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Scotland's producing theatres at immediate risk

Independent study commissioned by Scotland's six producing theatres reveals urgent need to overhaul sector if it is to survive.

An independent study reveals critical challenges to the Scottish producing theatre sector. Titled "Disappearing Act?", the report, conducted by independent analysts Data Culture Change, sheds light on the alarming state of the sector, calling for immediate and sustained action to protect this important element of Scotland's rich cultural heritage.

Commissioned in 2022 by six prominent independent producing theatres, Dundee Rep and Scottish Dance Theatre, Citizens Theatre, Glasgow, Pitlochry Festival Theatre, Royal Lyceum Theatre Edinburgh, The Traverse, Edinburgh, and The Tron, Glasgow, the study provides an extensive analysis of the current theatre landscape in Scotland.

Liam Sinclair, Executive Director of Dundee Rep and Scottish Dance Theatre said: "Scotland's producing theatres have been aware that the challenges we face have been building, and that in order to survive we needed to face some hard facts and tackle the issues head on. We came together to commission Data Culture Change to produce this independent report to provide us with the robust data to inform actions we are committed to taking in order to protect the future of theatrical work made here and telling Scotland's stories."

“Disappearing Act?” draws attention to several key points that demand urgent attention:

1. Producing theatre in Scotland has significant scale and impact

From 2017-2020 the six commissioning theatres’ collective average annual ticket sales totalled 423,000 and their collective turnover topped £20 million. Over the same period, they collectively staged an average of 106 productions a year, of which 80% were commissioned and other new work.

Producing their own work, representing and exploring their communities, the six organisations at the heart of this study use their civic spaces to provide opportunities for a plurality of voices to be heard.

The range and output of these theatres, alongside many others, reflect the individual communities and cultures of Scotland. These theatres invest in their community and its creativity, however this level of investment is at risk due to continued financial challenges.

2. Decades of cuts are being compounded by external factors

The six theatres collectively posted an annual trading deficit in three of the five years of the study. This was partially due to increasing aggregate annual building costs which reached over £610,000 in 2020/21.

There are now unprecedented challenges facing these theatres which maintain buildings, run full-time operating venues, and produce work that generates livelihoods for playwrights, actors and creatives. The impact of the pandemic has been broad and deep with some audiences slow to return and a sizable proportion of the ‘core’ frequent audience appear to have been lost. As well as reduced earned income, there are now enormous pressures on costs across the businesses, including major rises in the price of utilities.

This is especially important in the context of prolonged real terms reductions in revenue funding from national and local government. In addition, Theatre Tax Relief which has made a vital contribution to the finances of producing theatres during the last decade is planned to begin to taper down from current rates in 2025-26.

3. There is a lack of Scottish representation in theatre consumption

Key findings from the report reveal that Scotland is a nation of theatregoers. Almost 40% of Scottish households visited the theatre over the study period, but less than 15% of the theatre they consumed was made in Scotland.

4. Attracting and retaining skilled staff is challenging

Keeping skilled staff within the theatre industry is a challenge with wage expectations rising, reflecting increases in the cost of living. Theatre leaders are committed to putting fair work first and becoming carbon neutral, but these goals will only be achieved with greater income.

In response to the report, Alex McGowan, Executive Director of Citizens Theatre said: *“If the collective picture for our venues was bleak before the pandemic, the negative and continuing impacts of Covid-19 are potentially devastating. To avoid the risk of venue closures and the very real possibility of the end to a credible producing theatre sector in Scotland, fundamental sustained action is urgently required.*

“We recognise change won’t be easy and are committed to responding positively and flexibly. We hope our funders, partners, colleagues and the public will find in this report all the reasons to support our transformation.”

What next? The report outlines several recommendations to address the challenges:

1. A common approach

By taking collaborative approaches to production, marketing, learning and participation and the development of new income streams, the six independent producing theatres could utilise their diversity to be a creative strength for the nation. Increasing skills, knowledge and jobs that will enhance and support the wider theatre industry, as well as Scotland’s TV and Film industries.

2. Producing new Scottish work that will attract large audiences, nationally and internationally

Building on the crucial role the producing theatres play in the development of new Scottish work, the report recommends that the six independent producing theatres work together to find ways to collaborate with experienced commercial theatre producers, that will support and co-produce popular shows that are expected to tour within Scotland and then go on for further commercial exploitation in other parts of the UK and internationally.

3. Growing and diversifying audiences for theatre made in Scotland

Collective action is required by the six independent theatres to increase venue crossover, frequency of attendance and market share. The report recommends that the commissioning venues explore a range of shared-service models that could reduce costs and increase return on investment.

4. Collective Workforce Programme

Currently all six venues report significant problems in the recruitment and retention of trained staff. The report recommends that standard practices and approaches should be introduced across the six organisations, including the tracking of staff demographics and churn.

5. Working groups to address major technical and legal issues

Currently no-one is benefiting from the confused and contradictory landscape of Intellectual Property across Scotland and the UK.

The six commissioning theatres need to address key issues around intellectual property as well as common issues surrounding buildings tenure and investment, and employment relations.

Reflecting on the report Linda Crooks, Executive Producer of Traverse Theatre said: *“A sustainable producing theatre sector is fundamental to theatre and the cultural landscape of our society.*

“Scotland is one of the worlds’ leading cultural nations, playing host to the biggest annual arts festival in the world. We need to ensure that Scotland remains a cultural beacon throughout the year, as well as maintaining Scottish theatre’s representation during our festival season.

“We are keen to do more to support the broader ecology. Taking on board these recommendations we can grow the market for Scottish-made theatre domestically, throughout the UK and

internationally – bringing benefits to creatives, freelancers and the economy as a whole, not just for theatre, but for the television and film sectors that already contribute to Scotland’s economy.”

David Brownlee, Chief Executive of Data Culture Change said: *“Scotland is home to six of the world’s most exciting and diverse producing theatres. They have been doing all they can to deliver ‘more for less’ every year for over a decade, but in the wake of Covid and the middle of a cost-of-living crisis, an existential threat looms for individual theatres and the sector as a whole. The good news is that theatre managers know that no change is not an option and they will have to work in different ways to increase income, share skills and build audiences. With increased investment from Government and by the thousands of people who care deeply about work made in this country, the next decade could be a great one for Scottish theatre.”*

/ENDS

For further information, interviews and images please contact Susie Gray, The Corner Shop PR, susie@thecornershoppr.com 07834 073795

Production images from the six theatres [here](#).

NOTES:

The six organisations in this study operate with widely varying business models in different local, and national and international markets. What unites them is their commitment to producing their own work that allows them to represent and explore their communities and the issues that face them on stage. It makes their work ‘relevant’. They are civic spaces that give the opportunity for a plurality of voices to be heard.

The role of producing theatres in Scotland and the UK as a whole has become wider and more important in recent decades. They are increasingly centres for artist development. There has been a huge increase in the number and range of companies and individuals benefiting from access to the stages and facilities of the theatres. Theatres themselves are taking a leadership role in pro-actively supporting the creative and professional development of a more diverse new generation of theatre makers.

As cuts and changes in national policy priorities have had an impact on the ability of children and young people to access high quality cultural experiences, theatres have responded not only by increasing the opportunities to access provision in their buildings but also have increased the amount of their direct delivery of arts education services in schools.

As local government has had to focus diminishing resources on increasing pressure in statutory services, theatres are playing a greater leadership role in helping to ensure all communities have access to quality cultural opportunities and that the cultural sector makes the maximum possible positive impact on the social, educational and economic development of our communities.

THE STUDY

The commissioning of a study of this size and complexity by the participating theatres is unusual and is testament to the scale of the challenges they are facing. Rather than seek statistics to advocate for the status quo, the commissioners sought robust evidence to question long-established operating models, their place in the overall market for theatre and the public’s current perception of theatre being created in Scotland.

The six commissioning theatres are the only independent charities in Scotland that run venues that principally stage work that is made by the charity. They are not the only organisations that produce theatre in Scotland: there are local authority-controlled venues that produce work, other venues that produce or co-produce work for part of the year (particularly at Christmas) and of course Scottish touring companies including the National Theatre of Scotland.

Within the six commissioning venues there is a significant variety and diversity in size, location, programming policy, price of tickets, tenure of venue, level of annual public support and much more besides. Despite this diversity, they all recognise that they operate in the same ecology and are facing many of the same challenges.

The commissioning theatres requested that this study was robust and data led. The findings and recommendations are therefore largely driven from where the theatres are individually and collectively rich with data. This is true for finance and ticket purchasing. Data is currently far poorer for the scale and impact of the theatres' work in engagement and participation and in their support for the broader theatre ecology. The commissioning theatres have acknowledged the need to strengthen their evidence base in these primary areas of their work.

Joint statement from the six independent producing theatres:

"As executive leaders of Scotland six independent producing theatres we feel the stark challenges this report reveals around making theatre in this country now and in the future.

"Confronting the consequences of decades of public funding reductions alongside rising costs is a daily reality for us. Whilst we recognise the strain on public resources, we also recognise that continuing to achieve more with less is not sustainable.

"Greater collaboration is required as we face upcoming challenges and opportunities. That's why we find the proposal to adopt a common approach moving forward so compelling. Our collective diversity can serve as an asset for the people of Scotland even as we maintain our individual focus and purpose.

"By aligning on common goals whilst preserving that individuality, we can work smarter to the benefits of all our communities. A shared approach will capitalise on our collective strengths, encourage innovation, and promote the cultivation of new audiences.

"We are committed to a bright future for Scotland's theatre sector. A sustainable producing theatre sector is fundamental to the future of the performing arts in this country and we intend to contribute to a healthier and more vibrant cultural landscape.

"We have the potential to expand the market for theatre makers in Scotland domestically, throughout the wider UK, and internationally. This will increase the benefits of those working in the industry and boost the overall economy by bringing more visitors to Scotland and taking the best of Scottish talent to the world"