations and the city takes great pride in their status as iconic theatres. We are really proud of their ground-breaking work in pushing boundaries, engaging grassroots communities and developing current and future generations of artistic and creative talent through their repertory and youth theatres. It is absolutely certain that that they will remain at the heart of Liverpool's thriving cultural scene.' - Claire McColgan, the Director of Culture Liverpool

Cuts to Local Government have led to regional theatres increasingly working with other cultural organisations to fill the gaps. In Birmingham, aside from the city's Music Service, the REP is now one of the largest providers of arts education in Birmingham with a team of Education Officers working in 22 primary, secondary and special schools every week of the academic year engaging 1,867 children and young people.

Bristol Old Vic has partnerships running with Borderlands, with the main aim to increase refugee attendance at cultural events and Many Minds, where the collaboration sees work with individuals to engage with their creativity, improve confidence, self-esteem and build social skills and networks and work collaboratively to make high quality contemporary performance that promotes equality and combats stigma of mental ill-health.

2018 saw the culmination of Nuffield Southampton Theatre's three-year programme to establish lasting relationships with 7 of Southampton's most disengaged primary schools, coming from areas with up to 45% child poverty. Through this programme 1,359 early Key Stage 2 pupils and teachers enjoyed two contrasting theatre trips per year.

As well as supporting Sheffield Cultural Consortium, Sheffield Theatres has been active in setting up the Cultural Education Partnership in Sheffield which supports children's cultural education, and establishing the Culture Compact, an alliance of organisations across business, culture, retail and education with a mission to help create transformational change across the city.

In Leeds the Playhouse is playing a key role in demonstrating the social impact of culture on health and wellbeing at the other end of the age spectrum. Members of their Heydays weekly project for people aged 55+ speak eloquently about its value *'I find it's a lifeline... I've met up with old friends. I've made new friends. I'd be lost without it.'* Chichester Festival Theatre won a Positive Practise

Award from NHS Sussex Partnership Trust in recognition of their excellent collaboration and partnership-working with The Chichester Centre - a low secure in-patient mental health facility. CFT practitioners facilitate weekly workshops for groups at the centre which has demonstrated a unique experience for individuals to engage in a world they may not have experienced before, building confidence and a much-improved sense of social inclusion within the immediate area.

Liverpool Everyman & Playhouse's Creativity & Social Change team have been working in collaboration with Jewels Arts and the Diocese of Liverpool for a number of years with female street sex workers in their recovery through practical, spiritual and emotional support and to raise the profile of the need for joined up services to support the women including the promotion of a safe managed zone. This has included a number of residencies at the theatre and performances including A Glow in the Dark Nativity event marking International Day to End Violence Against Sex Workers.

As well as smarter working to combat reductions in resources, producing theatres are playing a major role in leading innovative and ambitious projects. Northern Stage is a member of Newcastle Gateshead Cultural Venues, a partnership of 10 building-based cultural producers working across arts, heritage and science communication. Together NGCV have established City of Dreams, a 10-year strategy to make culture part of the life of all children and young people in our city, developed in consultation with over 2000 young people and supported by over 50 cultural, civic, community and voluntary organisations. One of the first programmes to be launched through City of Dreams, Make Something Brilliant, has seen increased levels of participation in creative summer activity.

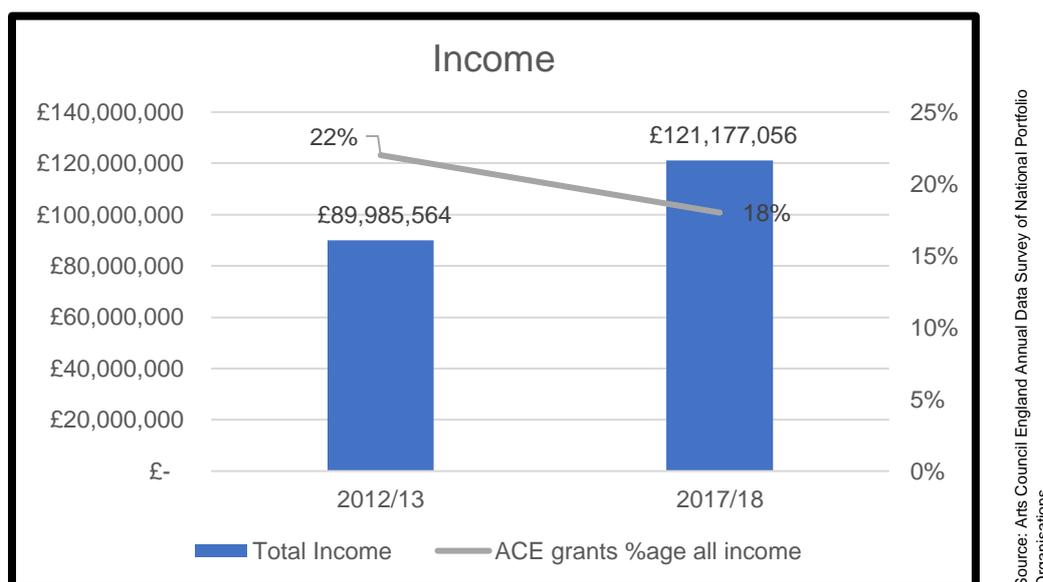
In Plymouth, the Theatre Royal's CEO championed the Mayflower 400 (M400) initiative as Plymouth's unique place-making and perception-changing opportunity in 2020. After establishing a citywide M400 leadership group across the public and private sectors in Plymouth, the theatre then facilitated the International Mayflower 400 Partnership of 11 English cities/towns, Leiden in Holland and Plymouth and Boston in Massachusetts. Thanks to the leadership shown in the City, then Prime Minister Theresa May requested Plymouth to lead the Mayflower 400 programme nationally and internationally and to date more than £35 million of new funding has been secured for tourism, heritage, arts and community infrastructure and legacy programmes.

Regional Producing Theatres offer unique places and practices to explore and address local and national issues. The 2017 Runnymede Report concluded that Bristol was the most segregated core city in the UK. Bristol Old Vic facilitated City Conversations were held in four different locations across the city and directly asked residents about their experiences of racial inequality and the impact that long-held racial divides are still having in the city. The initiative concluded with four pledges, direct calls-to-action, to address inequality in the workplace, representation at Board level, the creation of a Bristol Curriculum and a memorial to the city's involvement in the Transatlantic Slave Trade.

In Manchester the Royal Exchange Theatre responded to the Grenfell Tower disaster with 'Can You Hear Me From Up Here?', a performance and film were created by residents of four high rise tower blocks in Gorton and Hulme in south Manchester. The project gave voice to Manchester's tower block residents and worked with their housing provider to ensure their tenants voices could be heard.

Regional Producing Theatres are playing an increasingly important role in economic development through their Local Economic Partnerships (LEP). In Northampton the Royal & Derngate has chaired the Creative and Cultural group of their LEP (SEMLEP) and the theatre has been instrumental in supporting the development of a new Destination Management Organisation that has secured £243,000 over two years to deliver high level marketing campaigns to promote the county's visitor attractions and cultural assets that is expected to increase the value of the local visitor economy by 50% to £5 billion annually in 2023.

3.9 ECONOMIC IMPACT



Despite real term reductions in both national and local funding, aggregate income for the 13 theatres has risen by 20% in real terms (CPI) across the study period. ACE funding has declined to just 18% of turnover meaning that every £1 from ACE levers a further £4.54. ACE subsidy per ticket sale was £7.85 in 2017/18, a reduction of 9% in real terms from 2012/13.

Touring of productions produced by the 13 theatres has grown significantly during the study period: up 55% from 42 to 65 productions. This includes additional international touring.

The Snowman, created by The REP in 1993, has played to 9 million people over its 25-year life, toured to Japan, South Korea, Holland and Finland, had two separate videos/DVDs released commercially, generated £11 million income for The REP and had an economic impact on Birmingham estimated at £7.8 million.

Curve's production of Grease toured to Dubai. Curve's co-production of Sister Act The Musical was one of the most successful and best-selling touring productions of 2016/17. Made at Curve productions sold over 700,000 tickets on national and international tour in 2017/18.

In 2017/18 Leeds Playhouse toured productions across the UK and internationally attracting audiences of over 214,000 people. Strictly Ballroom, co-produced with Australia-based company Global Creatures, toured to Canada and attracted audiences of over 78,000 people before transferring to the West End in April 2018. Barber Shop Chronicles toured to Australia and New Zealand and attracted audiences of over 62,000 people.

Sheffield Theatres' Everybody's Talking About Jamie transferred to the West End for the start of a long, award-winning run at the Apollo Theatre. It then embarked on a National Tour before being made into a movie by Fox/Disney. Jamie will soon be followed in the West End by their production of the Life of Pi.

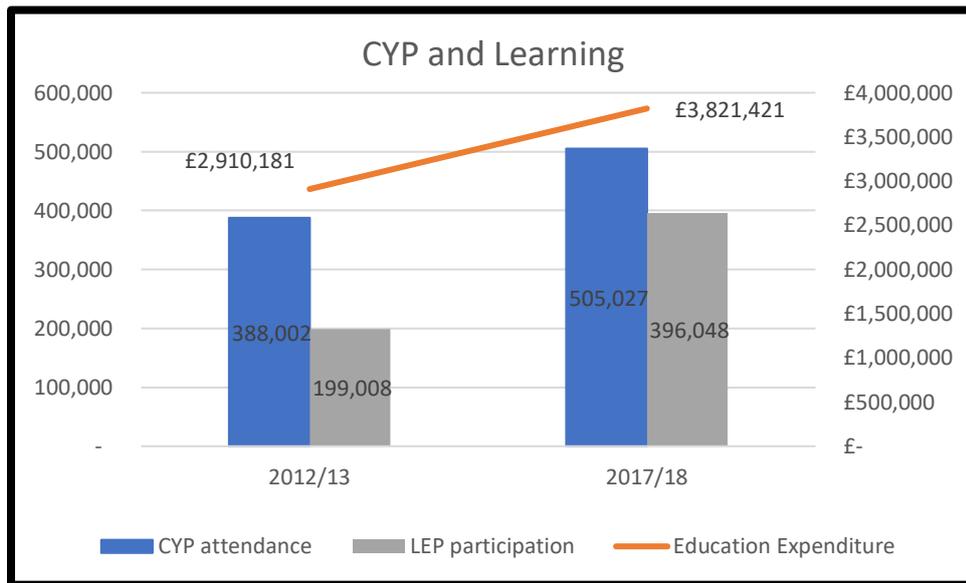
In 2019 Royal & Derngate transferred four of its Made in Northampton productions to the West End and a further six to major London theatres as well as touring productions to 118 venues nationwide and internationally, reaching over 340,000 audience members beyond Northampton.

Nottingham Playhouse's The Kite Runner has been out on four national tours and two West End runs while 1984 has completed four national tours, three West End transfers and a Broadway run.

Bristol Old Vic's *Touching The Void*, transferred to the West End at the end of 2019 after a successful run and national tour in 2018.

Chichester Festival Theatre has seen multiple recent productions transfer to the West End while other shows toured to the USA, Canada, Japan, South Africa, Australia & New Zealand. CFT commissions a regular Economic Impact study on the impact of theatre to Chichester District. The Economic Impact assessment carried out in 2014 showed that CFT's cultural activities had an important additional economic impact on the district, totalling £17.5 million. This has now increased to more than £20 million.

3.10 CHILDREN AND YOUNG PEOPLE



Source: Arts Council England Annual Data Survey of National Portfolio Organisations

Across the study period, known attendance at performances for children and young people has risen by 30%. Participation in learning and education activities has almost doubled. Despite local and national cuts to funding, aggregate spend across the 13 theatres on education activities has risen in real terms by 17%.

The impact of individual theatre’s work is recognised by experts and the participants themselves:

‘Our young people find in Leeds Playhouse a platform where they learn new skills, make friends, have fun but also a place where they have the opportunity to experience art and theatre that they would not otherwise be able to access.’ – The Children’s Society

‘The Young REP has been a massive building block in my life, without it I wouldn’t have become the confident young actor I am today. I have not only built the confidence I need to perform on a stage, but made many friends who will be friends for life and for this I am very grateful.’

‘I’m autistic and I struggle with feeling good about myself. The Hubs’ sessions help me feel happier and I’ve made lots of friends as a result of coming here.’

‘My time at the Young Company did a phenomenal amount to improve my confidence in my own voice and boost my aspirations as an artist.’

‘Traditional’ models of youth theatres are alive and well and adapting to contemporary needs.

Plymouth’s Youth Theatre, called the Young Company, has 600 members. All the young people involved have the opportunity to participate in a range of workshops including dance, theatre and design. There is a group specifically for children and young people who are deaf/disabled, called Create. Members of the Young Company have the opportunity to participate in three professionally produced plays each year, including a young company commission, a piece of writing where young people drive the process.

The Royal Exchange’s Young Company is an award-winning resident company for young artists aged 14-25 and has been designed to develop professional skills across the theatre. Each year they train 110 individuals who specialise as Creatives, Digital Content Creators, Performers, Technicians and Writers. Their aim is to proactively tackle some of the areas of underrepresentation in the industry and

to provide opportunities to young people who would otherwise not have access to professional training. The make-up of the Young Company is representative of all 10 districts of Greater Manchester including those from low socio-economic backgrounds plus over a quarter of the current cohort are from BAME backgrounds and 6% have a disability.

From its 800-strong youth theatre membership, Chichester Festival Theatre provides a unique opportunity for children and young people to perform the annual Christmas production in its 1300-seat main house. This production is managed, produced and marketed with the same level of investment, rigour and high production values as all CFT productions. . In addition, the Youth Theatre runs 52 workshop sessions each week in nine satellite groups across the county including sessions for the disabled and unrepresented groups. CFT also offers 80 bursaries each year for those from economically-deprived areas.

Liverpool's Young Everyman & Playhouse programme (YEP) is much more than a youth theatre: it is a ground-breaking, multi-disciplinary talent development programme preparing young people for the future world of work. Since its launch, YEP has provided opportunities for young people aged 14-25 from some of the most socially and economically deprived wards in the UK, developing opportunities for meaningful engagement, growth, skills and employability. A further 5,000 young people are general members of the scheme.

Learning and education work in producing theatres is evolving, broadening and increasing impact. Bristol Old Vic's FutureQuest programme works with students in Years 9 to 13 from schools and colleges across Bristol to provide them with knowledge of, and develop skills important for, university. Participants have the opportunity to visit a variety of universities, take part in subject specific events, improve their speaking and listening skills and have a mentor to help them with their studies and future choices.

Leeds Playhouse has had a designated space for young people for 10 years now, providing young people across the city and beyond with a wide range of activities including drop in, youth theatre, qualifications and employment, outreach, work with young carers and refugees and asylum seekers, and work with young people with learning disabilities.

Royal & Derngate worked with Scottish Opera to produce an opera for 12 – 24 month olds, Fox-Tot!, an immersive experience where children could wander into the performance space during the show and interact with the performers.

There is an increasing amount of work being commissioned for younger children. Nottingham Playhouse partnered with Nottinghamshire County Library Service to create Story Explorers, a playful and interactive storytelling adventure for children aged two to five that toured to 12 libraries around the county. Leeds Playhouse's Playing Me project supports preschool children from the refugee community, supported by the Rag Doll Foundation.

Since its launch in 2012 Young Everyman Playhouse (YEP) has provided opportunities for young people aged 14-25, no matter their circumstances. Across six different strands, YEP encourages the young people to see theatre in a new light by asking them to create many exciting experiences for different audiences. As well as £5 tickets there are six dedicated strands: Actors, Directors, Marketers, Producers, Technicians and Writers. Previous Young Everyman Playhouse members are now working in the industry, applying to drama schools, bidding for funding for their own projects, pressing for work experience among our team and joining with other groups locally and nationally to programme and create work.

Increasingly theatres can demonstrate not only outputs but also outcomes for individuals from their engagement and support of children and young people.

One such individual is A. A was referred to Northern Stage's Young Company via a freelance director working on a residency with B-tech students at a local college. He is 19 years old, has Autism Spectrum Disorder (ASD), partial sight and struggles with confidence in large groups of people and in developing relationships with his peers, strangers or new people. Since joining Young Company, A has blossomed – teching and cueing the ambitious performance event Where Do We Stand at Northern Stage, and subsequently co-leading the remount and tour of this technically complex and involved show to Birmingham Rep in August 2018. Subsequently, A was responsible for the technical management of the Where Do We Stand installation for Great Exhibition of the North – liaising with staff at Northern Stage, creative peers in Young Company and members of the general public attending the installation. A has now talked about how much he has developed as a young person, and it is apparent to see. He has challenged himself to develop his skills as a performer. In his own words, he has always wanted to explore performance, but simply didn't have the confidence or self-belief.

3.11 THE COST OF CUTS

This study paints a picture of 13 diverse theatres that have collectively proved remarkably resilient, despite the removal of significant amounts of public subsidy, particularly local government funding. Each theatre has responded to challenges in different ways. This plurality of approaches is crucial: the business model of each organisation is different, as is the market in which they are operating.

In this study we have explored the health and impact of a diverse basket of fruit. Within that basket it is unhelpful to try to compare apples to oranges. It is not surprising that each theatre has a different view on what has been the impact of cuts, both positive and negative, and the ability to adapt to the new financial realities is different for each organisation.

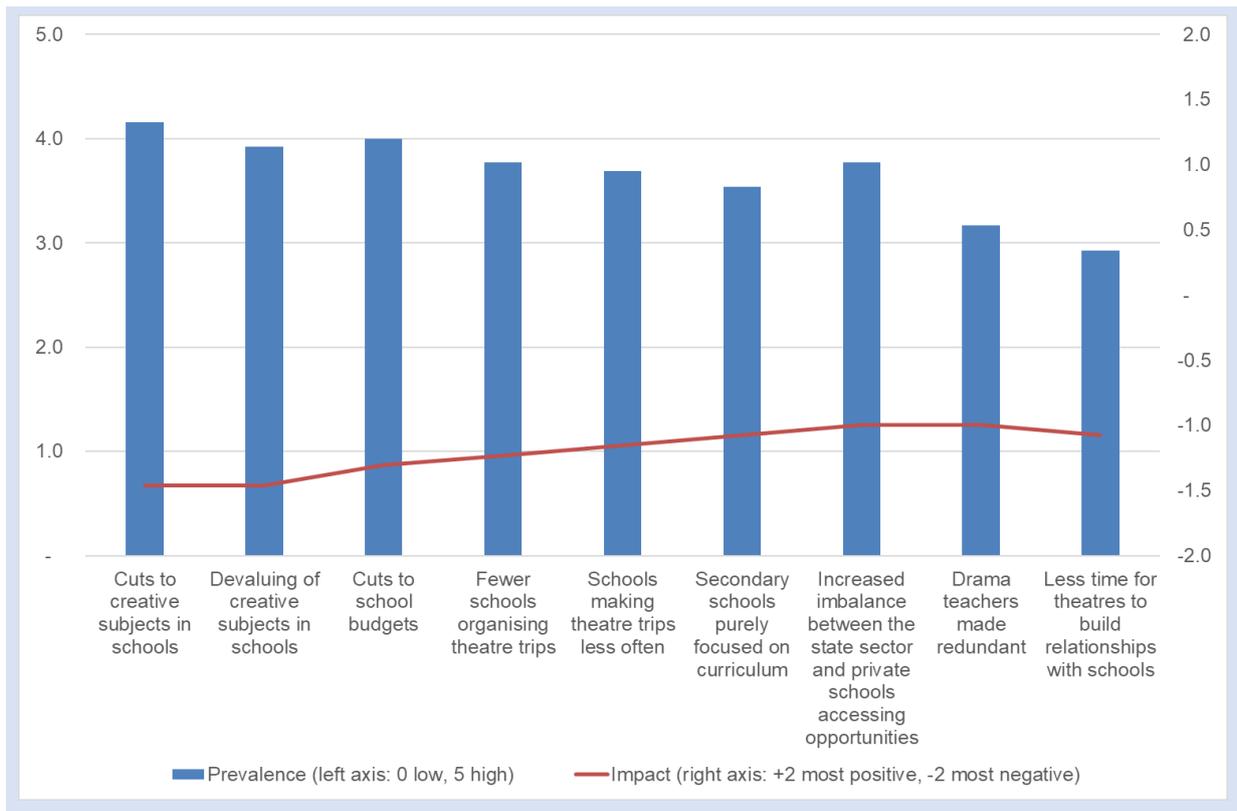
At least one respondent believed that they had witnessed each of the following changes in the sector and that they had had a negative impact:

- Increased reliance on co-productions
- Prioritised co-productions with commercial partners
- Increased the number of weeks of commercial touring shows taken
- Decreased the number of new plays we commission and/or produce
- Increased ticket prices
- Reduced the number of concessionary tickets available
- Introduced/increased ticket booking transaction charges
- Limited artist development work to that which solely can be funded from other sources (trust/foundations, ACE project grants etc)
- Forced use of auditoria and public spaces to be available for commercial activities (e.g. events/conferences) whenever possible
- Reduced total number of permanently employed staff
- Increased reliance on short-term/freelance assistance
- Reduced work with schools
- Increased resources focused on fundraising
- Reduced ability to take risk in programming generally
- Reduced ability to take risk around 'staples' such as Panto/Christmas show
- Increased emphasis on programming recognisable titles, done in a traditional way
- Increased reliance on adaptations (book and films)
- Increased emphasis on featuring a 'named' actor
- Reduction in non-artistic overheads (e.g. reducing rented office space)
- Increased proportion of productions being directed in-house
- Fewer main stage opportunities for emerging creatives
- Increased reliance on local actors

It should be noted that while some respondents believed the changes they were witnessing were negative for the sector, others saw the same change but thought it was positive. For example, most respondents believed that an increased reliance on local actors was a good thing.

One area of greatest commonality in views was around risk. Ten respondents stated that they had witnessed a reduction in 'the ability to take risk in programming generally' and seven of those perceived that this had had a negative impact.

The other area of commonality was working with schools, specifically reduced opportunities for young people of secondary school age to engage with their local producing theatres through state education. Respondents were asked nine questions around specific changes they had witnessed in their work with schools. They were universally found to be prevalent and negative.



Source: Brownlee Consulting Survey, 2019

4 AUTHOR'S CONCLUSIONS AND RECOMMENDATIONS

Fifty years ago regional producing theatres were buildings where talented artists created quality work for local audiences. In 2020 they are so much more.

What happens on stage remains of vital importance to our producing theatres. There is a renewed commitment to producing their own work that allows them to represent and explore their communities and the issues that face them on stage. There is also an increased emphasis on ensuring a plurality of voices can be heard in what are arguably our most accessible civic spaces.

From this crucial core purpose, there are a myriad of additional roles now being played by regional producing theatres that help them to deliver their visions and missions. They are a partner and a leader in their broader artistic communities. They are major civic organisations working to improve places and lives. They are supporters and facilitators of talented artists and companies. They are major providers of education services in schools. They are increasingly providers of services to an aging population. They change lives and they make lives worth living.

This study has tracked changes over a five-year period during a decade of unprecedented cuts in public spending. Rather than retrenching, the theatres in this study have responded ambitiously and innovatively to the financial challenges they have faced. Each organisation has different challenges and opportunities in theatres of different sizes and different eras with different catchments and demographics. All have worked to re-invent their business models to increase their impact and keep them sustainable in turbulent times.

The aggregated data in this study shows that collectively they have been successful: larger audiences, greater earned income, higher levels of participation by young people and more work on stage that reflects the diversity of our 21st century society. But each theatre has a different story to tell of the challenges they have faced in recent years and how they have had to adapt.

This has not been a review of all producing theatres in England: it was commissioned by and explores the data and stories of 13 of the best funded and resourced theatres in the England. It seems likely that outside the study group the experience of change and regeneration in recent years will be at least as diverse as that witnessed by this cohort. This report highlights instances of on-going support and collaboration between those most supported theatres and other theatres in their regions. This should be the norm throughout the country.

This report includes an extensive list of what are perceived by one or more theatres as an impact of austerity. I would like to highlight four of these.

i) Risk

It is unsurprising but still deeply concerning that theatres in this study universally report taking a more risk adverse approach to producing. Regional producing theatres are, in part, the R&D arm of the industry. For the health of the sector, exploration and innovation needs to be taking place in all areas of artistic and administrative work in regional producing theatres, and in all spaces, including on main stages. If we are to remain universally acknowledged as world leaders in theatre, new ways must be found to finance innovation.

ii) Children & Young People

The artistic and executive leaders polled for this report universally believe that there are increasing barriers to young people in state education engaging with high quality theatre through their schools. There has certainly been a long-term decline drop in arts subjects being studied at GCSE. This creates long-term threats for one of this nation's few world-leading industries. The talent pipeline for the industry has its source in mainstream education. Historically there has been a gap in the amount

of support for arts education between the state and private education sectors. This gap appears to be wider than ever and growing. At the same time, we know one of the determinants of attending the arts as an adult is having done so as a child. With less access to theatre in state schools, not only are we narrowing the talent pool, we're also potentially shrinking the future audience.

Whilst acknowledging these issues for the future of the industry, the main concern for most theatre leaders would be one of human rights: every child should have the opportunity to access high quality cultural experiences. This has led to some theatres becoming significant providers of arts education in schools. In the context of continued financial and policy pressures on the education sector, this activity should be applauded, and more should be done to coordinate and properly fund a national approach to cultural education and entitlement.

iii) Diversity in Workforce and Governance

It is to be hoped that greater diversity on stage will lead to greater diversity in the workforce and the leadership of theatres. There is certainly much more to be done to ensure managers and Boards reflect the make-up of the population. While diversity for individual theatres means very different things due to differences in local demographics, collectively to have BAME managers only account for around 6% of all management roles across the 13 is not enough. Only two theatres stating they have a Disabled person contributing to their Governance is a huge missed opportunity to benefit from the skills and experiences of Disabled artists and audiences and Disabled people with specialist skills. It also appears that there are barriers to entry into the sector for working class people. As access to data and understanding grows, theatres should work individually and collectively to increase the socio-economic diversity of both workforce and governance.

iv) Sufficient Funding to Produce

While there is no dispute that there has been a substantial increase in co-productions, there were mixed views from the leaders of the participating theatres on the whether the rise in number is a good or bad thing. It seems audiences don't mind: attendance is rising. Investment in production has gone up over the same period that the numbers of co-productions has risen, suggesting that this cannot merely be a cost-cutting exercise.

Before rushing to embrace a model of ever-increasing national co-productions, it is important to reflect on the defining and unique role of producing theatres: producing work, alone or with partners, that allows them to represent and explore their communities and the issues they face. Productions with multiple producers located across the country can dilute the 'relevance' to any one of those local communities. Sufficient funding to allow a high proportion of work produced by theatres to be created for, by and with the communities they serve is essential.

Despite funding pressures, this network of regional producing theatres is doing more than ever to make a difference in the artistic and broader communities they serve. The welcome introduction of Theatre Tax Relief has demonstrated how comparatively small amounts of extra investment can be multiplied into increased capacity, activity and impact. Individually and collectively, these arts organisations appear extremely well-placed to deliver significant cultural, social, educational and economic returns on further investment.

February 2020

COVID-19 Addendum

Re-reading these conclusions and recommendations three months after they were written and two months since all the 13 theatres shut their doors for an indefinite period is like stepping back into a different world. During the past decade theatres faced unprecedented challenges. Largely they tackled these boldly and creatively, delivering more impact and value for their communities than ever before.

In our 'new world' it's so far impossible to grasp and address the challenges. Most theatres are sensibly trying to plan for a number of scenarios, but as I write no-one has a clue as to when and how theatres will re-open. For the 'can-do' leadership of the sector, the current slippery uncertainty is deeply frustrating.

But this time will pass. As we begin to get a clear picture of the 'new normal' I have no doubt that this sector and its leadership will do all it can once again to adapt and thrive.

It must do so. The sustainability of the sector nationally and the wellbeing of communities locally is at the heart of the work of regional producing theatres. From opportunities for local children and young people to nurturing the emerging national talent in the sector to the support of freelancers and touring companies, we will need regional producing theatres post-COVID-19 more than ever.

I cannot close without highlighting a bitter irony. Over the last decade the UK (and particularly England) has seen massive cuts in grants to theatres. This has not been the case in the rest of Europe. Recent conversations with friends and colleagues on the continent have not reflected the existential concerns I hear on a daily basis from leaders in the UK. And why would they, when most of their income comes in the form of large grants from national, regional and local governments and box office income is at most secondary? It is because our theatre sector has been consistently creative and entrepreneurial that it now finds itself so vulnerable.

When the theatre sector in England asks for significant support to sustain it through the crisis, the Government needs to be reminded not only of the amazing outcomes the sector delivers for communities and the nation as a whole but also the incredible value returned for every pound invested in normal times.

June 2020

The Author

David Brownlee has worked in the arts for three decades. As well as leadership roles at UK Theatre, Audiences UK and the Family Arts Campaign, he has worked as a researcher, data analyst and writer for organisations including Arts Council England, The Stage and the BBC. He has co-authored two editions of the British Theatre Repertoire Report and had been the lead researcher and writer for the National Campaign for the Arts' Arts Index for the last ten years.

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