theatre assessment 2009

ARTS COUNCIL ENGLAND

‘I have seen theatre change more in the last five years than in the previous 30 years…those changes have been about where we make theatre, who we make theatre for, the form that it takes, the tools that you use, and I think that theatre makers are exploring all those things in a very, very exciting way that previously has just never happened. There is now no going back.’

– Lyn Gardner, April 2009

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Overview

Arts Council England embarked on a Theatre Assessment to gather an up-to-date picture of theatre in England. In particular, we looked to identify changes that had occurred in the theatre sector and its environment since the Theatre Review of 2001 and the additional £25 million that we invested in theatre organisations from 2003 onwards.

The research for the assessment was carried out during the summer and autumn of 2008, just as the credit crunch was beginning. The mood was therefore infected by fear of what was to come, even though the period under review was one of growth.

We commissioned factual analysis and a survey of perceptions about the current state of theatre in England. The findings of both can be found in the appendix.

The external context in which theatres and theatre artists operate as well as theatre practice changed substantially between 2002/3 and 2006/7. Local and national demographics were constantly changing, inflation was low, local authority budgets were squeezed and health and safety regulations proliferated. Reality TV fuelled a celebrity culture and there was new equality legislation.

Most Arts Council-funded theatre organisations benefited from a substantial increase in their grants, our touring department ceased to operate, National Lottery funding supported the recovery and stabilisation of organisations facing difficulty and Grants for the arts gave funding to many for the first time.

The theatre sector was changing too. Recent graduates from the burgeoning number of performing arts courses were developing work across artforms in non-theatre spaces using modern technology, work for children and young people was becoming more mainstream, diverse work was slowly becoming a more regular feature of theatre programmes, and physical theatre was increasingly featured in the programmes of our major theatres. A new generation of artistic directors was in charge of the regional producing theatres and they were beginning to rethink the role of a theatre within its community and the theatre profession.

The Arts Council had come under criticism from the sector, particularly in February 2008, as the portfolio review conducted at that time was thought to lack strategic overview. The 'soft touch' regime, intended to give arts organisations more autonomy, had in some cases resulted in a sense of remoteness. It was therefore important to hear the views of as many people involved in English theatre as possible so they could tell us what they felt the issues were. The resulting conversations are recorded in the Findings.

Unsurprisingly, given the breadth of our theatre portfolio, we discovered that consensus was rare and on many occasions the facts do not support the perceptions. We included commercial and unfunded theatre organisations in our scope, as well as fellow funders, but even within our traditional catchment we found different views, ways of working and understandings.

However, we believe that there are some emerging themes that need attention – our attention and that of our stakeholders and the theatre industry:

Risk and innovation

We will make sure our funding and processes challenge arts organisations to even greater ambition, whether they are working in traditional ways or discovering new ones. Greater exposure to international work and international influence is part of this, as is supporting the development of new ways of working and reaching people made possible through digital technology.

Touring

The development of a new approach to touring is a major priority to ensure that audiences countrywide have access to high quality work, touring companies and venues are able to plan ahead strategically and our investment is applied where it has most impact.

Audiences

We need to build on the progress that has been made in engaging with more diverse audiences and concentrate on increasing the percentage of the population that participates in theatre. We will work with our partners at a national and regional level to promote theatre-going and encourage our funded organisations to focus on appropriate audience development and participation schemes, including those for children and young people.

Talent development

Ensuring that talented people and companies are able to achieve the training and development necessary for them to create exciting and excellent work is of primary importance to both artists and audiences. We will work with partners towards the best possible training opportunities, and recognise the need for our funding to support the environments and conditions that enable talent and creativity to flourish.

Diversity

The Findings indicate some improvement in the diversification of both the work and the workforce, including a considerable increase in the number of women in senior positions, but there has been little other diversification amongst senior personnel or board members. We will work to remove barriers to diversification amongst theatre practitioners, the work they make and the audiences they reach.

Leadership and governance

A successful arts organisation inevitably has inspired and inspiring leaders at its head. We believe that the development, recruitment and support of these leaders, both senior staff and board members, is essential for the continued health of the theatre industry.

Our response to the Findings, including an analysis against the original objectives of the Theatre Review, is in the next section.

We intend to use the Theatre Assessment to help us determine our future strategy, to inform our investment decisions and to focus our development capacity. Therefore our response to the Findings focuses on the issues that we can do something about. This does not mean that we do not value other data or views recorded in the Findings; they have enriched our understanding of the English theatre sector and will give us guidance when specific issues arise.

Our next step will be to discuss the emerging themes with representatives of the theatre industry and our partners, testing them before they inform our future strategy. We will do this by September 2009.

We are very grateful to everyone who contributed to this work and for their willingness to share their views, knowledge and expertise with us.

In November 2008, the Arts Council's Chief Executive, Alan Davey, urged arts organisations 'to be bold and ambitious, to surprise even more and not retreat into the 'safe'[1]. This assessment has shown us that the additional confidence and resources the Theatre Review generated enabled many theatre organisations to do exactly that. The task facing us all is to keep making progress, in spite of the economic recession, and to ensure that as many people as possible are able to enjoy the results.

Barbara Matthews
Director, Theatre Strategy,
Arts Council England

1 'The Courage of Funders: risk and innovation in the age of artistic excellence', speech to the Royal Society of Arts, 2008

A response to the Findings

The first years of the 21st century were a boom time for the arts, with increased public investment and an administration supportive of their role in society.
In addition to the extra annual investment of £25 million invested into the regularly funded organisation portfolio, theatre benefited from our capital, recovery and stabilisation programmes. Grants for the arts also provided more than £56.4 million to theatre organisations between 2003/4 and 2006/7. Theatre organisations also received substantial public investment through local authorities and regional development agencies.

The investment of additional funds provided greater security, which has led to a more confident and energised theatre sector.
As a result there is more innovation, risk-taking and entrepreneurship, an enthusiasm for exploring new ways of working and work with greater relevance to the audiences it serves.[2]

Changes in theatre practice, perhaps brought about by technological development, the influence of university performing arts courses, collaborations with international artists and audiences' enthusiasm for challenging and unexpected work[3] have resulted in a period of extraordinary creativity. There has been an increase in energy and quality that commentators on English theatre have noted[4] and celebrated.

There remain some theatre organisations that have not challenged themselves robustly to be the best they could.[5]
They have not discovered how best to fulfil their obligations to the communities they serve or to challenge themselves to higher

2 Findings 3.2.3, 3.3.2
3 Findings: 3.1.2, 3.1.16, 2.5.5, 2.5.8
4 'In these days of greed and gloom, our theatre seems like a beacon in the long dark night of the nation's soul. British actors, directors and other "creatives" have recently picked up no fewer than 39 nominations for New York's Tony awards out of a total of 111.' Spencer, Charles, *Daily Telegraph*, May 20
5 Findings: 3.1.2

levels of achievement. As a result, their audiences have not developed as much as those of more adventurous organisations. We do not advocate change for change's sake, but theatre organisations that regularly review their role and operations are more likely to be effective, exciting and confident. They ensure that their mission remains appropriate and their activity is directed towards achieving it.

1. Arts Council England's relationships with our funding partners and the theatre sector

a. Individuals commented that they looked for the Arts Council to lead the sector, working in partnership with artists, and found that wanting. We will play a leadership role, advocating for the place that theatre should play in modern society and the conditions necessary for it to succeed.

b. Our plan for 2008–11 reasserts the importance of encouraging excellence and innovation. The introduction of a self-evaluation framework in 2010/11 will enable all arts organisations, not just theatres, to base their relationship with us on their artistic and cultural ambitions.

c. Before the Theatre Review, many producing theatres were hampered by large deficits which threatened their existence and curtailed their ability to make work and attract audiences. We addressed the situation through our recovery and stabilisation programmes and increases in grants since 2002/3 to most of our regularly funded organisations. This has enabled them to plan with more confidence. We encourage risk-taking and ambition, believing that they lead to better art and greater engagement, but we expect the boards and executives of the organisations that we fund to take a responsible attitude towards their financial viability.

d. We believe that specific initiatives, especially when sustained for an appropriate time or used cumulatively, have encouraged new ways of working. For example, there has been increasing engagement in theatre amongst children and young people and sections of the population without a tradition of theatre attendance. Initiatives designed to address specific needs will continue to play a role in our support for theatre. We have noted criticism about short-term initiatives[6] and recognise the benefits of maintaining a consistent strategic thread through our activity.

e. When regularly funded organisations, local authorities, regional development agencies and the Arts Council work well together the results are positive for all parties involved, including artists and audiences. Discussions are taking place between the Arts Council and local government representatives about more effective ways of working together as co-funders[7].

f. We do not think that the reduction in collaboration between commercial and subsidised managements reported to our consultants is borne out by the evidence – but clearly there have been some changes in the relationships between the commercial and subsidised sectors. In May 2009, 11 West End theatres had productions which originated in subsidised theatres[8] and there are examples of subsidised/commercial collaborations on the touring circuits. We believe the benefits of such collaborations are felt by all sectors of the theatre industry and that audiences are offered a greater range of work in a larger number of venues as a result.[9] The majority of theatre performances in England take place without our subsidy and so we recognise the need to understand the context within which we make our funding decisions.[10] We will continue to champion collaborations between the subsidised and commercial theatre sectors and to increase our own understanding of and relationships with commercial theatre.

g. The increase in overheads that we were told about is shown in the data for producing theatres. Those that have new and refurbished buildings face even greater expense. Although anxiety was mounting about the potential impact of a financial downturn, the reduction in fund-raising income had not been felt when the research was conducted. We have launched Sustain, a new £40 million fund that will provide extra financial support and expert help and advice for organisations under pressure specifically as a result of recession.

6 Findings: 2.2.2
7 Findings: 2.2.5
8 *39 Steps, Calendar Girls, Collaboration/ Taking Sides, The Last Cigarette, Madame de Sade, Les Miserables, On the Waterfront, Spring Awakening, War Horse, Woman in Black, Woman in Mind*
9 'It's a mark of the health of our theatre that artists and audiences now travel happily between the [commercial and subsidised theatres], and that the discoveries of the new wave are hungrily co-opted on behalf of the wider audience.' Hytner, Nicholas, 2008
10 A survey of theatre and dance performances during three weeks in 2008 in the North West and East Midlands regions showed that over 60% of the total were not subsidised by Arts Council England.

h. We were told of the challenges that legislation, both European and domestic, can cause theatres – sometimes inadvertently. We will continue to work with the National Campaign for the Arts and the industry umbrella bodies to identify such legislation and to lobby for changes where appropriate.

i. We have noted that amateur arts organisations often find it challenging to meet the demands of new legislation. We will include them when we are gathering evidence for our advocacy.

Analysis against the eight priorities of the Theatre Review

A better range of high quality art and new ways of working

a. The period of this review has seen considerable changes in the way theatre is made and presented to audiences. We welcome the 'rebranding' of theatre as 'more than plays on stages' and the work that happens outside traditional theatre spaces and infrastructures.[11] We believe this is an important innovation which refreshes the artform and reaches new audiences.

b. Traditional playwriting and theatre-making attract large audiences and English artists are rightly world renowned for their work. We gave grants to new writing of nearly £12 million through Grants for the arts between 2003/4 and 2007/8 and will continue to place a high priority and offer high levels of support to text-based work. We value the artists, audiences and skills that it develops, recognise the need for a healthy, vibrant and sustainable theatre infrastructure and the foundation the classical theatre canon gives to contemporary practice.

c. We have commissioned further research about changes within the programmes of theatre organisations; the ratios of produced to presented work, new commissions to revivals, etc. This will be available later in 2009.

d. Contemporary practice can benefit from acquiring traditional skills and traditional forms of theatre can be reinvigorated by challenge from artists who see the world and their art differently. Those organisations where 'mutual suspicions have fallen away'[12] and who have welcomed experimentation within their programmes project confidence and excitement and are proving successful in attracting large and diverse audiences.

11 Findings: 3.1.1
12 Findings: 3.1.2

Theatres which are 'playing safe'[13], in spite of a period of relative prosperity, should learn from the success of others. We will work to ensure that best practice is shared and challenge lack of ambition.

e. Collaborations and partnerships have increased significantly during the period and brought widespread benefit.[14] We welcome the variety of these: organisations of completely different kinds working successfully together for artistic, financial and managerial reasons and also the increased practice of theatres commissioning work from independent companies and artists. We believe that both artists and audiences benefit from working collaboratively and will continue to encourage the practice. Valuable learning and challenge takes place which increases quality and the diversity of work on offer.

f. Street arts gained considerable profile during the review period, benefiting from a year-on-year increase in funding through Grants for the arts[15] (and subsequent identification as a priority development area). The number of companies, festivals and events has proliferated and there have been improvements in infrastructure and quality. Although there are difficulties in counting and analysing audiences to unticketed events, there is recognition that an increasingly diverse creative community is attracting large audiences, including people who do not traditionally visit the theatre.[16]

g. We will focus our support of street arts on increasing its infrastructure and continued improvement in artistic quality.[17]

h. Circus was also added to the theatre portfolio during the period of this review and subsequently identified as a development priority in 2007. The findings indicate that circus is a rapidly growing artform in England with an increased interest from venues, resulting in more co-productions between theatre makers and circus companies and performers.[18] These developments will benefit from improvements to the circus infrastructure. We will continue working with the circus sector to improve training and skills development.

i. 'Digital opportunity' is currently an Arts Council development priority. The research suggests that few theatre organisations are yet making full and effective use of technological developments and are not always appreciating the impact that they are having on the behaviour of audiences.[19] There are some fine exceptions (often touring companies), with artists re-conceiving the relationship between their work, and audience and marketing activity being rethought, but other industries are more advanced.

13 Findings: 3.1.2
14 Findings: 3.1.3
15 Findings: 6.5.4
16 Findings: 6.5.2
17 Findings: 6.5.2
18 Findings: 6.5.3
19 Findings: 2.3

j. Through seed funding, research, sharing best practice and working in partnership with broadcasters and commercial companies, we will enable organisations that we support to benefit from the revolution in communication technology, both in developing artistic practice and reaching audiences.

k. We will continue to advocate for and support the development of high quality work for children and work with the sector towards a stronger infrastructure.

l. There are references in the findings to a lack of opportunity for mid-career artists and the difficulties in maintaining a consistent career for independent artists[20]. We will explore, in partnership with the theatre sector and in partnership with other artforms, ways of making our support for mid-career artists more consistent.

1. Education at the heart of theatre and an engagement with young people

a. Children and young people are a development priority of the Arts Council plan, *Great art for everyone* 2008–2011. The theatre sector is acknowledged as being strong in education, training and participative work and is key in the delivery of this agenda.

b. A focus on work for children and families has generated many success stories. This work is more respected, more frequently programmed and made by leading theatre organisations and there are now several theatres devoted to it. There has been an increase in commercial work for children as well. We recognise the additional financial pressures that exist because of low ticket prices and the danger of the increase in supply stalling during the recession.

c. Whilst there has been much encouraging progress there are still theatres who do not engage with this work, thus neglecting a major portion of their potential audience, and there are still examples of unimaginative work which relies on well known titles to sell the work regardless of quality.[21]

d. Focus groups told us that there had been notable growth in the number of programmes to increase engagement and that the status of learning departments within theatre organisations has increased, with their work influencing the mainstream.[22] They reported that as a result of this and other initiatives there has been an increase in participants from lower socio-economic groups, more people have attended theatre for the first time and more

20 Findings: 6.2.3
21 Findings: 6.3.1
22 Findings: 3.2.3

children from Black and minority ethnic communities are engaging with theatre.[23] The data shows that attendance at informal learning sessions (outside the education system) and professional training sessions provided by the constant sample of regularly funded organisations is substantially higher than in 2001/2.[24]

e. We will work with the newly formed Creativity, Culture and Education (CCE) to ensure they continue to play a key role in delivery of our children and young people's agenda through Creative Partnerships and the arts element of the Find Your Talent pilots.

f. We are working with the Departments for Culture, Media and Sport (DCMS) and Children, Schools and Families (DCSF) to improve advocacy for and an integrated approach towards work with and for children and young people.

2. More people engaging with theatre as audiences and participants

a. Audience numbers have stayed more or less constant since the Theatre Review[25] following a period of decline. Over the same period there has been an increase in the number of performances. This may be a consequence of diversifying programmes to reach audiences from more varied backgrounds, but we do not have the data to prove this one way or the other. Increasing the number of people who regularly enjoy the increased range of performances on offer will be a priority of us, working with our funded organisations and other partners. Improving our data is also a priority, to enable more sophisticated tracking and therefore audience development.

b. The assessment found that an emphasis on participation and volunteering has resulted in a doubling of the number of volunteers working within the sample of 74 theatre organisations that were used as the basis for statistical analysis over the five-year period 2001/2 to 2006/7.[26]

c. The consultations also reported positive progress in participatory work: more range and quality and a greater valuing of it by stakeholders and mainstream theatre.[27] It has been particularly successful in engaging young people from lower socio-economic backgrounds, Black and minority ethnic communities and those that have never experienced theatre before.

d. We will ensure that good practice developed through the Arts Council's Young People's Participatory Theatre

23 Findings: 6.4
24 Findings: 6.4.3
25 Findings: 4.2.2
26 Findings: 4.3.5
27 Findings: 6.4.1

(YPPT) project is shared with relevant partners, artists and companies regionally, nationally and internationally and will encourage theatre organisations to engage with initiatives which can increase opportunities for young people, such as apprenticeships and the Arts Award.

e. We are working with the national youth arts organisations and bodies to create a national infrastructure. Theatre organisations can learn from music and dance in this area and achieve greater impact with more benefits for young people.

f. We are developing a new touring strategy which will consider all scales of performing arts touring.[28]

g. It is not a surprise that touring companies should gravitate towards well-resourced producing theatres.[29] In one way this is encouraging as it suggests that theatres are sharing their resources with companies and artists and therefore the subsidy they receive is achieving wider benefit. However, unless the work that results from these collaborations is then seen more widely there is a danger of public subsidy becoming concentrated and sections of the country being neglected.

h. We understand the difficulties facing touring organisations funded by Grants for the arts because of the need to have developed touring plans before knowing whether the work will be supported.[30] This does not enable artists to plan their work nor venues to develop audiences and applies both to those who rely entirely on project funding and regularly funded organisations which tour with additional support. We will address these problems and ensure touring companies can benefit more effectively from Grants for the arts.

i. There are several references to the difficulties facing rural theatre companies.[31] We value the role of rural touring companies in providing theatre to under-served communities and will work with them to address issues of distribution and, when necessary, artistic quality. The future touring strategy will provide us with a context in which to look at these companies and the networks that programme them.

28 Findings: 6.6.2

29 Findings: 3.1.3

30 Findings: 6.6.4

31 Findings: 3.3.3, 3.3.14, 6.4.2

3. Cultural diversity and inclusion

a. We are encouraged by reports of the effectiveness of initiatives such as Black Regional Initiative (BRIT) and Eclipse Theatre (which tours Black theatre on the middle scale circuit), designed to increase the diversity of artists, work and audiences. We recognise that such interventions need to be long-term if they are to have an impact. We will continue to work, through funding streams and advocacy, to promote the artistic and economic arguments for greater equality and diversity within theatre.

b. We note the particular responsiveness of culturally diverse organisations and those with participatory programmes to changing demographics and value the role that they play and the expertise they possess.[32]

c. We will work to remove the continuing barriers that exist for practitioners from Black and minority ethnic and disability backgrounds,[33] using our funding and influence to increase opportunities within the existing infrastructure for practitioners from diverse backgrounds.

d. We will continue to support and facilitate work addressing the recommendations of the *Whose Theatre?* report.[34]

e. We will continue to develop disability theatre, working within the context of Arts Council England's disability equality scheme.

4. A new generation of artists and creative managers

a. During the period under review, the theatre industry grew considerably with the number of people employed by the theatre organisations in our constant sample increased by more than half. Permanent artistic staff numbers increased by 81per cent.[35] The number of freelance staff increased by even more, indicating that there has been more work created by larger casts and creative teams. This is a useful indicator of the ambition of theatre organisations and we hope theatre organisations will be able to maintain or increase current levels, providing valuable employment to actors, stage managers, etc, as well as large scale productions for audiences.

32 Findings 2.3
33 Findings: 3.1.4, 3.1.12, 4.3.3 Fig. 12
34 Young, Lola, *Whose Theatre? Report on the Sustained Theatre Consultation*, Arts Council England, 2006
35 Findings: 4.3.3

b. Female artistic staff within the constant sample increased from 50 to 126 – a factor of 152 per cent. This is an indication of a wider social change which has taken many years of campaigning, positive action and legislation to bring about. We hope that similar efforts to increase diversity will have the same impact in the long-term.

c. We recognise the role of the producer in helping artists to develop and make work and find audiences for it. They have been particularly influential in the less developed sectors such as diverse work and street arts. We will continue to support producers within the regularly funded organisation portfolio and through Grants for the arts.

d. The period under review was a time of investment in leadership, including the Clore and Cultural Leadership Programmes. Other initiatives such as the Arts Council's Escalator scheme and Live and Direct were also quoted as being valuable developments.[36] There are questions, however, about how they address the issues facing leaders who are also practising artists.[37] We are also concerned about the reducing opportunities for directors' training as a result of the withdrawal of ITV's support for their theatre director scheme and will work with the theatre sector to rectify this.

e. We welcome that some larger theatres offer their facilities and technical and managerial support to local artists and amateur companies.[38] We believe that the leaders of our publicly-funded producing theatres should ensure that they contribute to their communities and artform development. Those that do this develop a more sophisticated understanding of their audiences and are better able to prove and articulate their local value.

f. We believe we should support the boards of theatre organisations when they are appointing senior personnel and take up the right to be involved. We have commissioned a guide for the boards of producing theatres for use when recruiting their senior staff.

36 Findings: 3.3.7

37 Findings: 3.3.12

38 Findings: 3.1.3

5. An international reputation

a. We agree with Sir Brian McMaster that, 'working internationally builds an organisation's morale, broadens horizons and opens up different perspectives on an artist's or an organisation's work. Equally, international practitioners working within this country can inspire British practitioners and audiences.' [39]

b. We have not undertaken research to measure success in this area, but note that there was evidence of some growth of interest in working with partners abroad and presenting international work.

c. We will be clearer about how we can support artists wishing to exploit international markets and develop work with international artists. Our new Memorandum of Understanding with the British Council will contribute to this.

6. Regional distinctiveness

a. The Theatre Assessment considered the impact of the additional £25 million and changes in the external environment on the theatre sector as a whole rather than the issue of regional distinctiveness. However, there are many examples of both the Arts Council and theatre organisations responding to the needs of local communities and artists. We will maintain the flexibility to support arts organisations in a way that is appropriate to their circumstances and the local context.

39 McMaster, Brian, *Supporting Excellence in the Arts – from measurement to judgement*, DCMS, 2007

theatre assessment findings: data and consultation

Anne Millman and Jodi Myers

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Background

In 1999 Peter Boyden was commissioned by the Arts Council of England to undertake a review of the 'Roles and Functions of the English Regional Producing Theatres'.

The report, published in May 2000, identified lack of funding as a key barrier to change. Under-funding for over two decades had left the theatre industry with limited opportunity for innovation and a concentration on the survival of buildings and institutions meant that investment in the artform had become secondary.

As a result the Arts Council argued that the sector needed additional funding. By 2003 there was an additional annual £25 million of revenue support for theatre made possible by the Government's increase in the Arts Council's core grant. This represented a 72% increase in the budget for theatre.

The Theatre Review was undertaken in 2001/2 to decide where to invest the additional funds. The National Policy for Theatre in England (2002) identified eight specific priorities, which informed decisions regarding:

- a better range of high quality art
- new ways of working
- education at the heart of theatre and an engagement with young people
- more people engaging with theatre as audiences and participants
- cultural diversity and inclusion
- a new generation of artists and creative managers
- an international reputation
- regional distinctiveness

The grants of some theatre organisations were more than doubled. Almost all regional producing theatres received substantial increases. 83% of new funds went to producing organisations and companies, 12% to presenting theatres, 5% to strategic funding initiatives such as the Black Regional Initiative in Theatre (BRIT).

During the period under review in this Assessment (2002/3 to 2006/7), the Arts Council Recovery and Stabilisation programmes were in place, as well as a capital programme. The Lottery funded Grants for the arts scheme was introduced in 2003. Many theatre organisations received funding from several of these strands and so the impact of the Theatre Review cannot be judged in isolation. Funding from regional development agencies and European Union schemes was also significant for some organisations.

In January 2007 the Arts Council published a refreshed National Policy for Theatre in England. This identified four areas in need of development:

- circus and street arts
- experimental theatre
- theatre for children and young people, including youth and participative theatre
- diversity

The Arts Council undertook a comprehensive review of its portfolio of regularly funded organisations during 2007 and announced its funding plans for 2008–2011 in February 2008. The new portfolio contained 22 new theatre organisations. Thirty-two did not have their funding renewed and two organisations that benefited from the Theatre Review had their funding withdrawn through the Combined Arts portfolio.

These two events did not affect the period under review, but inevitably they will have affected the perceptions of those contributing to the consultation.

The brief

Anne Millman and Jodi Myers were commissioned to conduct the analysis, research and consultation for the Theatre Assessment with the following brief:

- identify the impact of the additional £25m annual support for theatre
- assess the effectiveness of additional investment in the sector
- work with the Theatre Strategy Team to undertake widespread consultation with the theatre sector

The scope covered a wide range of theatre practice including text-based work, experimental theatre, physical theatre, puppetry, musical theatre, street theatre, circus, building based and touring organisations, and work for children and young people including youth theatre and participation.

The consultation was undertaken between June and November 2008. 2001/02 was used as the baseline year, and the period under review was 2002/03 to 2006/07. A full list of everyone consulted can be found in Annexes 3 and 4 to the Findings.

1 Methodology: desk and data

1. Desk research of published literature from 1999 onwards was conducted resulting in a bibliography of 50 documents (see Annex two to this report)
   1.1 Navigating through the range of secondary data reports is a complex task, and it is important to note that baseline samples rarely correspond from one study to another.
   1.2 To provide a more consistent analysis, most of the quantitative evidence used in this document has been obtained at source from regularly funded organisation returns, as described below.

2. Analysis of regularly funded organisation data from all theatre annual returns submitted for the six years 2001/02–2006/07 is referred to as the total sample in this report. These returns cover an estimated 96% of Arts Council England's regular funding for theatre organisations, and can therefore be used as an indicator of the overall returns on that investment.
   2.1 The base number of returns and organisations responding varies from year to year so direct trend analysis must be treated with caution. However, to provide indicators about volume and ratios of activity, the total samples figures are used in this report.
   2.2 Additional reservations about using the regularly funded organisation returns for accurate trend analysis are: all data is provided by the regularly funded organisations themselves and has not necessarily been verified at source; there have been changes in some classifications over time; some questions have been added and others omitted during this period; in 2004/05 full and short versions of the questionnaire were produced. The baseline samples for this data are:

Table 1. Total sample of regularly funded theatre organisations

	2001/02	2002/03	2003/04	2004/05	2005/06	2006/07
All theatre RFOs: samples	126	156	174	216	226	225

Source: Arts Council England

3. Analysis of 74 regularly funded theatre organisations submitting returns for each of the six years 2001/02–2006/07, is referred to as the constant sample in this report. All of these were recipients of the £25 million uplift. This represents a smaller sample but enables direct comparisons across all years, and focuses attention on the £25 million portfolio. The same reservations about the quality of original data apply.

   See Annex one for the list of the 74 organisations included in this analysis.

4. Analysis of investment through the Grants for the arts (Grants for the arts) programme.

Methodology: approach and communication

5. A mix of invited focus groups, open meetings, personal interviews and specialist discussion groups, alongside a dedicated website live from early July to early November, was set up in order to achieve:
   - an inclusive process with a range of opportunities for participation
   - targeted inclusion of key practitioners
   - a balance of general and specialist discussions
   - a mix of practitioners, policy makers and commentators
   - wide geographic representation
6. Opportunities to participate in open meetings and in writing were promoted in press articles, a link from the Arts Council website, mentions on outgoing emails from the Arts Council and via membership and umbrella organisations.

Methodology: personal consultation

7. Focus groups were held in Birmingham, Brighton, Cambridge, Exeter, Leicester, Leeds, Liverpool, London and Newcastle.
8. A focus group was held with the Society of London Theatre (SOLT).
9. Three open meetings were held in Bristol, London and Manchester.
10. Seven specialist focus groups were convened to consider: changes in practice, children and families, critics and commentators, new writing, unsubsidised work, participation including young people, and touring.
11. Consultation with Arts Council England's Theatre Practice group was undertaken. Members of that group then convened focus groups with Arts Council England colleagues in each region.
12. Introductory group discussions were convened with industry lead bodies.
13. Personal interviews were conducted with representatives of Local Authorities and the amateur sector, as well as with key practitioners who were unable to participate elsewhere in the consultation.

See Annex four to this report for the list of stakeholders involved in the personal consultation.

Methodology: written submissions

14. Fifty-two written submissions were received, including those made to the Theatre Assessment website.
15. Additional written submissions were provided by umbrella organisations.

See Annex three for the list of stakeholders responding with written submissions.

Project management

16. Consultants Anne Millman and Jodi Myers were supported by an advisory group of theatre practitioners, Pippa Bailey, Kully Thiarai and Patrick O'Kane.
17. Arts Council England appointed a steering group for the Assessment. Its members were: Alan Davey, Chief Executive, Arts Council England; Michael Eakin, Executive Director, Arts Council England North West; Ros Robins, Director of Arts, Arts Council England West Midlands; Chenine Bhathena, Theatre Officer, Arts Council England London; Mark Hollander, Theatre Officer, Arts Council England Yorkshire; David Brownlee, Head of Local Government, Arts Council England; Amanda Rigali, Interim Assistant Director Arts Strategy, Arts Council England; Hassan Mahamdallie, Senior Strategy Officer Diversity, Arts Council England; Yvonne Harris, Director of Corporate Evaluation, Arts Council England; Isobel Hawson, Senior Theatre Strategy Officer, Arts Council England, Barbara Matthews, Director of Theatre Strategy, Arts Council England; and Deborah Williams, Artist in Residence and Creative Producer.

2 The external context: impacts and influences

2.1 The external context: introduction

This section provides a description of the external context within which theatre practitioners were operating over the five years 2002/03–2006/07. This section is not intended to provide a comprehensive and objective analysis of the external context, but rather to reflect the views of those consulted during the Assessment. It therefore represents respondents' observations on changes that had particular impacts on the sector.

It begins with a description of political changes and interventions that were considered influential, followed by social, technological and economic shifts. Subsequent paragraphs identify changes in the artistic context, including the relationship between commercial and subsidised sectors, ticket pricing, celebrity culture, and training.

This section of the report is based on the findings of interviews and focus group discussions, as well as written submissions. There was no consistent picture when it came to the sector's observations. Much depended upon individual organisations and the local operating context. The information below therefore reflects a range of divergent views, as well as highlighting areas on which a consensus of opinion was recorded.

2.2 The external context: political

2.2.1 International political context

Respondents acknowledged increased global communication as well as the enlargement of the European Union (EU), and referred to these as providing the opportunity for companies to work with a wider range of artists. Practitioners working in the areas of cultural diversity, disability and participatory arts were more likely to have engaged with the changing geopolitical context.

However, overall there were limited references to the impact of global politics during the discussions for this Assessment. There was a general perception that many cultural organisations in the United Kingdom had not responded to the wider external context. Exceptions to this were individual examples where the 'war on terror and the war in Iraq had influenced subject matter. There were also individual references to the temporary impact of terrorism on sales in London's West End, and the ascendancy of China and increased opportunities for East Asian artists to make collaborations.

The increase in EU legislation, particularly where this affected health and safety, was also mentioned by some respondents.

Amateur theatres had found compliance with this particularly challenging.

2.2.2 National political context

The changing political agenda, and consequent shifts in funding priorities, was a dominant theme of this Theatre Assessment.

On the positive side the sector had enjoyed the Labour administration's recognition of the importance of supporting the arts from the public purse. Increased support for and focus on cultural entitlement for children and young people had been widely welcomed. The sector also responded positively to the political emphasis on participation and volunteering: initiatives in these areas had brought theatre buildings closer to their communities, encouraging ownership and engagement. This is substantiated by the rising numbers of volunteers and increases in participation in regularly funded theatre organisations (see sections 4.3.5 and 6.4 respectively).

However, there was a widespread view that the sector had been buffeted by short term instrumental initiatives. Some of these had been initiated by government departments and others by Arts Council England. They included specific schemes focusing on audience development, cultural diversity, disability, formal and informal learning. While acknowledging that it was too early to evaluate the long term impacts of the initiatives introduced within the period under review, common concerns were:

- lack of follow through in the longer term, particularly in areas such as audience development, sustaining diverse work, and maintaining cross-sectoral relationships
- lack of autonomy to set and follow artistic goals
- distractions from core business and organisational mission
- perceived erosion of investment in the artform itself

Legislation at national level on areas such as licensing and child protection also had resource implications for theatres, and again the amateur sector found this particularly challenging. Many respondents commented upon the significance of the Disability Discrimination Act (DDA). There was agreement that this had raised awareness of the opportunities and obligations of engaging with audiences with disabilities, although one written response identified a number of small spaces that are no longer possible to use because they do not reach improved access standards.

2.2.3 Regional political context

There were isolated references to the growth of regional agencies over the five years 2002/03–2006/07. In some individual cases the regional development agencies (RDAs) had been instrumental in raising the profile of theatre, and in increasing economic investment. Culture had continued to be an integral part of regeneration agendas. In other individual examples the growth of a range of different regional organisations complicated regional and local relationships.

2.2.4 Local political context

Observations upon relationships between theatre organisations and Local Authorities were very varied, depending largely on individual circumstances and contexts.

Some organisations enjoyed very positive working relationships throughout the period under review. Some described a relationship that was good in principle but that had seen a reduction in funding because of budgetary restrictions. Others remarked upon a total decline in their relationships with their Local Authorities. The consultation findings pointed to a consistent decline in support in rural areas, and perceptions that there were fewer experienced arts officers to provide support and advocacy for the sector.

However, an analysis of a constant sample of regularly funded theatre organisations suggests that the proportion of Local Authority income to total income has remained relatively steady over the five years under review (see section 5.3.3).

Local Authority representatives described three main priorities between 2002/03 and 2006/07:

- relationships between theatres and communities
- participation
- the role of local theatres in place shaping

These themes were reflected in conversations with the theatre sector itself, and a number of positive trends were identified. These included:

- the development of local strategic partnerships which emerged as a positive step in some areas, particularly because they provided support for participation and young people
- some practitioners experienced increased clarity of expectation and mutual understanding between theatre organisations and local authorities
- there was increased recognition of education programmes amongst theatre organisations and their partners in local

authorities
- work was commissioned through education initiatives such as Creative Partnerships (CP) and Sure Start
- there was greater recognition of how theatres can contribute to local communities and help social cohesion
- the five years under review saw a growth in dialogue between theatres and children's services and other local authority departments
- there was more co-operation between local authorities in London

One person also welcomed the recent addition of a national indicator for engagement with the arts.

On the negative side, the Theatre Assessment consultation process identified a number of themes:

- increased and unrealistic expectations by local authorities, particularly around education
- increased expectations from a wider range of local authority stakeholders, without additional financial support to deliver
- pressure on local government budgets, particularly unitary authorities
- perceived reduction in funding for arts organisations from local authorities
- perceptions of less support for theatre for its own sake, with instrumental agendas driving funding
- perceptions of disinvestment by local authorities as a direct consequence of increased funding from the Theatre Review

2.2.5 The political context: Arts Council England and local authorities

There was a perceived decline in the relationship between Arts Council England and local authorities over the years in question, and criticism voiced that there was a lack of dialogue between them. Local authorities themselves felt excluded from discussions about changes to annual funding agreements. There was also concern that Arts Council England lacked an understanding of the nature of Local Authority budget rounds or where support from Local Authorities may be built. The local authority stakeholders interviewed commented that Arts Council England's public relations had been poor.

2.3 Social and technological context

The impacts of social and technological change on the way that theatre was made, and on audience expectations, are described in section 3.2.4. Overall, the Theatre Assessment revealed that theatre organisations have been constantly trying to catch up with social and technological change.

The demographic turnover in local populations emerged as a particular issue for those operating in urban areas: in parts of London demographic shifts were occurring every five or six years, requiring a constant review of approaches to community dialogue and engagement. Culturally diverse organisations and those with strong learning and participatory programmes explored new partnerships and developed practice accordingly.

The rapidity of technological change and consequent pressure to adapt applied to a range of factors:

- technologically literate audiences
- rise of blogging, instant reviews, and talkback sites
- growth in Facebook use
- greater expectation of more flexible opening times and 24/7 entertainment
- changing audience expectations and ways of engaging with work, impacting upon its duration and content
- changes in lifestyle particularly for young people

Individual respondents described how audiences and artists had opportunities to communicate and collaborate virtually across the world. There were some examples of online communities beginning to contribute to the development of the work itself.

Many respondents commented on the impact of technological development on communication. This spanned the growth in e-flyers and online ticket sales, allied to the wealth of information available to customers on the internet, and increase use of blogs. Some theatres developed more sophisticated customer relationship management systems through their box offices, website, and communications strategies. However, there was widespread concern that theatre marketing practice had not developed sufficiently. Few theatre organisations had developed a communications mix that was fit for purpose in the 21st century.

Other communication issues raised by individuals included the proliferation of free but poor quality papers in urban areas; continued lack of interest in theatre by broadcasting, other than for high profile casting competitions; and an increase in the awareness the public has of where Lottery money was going.

2.4 *Economic context*

Overall, this Assessment of the five years 2002/03–2006/07 pointed to a period of stabilisation in theatre in England. This arose from a sequence of consecutive waves of new funding prior to and overlapping with this period.

Towards the end of the five years in question we heard that the costs of insurance began to rise for many theatre organisations, and rises in energy costs more recently contributed significantly to increased overheads. During the period under review theatre started to engage with the implications of climate change for its business. However this concern about rising overheads was not born out by analysis of regularly funded organisation expenditure (see 4.2).

Respondents consistently referred to problems experienced by emerging artists as a result of increases in student loans, lack of unemployment benefits, and rising costs of rented accommodation.

Another challenging factor noted by some individuals was the strength of the British pound against the US dollar. This had meant a drop in the number of American visitors to London, and the compensating European tourists had attended musicals rather than plays.

2.5 *Artistic context*

2.5.1 *Artistic context: commercial and subsidised sectors*

With a number of notable exceptions which saw a growth in collaboration, we heard of a period characterised for some by less dialogue between the commercial and the subsidised sectors at both a strategic and operational level. This may have been because many Arts Council England funded companies had been better resourced and became more confident and entrepreneurial: they were therefore less likely to turn to the commercial sector in order to boost production resources or to exploit work.

Despite a period of strong ticket sales in London's West End, a number of concerns were raised by independent producers. These were:

- dominance by musicals
- fewer plays coming through from the subsidised sector
- increasing difficulty in putting on new writing
- shortage of writers being supported to create work for bigger stages
- rising costs of mounting shows
- increased difficulty in contracting key performers even for limited runs
- that the West End audience for serious drama had migrated to subsidised theatres

It is worth noting that during this period, both the National Theatre (NT) and the Royal Shakespeare Company (RSC) were in good health and well-regarded. Previously it had been unusual for both to be stable at the same time.

2.5.2 Artistic context: ticket pricing

There was some debate about ticket pricing, particularly in London. This was due in part to increased production costs, but had cultivated the assumption that a high ticket price represents artistic value. As a result some respondents believed that rising ticket prices made it harder for audiences to take a risk on an unknown quantity.

At the same time there were several references to the NT's public relations coup in offering tickets for many performances at £10 through the Travelex scheme. The NT told us as well as increasing access, this had enabled it to make it easier for an audience to engage with uncertainty. Again there were perceptions that this had an impact on the potential audience for plays in the West End: audiences enjoying good seats at the NT for £10 may be disinclined to go to the West End and pay five times that sum. In addition, the widespread growth of free events added to the debate and led to perceptions that audiences were increasingly confused about pricing.

2.5.3 Artistic context: celebrity culture

There was frequent mention of the rise of celebrity culture and the impact this has had on theatre making and attendance. Apart from a growing emphasis on star casting throughout the industry, respondents described the impact of televised auditions on increased sales for specific shows in London's West End. There were also reports that this had caused vocational training to be undervalued.

Amateur theatres reported a significant and worrying change in motivations for engagement among their younger members: where previously they had been driven by a desire to perform, they were now driven by a desire to become a star.

2.5.4 Artistic context: the total experience

The five years covered by this Assessment saw some theatres experimenting with non-traditional performance times, including late night performances linked to post-show celebrations, and Sunday performances.

There were consistent observations that new or refurbished facilities had raised audiences' expectations. Representatives of theatres that had not benefited from capital developments were increasingly concerned about being left behind, and some reported that they had struggled to maintain audiences.

2.5.5 Artistic context: training

While we did not engage directly with institutions of Higher Education for this Assessment, we heard a number of comments about recent developments in training.

Respondents remarked on a growth in training which focused on devising work, so that on graduation more artists were likely to make their own work instead of waiting for an offer of employment. This culture of independence and entrepreneurialism developed during a time when it had become more commonplace for students to have to work while still studying.

We were told that retreat from contemporary performance in journalism had led to an increase in academic study, which shrouded work in impenetrable language. Individuals remarked upon the increased academicisation of training (see 3.3.11). Other academic developments reported were the study of the work of companies that, in the past, might have been considered as alternative. Some, such as Shared Experience, had become part of school syllabi, and this led to companies finding themselves being asked to provide more workshops.

2.5.6 Artistic context: venue hire

Availability of affordable rehearsal and performance space remained an issue for some, particularly but not exclusively for amateur companies. With venues exploiting the earning potential of their facilities further, some amateur companies found themselves reducing their technical time in venues in order to meet rental charges.

2.5.7 Artistic context: developments in Scotland

Two developments in Scotland were highlighted. The positive one was the development of the National Theatre of Scotland, with its model of high profile collaborations without a building base. The negative development was the prohibitive costs for producers or companies to present contemporary plays at the Edinburgh Fringe, other than at the Traverse Theatre. There were also perceptions that during the period under review ticket prices had risen notably in Edinburgh.

2.5.8 Artistic context: international partnerships

During the period under review there was evidence, albeit patchy, of a growth of interest on the part of companies or theatres in working with partners abroad or in the presentation of international work.

LIFT had undergone change; BITE (Barbican International Theatre Event) consolidated its reputation as a showcase for international work; and 2006 saw the appearance of The Sultan's Elephant from France in central London. The inaugural SPILL festival and the Manchester International Festival took place the following year. During the period covered by this Assessment both Visiting Arts and the British Council made changes to the ways in which they worked, some of which had not been clearly understood by parts of the constituency.

3 The sectoral perspective: making, seeing and supporting the work

3.1 The sectoral perspective: making the work

3.1.1 Making the work: introduction

This section of the Theatre Assessment describes key trends and changes in the way that theatre was made during the years under review.

The boundaries of what constituted theatre expanded for Arts Council England as the Theatre (formerly Drama) Department widened its portfolio to include more street arts and circus. However, it should be noted that areas of practice such as live arts and burlesque, some of whose practitioners identify with theatre, are supported by other departments and were not part of this Assessment.

It should also be noted that Arts Council England's combined arts portfolio encompasses participatory and celebratory work, festivals and carnival, arts centres, presenting theatres and rural touring. The common link between them is that they work with multiple artforms to achieve their aims. Some of these have directly benefited from the Theatre Review and others received increased investment over the last five years due to prioritisation of street arts and circus.

The years since the £25 million uplift saw a shift in the language used by some theatre practitioners to describe what they do: there was more reference to 'theatre making', and the terms 'experimental' or 'performance art' were less frequently used by practitioners or commentators. It was noted that some definitions adopted by artists might have been political or influenced by funding criteria.

We heard that regional theatre was now much more than plays on stages. Some people no longer talked about theatre, but instead referred to events or 'stuff' that happens. As one individual explained, 'The work we do has rebranded theatre', and another said, 'We've taken the definition of theatre away from the notion of a building.'

The evidence for this section was sourced from the personal consultation programme and from written submissions.

3.1.2 Making the work: tradition and change

Divergent views were expressed about overarching changes affecting the sector.

It was asserted by some that the traditional hierarchy with big buildings at the top and independent artists at the bottom, or the career path where one started small and moved up the scale, had been demolished. We heard that mutual suspicions had fallen away and many experimental artists were now working at major venues in London and in the regions.

On the other hand, we also heard that many larger companies were still playing safe, although there was little discussion of classical work. Some individuals reported that, even if work on stage does not look very different, the process by which it had been made might have changed. There was recognition of the difference between risk and innovation, and we heard that that not all innovative work is risky, or takes place in London.

We heard of a growth in work that was specifically designed to provide an intimate experience for a few people, reflecting a focus of much contemporary practice on internal concerns and journeys.

Representatives of some organisations that had previously been on the margins found themselves being the battleground for new ideas, and there was little doubt that the period under review here saw an overall growth in contemporary practice. It was also felt that there had been changes to what constitutes a centre of excellence.

It was also evident that major barriers have yet to be breached for practitioners from Black and minority ethnic and disability backgrounds. Three commentators expressed disappointment at lack of progress on recommendations made as a result of the Sustained Theatre consultation (Source: 'Whose Theatre?' Baroness Lola Young et al, Arts Council England, 2006).

3.1.3 Making the work: collaborations and partnerships

There was a consensus of opinion that one of the strongest characteristics of the years since the £25 million funding uplift had been the growth of collaborations and partnerships. There were numerous references to larger institutions being noticeably more welcoming to independent companies and artists, some of whom previously would have been marginalised. We heard about the range of companies and artists with which producing theatres had been working, with both national and regional organisations bringing in a much wider range of artists.

We heard examples of:

- producing theatres working with each other to create shows that subsequently played in each venue
- producing companies working with touring companies
- smaller companies co-producing together
- presenting venues commissioning, co-commissioning or co-producing with independent companies

None of these approaches were entirely new, but there had been a significant increase in this activity during the period under review.

It was noted that the term co-production could cover a range of collaboration, from pooling of resources to the joint creation of work. Some companies said they preferred to be commissioned, as their creative practice did not lend itself to the process of co-production.

There was discussion about whether a number of partnerships had initially begun for principally economic reasons. However, there was general acceptance that the overriding culture now was one of shared values that brought benefits to both parties.

This trend also enabled the larger organisations to take more artistic risks. There were suggestions that the most exciting work has been realised out of collaborations between buildings and independent companies. One person observed that smaller companies doing interesting work had tended to gravitate towards those producing theatres that were better resourced.

There was agreement that other positive features of the increase in partnerships included:

- growth in consortia with groups of theatres working together to present a wider range of work, some specifically focusing on presenting culturally diverse work
- collaboration creating a buzz about the work among audiences
- co-productions resulting in longer contracts for actors
- more face-to-face discussions rather than remote negotiations
- more sectoral networking
- very recent growth in the number of international collaborations developed by medium sized producing houses

There was consensus that negative features included:

- the increase in swapped productions contributed to programmes of producing theatres lacking regional distinctiveness

- longer contracts for actors may have resulted in fewer engagements
- smaller companies collaborating with producing theatres might have experienced a degree of compromise to their independence
- collaboration required adjustment to working practices
- small companies found it difficult to get on the radar of larger organisations
- one person expressed a view that co-productions between producing theatres could be difficult to secure for plays which were seen as challenging

As well as bringing stylistic change and difference to the stages of major buildings, there were a number of examples where collaborations and partnerships gave smaller companies access to the infrastructure and resources of larger organisations. This technical and managerial support was significant in enabling them to realise their ambitions. Representatives of the amateur sector also described a growth in shared resources across the professional and amateur divide.

During this same period there were individual examples of larger organisations which were keen to support the wider theatre ecology and locally based artists in particular. Building based organisations were more inclined to offer their resources to local companies as well as to emerging artists who wanted to both work in and outside of their venues.

There were also examples of theatres collaborating with companies and artists from other artforms, although some people thought there had been more connections made between other artforms than between theatre and other artforms.

It was noted that the development of new approaches to theatre can take some years to be fully realised. For example, the period under review had witnessed maturity of productions integrating text and movement, a development which had started many years before.

3.1.4 Making the work: diversity

Some respondents remarked that it was too early to assess the long term impacts of initiatives such as Decibel and Black Regional Initiative in Theatre (BRIT). Despite this, over the five years in question encouraging signs in the making of work were identified as:

- growth of awareness of diverse practice
- more integration of this within the core activities of some theatre organisations
- development of a more diverse mix of work, some arising from co-productions
- standards of work raised
- examples of quality work done through specific initiatives and partnerships led by organisations such as Eclipse and Leicester Haymarket
- more diverse issues being examined, particularly in participatory work
- more support for bilingual and trilingual work, translation and sur-titling
- more integration of sign language

However, there was a consistent view that diverse work was still not widely integrated and connected with main programming. Also that there was an inconsistent supply of high quality diverse product, and a particular shortage of such work for large scale mixed programme venues.

3.1.5 Making the work: technology

There was general agreement that the years 2002/03 – 2006/07 saw an increase in the integration of new technologies into the creation of theatre, although this has yet to become widespread practice. Conversely we heard some opinions that lighting and sound had not moved on much in the period under review and in many instances has been eclipsed by that used in dance and concerts.

Another development was an increase in interactive work. This work had taken place in a variety of ways across different platforms, for example using new technology, online communities, and based on games as well as theatre practice. In this work theatre makers may not have been leading the work itself, and the audience may have had a creative role.

There was agreement that interactive work and use of technology was linked to a growing engagement with young people, although some individuals voiced concerns that many theatre organisations were still out of step with the world that young people inhabit (see 2.3).

3.1.6 Making the work: new writing

Individual respondents referred to the development of new ways of telling stories, and of a shift from new writing to new work. However, the figures told a different story, with new writing still dominating Grants for the arts awards (see 6.2.5).

There was a consensus of opinion about a continuing lack of opportunity for second productions of contemporary plays. We also heard about a growth of work based on films and novels and a shortage of new musicals. Despite an ongoing interest in verbatim and similar styles of theatre, some practitioners remarked on a shortage of drama dealing with current issues.

3.1.7 Making the work: emerging artists

Some individuals commented on the rise of 'scratch culture', where host organisations seeded a lot of new work at low cost. While this provided an important platform for emerging artists, not all hosts had been in a position to offer on-going support to develop the work.

The general emphasis on commissioning work over the last 10 years was welcomed, but several people commented that a lack of focus on exploiting the work had not always served commissioned work well. This is referred to in the section on touring (see 6.6), but concerned more than the subject of distribution: it was pointed out that much work benefits from development over a period of time.

3.1.8 Making the work: where work is made

Space was a dominant theme of the Theatre Assessment discussions: what space has been required or was available for the creation and presentation of work.

We heard specific examples of progress for some artists whose work had previously been seen in small venues successfully challenging those running buildings to make their main stages available.

We also heard that fewer artists wanted to work in black box studios, and of a general shortage of traditional work for small spaces.

Lack of spaces managed and led by Black and minority ethnic practitioners was also highlighted by some respondents. Individuals expressed frustration that they were confined to small venues and still could not access main stages.

There were a number of examples where capital improvements had encouraged theatres to open themselves out to audiences and communities during the day. As well as buildings utilising their public areas, we heard that a few artists and companies had started to encourage those running venues to think about how new public spaces might be made available for creative work. This was not confined to producing houses: there was engagement between one or two presenting houses and companies working in a site responsive way.

3.1.9 Making the work: site-specific

While site-specific or site-responsive work are not new developments themselves, during the period covered by this Assessment the profile of this work rose. It was increasingly described as ‘event theatre’.

This work was created by both young and mature artists, and has taken place in inside and outside unusual found or adapted spaces. Practitioners believe that these events redefined relationships with audiences; attracted large, enthusiastic numbers, often but not exclusively of young people; and attracted those searching for an immersive experience. Many of these events have been ephemeral, but others sustained hitherto undreamed of extended runs.

3.1.10 Making the work: festivals and new locations

There were frequent references to an increase in festivals that colonised a variety of spaces, both large and intimate, creating a buzz around the work, much of which was free.

We also heard that some companies had discovered new locations for making work and new audiences for it, through their engagement with Higher Education, architecture, health and environmental sciences.

Other companies referred to new ways of building communities online, and that these were capable of sustaining themselves even in the absence of work to see. One person described an event starting when people first heard about it, and only ending when people stopped talking about it.

3.1.11 Making the work: interventions

There has been a less obvious but notable expansion in theatre as unplanned and unexpected intervention, rather than something an audience member sets out to see.

Besides opportunities created by street arts, a more recent development was that of the social space where people might go for a drink, and then find themselves watching a performance. Other performance-based work was taking place in predominantly music venues, such as nightclubs. However, the opportunities to engage with theatre in this way were still largely confined to major cities and were currently relatively limited.

3.1.12 Making the work: leadership

As noted in section 3.3.2 , one of the key outcomes of the Theatre Review was the change of leadership for the majority of regional producing theatres. This led to the appointment of a new generation of artistic directors, often younger than their predecessors and with previous experience of small-scale or site specific work, who consequently brought different voices to the table. For a while it became easier to recruit for these posts, but over the period under review London proved a magnet.

We heard that there have been more women running theatres and more women directors have gained recognition. This is born out by an analysis of employment within the constant sample of regularly funded theatre organisations. However, there were continued concerns about the lack of diversity among staff at senior and Board levels. This is supported by analysis of proportions of Black and minority ethnic permanent and contractual staff in regularly funded theatre organisations (see 4.3.3).

3.1.13 Making the work: creative roles

There were individual views expressed that the additional money invested enabled some producing theatres to employ more guest directors, so that artistic directors were freed to do more than just direct shows. We heard that there were fewer associate directors in place at the end of the five years than there were in the first two after the Theatre Review, but that there was a trend towards companies having more artistic associates. This is supported by evidence of increasing levels of contractual artists among regularly funded theatre organisations (see 4.3.3).

Individuals also mentioned an increase in opportunities for assistant directors, the emergence of new designers, and a growth in dramaturges and literary managers (see 6.2).

Despite the new artists that collaborations had introduced to producing theatres, one person remarked that there was still a tendency for many companies to work with the same creative teams. The same observation was applied to production managers, which meant it has been difficult for experienced staff to progress.

3.1.14 Making the work: the producer

There were frequent references to the rise of the producer, and acknowledgement for the producer’s role in facilitating the vision of artists. However, there was also a lack of clarity about what this term meant, especially for smaller companies.

One person observed funders had become more comfortable talking to producers than directly to artists, and another commented that Arts Council England sometimes appeared more interested in supporting producers than companies.

Several practitioners noted that many younger artists were thinking more like producers than their predecessors.

3.1.15 Making the work: workforce profile

There was a strong consensus of opinion about a lack of socio-economic diversity in the sector, with some respondents believing this to be the over riding issue. This also linked with comments regarding developments in training and Higher Education institutions (see 3.3.11).

However, individual respondents observed progress in a number of areas, such as:

- a growth in more culturally diverse outdoor work, particularly by deaf and disabled artists
- some diaspora artists started to make work by developing connections with their country of origin
- new companies had been introduced into the regularly funded organisations portfolio
- more writers from Black and minority ethnic backgrounds produced notable new plays reflecting the diversity of society

Conversely, there was general agreement that much more progress needs to be made (see also 4.3.3, Fig 12, for analysis of proportions of Black and minority ethnic permanent and contractual staff). Individual respondents criticised:

- lack of engagement with Muslim and Sikh artists and communities
- lack of progress in increasing the diversity of directors
- in contrast to the point made above, others felt there was less contemporary outdoor theatre work from diverse, especially Black and minority ethnic, backgrounds
- lack of producers for Black and minority ethnic work
- few Black and minority ethnic practitioners working in design
- lack of critical mass of disabled artists
- few gay and lesbian voices
- shortage of British Chinese voices

3.1.16 Making the work: other developments for artists

Additional changes in the profile and experience of artists over the five year period under review were identified as:

- increase in designer/director theatre makers, with some

people graduating from design courses setting up their own companies
- a number of companies working with international artists, both making work aboard and introducing new expertise to the UK
- more opportunities for non–white performers and the establishment of a significant number of new writers, especially from the Black communities, but less obviously from South Asian backgrounds
- while it was harder for individual artists to sustain a career, there had been a fluidity enabling some of them to move from, say, outdoor work to opera more easily

3.2 The sectoral perspective: seeing the work

3.2.1 Seeing the work: introduction

This section of the report is based on the findings of interviews and focus group discussions, as well as written submissions. There was no consistent picture when it came to the sector's observations on audience profiles, growth or shrinkage in audience numbers, or to the attraction of new audiences. Much depended upon individual organisations and the local operating context. The information below therefore reflects a range of divergent views, as well as highlighting areas on which a consensus of opinion was recorded.

3.2.2 Seeing the work: changes in audience profile

Areas where a consensus of opinion emerged were:

- local demography changed the profile of the audiences, and theatres had to keep pace with rapidly changing population profiles
- there were bigger audiences for specialist theatre, especially for scratch performances and large-scale spectacle
- audiences became more fragmented and more varied, but these niche audiences might not be becoming regular theatregoers
- there was been increasing engagement of young audiences, driven largely by outdoor and site-specific work, the use of technology, and an increase in participatory work
- likewise there was a development of family audiences, driven by an increase in work for children and families
- audience development schemes such as the Arts Council's New Audiences may have had short term impact
- new audiences were attracted to mainstream theatre through star names
- individuals observed increases in diverse audiences for reasons such as: the 'Bollywood effect'
- helped with South Asian audiences; the EAST scheme encouraged an influx of members of diverse communities and culturally diverse shows specifically developed for this market

Some organisations observed an erosion of the core, loyal audience, and a consequent diversification of their customer base. There was recognition for audiences' increasing hunger for engagement and a two-way relationship. In addition, some illustrations were made about how changing operational models have led to a change in audience profile.

However, national trend data available for the five years of this Assessment reveals a static picture for attendances and audience profiles (see 4.2). Individual practitioners also commented on limited progress in some areas:

- largely white audiences for most mainstream work
- little engagement with diverse audiences, with the exception of some key venues
- British Chinese audiences being particularly ignored
- programmers tending to target culturally specific audiences for culturally specific shows, thereby pigeonholing artists and audiences
- changes in political agendas providing obstacles to long term audience development
- imperative to fill seats countering initiatives to develop new and more diverse audiences
- growth of celebrity culture: audiences choosing faces that they know rather than the unexpected or unfamiliar
- increased attendances by people with disabilities

3.2.3 Seeing the work: ownership and relevance

In most cases, but not all, the last five years saw a major shift in theatre organisations' engagement with their local communities. Respondents believed that local people's ownership of theatres had increased, and that this was based primarily on relevance of the product. There was consensus on:

- more joined-up thinking between education departments and main house programming
- education departments in theatres made strides in relationships with local communities
- education departments broadened out to encompass lifelong learning and participation in many forms
- organisations that engaged with creative learning consequently built closer relationships with their local communities
- theatres were using and engaging with the talent on their doorstep and engaging in issues that were local as well as national

The rise of the British National Party led one theatre to explore how it might better engage with disillusioned and alienated white working class communities.

Individual examples of the reasons why some theatre organisations made less progress were cited as:

- some theatres have few links to local communities
- some regional touring companies do not have strong relationships with their home regions
- in central London domination of the West End is allied to high priced tickets and lack of links with local communities
- some theatrical output is increasingly out of touch with its audience
- there is little ownership of the local theatre or company by some communities

It was suggested that issues about theatre etiquette have arisen, particularly texting and talking during performances.

3.2.4 Seeing the work: audience expectations

Many practitioners observed there was a close correlation between changing audience expectations and the way that work is made (see 3.1.3 and 3.1.5). Observations included:

- increased expectations of experiencing an 'event', particularly outdoors and away from theatre buildings
- raised expectations of quality and standards (in terms of facilities as well as performances)
- audiences became more adventurous, willing to take on the new and to engage with unusual work in unusual spaces
- development of audience tastes for challenging and culturally diversified theatre
- greater appetite for political and provocative theatre
- some young audiences who were involved in participatory projects became more knowledgeable of theatre practice
- audiences wanted to more advance knowledge of the production they are thinking of seeing and the building they may be visiting

3.3 The sectoral perspective: supporting the work

3.3.1 Supporting the work: introduction

This section of the report summarises the sector's perspective of the impact of the £25 million uplift in funding. It also reflects perceptions on any shifts and changes in organisational models, leadership, and employment. This is followed by comments on issues around support for artists at different stages in their careers, and provides a qualitative evaluation of the impact of the Grants for the arts funding stream. It subsequently summarises respondents' perspectives on the sector's relationship with Arts Council England during the past five years.

This section of the report is based on the findings of interviews and focus group discussions, as well as written submissions. There was no consistent picture when it came to the sector's observations and much depended upon individual organisations and the local operating context. The information below therefore reflects a range of divergent views, as well as highlighting areas on which a consensus of opinion was recorded.

3.3.2 Supporting the work: £25 million increase positive impacts

There was consensus of opinion that the impacts of the additional £25 million per annum were far beyond the monetary. While the money had been spread relatively thinly, and inevitably organisations were not able to achieve all that they wished, the investment did much more than allow deficits to be cleared. This in itself was acknowledged to be hugely important in giving organisations security as well as the ability to plan ahead and to take more risks.

There was agreement that as a result of the investment:

- the industry experienced a widespread increase in confidence, optimism and ambition
- the subsidised sector became more open and less inward looking, and in some instances, more entrepreneurial
- running a regional theatre became an attractive career proposition and many changed artistic leadership
- many new artists and companies benefited from support for the first time
- representatives of Black and minority ethnic-led and disability-led theatre organisations reported increased capacity and profile; the funding uplift also helped to develop Black Regional Initiative in Theatre further
- there were improvements to working conditions and to the overall infrastructure in producing venues

Some organisations were able to employ more people and a number were able to invest in areas which had previously been under resourced, such as actors' salaries. This is supported by research into pay levels and employment levels (see 4.3.4 and 4.3.3 respectively). There was also a noticeable improvement in production values, allowing companies to do larger cast plays or, in some cases, have longer rehearsal periods. It was widely felt that improved production standards led to higher audience expectations. We heard that the additional investment offered a number of organisations the opportunity to be less cautious and to take more risks.

There was a greater sense of cohesion across much subsidised theatre, as artists from different practices and with different experience started to collaborate, or at least to see themselves as part of the same industry. We were told that some work became more glamorous, attracting a higher profile in national papers, which had led to theatres becoming more valued by local communities.

3.3.3 Supporting the work: the £25 million increase's neutral and negative impacts

A range of more critical opinions were voiced during the consultation for this Assessment. One of these was a perception that the emphasis upon producing venues had been detrimental for some presenting venues. Another was a perception that a greater divide had emerged between the haves and have-nots, between the funded and unfunded.

In addition, some people had reservations about the wider sectoral impact of the funding uplift: they believed it had benefited the few in the short term, but not the many in the longer term. There was a perception that a focus on large scale high impact events in urban areas had been damaging for rural, small-scale and community touring.

3.3.4 Supporting the work: sustainability of the £25 million increase

There was a consensus of opinion that momentum was maintained until 2006/07, but since then has begun to falter. It was put to us that it felt like support for theatre was coming to the end of a golden age.

The principal reservation about the impact of the additional £25 million concerned sustainability and that insufficient progress had been made regarding the sustainability of the sector. Five years on, the sector was not necessarily more resilient. Analysis of relative levels of income and expenditure supports this view (see 5.2). The improvement of production values and consequent increase in audience expectations also makes the spectre of financial cutbacks more challenging.

It was pointed out that some major building-based children's theatres carry large deficits yet cannot raise ticket prices.

3.3.5 Supporting the work: business models

Individual respondents in the consultation for this Assessment remarked upon the development of more entrepreneurial ways of working, driven largely through more co-productions and cross sectoral partnerships. Some people also referred to the growth of a more plural funding base: although this opened up new avenues for project funding, it left continuing problems with core funding. One organisation described how their positioning had changed from a theatre organisation to becoming a social enterprise provider.

Other observations included:

- increased business skills within the sector
- isolated examples of better relationships between subsidised and commercial theatre
- more sharing of resources, including knowledge and networks
- good links between disability sector and corporate industry
- however, analysis of the economic models of regularly funded organisations does not illustrate any major changes (see 5.2 and 5.3)

3.3.6 Supporting the work: leadership

During the period under review, there was consensus that:

- boards of most theatre organisations were significantly unchanged, although there had been more recognition of different governance models
- there was still little progress in diversifying the profile of those boards (see 3.1.12)
- major capital developments provided the impetus to address organisational change

The debate about whether Chief Executive Officers (CEOs) should hold managerial or artistic posts continued. However, organisational structures have been largely unchanged, with single artistic directors remaining leaders of organisations. It was acknowledged that the most successful theatre organisations have developed strong partnerships between internal post holders, irrespective of roles and responsibilities.

Respondents observed that there had been more opportunities for artistic directors to take sabbaticals, benefit from and act as mentors, and travel collectively to see work and share that experience with their peers. However, some reported that there was still reluctance for people who have been in a job for a long time to move on: they themselves constitute the glass ceiling through which new or younger leaders cannot pass.

3.3.7 Supporting the work: young/emerging artists

There was a strong consensus of opinion that there had been a major growth in support for young artists, including writers, directors and designers. As a result we noted the emergence of an increasingly diverse range of practitioners. Key developments included:

- mentoring opportunities for young directors
- fewer associate directors but more opportunities for assistant directors
- support from the Escalator scheme for emerging leaders and managers
- action learning sets
- the importance of schemes such as Live and Direct
- investment in the Cultural Leadership Programme (CLP)

3.3.8 Supporting the work: mid career/emerged artists

There was also much agreement that the emphasis on nurturing new and emerging artists resulted in fewer sources of support for those in the middle stages of their career. Writers, in particular, reported continuing problems in making a career, with less support for writers aged over 25. A number of artists, particularly writers, complained of continuing struggles to earn a living wage, and of more polarised earnings.

In addition, one or two individuals pointed out that during this time the arts appeared to have been less of a priority for National Endowment for Science, Technology and the Arts (NESTA), which had previously provided important opportunities for practitioners to be supported for significant periods of research or reflection.

3.3.9 Supporting the work: diverse work

Interwoven into the conversations about support for artists were individual examples of encouragement as well as disappointment in support for diverse work.

A number of schemes, including Sustained Theatre, Eclipse and Decibel, were acknowledged to have created shared networks and knowledge. The development of action plans and programming policies were also described as positive developments. One person wrote of a sense of space for Caribbean and African artists, and another of securing support for a Chinese project.

Issues that still remain to be addressed were identified as:

- sustaining initiatives over the longer term
- in some cases the focus on diversity had been led by the need to tick boxes, and has not resulted in real engagement, particularly in large institutions
- targeting of diversity not for its own sake but for economic reasons
- increased focus on diversity but funding has not followed
- genuinely promising talent destroyed by being funded prematurely and disproportionately because of ethnicity

3.3.10 Supporting the work: producers

The growth of the producer's role has been a key development in the period under review. While there had been a greater understanding of the role, and an increasing range of producer networks, this had not diminished the need for general management positions as the work had changed. Some artists also questioned the appropriateness of the role of the producer, believing it to represent another layer in an increasingly complicated process of making work and delivering it to the marketplace.

3.3.11 Supporting the work: higher education

A common theme throughout the research was concern about the quality and quantity of graduates from higher education institutions. For example, there was a notable growth in postgraduate courses in directing, scenography and live art. While recognising the value this might bring, practitioners were concerned that this was leading to a greater number of graduates wanting to enter the profession who had high expectations but low skills. It also contributed to the perpetuation of existing employment demographics particularly with regard to lower socio-economic groups.

We heard that training for production and technical staff had become too specialised to meet the requirements of the industry. A number of people also expressed worries about the proliferation of unpaid internships. These were often for work which previously would have been remunerated, and were dependent on the intern having some sort of family or other support, another inhibitor to widening the workforce.

3.3.12 Supporting the work: leadership programmes

Respondents referred to a plethora of leadership initiatives, but felt these had not been a panacea. There was uncertainty about the impact that these were having.

Opinions about the emergence of leadership programmes in general, and the Clore Leadership Programme in particular, were divided. Some people felt that these have provided opportunities for a wide range of people. Others had reservations about the effectiveness of these programmes: they were concerned about over-promotion, downplaying the role of the artist, lack of engagement with the theatre profession, and elitism.

Some schemes such as Escalator, which had benefited emerging leaders and managers, were commented on favourably.

3.3.13 Supporting the work: Grants for the arts

There was much agreement that the Grants for the arts scheme established in 2003 has made a huge difference to the independent sector. Its light touch and ability to support research and development and to get the money directly into the work was widely welcomed.

Opinions about the early stages of the scheme were positive. Compared with the multiplicity of previous schemes, Grants for the arts provided:

- a simplified application process
- a simplified funding system and 'one-stop shop'
- better distribution between London and the regions, with larger grants being available
- encouragement for new and emerging artists
- support for new and developing work, enlarging and enriching the
- artistic community
- more diversification of work
- high impact for smaller projects
- support for more work created outside traditional spaces
- surgeries and one-to-one meetings with staff were beneficial
- help for established organisations to develop new creative areas

However, there was also a consensus of opinion about a number of overarching concerns:

- Grants for the arts was unable to support companies which needed to consolidate, there being no ladder of opportunity for progress from project funded to regularly funded organisation status
- the open nature of the scheme meant that Arts Council England was unable to be strategic
- Grants for the arts was the only option available for a range

of types of application
- there were regional variances in the way rules were applied
- the weekly consideration of applications by Arts Council England did not always lead to consistent judgements

A range of other individual concerns were raised:

- some applicants were confused about which Arts Council England departments to approach
- forms and processes were difficult for some sectors or individual artists to engage with
- Grants for the arts was described as a game of two halves: the first was a major boost to the sector but was not sustained, and therefore ground gained was lost
- timescales for decisions were problematic
- it created problems for venues when applications from companies were
- rejected, particularly if the first part of a project had received funding
- the focus on projects rather than productions may have resulted in less
- work being performed
- it created a dependency culture for new and emerging artists
- mature artists and larger organisations received less support

Individual artists, including writers, were not always aware of the possibility of applying to Grants for the arts, or did not find it easy to understand the agenda. Several preferred the old system, through which specific schemes flagged up priority areas.

While we heard new applicants needed advice and guidance, over the period under review Arts Council England officers began to have less ability to offer that support. The emphasis on matched funding also meant that small organisations had to spend a lot of time fundraising.

There were strongly held views that Grants for the arts' emphasis on emerging artists had not served more experienced artists, who may have built up loyal audiences in regional venues, well. In addition the inability of Arts Council England to offer a guarantee against loss as previously was regretted.

3.3.14 Supporting the work: diversity initiatives

There was a consensus of opinion that the timing of this Assessment is premature for assessing the impact of the diversity initiatives of the early years of this century. Despite this a number of positive benefits were identified (see 3.1.4).

There were criticisms that the level of debate about diversity, and consequent understanding of its complexities, has been unsophisticated. Box-ticking exercises, and narrow definitions of diversity have restricted the debate, and some organisations working in areas such as social exclusion or with rural communities have felt marginalised as a result. There were repeated comments that initiatives had been too prescriptive and therefore out of step with changing contexts.

3.3.15 Supporting the work: relationships with Arts Council England

While several people from larger companies expressed great satisfaction with the way Arts Council England staff, at national and regional level, had supported them during this period, many remarked on a declining relationship. Although welcoming a reduction in paperwork, a number of people observed an increase in long distance bureaucracy, with less face-to-face dialogue, meaning there had been something of a rupture in the relationship of funder and client. Respondents also observed a turnover of officers resulting in a loss of skills and knowledge, especially from the national office.

It was felt that the Arts Council England had spent too much time internalising. Respondents noted a lack of strategic planning, with Arts Council England focusing only on its own portfolio and not engaging with the wider theatre community. They were also frustrated by a large range of short term initiatives, some of which appeared to be politically driven.

Some people perceived that Arts Council England had moved away from the mainstream in favour of experimental, but that audiences had not moved as much.

Another theme to emerge concerned Arts Council England's role. Individuals commented that they looked for Arts Council England to lead the sector, working in partnership with artists, and found that wanting.

4 The factual story: making, seeing and supporting the work

4.1 The factual story: making the work

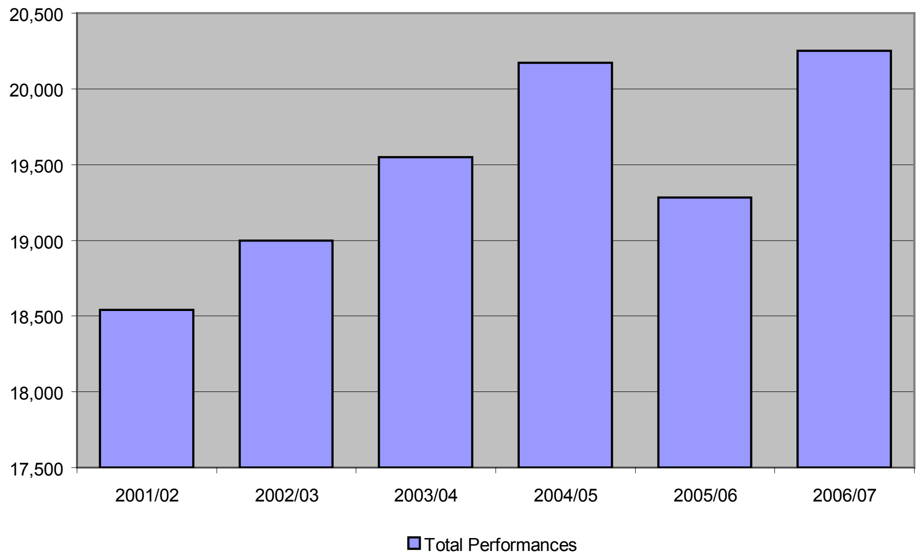
4.1.1 Making the work: introduction

This section of the report draws upon raw data analysis of the total sample of regularly funded theatre organisations and the constant sample of 74 organisations in receipt of the £25 million uplift in funding. It is also supported by secondary desk research.

4.1.2 Making the work: volume of work

Analysis of the volume of work among the constant sample of 74 regularly funded theatre organisations shows a steady upward trajectory in the number of performances being presented. The exception to this was 2005/06, which is in part accounted for by the closure of two major regional theatres for capital development.

Figure 1. Constant sample of regularly funded theatre organisations' total performances



4.1.3 Making the work: new work

Analysis also shows an upward trend in new productions in the later years of this Theatre Assessment

Figure 2. Constant sample of regularly funded theatre organisations' types of work

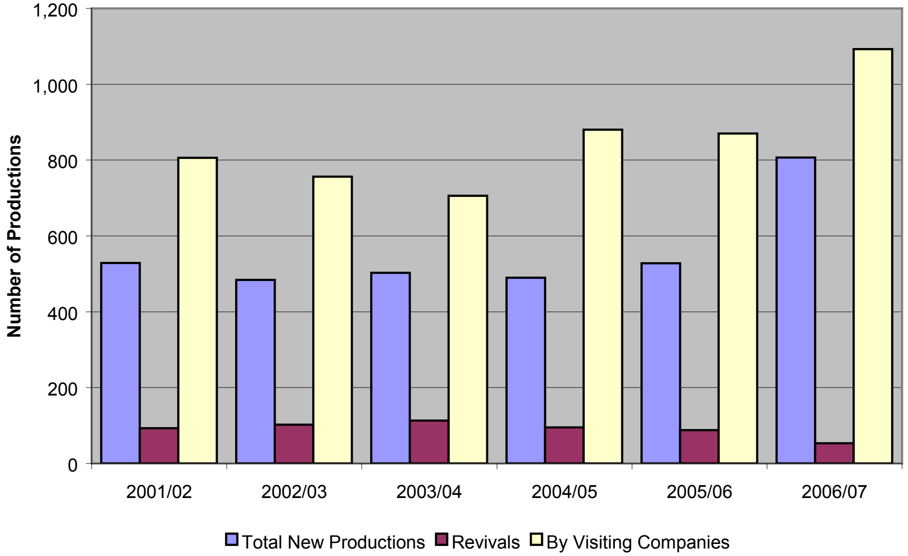
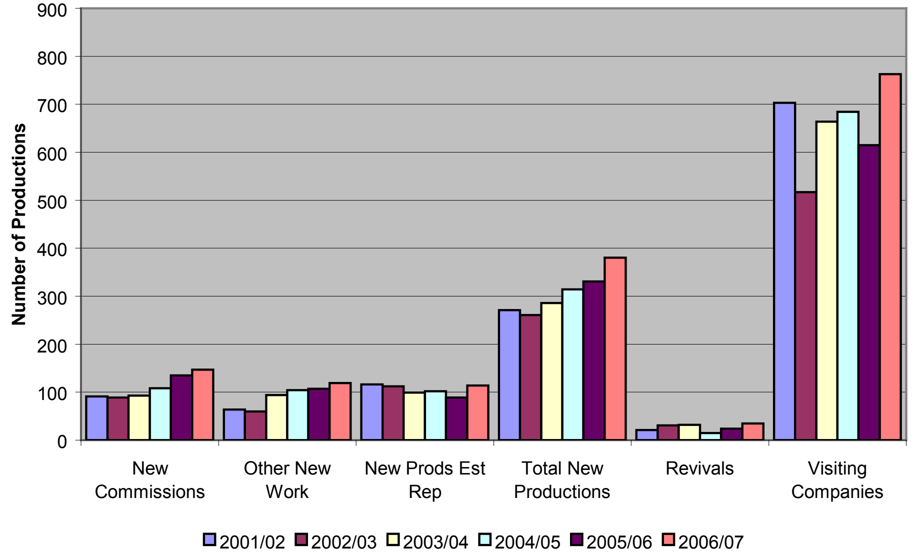


Figure 3. Constant sample of producing regularly funded theatre organisationss' types of work

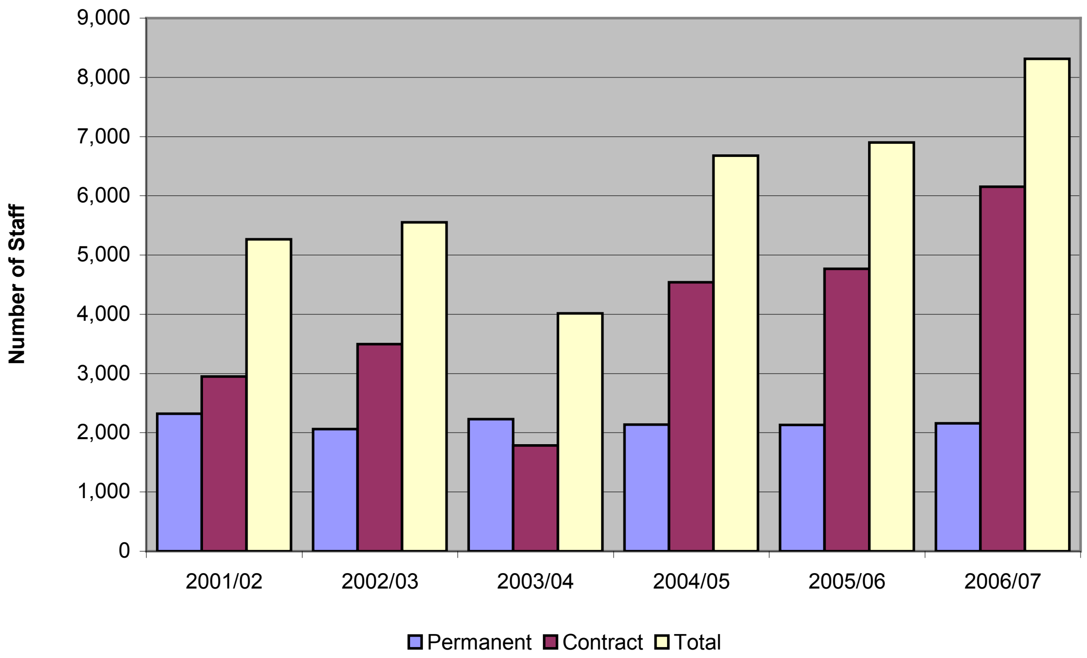


Analysis of a sub-sample of 32 producing houses also shows the total of new productions and commissions increasing throughout the period under review.

4.1.4 Making the work: staffing levels

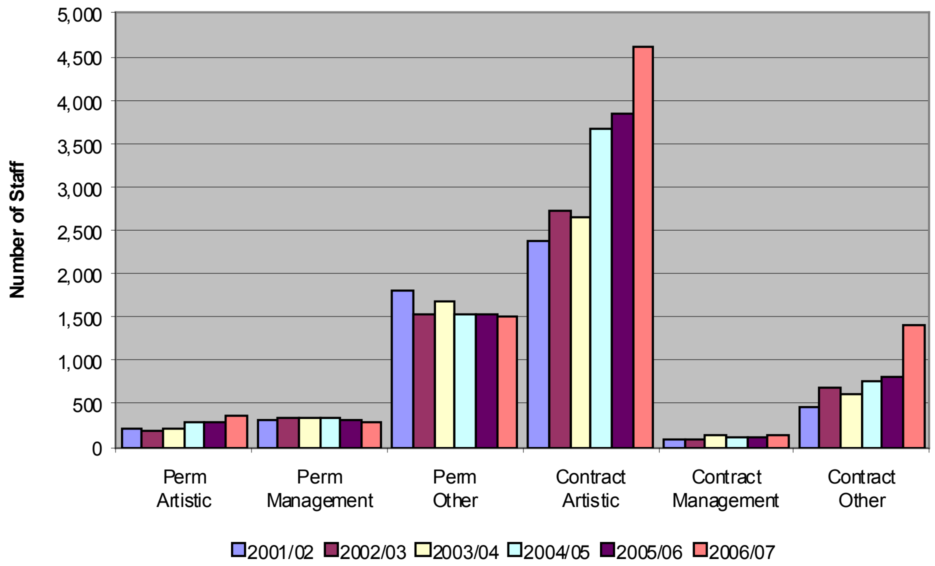
Analysis of all regularly funded organisation data sets shows a steady rise in the total number of staff during the period under review, with the exception of 2003/4 when there was a marked fall. The reason for this is not clear. Within this, there was a marked increase in contractual staff and a decline in the number of permanent staff employed.

Figure 4. Constant sample of regularly funded theatre organisations' total employee



Further analysis shows that there was a particular rise in the number of contractual artistic staff.

Figure 5. Constant sample of regularly funded theatre organisations, breakdown of employees



4.2 The factual story: seeing the work

4.2.1 Seeing the work: introduction

The focus of this section of the report is upon the volume, profile, expectations and behaviours of theatre audiences. It examines attendance trends together with quantitative data on audience profiles.

There have been many audience profiling studies at local and regional level in the period under review. These include an evaluation of Arts Council England's new audiences initiative; economic and social impact studies from the University of Sheffield; Arts in England: attendance, participation and attitudes in 2001 and 2003; Taking Part: England's Survey of Culture, Leisure and Sport, initiated by the Department for Culture, Media and Sport in 2005/06; and a range of local and regional studies of audience development initiatives.

Some evidence for this section is therefore sourced from desk research, particularly where it relates to any national trends, supplemented by analysis of attendances at regularly funded theatre organisations.

4.2.2 Seeing the work: audience trends in England

In 2004/05 Taking Part: The National Survey of Culture, Leisure and Sport was initiated by the Department for Culture, Media and Sport .

Figures for 2005/06 were:

Table 2. Taking art attendance, theatre and street arts/circus

	Play/drama %	Other theatre performance %	Street arts/ circus %
None	77	74	86
1-2 times a year	12	17	9
At least 3-4 times a year	9	7	3
At least once a month	2	1	1
At least once a week	0.2	0.1	0.4

Source: Taking Part survey, briefing No. 8, Arts Council England, April 2008

Taking into account audience overlap (about half of those attending a play or drama had also attended some other type of theatre performance in the previous 12 months) it was estimated that the combined reach of theatre and street arts/ circus through attendance and participation is 42%, or two in five adults in England. When compared to Taking Part data for 2004/05 there was little evidence of change.

A third source of data, Target Group Index (TGI), asks about attendance at plays, rather than street arts or circus. The findings of this survey showed an increase in the percentage of adults attending plays in England over the years 2001/02–2005/06:

Table 3. Percentage of adults attending plays in England

	% of adults attending plays in England
2001/02	24.4
2002/03	25.0
2003/04	25.6
2004/05	26.0
2005/06	30.7

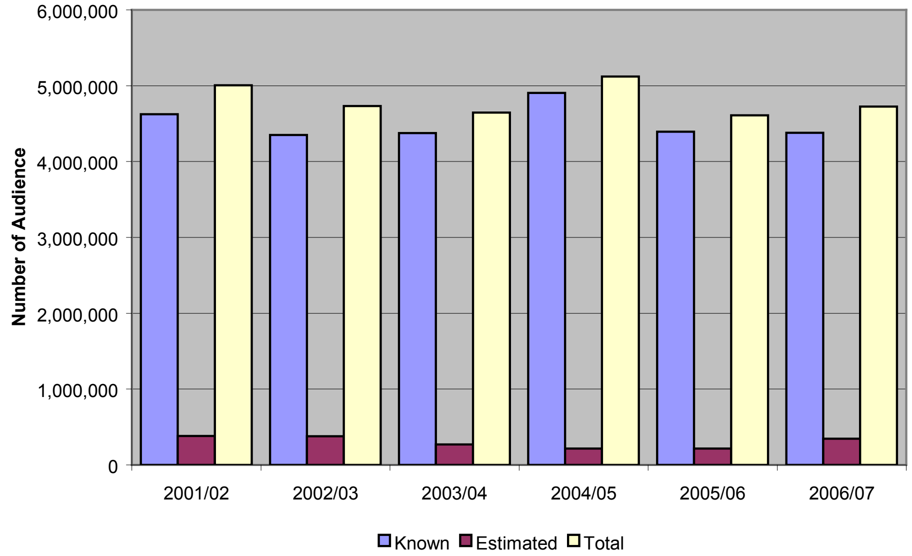
Source: BMRB (British Market Research Bureau)

Note: percentages include people who attend less frequently than once a year

4.2.3 Seeing the work: regularly funded theatre organisations

Total attendances for the sample of 74 regularly funded theatre organisations have remained static.

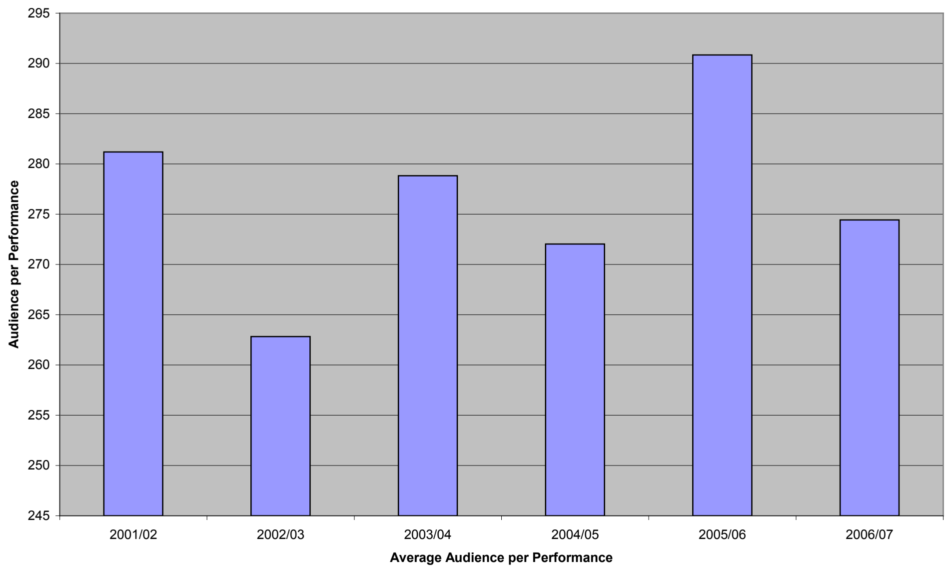
Figure 6. Constant sample of regularly funded theatre organisation attendances



Analysis of specialist samples within this grouping, such as touring, new writing organisations and children's theatres, shows that increases in the number of performances appear to spread the audience base more thinly, leading to lower average attendances (see section 6), which largely explains the reduction in attendance per performance observed in the constant sample (Figure 7).

Analysis of returns for all regularly funded theatre organisations over that period tells a somewhat different story, with 2005/06 performing particularly strongly, although the reasons for this are unclear:

Figure 7. Total sample of regularly funded theatre organisations' average attendance per performance



4.2.4 Seeing the work: changes in audience profile, secondary research

While the findings of different surveys may not agree on percentages of adults in England attendance figures for theatre, street arts and circus, there is a concurrence when it comes to audience profiles.

The conclusions of the Arts in England surveys 2001 and 2003, the Taking Part survey and TGI are broadly similar. They show consistent trends for theatre audiences. This summary is from the Taking Part survey, briefing No.7, April 2008:

- individuals with higher levels of education are significantly more likely to attend
- social status is also a strong predictor
- women are significantly more likely than men to have attended plays/dramas, other theatre performances and street arts/circus
- Black and minority ethnic adults are less likely to have attended, particularly for musicals and pantomime; also less likely to attend plays/dramas; Black adults less likely to attend street arts
- likelihood of attending increases steadily with age 60–69 for other theatre; lower for street arts and circus at 50–59
- Londoners are the most active attenders, those living in North East, North West, and East Midlands significantly less likely to attend
- adults with children aged 0–4 have a lower probability, children aged 5 – 10 have a higher probability

The investment of £20 million into Arts Council England's new audiences initiative across the five years 1998/99–2002/2003 also overlaps with the period under review for this assessment. The evaluation of the programme concluded that the 1,157 awards generated more than four million attendances to live arts events. 33% of these were general events, while 23% focused on young people, 20% on diversity and 9% on disability. This undoubtedly had specific impacts for individual theatre organisations. However, there is no published evidence to demonstrate that these audiences have been sustained. (Source: New Audiences report, Arts Council England, 2004).

4.3 The factual picture: supporting the work

4.3.1 Supporting the work: introduction

This section of the Theatre Assessment provides an analysis of staffing trends and pay. It is sourced from desk research, regularly funded organisation data analysis, consultation, and written submissions.

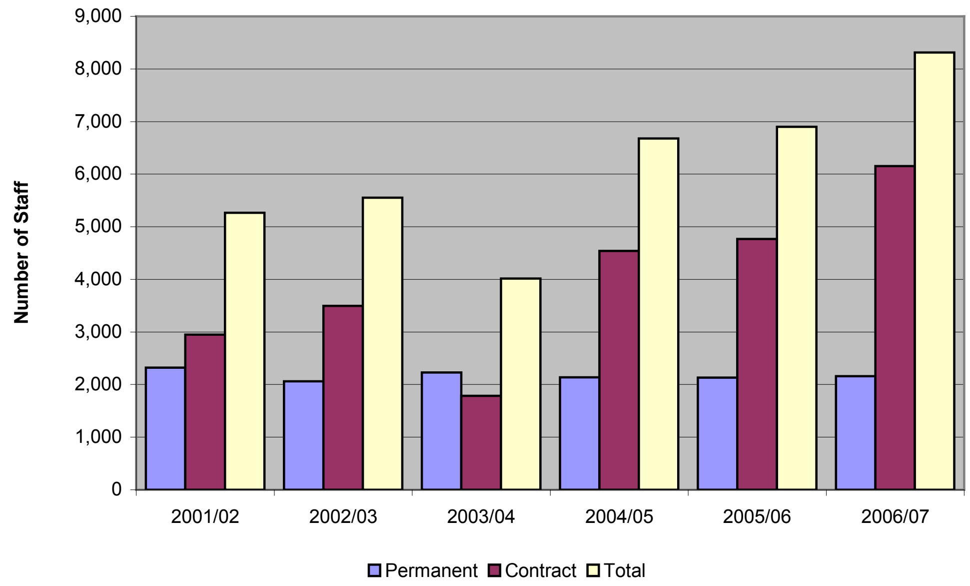
4.3.2 Supporting the work: financial models

As the income and expenditure analysis of regularly funded organisations shows, there was no quantitative evidence to suggest that these theatre organisations' financial models changed during the period under review (see 5.3.4).

4.3.3 Supporting the work: employment trends

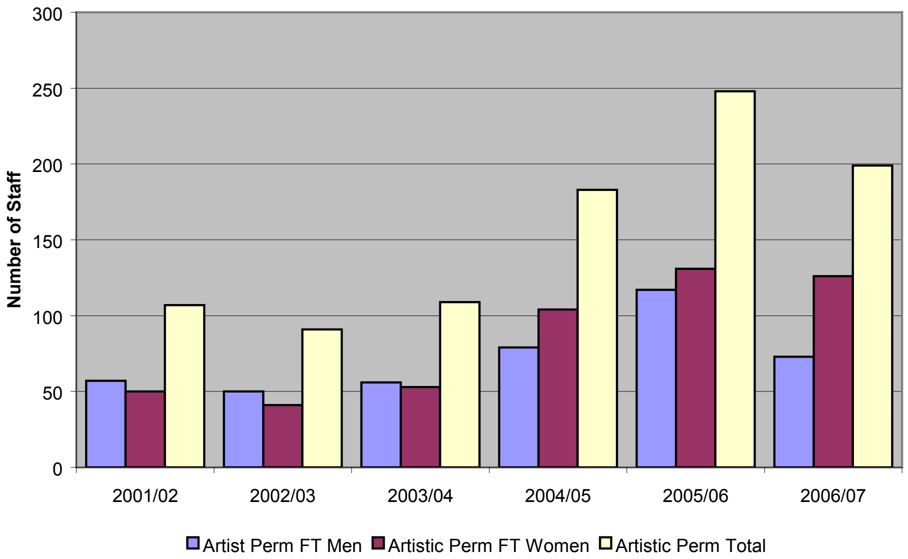
The total number of permanent and contractual staff employed by the constant sample of 74 regularly funded theatre organisations in receipt of the £25 million rose by 57.7% in the period 2001/02–2006/07.

Figure 8. Constant sample of regularly funded theatre organisations' employment



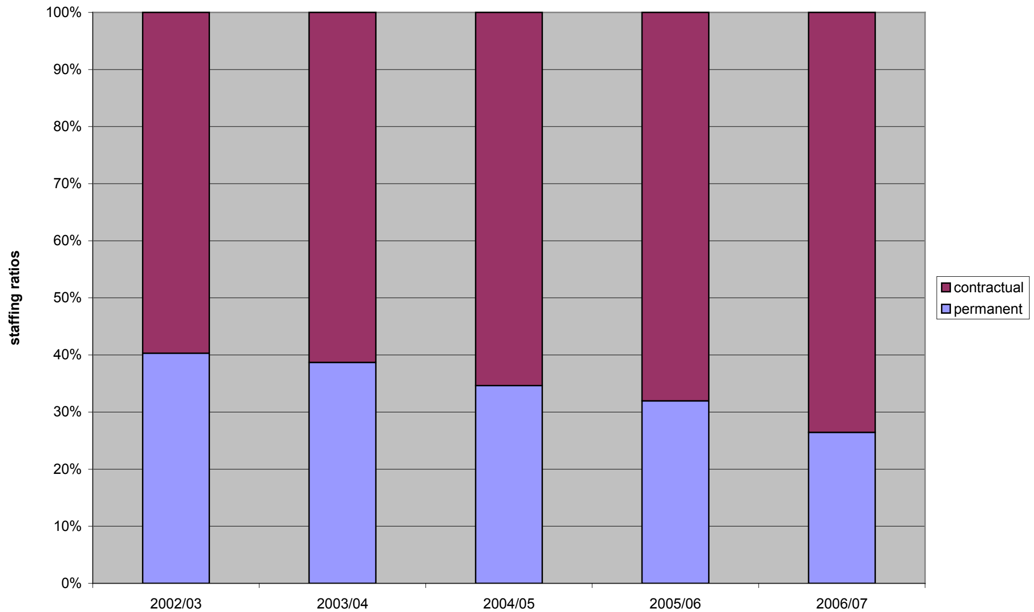
Within that same period the number of full time female artistic staff rose from 50 to 126. This was an increase of 152.0%, compared with an increase of 28.1% for full time male artistic staff. In 2005/06 there was a peak in the number of permanent artistic staff, with the percentage of women even higher, even though there was a dip in the amount of work produced.

Figure 9. Constant sample of regularly funded theatre organisations' full time artistic staff by gender



There was a clear trend to employing proportionately more contractual staff during this period, as analysis of the total sample of regularly funded theatre organisations shows.

Figure 10. Total sample regularly funded theatre organisations' ratios of permanent and contractual staff



With the exception of 2003/04 this same trend is mirrored within the constant sample of 74 regularly funded theatre organisations.

Figure 11: constant sample of theatre RFOs ratios of permanent to contract staff

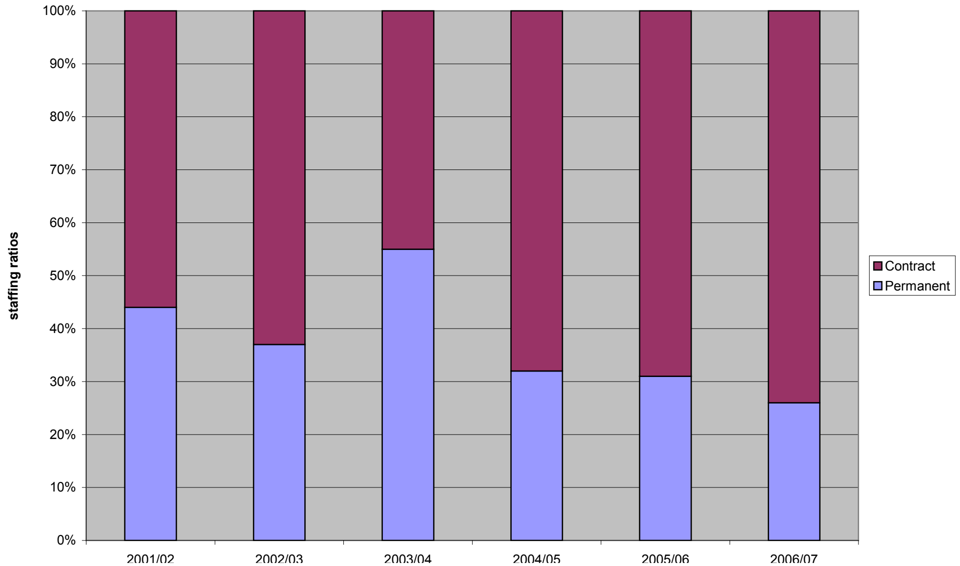
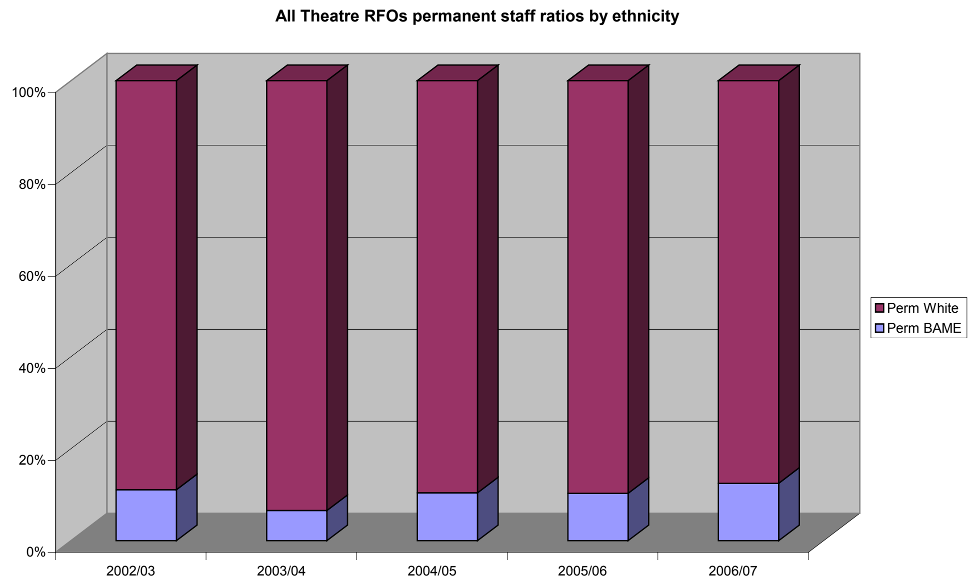


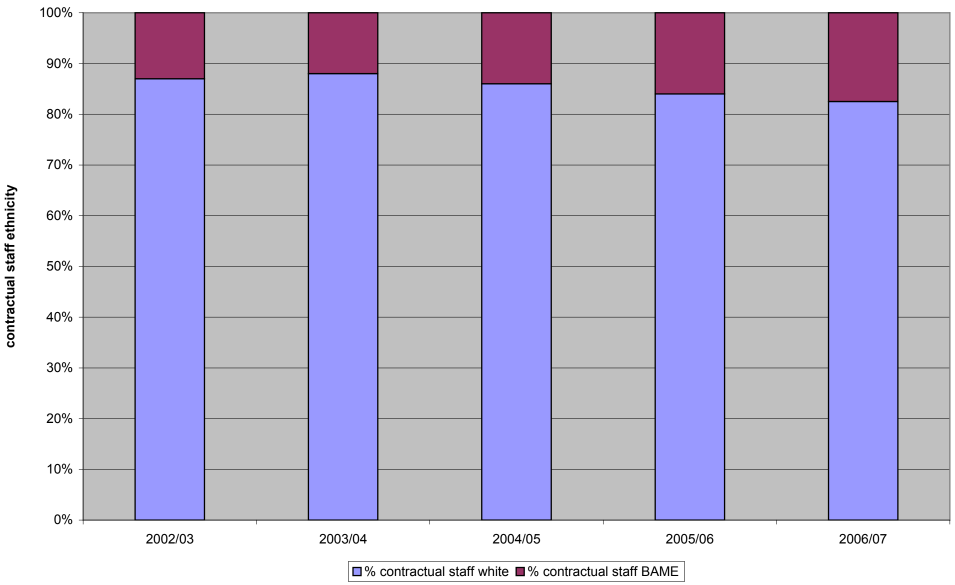
Figure 12.Total sample of regularly funded theatre organisations' permanent employment by ethnicity



Analysis of the ethnic profile of staff for the total sample of regularly funded theatre organisations shows that the proportion of white to Black and minority ethnic staff as remained constant throughout the period under review:

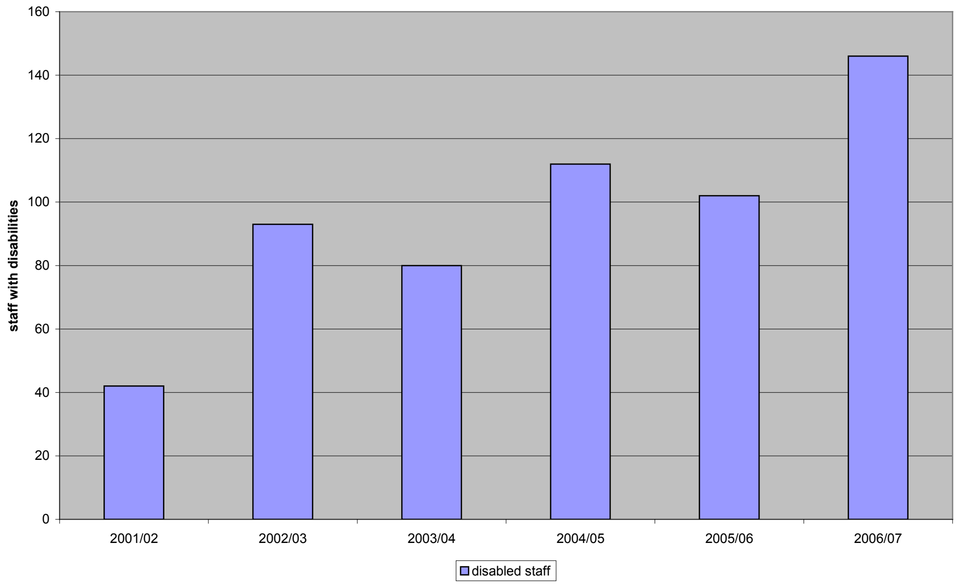
Over the same period there was a growth in the proportion of contractual Black and minority ethnic staff employed.

Figure 13. Total sample of regularly funded theatre organisations' contractual employment by ethnicity



Across the total sample of regularly funded theatre organisations the average number of disabled people employed rose from 1.01 in 2001/02 to 1.5 in 2006/07. The number of staff with disabilities within the constant sample of 74 regularly funded theatre organisations also rose.

Figure 14. Constant sample of disabled regularly funded theatre organisation staff



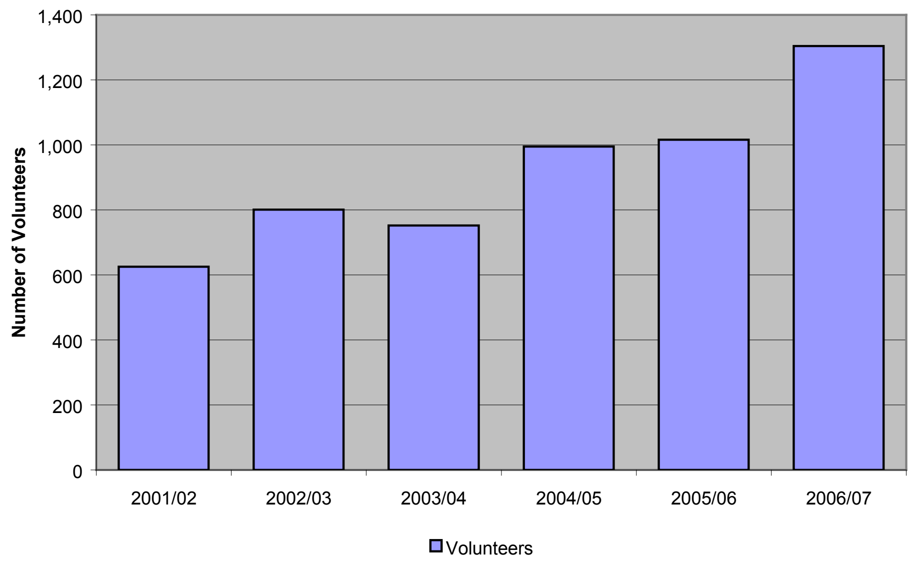
4.3.4 Supporting the work: pay

In 2007 a review by Equity of pay in the theatre industry concluded that improvements in levels of pay in 2001/02 and 2002/03 had influenced the increase of the proportion of actors accepting work in regional producing theatres. Their analysis shows a 13% increase in actor weeks from 2001/02 to 2004/05 with a subsequent drop of 2.5% in 2005/06. Over the same period total wages grew by 40% from 2001/02 to 2004/05 with a subsequent drop of 2% in 2005/06. This was a UK-wide survey including unsubsidised theatres in the sample, so it is difficult to evaluate the role that the Theatre Review played in these improvements. (Source: A Brighter Future: the case for investing in subsidised theatre, Equity, 2007)

4.3.5 Supporting the work: volunteers

Volunteers have played an increasingly important part in supporting theatres over the period of this assessment. Analysis of the constant sample shows that the number of volunteers doubled across these 74 organisations:

Figure 15. Constant sample of regularly funded theatre organisations' volunteer



5 The factual story: financing the work

5.1 Financing the work: introduction

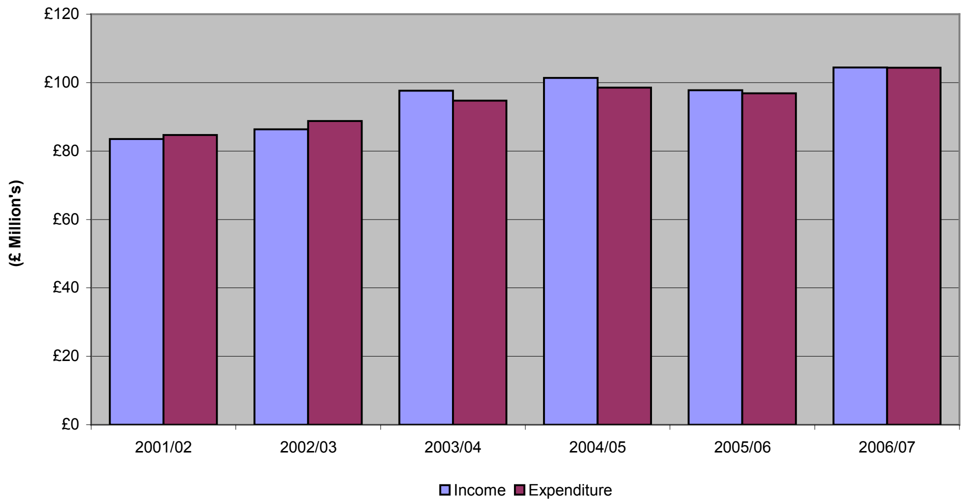
This section of the Theatre Assessment provides headline data on levels of investment in the sector since 2001/02. It also examines any key changes in income during the period under review, focusing particularly upon a sample of 74 regularly funded theatre organisations that benefited from the £25 million funding uplift.

The evidence for this section has been sourced from Grants for the arts and regularly funded organisation data, and from desk research.

5.2 Financing the work: total income and expenditure

Detailed analysis for this Theatre Assessment shows that total income for a constant sample of 74 theatre organisations, all of which were included in the £25 million uplift, rose by 25.0% in the five years from 2001/02 to 2006/07. Total expenditure rose by 23.2% in that same period. Inflation levels held steady during the period under review until a marked rise of 1.1% in 2006/07.[1]

Figure 16: Constant sample of regularly funded theatre organisations' income and expenditure totals



1 Source for annual inflation rate: Office of National Statistics Retail Price Index, all items.

Note: Annual inflation rate is recorded for calendar years. Figures used here are 2003 annual inflation rate for 2002/03; 2004 for 2003/04; 2005 for 2004/05; 2006 for 2005/06; and 2007 for 2006/07.

5.3 Financing the work: income sources

5.3.1 Income: Arts Council England regularly funded organisation and Grants for the arts

Investment through the regularly funded organisation portfolio and Grants for the arts scheme are as follows:

Table 4. Arts Council England regularly funded organisation and Grants for the arts theatre funding

	Grants for the arts, main artform theatre	RFO and Grants for the arts
2001/02 (£)	Not applicable	50,506,040
2002/03 (£)	Not applicable	71,669,239
2003/04 (£)	10,140,379	95,641,820
2004/05 (£)	13,470,636	104,163,075
2005/06 (£)	15,028,771	110,061,153
2006/07 (£)	17,806,594	115,904,285

(Source: Arts Council England)

(Note: in 2001/02 regional arts boards used a variety of artform classification systems. The figure for this year is an aggregation of regional arts boards and Arts Council England records. In addition, the investment in combined arts for that year was £22,450,891.)

5.3.2 Income: Arts Council England other programmes

The regular funding and Grants for the arts investments must also be seen within the context of the additional funds identified below. Not all of these figures can be verified, and should be used for contextual purposes only.

Touring

- portfolio of national touring companies: middle-scale, children and young people, cultural diversity, inclusion, new technology and other touring. National support £7.1 million in 2002/03 rising to an estimated £9.2 million in 2005/06
- fixed term funded festivals and national support organisations: £159,000 in 2002/03 rising to an estimated £184,000 in 2005/06
- large and middle-scale touring: Almeida[2], Birmingham Rep, English Stage Company, Northern Stage, Plymouth Theatre Royal, and Sheffield Theatres £640,000 in 2002/03 rising to an estimated £780,000 in 2005/06

(Source: Arts Council England drama department budgets 2002/03–2005/06)

2 The Almeida did not take up its National Touring Contract, which was subsequently awarded to the Watermill Theatre in Newbury.

Managed funds

- these were instrumental in supporting specific initiatives including Black and Asian Theatre Development (Black Regional Initiative in Theatre, touring consortium, traineeships), carnival, children's theatre development, circus and street arts, national networking, new writing initiatives and professional development. National support £1.7 million in 2002/03 reducing to an estimated £1.3 million in 2005/06

(Source: Arts Council England drama department budgets 2002/03 – 2005/06)

Stabilisation and recovery programme

- a number of practitioners who took part in this Assessment referred to the combined effects of the £25 million uplift and earlier stabilisation and recovery funding received in the five years before. Between 1996/97–2000/01 organisations with theatre as their main artform were awarded over £11.1 million
- in total 21 theatre organisations received money from the stabilisation and recovery programme, which represented 28% of the overall programme.

(Source: Arts Council England stabilisation and recovery awards by region, April 2005 and DCMS awards website 2008.)

(Note: main artform is taken from project classifications that are self-determining by the applicant.)

Capital programmes

- likewise, organisations with theatre as their main artform were awarded a total of the total capital awards just under £303 million in the years 1994/95–2000/01

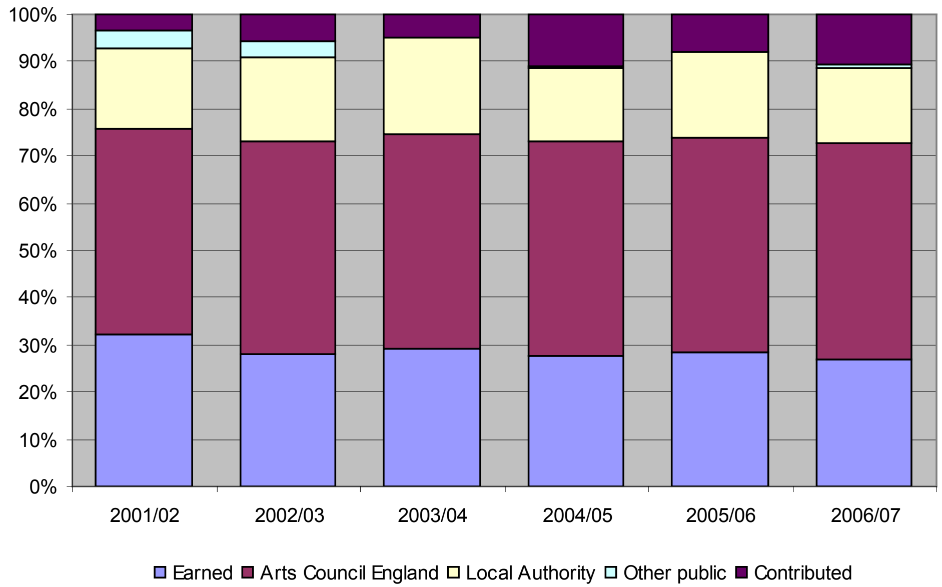
(Source: DCMS awards website, 11 November 2008.)

(Note: main artform classification determined as above.)

5.3.3 Income: ratios from all sources

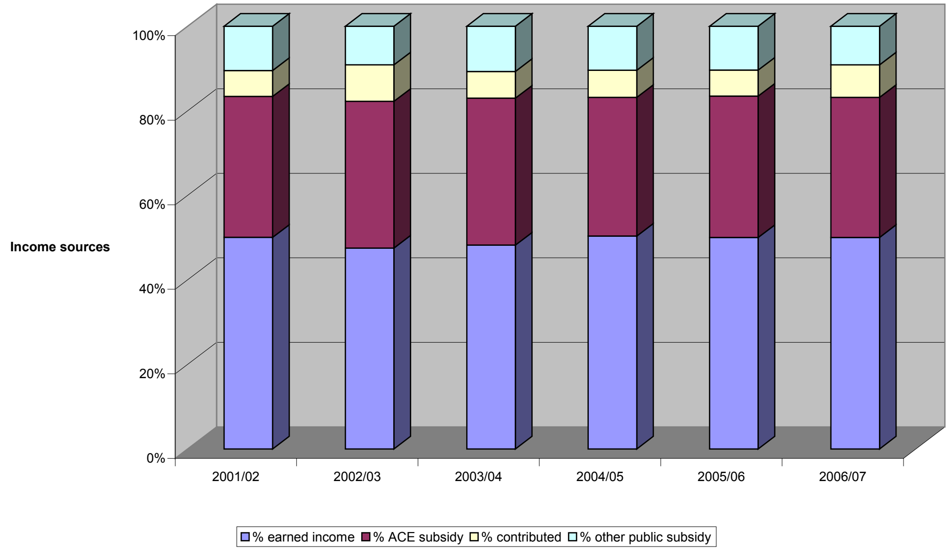
Analysis of the constant sample of 74 regularly funded theatre organisations shows that ratios of earned income and support from Arts Council England were fairly consistent throughout this period, although earned income decreased in 2006/07. There were more fluctuations in Local Authority and other public support:

Figure 17. Constant sample of regularly funded theatre organisations' income source ratios



This is further substantiated by an analysis of income for the total sample of regularly funded theatre organisations over the full five year period since 2001/02. There are few variations in ratios of income derived from different sources. This is the case despite differences in the baseline samples of regularly funded organisation submissions in these years.

Figure 18. Total sample of regularly funded theatre organisations' income source ratios



Analysis of the sub-sample of 33 producing theatre organisations shows that they achieved relatively high proportions of earned income in relation to total income: 54.5% in 2001/02 and 49% in 2006/07. Income from other sources was fairly consistent over time, although there was a reduction in the ratio of local authority support from 13.8% of total income in 2001/02 to 10.7% in 2006/07.

Figure 19. Constant sample of producing regularly funded theatre organisations' income source ratios

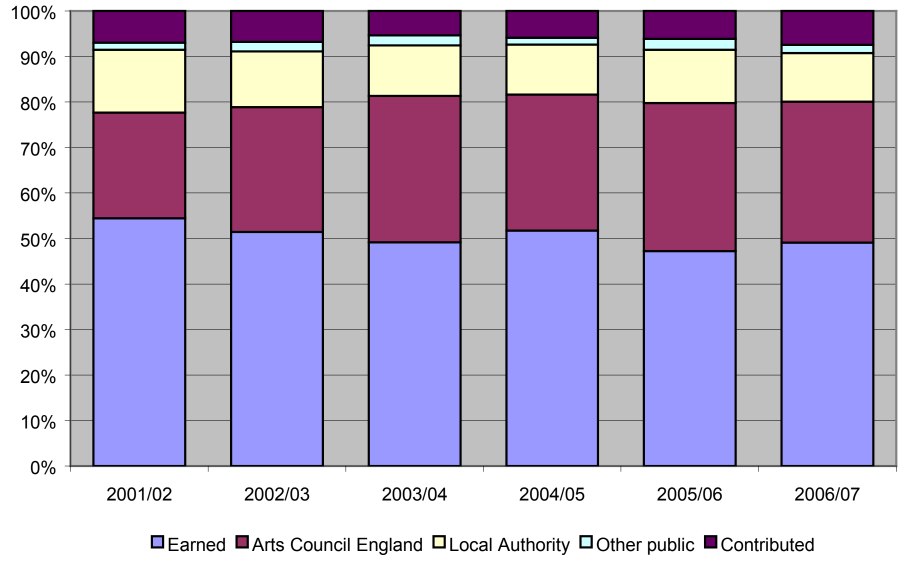
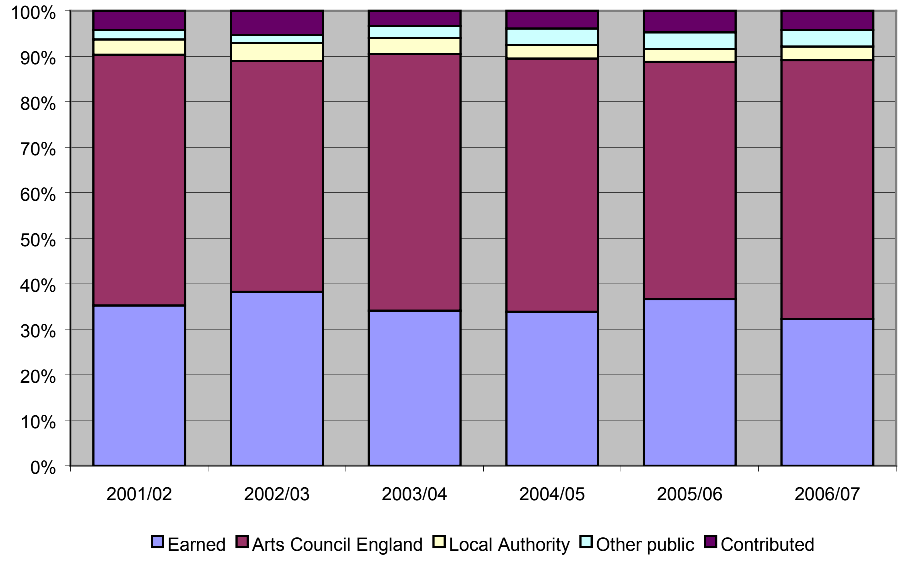


Figure 20. Constant sample of touring regularly funded theatre organisations' ratios of income



Analysis of a sub-sample of 38 touring theatre organisations shows that they relied more heavily on Arts Council England support, with ratios of earned income varying from a high of 38% of total income in 2002/03 to a low of 32% in 2006/07.

5.3.4 Income: ticket sales

Information on average ticket yield and capacities was collected on regularly funded organisation returns in 2004/05, 2005/06 and 2006/07 but the data does not yield sufficient detail for meaningful analysis.

5.4 *Financing the work: expenditure*

5.4.1 Expenditure streams

We are reliant upon regularly funded organisation returns to show any trends in expenditure levels over the years 2001/02–2006/07. The way in which information about expenditure on the artistic programme was gathered changed in 2004/05. It is therefore only possible to assess any fluctuations for the three years 2004/05–2006/07. Indicators from the total sample of regularly funded theatre organisations show very little change over these years.

Figure 21. Total sample of regularly funded theatre organisations expenditure ratios

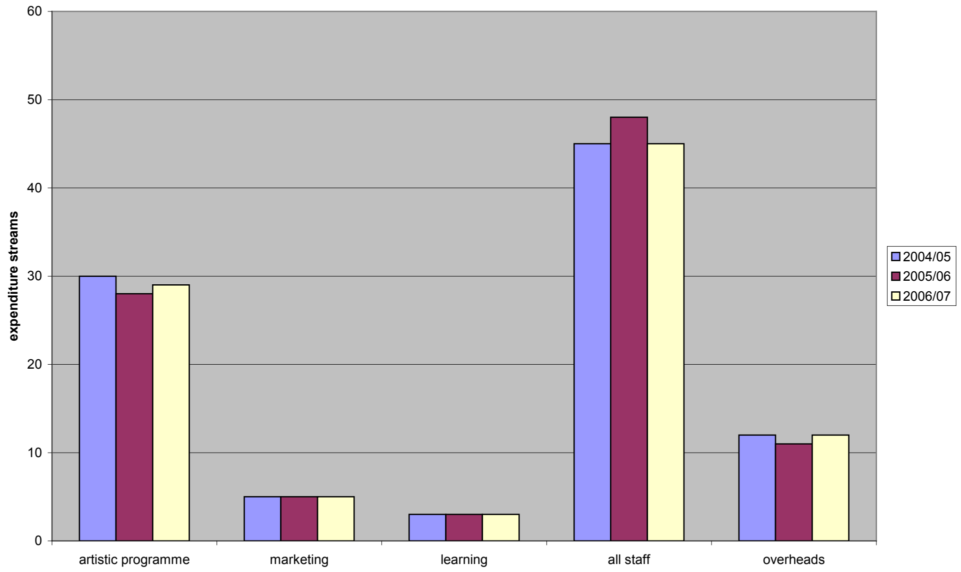


Figure 22. Constant sample of regularly funded theatre organisations' expenditure ratios

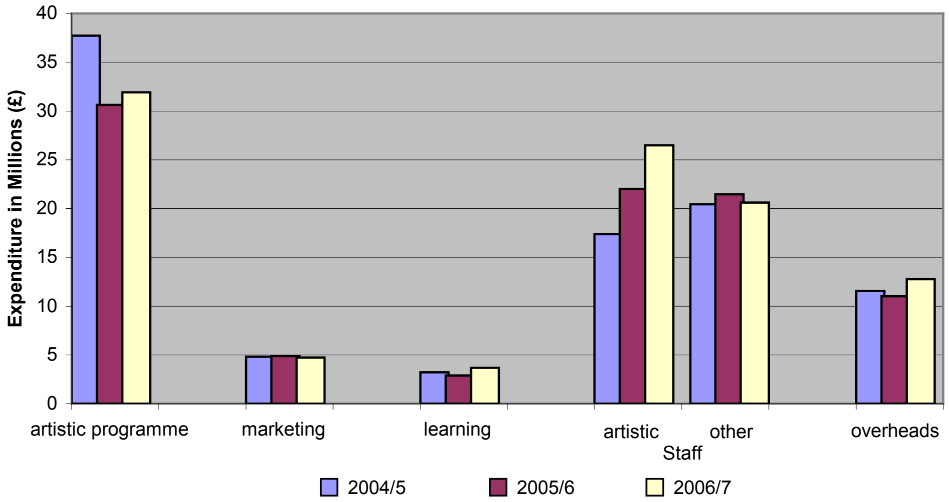


Figure 23. Constant sample of producing regularly funded theatre organisations' expenditure ratios

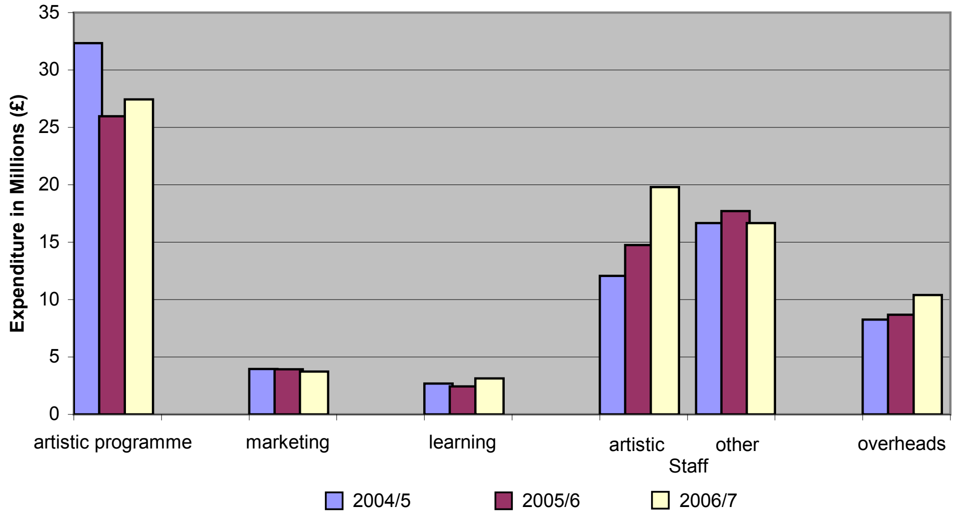
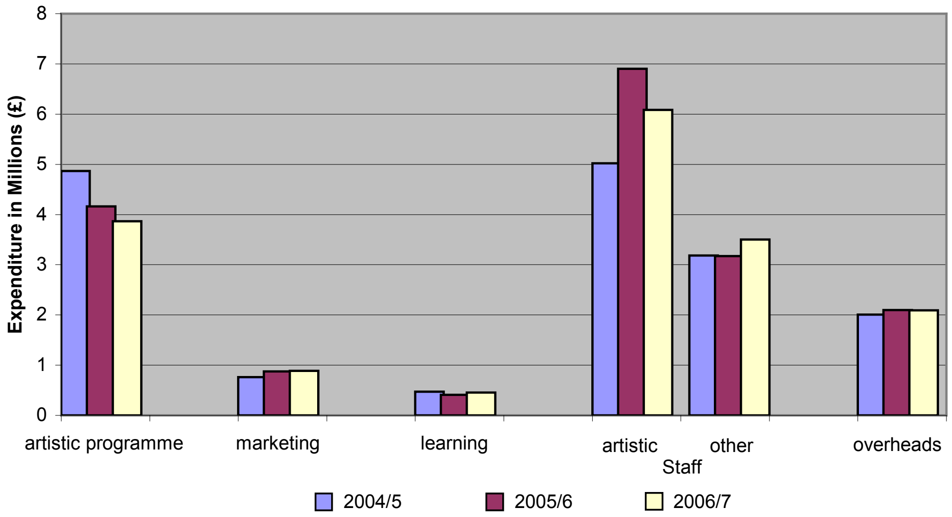


Figure 24. Constant sample of touring regularly funded theatre organisations' expenditure ratios



5.4.2 Expenditure: economic impact

A study in April 2004 concluded that the economic impact of 49 West End theatres venues was £1.5 billion. The economic impact of 492 venue-based theatre organisations in the UK, excluding the West End venues, was calculated at £1.1 billion. Taking turnover into account, it also concluded that the total impact of organisations outside of London was £1.8 billion. However, there has been no assessment of the economic impact of theatre since.

(Source: Dominic Shellard, University of Sheffield, April 2004).

6 Spotlight on specialisms

6.1 Spotlight on specialisms: introduction

During the consultation process for this assessment it became apparent that individual areas of work required more detailed examination. In several cases these corresponded with priority areas identified by Arts Council England at the outset of the period under review.

This section therefore provides a spotlight on five key subject areas, namely new writing; work for children and families; participation, including young people; street arts and circus; and touring. This section of the report is based on the findings of interviews and focus group discussions as well as written submissions. There was no consistent picture when it came to the sector's observations and much depended upon individual organisations and the local operating context. The information below therefore reflects a range of divergent views, as well as highlighting areas on which a consensus of opinion was recorded. The section is also based on secondary data analysis and analysis of regularly funded organisation data.

6.2 New writing

6.2.1 The sectoral perspective: investment in new writing

There was a widespread view among practitioners that while there had been a growth in development of writers there had been a reduction in the amount of work commissioned and produced. This was particularly linked to changes in the touring circuit, and perceptions that it had become increasingly difficult to place 'straight' plays (see 6.6).

6.2.2 The sectoral perspective: changes in new writing

Respondents in the consultation programme identified a number of changes in the new writing landscape during the period under review:

- the range of regularly funded organisations producing and presenting new work increased
- the impact that this has had on organisations that were the traditional homes of new writing, which have responded by opening themselves up to more collaborations, and producing a wider range of work
- companies that were specialists in new writing began to investigate different ways of making work
- changes in artistic leadership at London venues have meant that new writing was no longer necessarily confined to new

writing houses
- in turn this may have led to less distinctive individual brands
- wider range of people involved in commissioning and developing work, influenced by international work
- multimedia events and the incorporation of music and dance into theatre had also become more common – it was said the emphasis had moved from drama to theatre

One result of these changes was a period of some confusion, particularly around the issues of the 'well-made play' and the role of the writer.

Respondents observed that a focus on process rather than outcome has left some writers out in the cold, without support to draw them into the collaborative approach. On the positive side, respondents identified the development of individual skills through collaborative working.

We also heard of the difficulties of presenting new writing in the West End, where there had been fewer plays from the subsidised sector than five years previously and that writers were not often being developed to move from studio to main stage.

6.2.3 The sectoral perspective: support for new writers

A consistent theme during the discussion was the emergence of a new generation of directors. The Young Vic's directors' scheme, LIFT and Barbican International Theatre Event (BITE) were all cited as influences on directors with an interest in multidisciplinary work. The growth of a new generation of artistic directors in regional theatres had also led to the start of a revitalisation of studio spaces. Some commentators also observed that the quality of direction had improved over the previous five or six years.

For writers the picture had become more complex. Positive developments included the ability to move across genres, venues and mediums more freely. Other positive developments included:

- increased support and encouragement for new writers
- more openness and more networks to support writers
- more opportunities to present the work of unknown writers in flagship venues
- a consequent diversity of starting points and backgrounds
- pooling of resources resulted in new connections between writers and theatres

The more negative aspects of the period under review were perceived to be:

- decline in career paths for emerged/mid career writers and lack of continuity of experience
- continued low profile of playwrights for children's theatre
- continued lack of female playwrights
- increased difficulty of supporting writers' ambitions for large scale work
- the producer role intervening with rather than supporting the writing process
- continued dominance of London
- lack of second runs
- lack of support for new writers of musical theatre

In addition the growth of the dramaturge and the role of dramaturgy was identified as a major change. Respondents observed that there had been more acceptance of dramaturgy over the previous five years, and that a new generation of writers had emerged who had never known anything other.

One particularly complex area of discussion focused on whether the move towards collaboration, and more multilayered processes, supported or marginalised the writer. For some this development had opened practice up, and had taken new writing away from the wings and into centre stage: collaboration has replaced new writing as the buzzword.

For others, writers have become victims of these processes, depending more than ever on approval from an artistic director, a dramaturge or some other voice of authority. Two individuals were also concerned that the focus on the new has jeopardised the careers of those who are no longer new.

Additional changes since the £25 million funding uplift have been the growth in higher education opportunities for directing and creative writing. Practitioners observed that this has led to unrealistic expectations among artists, as well as a focus on performance rather than mainstream theatre. They were also concerned that this would continue to prohibit the emergence of writers from lower socioeconomic groups, and result in a more narrow range of voices being heard (see 3.3.11).

6.2.4 The sectoral perspective: audiences for new writing

New writing practitioners observed increasing problems in reaching audiences outside of London, again because of decline in the touring infrastructure (see 6.6).

In London commentators pointed to a polarisation of two distinct types of audience, born out by data from Audiences

London: the traditional theatre audience that is loyal to its local venue, and a younger Black and minority ethnic audience that will travel across the city.

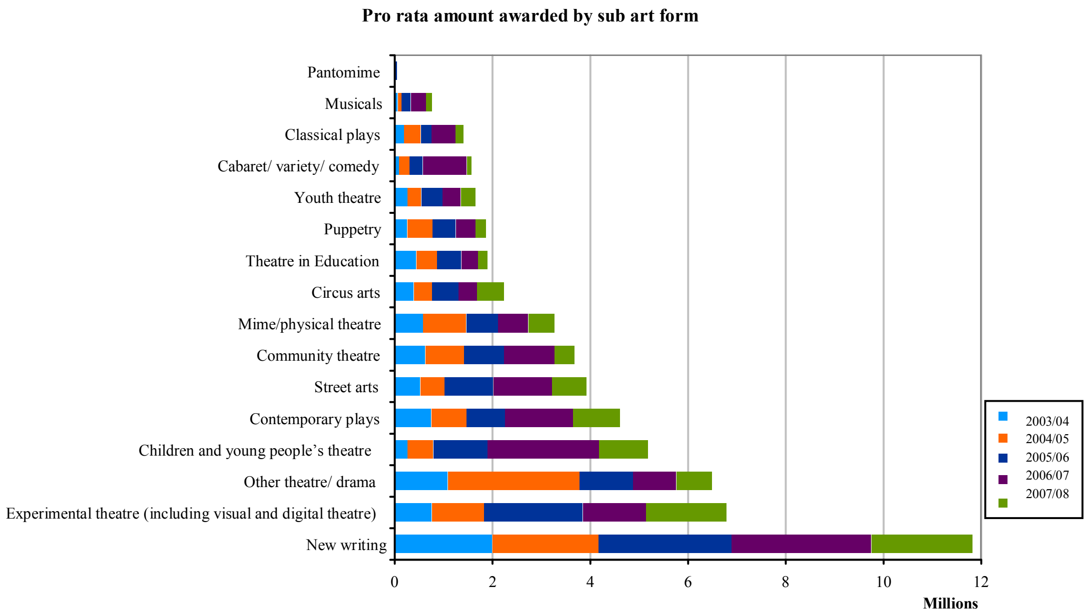
6.2.5 Facts and figures: investment in new writing

A common thread through Arts Council England policy documents from the1999 *Theatre writing strategy* onwards has been an emphasis on supporting new work and the individual artist. Following a second review in January 2004, a range of actions were implemented to support training and development for writers, literary managers and dramaturges. A range of other initiatives were also explored.

(Source: Theatre writing strategy and action points, Arts Council England, January 2004)

In addition to supporting its portfolio of regularly funded theatre organisations, new writing initiatives were supported through the Arts Council England's Drama Department's managed funds. The sums allocated were £270,000 in 2003/04 and £100,000 in subsequent years. In addition Arts Council England's increased investment in new writing through Grants for the arts was notable. Of all sub-artforms, new writing has achieved the highest levels of investment:

Figure 25. Grants for the arts theatre awards 2003/04 – 2007/08



6.2.6 Facts and figures: volume of new writing

As the analysis of producing theatres shows in section 5.1.3 above, the peak years for the number of new commissions were 2003/04 and 2005/06, although there was no major downturn during the period under review.

Scrutiny of a constant sample of eight new writing organisations, all of which were in receipt of the £25 million, shows a slight dip after 2001/02 and subsequent peak in 2003/04. It also shows that the proportion of new commissions in these organisations was consistently higher than for other types of work.

Figure 26. Constant sample of regularly funded theatre organisations' new writing types of work

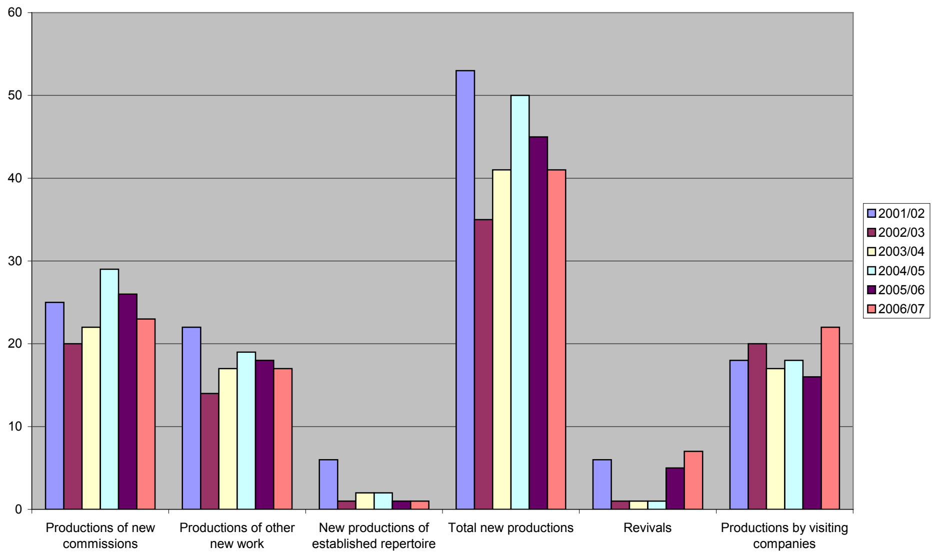
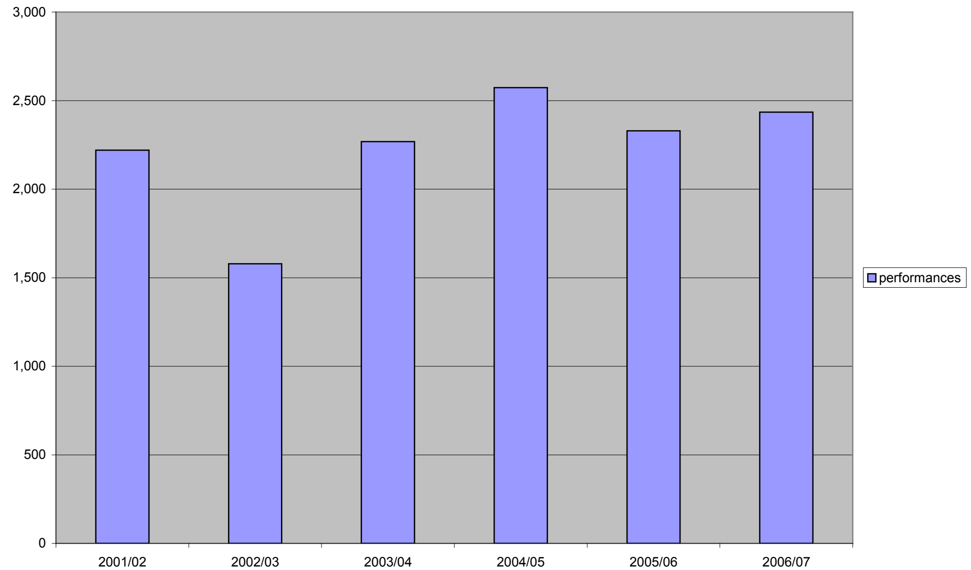


Figure 27. Constant sample of regularly funded theatre organisations' performances of new writing

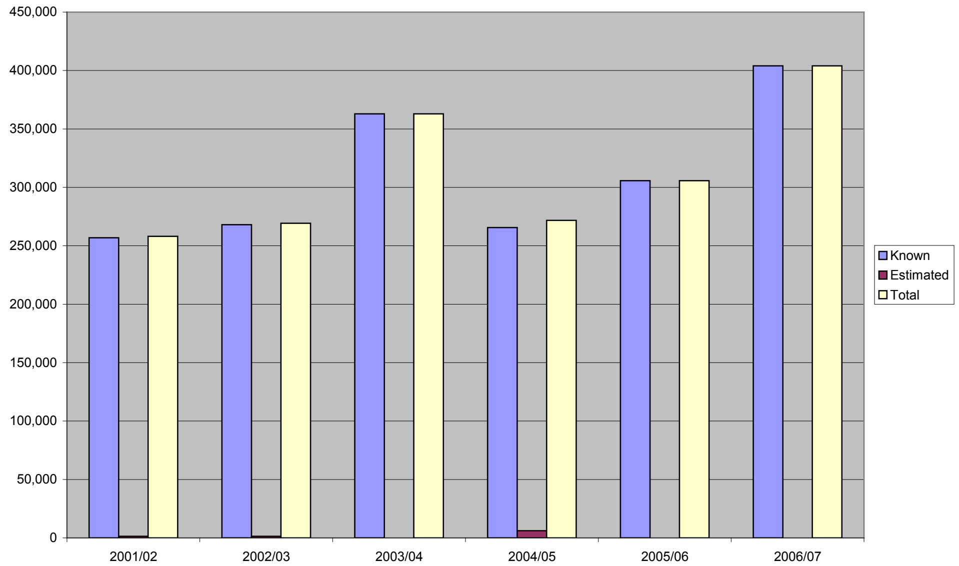


Further, following a decline in 2002/03 the number of performances in these same organisations rose and has since remained quite steady.

6.2.7 Facts and figures: audiences for new writing

Attendance trends for the constant sample of regularly funded new writing organisations show fluctuations that do not appear to bear relation to volume of performances. In this instance, 2003/04 performed well and the last year of this study, 2006/07, exceeded all preceding years.

Figure 28. Constant sample of regularly funded new writing organisations' attendances



New writing practitioners observed increasing problems in reaching audiences outside of London, again because of decline in the touring infrastructure (see 6.6).

6.3 Spotlight on specialisms: work for children and families

6.3.1 The sectoral perspective: changes in the work for children and families

There was much agreement that progress had been made in a number of key areas

- more good work for young audiences: the bar has been raised
- more confidence: work for young people and families was more respected
- much greater investment in work for early years and teenagers
- repertory theatres started to embrace work for young people
- co-productions between theatre organisations
- some venues realised that work for families was good for the box office
- the development of circus-influenced work for children and families and become embedded in theatre practice

The main areas of disappointment and principal concerns were consistently voiced as follows:

- a gap between early years and teens: lack of work for 7–12-year-olds and those age groups being more pressured by the school timetable
- work for children and families was squeezed out of venues as focus has remained on income generation
- there was an emphasis on well known titles and big brands, especially for commercial touring
- fewer venues were interested in experimentation
- the response of some repertory theatres was disappointing: there was less investment of the £25 million in this area of work than expected

- work for families was not always of the highest quality
- continued lack of coverage in national newspapers
- problems for companies trying to progress from small to middle-scale

6.3.2 The sectoral perspective: work for children and families, formal learning

There was agreement that higher quality work was going into schools but there was felt to be a particular problem with secondary schools. Respondents observed that secondary schools were engaging less frequently, and the work had become a commodity. The reasons included:

- less willingness and capacity to travel
- pressures on teachers to justify activities
- the need to ensure that children are not off the timetable
- secondary schools were offered more free sessions supported by local authorities, and therefore it was difficult for theatres to attract secondary schools to activities for which they have to charge market rates. There was an increasing expectation that all events should be free of charge
- service level agreements affected work with local authorities
- building based organisations had fewer relationships with schools

The emergence of a number of schemes such as Artsmark over the period in question was noted, but these were criticised for being isolated without the benefit of joined up thinking. There was cynicism about the bureaucracy surrounding Creative Partnerships, which in itself sometimes competed directly with local theatres.

6.3.3 The sectoral perspective: work for children and families, support for artists

Practitioners agreed on a number of shifts and initiatives over the period of this review:

- cultural diversity bursaries nurturing new artists
- artists working across different sectors more, developing cross artform skills and experience
- strengthening of the International Association of Theatre for Children and Young People (ASSITEJ) helping to lead the agenda internationally and support new artists
- new initiatives in Scotland
- international partnerships

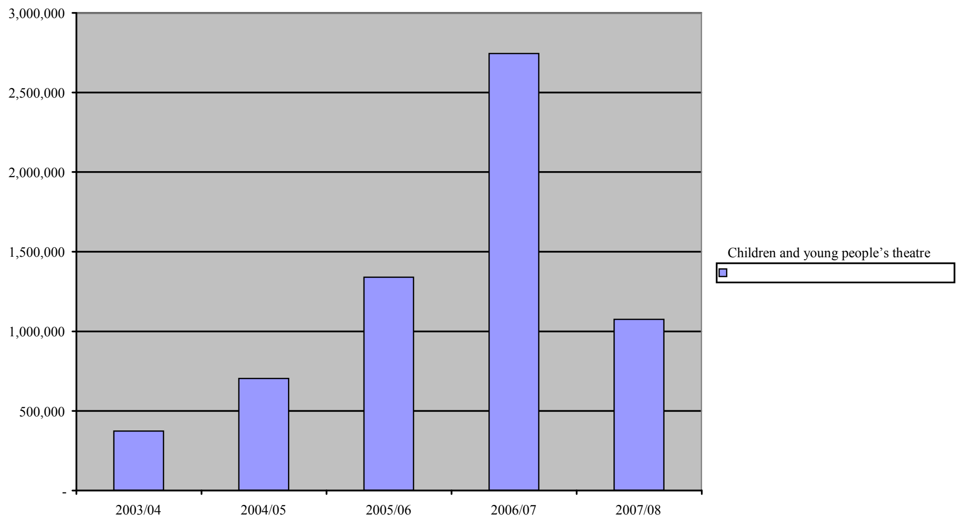
6.3.4 The factual picture: investment in work for children and families

The recommendations of the Review of Children's Theatre (November 2000) informed the Theatre Review, as a result of which more financial support became available for young people's theatre. A seminar in 2003 also resulted in the funding of a series of pilot programmes covering writing, training, publishing and bursaries (Source: *Further development of children's theatre*, Arts Council England, July 2003).

In 2003/04, as a result of the Theatre Review, children's theatre development saw 170% increase in allocation through the drama department's managed funds, resulting in an annual allocation of £380,000 to 2004/05 and £320,000 in 2005/06.

In addition to regularly funded theatre organisations focusing upon work for children and families, this area of work has been awarded some £5 million from Grants for the arts, and is the fourth largest recipient of Grants for the arts support after new writing, experimental theatre and other drama.

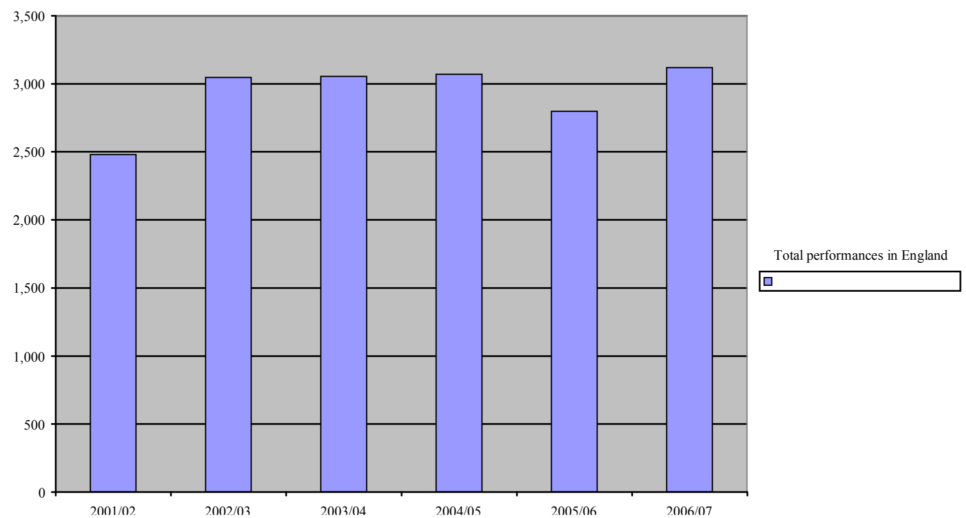
Figure 29. Value of Grants for the arts awards for children and young people's theatre



6.3.5 Facts and figures: volume of work for children and families

The total number of performances presented by a constant sample of 15 theatre organisations which were recipients of the £25 million uplift shows an increase over 2001/02 and then a sustained level of activity:

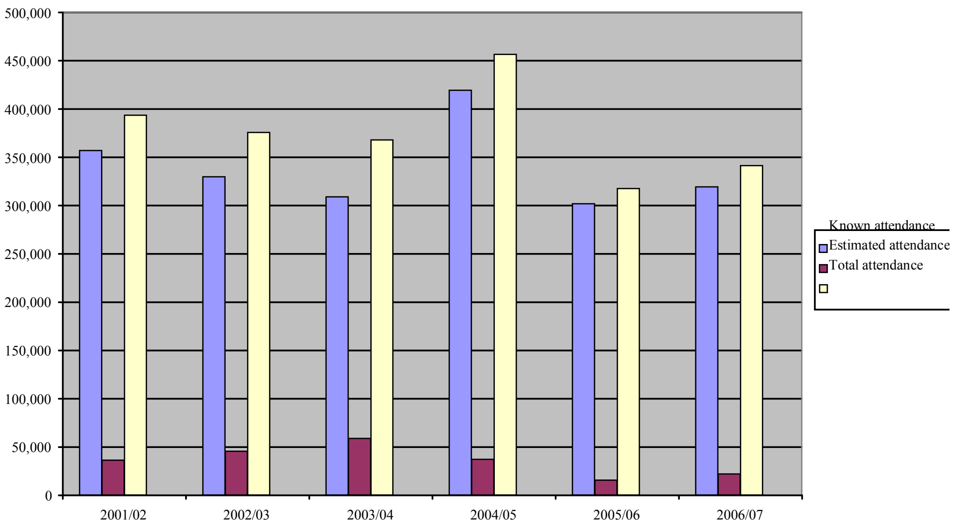
Figure 30. Constant sample of children and young people's theatre organisations, total performances



6.3.6 Facts and figures: children and family audiences

Within a constant sample of eight regularly funded theatre organisations producing work for children and families, all of which were recipients of the £25 million funding uplift, there have been some fluctuations of attendance figures. These are not related to the volume of performances described in the section immediately above. In the last two years of the period under review attendances appear to have declined:

Figure 31. Constant regularly funded theatre organisations' children and young people attendances



6.4 Spotlight on specialisms: participation, including young people

6.4.1 The sectoral perspective: changes in participatory work

Conversations with practitioners who were involved with participation during the period of this Assessment yielded evidence of a number of key changes, most of which were positive. They pointed to:

- more specialist intensive programmes underpinned by research and development more targeted programmes of activity
- more range and more quality
- change in terminology from education to learning, better understood by internal stakeholders
- after many years on the periphery, learning had become positioned at the heart of more organisations: education officers had become associate directors
- international influences and digital developments
- in some cases the work has become linked with main stages, in others has developed its own community of activity
- experimentation in this area began to influence the mainstream: rebranding theatre development of intergenerational and transgenerational work

Respondents referred to a large increase in work for early years, and a development of quality in this area. Developments with formal learners included longer term schools programmes, and a more two-way relationship with teachers to develop programmes around specific needs.

Qualitative responses point to the growth in young participants and their engagement with theatre organisations.

Those involved in participatory work described how young people are driving the work. They also observed:

- growth in participants from lower socio economic backgrounds
- growth in the numbers of people who are new to theatre
- increased engagement with children from Black and minority ethnic communities

6.4.2 The sectoral perspective: support for participatory work

There were several references to the effectiveness of Creative Partnerships in generating significant amounts of cross fertilisation across a range of sectors from formal learning to health to science. Creative Partnerships had also encouraged artists to train as teachers and vice versa. There was also a view that Arts Council England’s dialogue with the Department for Children, Families and Schools (DCFS) had encouraged more joined up thinking.

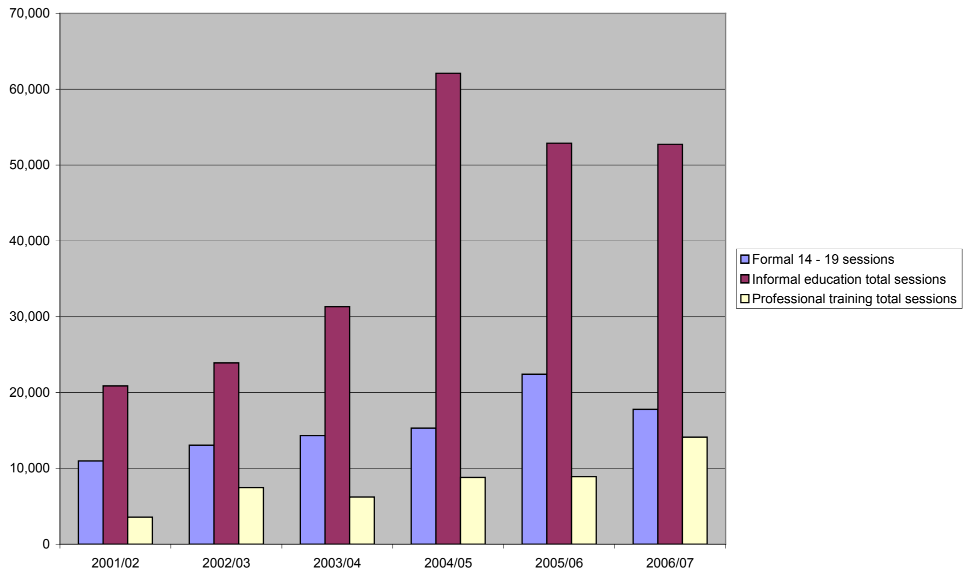
However, practitioners working in rural areas and or outside Creative Partnership areas observed a lack of support for participatory work, and a comparative disenfranchisement of young people from higher socio-economic groups.

Two people remarked that the extended schools programme had created more possibilities for partnerships, but that quality of work was difficult to guarantee

6.4.3 The factual picture: volume of participatory work

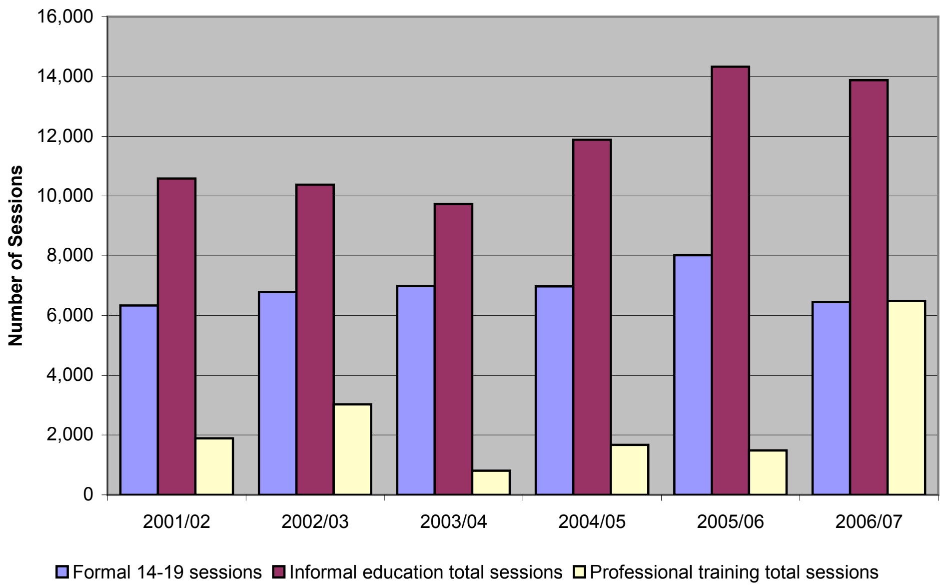
There are no national indicators for the volume of learning and participatory work during the period of this review. Analysis of all regularly funded theatre organisation returns shows a levelling off of informal education work despite the increase in base sample sizes for the years 2005/06 onwards and a reduction in formal education work in 2006/07:

Figure 32. Total sample of regularly funded theatre organisation sessions



The constant sample of 74 theatre organisations receiving an uplift after the Theatre Review shows the same pattern in formal learning sessions but an increasing number of professional training sessions and a huge leap in informal learning sessions in 2004/05. Detailed analysis of data shows that attendances broadly mirror the number of sessions

Figure 33. Constant sample of regularly funded theatre organisation sessions



6.4.4 Facts and figures: changes in participatory work

A study commissioned by Arts Council England in association with the National Association of Youth Theatres yielded the following information about 600 providers in England (Source: *Paving the Way: mapping of young people's participatory theatre*, Arts Council England, April 2008):

- 141 organisations provide youth committees
- 25% of organisations have waiting lists
- 26% provide in-house artistic training and 19% provide external training
- over 50% are either voluntary, part time or senior – only 6% full time
- 45% of provision delivered within a school environment (30% out of school time), 55% in rural areas

6.4.5 Facts and figures: volume and profile of participants

The findings of Arts in England 2003: attendance, participation and attitudes, Arts Council England, December 2004, showed that 2% of adults in England had taken part in a drama or theatre event in both 2001 and 2003. Most of these people had done so once in the past year.

In 2004/05 *Taking Part: The National Survey of Culture, Leisure and Sport* estimated that about two in five English adults had seen or taken part in some type of theatre performance in the previous 12 months. This data was supplemented by a child survey conducted in 2007 which showed:

- 92% of all children had participated in an arts activity in the past twelve months
- 36% had rehearsed or performed in a play
- of those children who had participated in an arts activity 84% had done so out of school lessons (77% of all children)

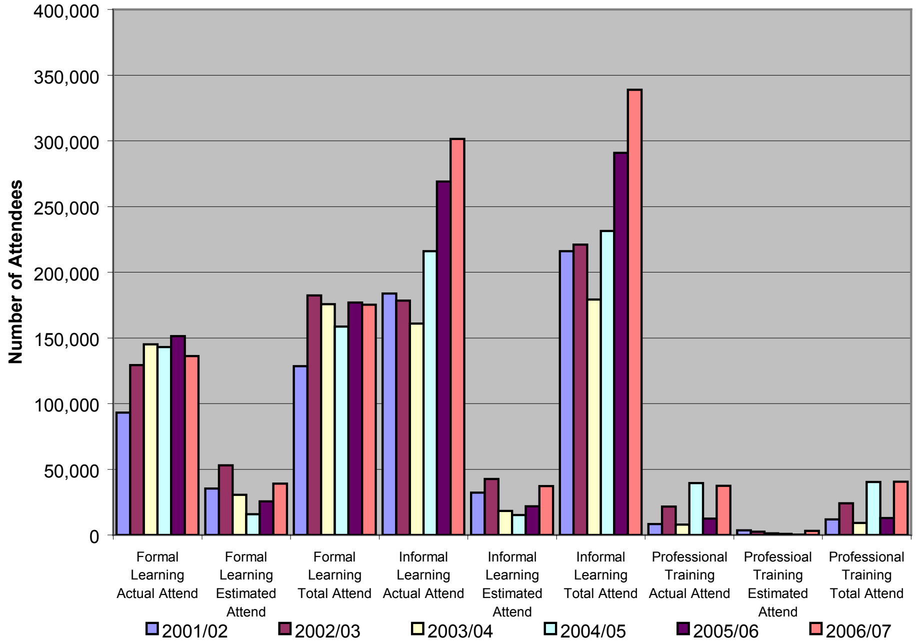
(Source: *Taking Part: England's survey of Culture, Leisure and Sport, Headline findings from the child survey 2007*, DCMS)

In addition the *Paving the way* study identified that:

- 24% of young people involved in youth and participatory theatre were from Black and minority ethnic backgrounds
- 2% were disabled

Analysis of the constant sample of regularly funded theatre organisations shows a particularly steep rise in the number of participants at informal learning sessions, whereas numbers for formal learning have fluctuated over the period of this review:

Figure 34. Constant sample of regularly funded theatre organisations' total participants



6.5 Spotlight on specialisms: street arts and circus

6.5.1 The sectoral perspective: support for street arts and circus

During the consultation process for this Assessment there was consensus that, while street arts and circus are areas of practice with long histories of achievements, they have been validated by the Arts Council since the Theatre Review.

Additional investment in these areas of work undoubtedly allowed a number of companies to fulfil their ambitions and meant that audiences are seeing a wide range of better resourced work.

Distribution remained a challenge in both areas, due to limited infrastructure and patchy provision of promoters and festivals across the country.

Given that the Arts Council commissioned comprehensive Health Checks of both sectors in 2006, there is relatively little new to report, so the comments reflected below are inevitably partial. Street arts and circus embrace very diverse practices, beyond even the broadest definition of theatre, so in the context of the Theatre Assessment, our comments are predominantly concerned with those points of contact rather than divergence.

6.5.2 The sectoral perspective: street arts

It was recognised that street arts has largely developed from a different practice from traditional theatre making, which has more in common with outdoor theatre. Unlike building-based companies, we heard that those working outdoors keep work in the repertoire, which helps to cover periods when shows are not viable or are in development.

There was agreement that there had been a number of positive developments over the period under review, including:

- greater acknowledgement that work in public places can attract new and diverse audiences, reach high standards, be spectacular and be work which changes lives
- recognition by a variety of agencies that work which is capable of attracting large audiences can help community cohesion and place shaping
- acceptance that work taking place outdoors does not detract from or compete with indoor work
- Arts Council England investment allowed artists to be much more ambitious and audiences to see better resourced work
- better educated audiences, some of which actively search work out rather than happening upon it
- a growth in festivals, primarily supported by local authorities; one such is ESSEXstreetdiversions in Chelmsford, run by the council, piloted in 2003 and has since grown considerably
- recognition of the potential for engagement with street arts by buildings: the National Theatre's Watch This Space has become one of the most important events in the summer street arts festival calendar
- a more culturally diverse sector, including work by deaf and disabled artists, and increased profile for mela

- a growth of work exploring different ways of interrogating place and engaging with a community
- support from foundations

On the negative side there was agreement that:

- the sector still lacks infrastructure and some artists are poorly supported
- local authorities have sometimes sought to devolve events that are working well
- there remains a degree of polarisation in the theatre industry, and although outside the period of this assessment, we heard that the way that Arts Council England's disinvestment strategy was announced did not encourage unification of the sector

It was also observed that:

- some festivals disappeared as others emerged, and with a handful of constants across the country the number of events appears to have been relatively stable during this period
- many street theatre companies have been working abroad

While Royal de Luxe's *Sultan's Elephant* in London in May 2006 undoubtedly raised the profile of the sector, there was a feeling that it might have placed the bar too high. It raised expectation that work of this scale and complexity can be easily replicated, and little anticipation that British work would be resourced at that level in the foreseeable future.

6.5.3 The sectoral perspective: circus

It was harder to identify particular developments in circus over the period of this assessment. This may be because some circus practitioners do not identify with the theatre per se, there were examples of isolated dialogue with the rest of the sector and there are few regularly funded organisations in this area. Whatever the reason, we had less engagement from the circus community during the Assessment than we would have liked.

However, we did hear that the period has seen 'a huge explosion in circus…the landscape is expanding and not shrinking' This has included work that is site specific and installations, with a self-reliant sector prepared not to be dependent on bookers or venues.

We heard that venues had become interested in working with circus companies or collaborating with circus artists, but did not always have the resources to support it.

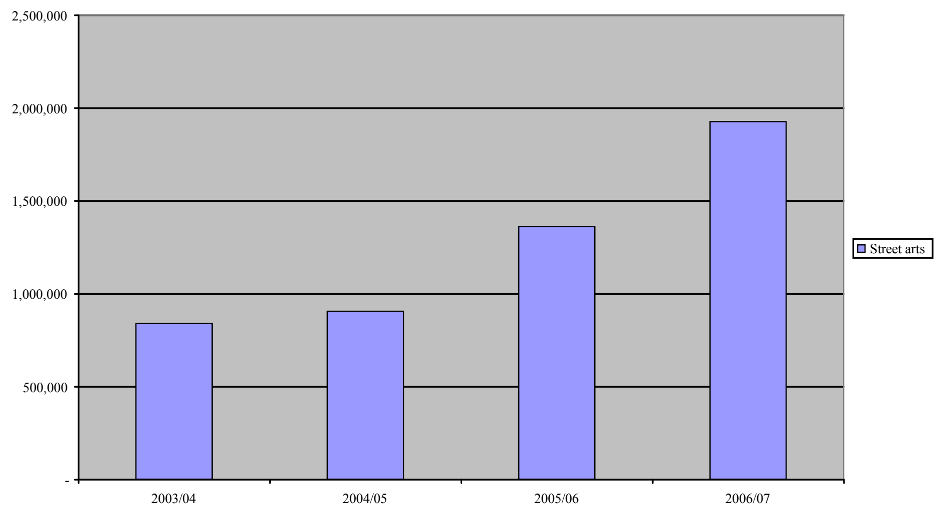
We noted *Airborne*, mapping of youth circus activity in the UK (Arts Council England 2007) as a useful snapshot of development at the midway point of the Young People's Participatory Theatre Project.

The millennium had provided a good opportunity for investment in circus training. However, concern was voiced that across the country training opportunities for children were significantly behind those available elsewhere in the world. They also continued to be inadequate for artist development. We also heard that most existing opportunities were largely inaccessible to young people in lower socio-economic groups.

6.5.4 The factual picture: street arts

Grants for the arts support for street arts has increased steadily during the period under review

Figure 35. Grants for the arts street arts awards

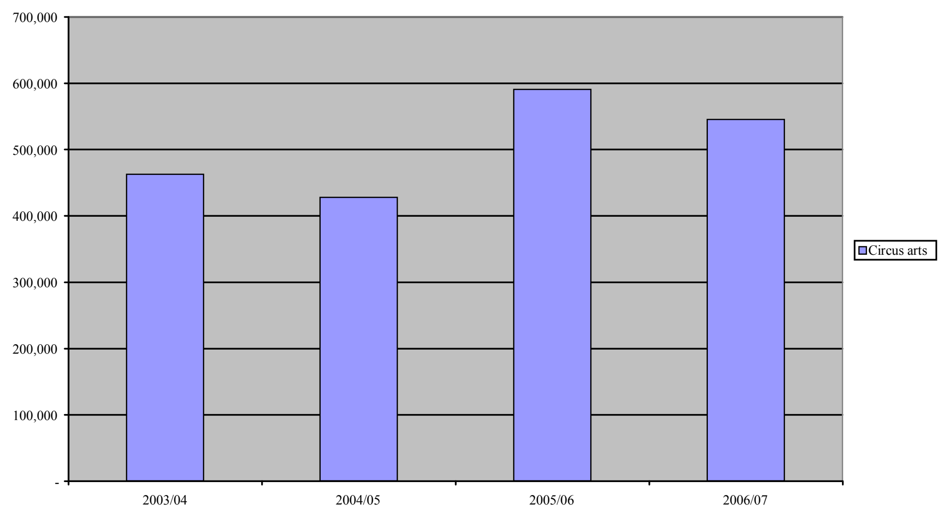


Note: the sizeable increase in 2006/07 would have been linked to the investment in The Sultan's Elephant

6.5.5 The factual picture: circus

An analysis of Grants for the arts awards over the years 2003/04– 2006/07 shows a peak of investment in 2005/06.

Figure 36. Grants for the arts circus arts awards



6.6 Spotlight on specialisms: touring

6.6.1 Touring: introduction

This section of the Assessment focuses primarily on touring into buildings, either traditional arts centres and theatres or village halls.

Touring has continued to be a major way through which work is distributed and audiences experience theatre. The touring landscape was described as having grown and become more complex during the period under review. There had been growth in touring outside traditional venues, particularly development of the rural touring circuit, alongside destabilisation of much of the traditional circuit.

We heard there had been little celebratory work of scale suitable for venues over the period under review.

The growth of collaborations, both in terms of resources and content, and embracing new forms of theatre referred to elsewhere in this Assessment also characterised discussions on touring.

While traditional definitions of scale have become increasingly meaningless, it is difficult to consider touring without recourse to some description of scale, at least with reference to the venues in which much work is still experienced.

6.6.2 The sectoral perspective: touring overview and strategy

There was a widespread view that a disjuncture had appeared between work funded to tour and what promoters and venues have wanted to present. Welcome as Arts Council England's prioritisation of the creation of work had been, the accompanying lack of emphasis on distribution of work had exacerbated the situation.

Respondents to this consultation believed that changes at Arts Council England were a significant contributory factor to the fracturing of the market. This was traced from a gradual shift away from the strategic and interventionist way the national Touring Department had worked in the past, followed by abolition of the Touring Department.

There was consensus that Arts Council England lacked:

- a national overview of work and audiences
- a meaningful integrated system for consideration of applications for touring
- engagement with venues of all scales
- engagement with the commercial sector

6.6.3 The sectoral perspective: touring, impact of funding decisions

Several companies and venues felt the £25 million had helped create an easier climate in which to make work.

The consultation for this Assessment recorded notable increases made to key presenting venues, which was widely welcomed. However, respondents believed that a two-tier system had emerged: venues that were relatively well resourced and those that struggled to offer the sort of fees or guarantees that companies required.

Many smaller companies reported that fees had not increased since the early 1990s. Over the period under review a number of small theatres and arts centres lost their relatively small but nevertheless vital grants, which meant they were no longer in a position to offer fees at all. As a consequence their programmes had become more risk averse.

A number of people believed that venues of all scales had become increasingly risk averse, however some venues expressed a wish to engage with a wider range of work but were unable to resource it adequately. On a more positive note, others acknowledged the availability of more imaginative middle-scale productions over this period.

6.6.4 The sectoral perspective: touring, Grants for the Arts

Particular problems had been experienced with Grants for the arts as far as touring was concerned:

- small-scale touring had been too dependent on Grants for the arts
- lack of continuity of funding contributed to venues finding it difficult to maintain relationships with companies and harder to promote return visits, or to encourage audiences to make links between the work of one company and another
- some venues were frustrated about work being funded for development and then turned down for touring, leaving them with holes to fill in their programmes at short notice
- some venues were disappointed that their views were not sought about the viability of a project, especially when they had a relationship with the company being considered
- there was a lack of clarity and consistency about whether regularly funded organisations were able to apply for Grants for the arts for touring
- several producers who are members of regularly funded organisations expressed frustration that there were limitations in how often they could apply for support for individual touring projects

6.6.5 The sectoral perspective: touring, changes in ways of working

There was consensus that many established and newer artists and companies do not find the traditional system of lengthy tours of one night stands or split weeks satisfying or appropriate to their work. The financial risk they had been increasingly expected to take contributed to their reluctance to work in this way. Consequently many sought other ways of getting their work to an audience, including fewer but longer visits, residencies, partnerships with theatres or promoters, particularly in the regions in which the companies are based.

It was acknowledged that artists want to make work for different scales at different times, and there had been more conversations about where work might best be sited and audiences might be found. One touring company reported that it had created much stronger relationships with theatres over this period, due primarily to its move from the small to middle-scale supported by Theatre Review money, but the company had been surprised by how radical the change was.

6.6.6 The sectoral perspective: touring, building-based circuits

There was consensus that building-based touring circuits, particularly the middle – and small-scale, have shifted considerably over the last five years. We were told that many producing theatres have increased the amount of co-productions they are entering into with other producing theatres or with touring companies. They were also hosting more visits from touring companies on their main stages.

At the same time, we heard that several presenting houses have sought to exert more influence over their programmes through increasing amounts of co-commissioning and co-producing. However, there was a lack of strategy to support these developments. Some commented that as a consequence interesting work had been seen in relatively few “safe houses’, such as the studios of producing theatres.

There was also agreement among promoters that many interesting companies, which would previously have played the small-scale circuit, had moved into the middle-scale, but were not succeeded by comparable companies. Many smaller venues held a view that the small-scale sector was less distinctive than previously and consequently they struggled to find appropriate and affordable theatre to programme. This led to less interest from audiences, which in turn made it harder for promoters to programme theatre. As a result the proportion of theatre in many small venues had reduced in favour of music or dance.

Several venues reported that dance companies had been more interested in making relationships with them than theatre companies. There was recognition of the role of the dance agencies in contributing to the development of the dance in the regions. Acknowledging that dance is a relatively small sector, people noted it appeared to have better networks than theatre.

Respondents remarked on the programmes of a number of middle – scale venues relying heavily on tribute bands, comedy or commercially available drama of variable quality.

6.6.7 The sectoral perspective: touring, rural circuits

There was much agreement that rural touring has been one of the success stories of the period under review, particularly during the earlier years, with a marked growth in confidence, skills and profile. Some practitioners still felt that only work taking place in buildings in metropolitan areas is valued, but there has been a growing recognition of the value and importance of rural touring, however, work of a high quality is not always available.

While remaining interested in drama, new work was usually seen as risky by rural promoters, and without the availability of established companies the sector has moved towards programming more dance and music and less theatre. There was the additional consideration that technical requirements are limited in many village halls.

Respondents remarked on an expansion of promoters whose priority was engagement with community development. Many of these were volunteers, supported by local authorities. This led to considerable success in diversification of theatre programmes and the audience for them, but in some cases promoters had to struggle to pay the fees asked of them. We also heard of a lack of dialogue between rural circuit and town-based venues operating in the same geographic area.

6.6.8 The sectoral perspective: large scale touring

There was consensus that large-scale touring had been particularly problematic during the five years under review, with a marked shortage of high quality drama available. The introduction of the National Touring Contracts was felt to have only been partially successful. While these enabled a number of companies to plan long term, they did not generate sufficient work on a consistent basis to meet the needs of large-scale presenting houses.

During the period of this assessment touring, beyond exchanging co-productions, was not a priority for many larger regularly funded organisations. Those regularly funded organisations that toured tended to play in other producing houses, with a similar approach to audience development and education. This meant that an over – provision of musicals dominated large presenting venues, and a number of theatres struggled to find sufficient high quality work to enable them to sustain an audience for drama.

Despite an Arts Council England commissioned report on relationships between subsidised and commercial theatre in 2003, during the period under review both commercial managements and large venues found it hard to engage with the funding body. Additionally the three-month turnaround period for applications has been highly problematic for the sector.

It was noted that the Ambassadors Theatre Group's recent domination of the large-scale circuit might have distorted the distribution of such drama that was available. On the other hand, Theatre Royal Bath Productions had become a major provider of drama for a particular circuit of middle – to large-scale venues, without subsidy.

6.6.9 The sectoral perspective: management infrastructure for touring

The view was expressed that, with some exceptions, presenting venues tend to lag behind artistic developments. However, in the light of the development of new ways of working, there were encouraging signs of new dialogues emerging between artists/companies and venues. The Escalator scheme operated by Arts Council England, East was acknowledged as a valuable way of encouraging venues to engage with new work.

It was noted that promoters were becoming more confident in saying when work was not of the appropriate standard, but attention was not being paid to developing the next generation of venue managers, especially on the small-scale.

6.6.10 The sectoral perspective: touring, the London showcase

London remained an important showcase for touring work and a number of people commented that it had become harder to get a touring show into London. In addition, there has been a shortage of venues in London prepared to present experimental work.

6.6.11 The sectoral perspective: touring, international theatre

Availability of international theatre outside London has been intermittent. Where there are people running buildings interested in international work there has been less dependency on festivals. Investment in international travel for UK practitioners has led to some exciting collaborations. There was also a shortage of contemporary performance from abroad in London apart from BITE and the first Spill festival in 2007. In the Midlands the RSC Complete Works season featured high quality international work.

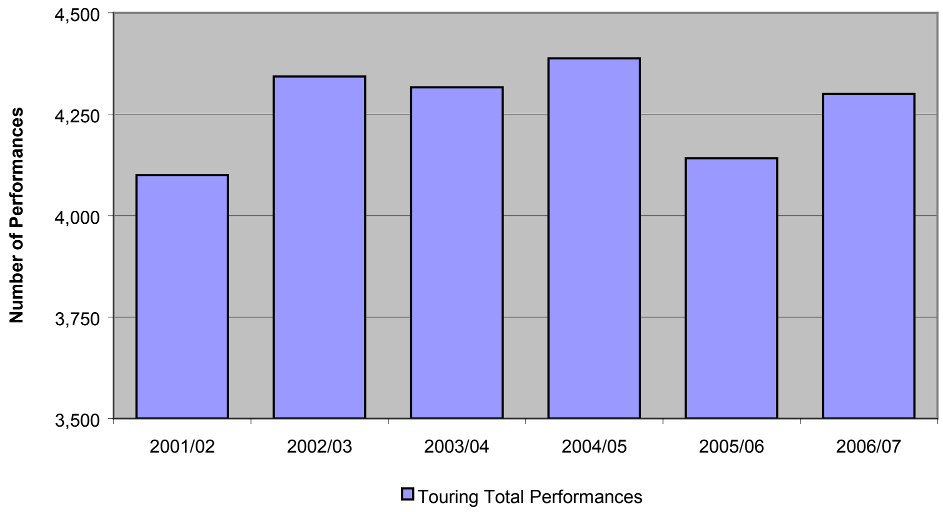
There were fewer networks and initiatives supporting international work over the last five years than there had been previously. A number of people were concerned about a lack of consistency concerning Arts Council England's engagement with international work.

Visiting Arts had moved away from supporting incoming companies in favour of other forms of international activity. There was also a perception amongst parts of the constituency that the British Council had disengaged from involvement with facilitation of and support for British work touring overseas, which was regretted. However, it was recognised that a number of companies had forged successful international partnerships independently.

6.6.12 Facts and figures: volume of touring work

An analysis of a constant sample of 40 regularly funded theatre touring organisations, all of which received an uplift from the £25 million increase, shows that the number of performances by these organisations increased substantially in 2002/03 over 2001/02. The picture has fluctuated since, with 2006/07 returning to 2002/03 levels.

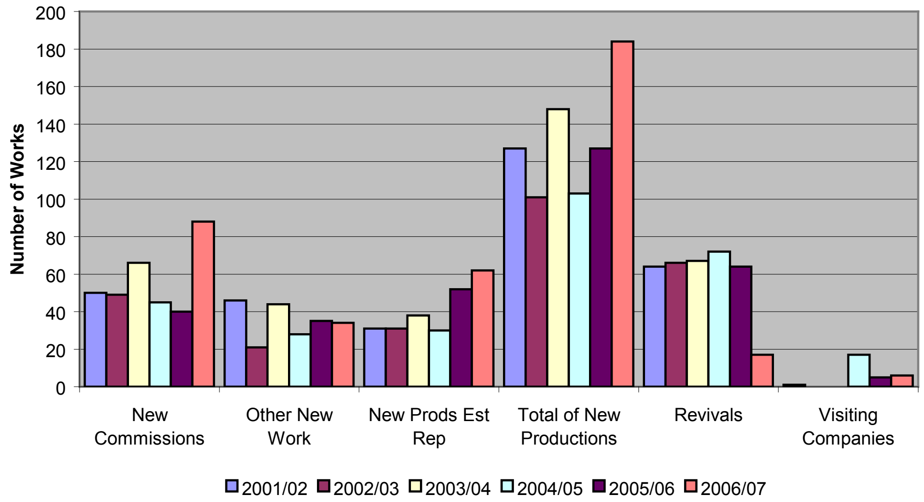
Figure 37. Constant sample of regularly funded theatre touring organisations' total performances



6.6.13 Facts and figures: touring, types of work

An analysis of the same constant sample of 40 regularly funded theatre touring organisations shows particular peaks of activity in the years 2004/05 and 2006/07. Overall it also demonstrates the dominance of new work, and within this mix a somewhat higher number of new commissions than of other new work.

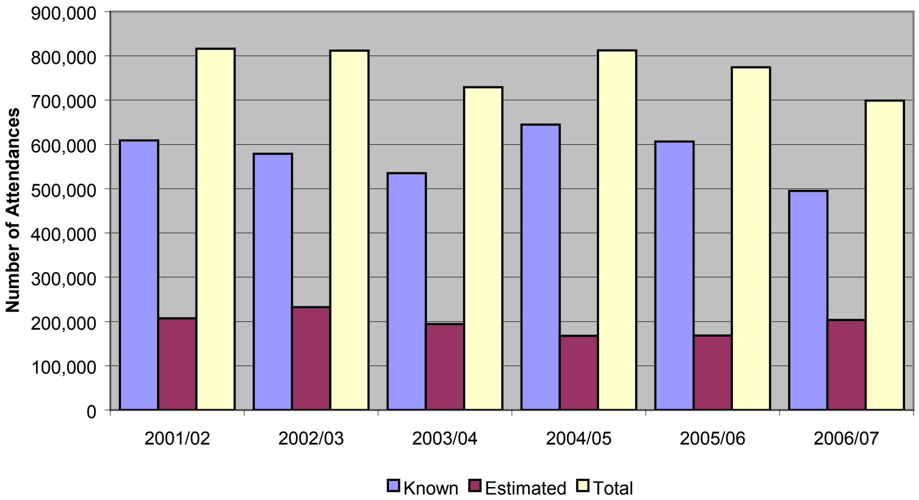
Figure 38. Constant sample of regularly funded theatre touring organisations' types of work



6.6.14 Facts and figures: touring, attendances

The number of attendances across the five years of this review has not mirrored increases in performances. For example, in 2002/03, while the number of performances increased by 9% over 2001/02, the number of attenders decreased by 10% over 2001/02:

Figure 39. Constant sample of regularly funded theatre touring theatres attendances



Annex one: theatre organisations which received a funding uplift after the Theatre Review

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Action Factory	149%			T
Action Transport	121%			T
Actors Touring Company	13%	Y		T
Almeida Theatre,London	96%		P	
Arc	35%			
Arts Alive	77%			
Arts Theatre, Cambridge	60%			
Barbican Theatre, Plymouth	57%			
Barracudas	100%			
Battersea Arts Centre	236%	Y		
Belgrade Theatre, Coventry	66%	Y	P	
Big Brum	86%			T
Birmingham Rep	56%		P	
Bishop Auckland Town Hall	250%			
Black Country Touring	261%			T
Blackpool Grand	NEW			
Bolton Octagon	72%	Y	P	
Brewery Arts Centre, Kendal	51%		P	
Brighton Production Development	NEW			
Bristol Old Vic	64%		P	

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Brouhaha	152%			T
Bush Theatre, London	62%	Y	P	
Buxton Opera House	NEW			
C&T	106%			T
Centre for International Street Theatre	NEW			
Channel Theatre	123%	Y		T
Cheshire Rural Touring	NEW			
Chichester Festival Theatre	550%		P	
Chol Theatre	56%			T
Clean Break	136%			T
Cleveland Theatre Company	160%	Y		T
Common Players	322%			T
Compass Theatre	36%	Y		T
Contact Theatre, Manchester	91%		P	
Customs House Trust	21%			
Darlington Arts Centre	42%			
David Glass Ensemble	23%			T
Derby Playhouse	82%		P	
Dodgy Clutch	333%			T
Donmar Warehouse, London	21%	Y	P	
Doo Cot	326%			T
Drill Hall, Drill Hall	30%			

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Dukes Playhouse, Lancaster	104%	Y	P	
Durham City Millennium Hall	NEW			
Eastern Angles	71%	Y		T
Eclipse Touring Grants	NEW			T
English Touring Theatre	25%	Y		T
Farnham Maltings	122%			
Faulty Optic	NEW			T
First Movement	149%			
Fittings Multi Media	NEW			T
Forced Entertainment	41%	Y		T
Forkbeard Fantasy	45%			T
Gardner Arts Centre, Brighton	66%			
Gate Theatre, London	381%	Y	P	
Gloucestershire Everyman, Cheltenham	58%			
Graeae	75%	Y		T
Green Room	68%		P	
Greenwich Young People's Theatre	10%			T
Hackney Empire, London	68%			
Half Moon Young People's Theatre	138%	Y		T
Hampstead Theatre, London	77%	Y	P	
Harrogate Theatre	100%		P	
Hoipolloi	409%	Y		T

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Hull Truck Theatre	104%	Y	P	T
Improbable	NEW			T
International Workshop Theatre	10%	Y		
IOU	6%	Y		T
Kali Theatre	NEW			T
Kaos Theatre	NEW	Y		T
Kneehigh Theatre Company	40%	Y		T
Komedia	238%			
Lancashire Rural Touring	NEW			T
Lawnmowers	NEW			T
Lawrence Batley Theatre, Huddersfield	130%			
Leicester Haymarket (now Curve)	41%	Y	P	
LIFT	75%			
Live and Local	83%			
Live Theatre, Newcastle	112%	Y	P	
Liverpool Theatres	69%		P	
London Bubble	24%	Y		T
London International Mime Festival	184%			
Louth Riverhead Theatre	NEW			
Lyric Theatre, London	77%		P	
M6	37%			T
MAC, Birmingham	49%			

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Manchester International Arts	158%			T
Mercury Theatre, Colchester	120%	Y	P	
Merseyside Producers	NEW			
Mid Pennine Arts	67%			
Mind… the gap	277%			T
Miracle Theatre	NEW			T
National Touring Contracts	NEW			T
Natural Theatre	14%	Y		T
New Breed	310%			T
New Perspectives Theatre Company	61%			T
New Victoria Theatre, Newcastle-under-Lyme	54%	Y	P	
New Wolsey, Ipswich	53%		P	
Nitro	53%			T
North Country Theatre	133%			
Northampton Theatres	75%	Y	P	
Northcott Theatre, Exeter	84%	Y	P	
Northern Broadsides	183%			T
Northern Stage, Newcastle	66%		P	
Nottingham Playhouse	43%	Y	P	
NOW Festival	204%			
NTC Touring	36%			T
Nuffield Theatre, Lancaster	NEW		P	

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Nuffield Theatre, Southampoton	38%	Y	P	
Oily Cart	33%	Y		T
Oldham Coliseum	42%	Y	P	
Open Theatre Company/The Shysters	159%			T
Orange Tree, London	109%	Y	P	
Out of Joint	12%	Y		T
Oval House, London	109%			
Oxford Playhouse	405%		P	
Oxford Stage Company	10%			T
Oxfordshire Touring Theatre Company	118%	Y		T
Paines Plough	26%	Y		T
Pegasus, Oxford	139%			T
Pentabus	56%	Y		T
People Show	32%			T
Pilot Theatre Company	401%	Y		T
Polka Theatre	42%	Y	P	
Poole Arts Centre (now The Lighthouse)	278%			
Pop-Up	14%	Y		T
Portsmouth New Theatre Royal	NEW			
Pride of Place	NEW			
Proper Job	130%			T
Queens Hall Arts Centre, Hexham	57%			

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Queen's Theatre Hornchurch	329%		P	
Queer Up North	184%			
Quicksilver	13%	Y		T
Reckless Sleepers	409%			T
Red Ladder	13%	Y		T
Red Shift Theatre Company	37%	Y		T
Rejects Revenge	156%	Y		T
Royal Court, London	28%		P	
Royal Exchange, Manchester	36%	Y	P	
Salisbury Arts Centre	67%			
Salisbury Playhouse	100%		P	
Shared Experience	44%	Y		T
Sheffield Theatres	91%		P	
Sixth Sense	155%			T
Snap	65%			T
Soho Theatre, London	130%		P	
South Asian Theatre Development	509%			
South England Touring Agency	275%			
Spare Tyre	83%	Y		T
Sphinx	29%	Y		T
Stage Exchange	NEW			T
Stanwix Theatre, Carlisle	167%			

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Stephen Joseph Theatre, Scarborough	33%	Y	P	
Stockton International Riverside Festival	280%			
Talawa	38%	Y		T
Tamasha Theatre Company	41%	Y		T
Tara	28%	Y		T
The Courtyard, London	417%			
The Creative Factory	NEW			
The Gantry, Southampton	131%			
The Hawth, Crawley	NEW			
The Haymarket, Basingstoke	143%			
The Junction, Cambridge	210%			
The Virtual Ensemble	NEW			
The Watermill, Newberry	131%		P	
Theatre Alibi	35%	Y		T
Theatre by the Lake, Keswick	233%		P	
Theatre Centre	9%	Y		T
Theatre Company Blah Blah Blah	98%	Y		T
Theatre de Complicite	54%	Y		T
Theatre Melange	93%			T
Theatre Rites	NEW			T
Theatre Royal Plymouth	84%	Y	P	
Theatre Royal, Stratford East	74%	Y	P	

Organisation	%age increase	Included in constant sample of RFO	Producing Theatre	Touring Company
Theatre Royal. Bury St Edmunds	129%			
Theatre sans Frontieres	375%	Y		T
Theatre Venture	29%			T
Tiata Fahodzi	NEW			T
TieBreak	60%			T
Total Theatre	67%			
Travelling Light	230%	Y		T
Trestle Theatre Company	31%	Y		T
Tricycle Theatre, London	117%		P	
Trinity Arts Centre, Tunbridge Wells	90%			
Unicorn Theatre, London	136%	Y	P	
Unity Theatre, Liverpool	78%	Y		
Walk the Plank	240%			T
Warwick Arts Centre, Coventry	36%			
Watford Palace Theatre	147%	Y	P	
West Yorkshire Playhouse, Leeds	47%	Y	P	
Winchester Theatre Royal	NEW			
Xtrax	NEW			T
Yellow Earth Theatre	75%	Y		T
York Theatre Royal				
Yorkshire Women’s Theatre	369%			T
Young Vic, London	57%	Y	P	
Yvonne Arnaud Theatre, Guildford	220%	Y	P	

Annex two: bibliography

Policy and evaluation documents

Title, author, date, length	Content
Theatre writing strategy and action points, Arts Council England, 1999, 14pp, electronic	Strategy and action plan
National Policy for Theatre, Arts Council England, July 2000, 7pp, electronic	Post Boyden description of eight key priorities
Spending Review, Department for Culture, Media and Sport, 2000. See pp 86– 103, electronic	Review and priorities for 2001/02–2003/04
Street Arts and Circus: a snapshot, Helen Jermyn, 2001, 45pp, electronic	Consultation with the sector/questionnaires: provides comprehensive baseline picture as of 2001
Feedback to Executive Board: corporate planning, December 2002, 15pp, electronic	Policy development internal working paper
Children's Theatre Investment, July 2003, 9pp, electronic	Extra money invested in children's theatre: case studies and evaluation
Theatre Review Update West Midlands and SWOT, April 2002, electronic	Snapshot regional picture
CSR Evidence Based? Report 2: Theatres and Orchestras, 16pp, electronic	Quantitative: tracking back 01/02/03/04: new work, outputs, attendance, education, workforce
Live & Direct training course evaluation, Helen Jeffreys, 2004, 19pp, electronic	Qualitative: training for Black/Asian directors, career development via interviews
Airborne: Circus Mapping, Executive Summary, Arts Council England, 2007, electronic	Quantitative: circus groups; young people participation and profile Qualitative: benefits
New Audiences (1999–2003), 2004 29pp, electronic	Evaluation on impact plus data on New Audiences investment Quantitative: some indicators, mainly advocacy document
Race Equality Scheme annual report, 2004/05, 35pp, electronic	3 year plan 2004–07, review of first year Qualitative/quantitative: evaluation of progress against goals Quantitative: Grants for the arts allocations, artform analysis, decibel, by region
Report on Theatre, HOC Culture, Media and Sport Committee March 2005, 45pp, hard copy only	Evidence on West End and subsidised sector plus RSC, and case for support. Qualitative and quantitative

Title, author, date, length	Content
Airborne: mapping of Youth Circus Activity in the UK Leila Jancovich,2007 48pp, electronic	Priorities to 2008; survey data mainly quantitative
Theatre background paper for HOC March 2005, 37pp, hard copy only	Quantitative: key facts and figures on regularly funded organisations and project case studies
Summary of funding for HOC, March 2005 17pp, hard copy only	Quantitative: key facts and figures on all funding areas
Responses to questions from Select Committee. hard copy only	Quantitative: key facts and figures and some individual lines of questioning
Briefing approach to developing Black and Asian Theatre, October 2005, 5pp, electronic	Precursor/brief to Whose Theatre? report Quantitative: data on 2004/05 funding
Street Arts Health Check, David Micklam,2008, 17pp, electronic	Quantitative: regularly funded organisation analysis, income and expenditure plus narrative
Circus Health Check, David Micklam, 2006, 19 pp, electronic	Quantitative: analysis, narrative on provision, priorities 2006-08
Creative People: Eclipse Theatre Research, Arts Council England, 2006, 27pp, electronic	Survey of 66 venues – not all responded; detailed case study of 26 practitioners Qualitative: practitioner inroads, positive action, work histories
Whose Theatre? Lola Young et al 2006, 64pp, electronic	Narrative of The Sector flowing from the Theatre Review / plus quantitative: capital funding, cultural diversity funding
Social Impact Study Dominic Shellard, Sheffield University 2006, 33pp, electronic	Survey self-defined of 448 ITC members, defined 10 key factors Qualitative: outcomes of social impact and case studies
Arts Centres Research, Seven consultants Executive summary 19 pp September 2006, Hard copy only: unpublished	Fulfilment of Ambitions for the arts; impact of Arts Council funding; successful approaches to multi artform programmes. Quantitative data and qualitative value judgements on programming
National Policy for Theatre in England, spring 2007, 10pp, electronic	Vision and priorities

Title, author, date, length	Content
Implementing the National Policy for Theatre in England: baseline, MORI, December 2007, 61pp, electronic	Refers back to 2001 baselines Self-completion by all regularly funded organisations, 66% response rate (147, excludes RNT and RSC) Quantitative: key performance indicators, tracking to Arts Council's eight priorities
Discussion paper, Paul Allen, December 2007, 9 pp, electronic	Digital technology and the opportunities for the theatre sector Qualitative: contextual opinion based
Supporting excellence in the arts, DCMS/McMaster, 2008,31pp, electronic	Priorities and principles for future support
Manchester Theatre Review,Artservice, March 2008, 87pp, electronic	Quantitative: subsidy, sales, markets, product outputs, income, staffing, economic impact and 05/06 regional producing theatres data
Paving the Way: mapping of Young People's's participatory Theatre, Arts Council England/National Association of Youth Theatres, April 2008, 22p, electronic	Executive summary of mapping project Quantitative: involvement, provision, profile
Open Doors: evaluation, Audiences Central, May 2008, 48pp, electronic	Evaluation of one strand of Young People's Participatory Theatre: quantitative and qualitative evidence/case study/impact/GLOs
Strategy and Report on Circus, Felicity Hall, 2002, 21 pp	State of circus, context, issues and recommendations for Arts Council England, andtracks progress since Theatre Review
Arts Council England portfolio 2008, 2008, 135 pp, electronic	List of regularly funded organisation clients by region 2008/09 – 2010/11
Our Creative Talent: the voluntary and amateur arts in England DCMS, July 2008, 100+ pp, electronic	Evaluation of facts and figures engagement in voluntary and amateur arts: quantitative plus case study examples
Review of Arts Council England's regularly funded organisations 2007-08: Lessons learned, Genista Mcintosh, April 2008, 53pp, electronic	11 recommendations

Data reports SEE ATTACHED DOC FOR TABLE OF DATA REPORTS ALPHABETICALLY BY TITLE

Regional producing theatres' data, 2001/02, hard copy only	Impact and return on investment
Theatre organisations in England benefiting from the extra £25m, 2003, hard copy only	Breakdown of all venues by region 2000/01 total, 2003/04 total and increase and percentage increase and criteria
Cultural Diversity, Arts Council England/UK Film Council/Resource/Office of National Statistics 2003, 134pp, electronic	Quantitative: census/ interview 7,667 sample on support, attendance, barriers and participation levels
Regularly funded organisations Statistical Survey, Arts Council England, 2003/04, 117pp, electronic	Tracking of 10th year of regularly funded organisations scheme Quantitative: finance, outputs, by artform; attendance; national Cos Should spell out Cos in full; touring; new work; education; learning; participation; equal opportunities; diversity
Economic Impact study of UK theatre, Dominic Shellard, April 2004, 35pp, electronic	Quantitative study on impact regionally and nationally plus three case studies
2004/05 ticketing data from regularly funded organisations: internal, 2005, 1pp for theatre, electronic	Spreadsheets of attendance and ticketing returns across all artforms
Disinvestment, 2005/06, electronic	Regularly funded organisations list and amounts
Regularly funded organisations 2005/06 data tables: internal document, 2007, 10pp, electronic	Quantitative analysis of returns from regularly funded organisations sample
Ten-year review of TGI Target Group Index trends, British Market Research Bureau,2006, 2 pp, electronic	Quantitative trend data on percentage of adults who attend in England and in Great Britain by artform
Regularly funded organisation case for investment, 2005–08, electronic	Allocations by artform
Taking Part Survey briefing no 8 ACE, DCMS/Arts Council England/MLA April 2008, 9pp, electronic	Quantitative data on attendance and participation
Regularly funded organisations key data from 2006/07 Advocacy document, 13 pp May 2008, electronic	Key headline quantitative data on regularly funded organisation clients

Annex three: individuals and organisations making a written contribution

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