



VENUE MANAGERS' SURVEY RESULTS

June 2025

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INTRODUCTION AND METHODOLOGY

In spring 2025, the Local Theatre Touring Alliance (LTTA) conducted a wide-ranging survey of UK theatre venues to better understand the changing landscape for touring and presenting work. This survey was designed to capture detailed qualitative and quantitative insight into how programming, audience behaviour, staffing, finances and sector relationships have evolved in the decade since 2014.

The survey was open to all UK venues who regularly present live performance, with a particular emphasis on those who programme mid-scale touring work across drama, music, comedy, dance and family performance. Over 50 venues responded, ranging from major regional houses to smaller community-led spaces. The median size of a main house was 545 seats. Collectively they sold almost 4 million tickets in 2024.

The survey was completed by senior leaders from UK theatre venues, most commonly Chief Executives, Artistic Directors, Venue Managers or Programmers. A third of the sample had been in post for less than five years. 9% of respondents had over 25 years experience running their venue.

The majority are mid-scale venues, with a focus on touring work. 20% were over 75 years old, while a third had started operation in the 21st Century.

Responding organisations ranged from local authority-run theatres and independent charities to commercially operated venues and trusts, covering a wide geographical spread and a mix of producing and presenting models.

60% of venues were owned by local authorities, but only 20% were operated by them.

The aim of the survey was not simply to catalogue challenges, but to uncover practical insights that can help inform policy, support touring partnerships, and build stronger links between venues of all types. Responses were anonymised and themed to provide an honest, detailed picture of the current moment in UK theatre. This report distils the findings and makes clear recommendations for action.



HEADLINE FINDINGS

52 venues responded to the Local Theatre Touring Alliance survey, providing a rich, honest picture of the sector's recent changes, current challenges, and emerging opportunities.

While no two venues are alike, several strong patterns emerged:

1. **Shift to short runs:** There is a clear move towards more one-night events and fewer week-long runs. This allows greater programming flexibility but significantly increases pressure on staff and resources.
2. **More cautious deal-making:** Venues are now more likely to avoid guarantees, which are seen as increasingly unaffordable and risky. 80/20 box office splits are becoming the norm, with many noting a deterioration in deal terms compared to a decade ago.
3. **Opera, ballet and contemporary dance are largely absent from the programme:** together, these art forms account for just 4% of reported programming, reflecting perceived decline in affordable, high-quality touring in these genres and the financial risks that venues are willing to take.
4. **Delayed audience booking:** Audiences are buying tickets later than ever, reducing financial certainty for venues and touring companies alike.
5. **Loss of community/amateur work:** Many venues reported a decline in community hires and amateur productions, which were once a staple of programming and income.
6. **Rising costs, static funding:** Escalating costs—particularly for staffing, energy, and technical infrastructure—are outpacing income growth. Very few venues report any kind of regular public funding or subsidy.
7. **Local government engagement:** Local Authorities remain central to the success or survival of many venues — as funders, landlords, partners, or sources of political support. Yet their role is largely absent from national cultural strategy and infrastructure discussions. Respondents highlighted the need for stronger dialogue with local government, especially in the context of ongoing devolution, shifting priorities, and the impact of outsourcing on cultural provision.
8. **Optimism and Resilience:** Despite the scale of challenges facing the sector, many respondents expressed a strong sense of optimism, pragmatism and determination to adapt. This “can do” mindset was especially evident among mid-sized venues with stable funding or strong local support. However, smaller organisations — particularly those without regular funding or in more precarious local authority contexts — expressed greater uncertainty about the future, highlighting a growing disparity in confidence across the part of the sector.



OPPORTUNITIES AND CHALLENGES SUMMARY

The responses revealed a sector under pressure but full of potential. The biggest challenges were remarkably consistent across geography, size, and governance model — yet so too were signs of resilience, innovation, and commitment.

Key Challenges:

- **Rising Costs:** Staffing, utilities, insurance, and compliance costs (including new legal frameworks like Martyn's Law) are all rising faster than revenues.
- **Lack of affordable, high-quality product:** There is a significant gap in mid-scale touring drama, musicals, dance, and opera that venues can afford and audiences want. The available work is often too expensive or pitched at the wrong scale.
- **Technical skills shortages:** Almost every venue reported difficulty recruiting and retaining skilled technical staff. Casual crews are hard to find, and many teams are stretched or under-trained, especially outside major cities.
- **Shrinking community engagement:** Amateur, community, and school groups are hiring less often, reducing earned income and weakening vital local connections.
- **Infrastructure strain:** Many buildings are ageing, with accessibility, equipment, and environmental upgrades required — but few have the funds to invest.
- **Fragmented networks:** While numerous local and national networks exist, none were consistently mentioned by respondents. The value of current networks appears uneven, and many venues feel disconnected or unsupported.

Emerging Opportunities:

- **Appetite for collaboration:** Many venues expressed interest in new partnerships — particularly for co-commissioning, sharing work, or developing new touring models.
- **Audience loyalty:** Despite late booking and reduced frequency, audiences remain loyal. Several venues reported rising confidence and strong returns on certain types of work.
- **Flexible programming models:** Venues are increasingly agile, experimenting with formats, pricing, and event types to respond to changing demand.
- **Stronger civic identity:** Many venues described themselves as “trusted by the community,” playing a vital role in their local area — especially where no other professional arts space exists.



CURRENT PROGRAMMING MIX

	Professional Produced	Professional Presented	Amateur/ Community	Total
Drama/plays	7%	12%	5%	24%
Musical Theatre	0%	5%	4%	9%
Opera	0%	1%	0%	1%
Ballet	0%	1%	0%	1%
Contemporary Dance	0%	1%	1%	2%
Classical Music	0%	2%	0%	2%
Popular Music / Gigs	1%	21%	1%	23%
Family / Children's Theatre	1%	9%	0%	10%
Comedy (stand-up)	1%	9%	0%	10%
Pantomime	7%	5%	0%	12%
Commercial Dance (e.g. Strictly)	0%	1%	0%	1%
Talks / 'Audience with'	0%	3%	0%	3%
Total	17%	70%	11%	

Table 1: Average self-reported programme mix of performances in 2024

The self-reported data from venues unsurprisingly reveals a heavy reliance on **professionally presented** work, which accounts for **70%** of total programming. **In-house production** represents **17%**, and **11%** of programming is delivered by **amateur or community companies**.

While that 11% may seem modest, it's notable — **more than one in ten performances** in responding professional venues are by non-professional groups. In particular, **musical theatre** is heavily reliant on amateur companies, with nearly **half of all musical theatre presentations** coming from this sector. This suggests that for many venues, community-led work plays a key role in sustaining art forms that are otherwise expensive to present.

Drama and popular music/gigs dominate, accounting for **24%** and **23%** of programming respectively. Pantomime, comedy, and family/children's theatre each make up around **10–12%** of the offer.

By contrast, **opera, ballet and contemporary dance together account for less than 5%** of reported programming — surprisingly low given the strategic emphasis often placed on these art forms. These figures reflect both financial risk and the collapse of mid-scale touring options in these genres, a challenge cited repeatedly in the survey.



PROGRAMMING TRENDS

The survey revealed clear shifts in programming patterns over the last decade, driven by cost pressures, changing audience habits, and the availability of touring work. While every venue is unique, several broad trends emerged.

More One-Nighters, Fewer Long Runs

Many venues reported a drift towards one-night events and away from week-long runs. This reduces financial risk and helps maintain variety, but creates extra pressure on technical, marketing and front-of-house teams.

“More one-nighters, less touring.”

“Fewer longer runs now, more intense programming.”

A Decline in Touring Drama

Traditional touring drama is increasingly scarce, and what does exist is often unaffordable without guarantees. Some venues reported relying on just two or three companies for regular work.

“There is a significant lack of touring mid-scale ‘theatre’ work.”

“We’d love to take a risk on drama, but the guarantees make it too much of a liability.”

Less Risk and Innovation

Several venues have expanded their offer to include music, comedy, cinema, and local community events. At the same time, programming has become more cautious, with a focus on well-known titles, tributes, and family-friendly fare.

“There’s lots of product based on existing IP — original stories are harder to find.”

Growth in In-House Producing (for Some)

A minority of venues have expanded their in-house producing capacity, either through refurbishment, partnerships or audience demand. Others noted a shift *towards* producing as a strategic goal.

“More long runs and self-produced work.”

“Slight shift toward producing.”

Decline in Community and Amateur Work

Many venues reported a fall in amateur and community theatre hires — previously a source of income, participation, and loyal audiences. The loss of this work is often linked to changes in local authority support or education provision.



AUDIENCE BEHAVIOUR AND BOOKING PATTERNS

The past decade — and especially the post-Covid years — have brought noticeable shifts in how audiences engage with local theatres. These changes affect programming, planning, and financial stability.

Later Booking Is the Norm

A clear and near-universal trend is later booking. Audiences are increasingly waiting until the last days (or even hours) before committing to attendance, making it harder for venues and producers to plan with confidence.

“It’s steel pants territory — we have to hold off until the last minute to see if we’ll actually have an audience.”

“Customers are booking later and later than ever.”

Risk Aversion Is Growing

Audiences are less willing to take a chance on new or unfamiliar work. This leads to a narrowing of options: populist or nostalgic shows continue to do well, but more ambitious or challenging work struggles to find a crowd.

“Audiences do not want issue-based work — they want a good night out.”

“It’s harder to attract people to try something new — the gulf is getting wider.”

Repeat Attendance Has Fallen

Several venues noted a drop in frequency of attendance, especially among loyal, older audience segments. Fewer people are seeing multiple shows in a season, even if overall numbers are stable.

“Live events seem to have fewer repeat bookers — we’re out of the habit.”

“Audience retention is harder, frequency of attendance is dropping.”

Audience Behaviour Has Deteriorated

Some respondents mentioned increases in disruptive or inattentive behaviour — likely a reflection of broader cultural shifts and the effects of lockdowns.

“Audience behaviour has changed over recent years — not always for the best.”

“Some audiences are a bit ruder.”



ORGANISATIONAL CHALLENGES

Venues across the country are facing a perfect storm of operational pressures. These include rising costs, outdated infrastructure, skills shortages, and the cumulative impact of underinvestment over many years.

Rising Costs and Stretched Resources

Staffing, utilities, insurance, and compliance costs (including new legal frameworks like Martyn's Law) are all rising faster than revenues. Venues are struggling to maintain high-quality programmes and customer experience under intense financial pressure.

"Costs rising faster than our ability to generate revenue."

"We now have to provide security at most events — very rare a few years ago, now a significant extra cost."

Loss of Skills and Struggles to Recruit

Post-pandemic, there is a widespread shortage of skilled technical and marketing staff. Many experienced professionals have left the industry, and training pipelines are weak, especially in regional areas.

"We struggle to recruit technical staff — retention is really difficult."

"The local university completely axed its performing arts and technical theatre courses."

Infrastructure Issues and Maintenance Backlogs

Many venues operate in historic or ageing buildings that need urgent investment. Failing HVAC systems, inaccessible spaces, and outdated technical equipment are common concerns.

"RAAC, ageing estate, net zero, accessibility — it's all coming at once."

"We've lost commercial tours due to the inaccessibility of parts of our venue."

Challenges in Balancing Risk

Some respondents reported that guarantee levels and deal structures increasingly place financial risk onto the venue, especially for drama and musicals. They feel this makes it harder to offer a diverse programme or take artistic risks.

"We're being asked to guarantee £120k a week for a five-hander."

"Overheads have increased, and producers are offering just 20% net splits."

Public Funding Is Inadequate or Absent

Many venues reported significant challenges tied to reduced or disappearing public funding. "Reductions in public funding" and "cuts in local authority investment" are widely felt, with some expressing frustration that support tends to go to those visibly struggling:

"We are not supported, yet we see theatres struggling who immediately receive support."



Many venues operate with little or no public support — and feel invisible as a result. Some report being punished for success, excluded from strategic conversations or support because they are “not failing”.

“We receive no grant or support from any funders — it’s demoralising.”

“Because we’re not failing, we’re not supported.”

Scarcity of quality touring product

A significant number noted the growing difficulty in sourcing “affordable quality touring drama” or “midscale musicals.” This was compounded by a reduction in the number of producing companies, cancellation of tours, and a shift toward conservative, risk-averse programming.

The Particular Pressure on Small Venues

Smaller venues face a distinct set of challenges that scale up beyond their resources. With fewer staff, tighter budgets, and lower seat capacities, they are often expected to deliver the same range of programming, engagement, and income generation as larger peers — but with far less resource. Many reported being unable to absorb cost increases or offer competitive guarantees, and often struggle to attract or retain skilled staff. Their location in less affluent areas can limit price elasticity and access to donors, while their visibility in policy or funding conversations is limited.

“We are smaller and have fewer seats to sell but are dealing with the same cost increases and pay rates.”

“We tend to be lower in profile so can’t attract the same interest that could in turn attract funding.”



SKILLS GAPS

A striking and consistent concern across the survey responses was the **difficulty in recruiting and retaining skilled technical staff**. Over **60% of venues** reported problems in this area, often citing the post-COVID departure of freelance workers, the loss of local training provision, and a lack of formal routes into the profession for early-career technicians. Some venues mentioned apprenticeships as a potential solution, though these are still relatively rare.

There were also repeated mentions of **shortages in marketing skills**, particularly digital, data and strategic communications. A number of venues noted they had eventually been able to recruit for these roles but only after long delays, and typically with reduced numbers compared to pre-pandemic.

In a smaller number of cases, venues reported difficulty finding staff for **fundraising, producing, and finance roles**, especially at senior level. A few also mentioned challenges filling front-of-house or chef roles, though these were less prevalent.

While not always phrased as skills gaps, several venues made the case for **shared roles or networks** to reduce pressure on overstretched teams — a reminder that the issue is often one of **capacity as much as expertise**.



NETWORKS

While a wide range of national and regional networks exist to support the sector, responses suggest that the landscape is fragmented and sometimes difficult to navigate. Very few venues cited engagement with the major industry bodies, indicating a possible mismatch between what's on offer and what venues find useful. There is an opportunity to clarify, connect and potentially consolidate networks to ensure support is more accessible, relevant and better aligned with the practical realities of venue-based work.

Several venues described relying instead on **informal personal networks** or struggling to find the time and capacity to engage with wider sector structures — especially where they operate with minimal staff.

Some respondents expressed frustration that existing networks can feel overly centralised or **not reflective of the pressures on venues outside metropolitan hubs**. Others were just overwhelmed by the number of initiatives:

“We’d welcome more collaboration, but it’s hard to know where to start – there are so many overlapping groups.”

There is appetite for **peer exchange, practical collaboration, and shared advocacy** — but it may need to be delivered in new or more flexible formats to be meaningful and inclusive.



FINAL THOUGHTS

The final open-ended question invited venues to reflect more broadly. Many chose to amplify themes discussed earlier, but a number introduced new considerations or offered insights into mindset and future planning.

Urgency around public sector policy and ownership

Some venues called for greater understanding from local authorities about the operational reality of theatres (largely owned by local authorities), especially where leisure contractors are involved. Others raised questions about the long-term implications of devolution, changing funding structures, or the lack of cultural strategy at local government level.

The case for collaboration and shared infrastructure

A recurring theme was the appetite for co-commissioning, joint touring models, or shared programming between like-minded venues. Many stressed that mutual support is more important than ever, and that new consortia might deliver greater value than historic models.

Infrastructure and accessibility

A few venues reported that lack of investment in physical infrastructure was now starting to affect programme potential, with issues of access, safety, and technical suitability. For older buildings in particular, producers are beginning to opt out of dates due to inaccessibility for cast or audiences.

A shift in language and positioning

There were calls to shift the public narrative around the arts, from one of subsidy to one of investment, particularly in relation to broader economic and community outcomes. One contributor wrote:

"We need to talk more about investment, rather than subsidy, and we need to talk about the wider economic benefits that a successful arts industry can reap in the regions."

The role of the building – and of the people who run it

The survey also captured the weight of leadership: the need to juggle fundraising, staffing, maintenance, and community purpose. As one participant put it:

"We have to remain competitive, financially sustainable and agile, whilst also unblocking the toilets."

Optimism and resolve

Despite the challenges, there was a strong sense of pride, resilience, and pragmatism. Several venues reported diverse and well-attended programmes and an openness to trying new models.

"We're coming to the end of a £6m campaign to make the venue accessible... so we have to be here in 10 years – and more."



SUMMARY OF FINDINGS

- **Programming models are shifting**, with a marked increase in one-night shows and fewer longer runs, often in response to cost pressures and changes in audience behaviour.
- **Audiences are booking later** and attending less frequently. Confidence and habit have been eroded, especially for non-mainstream work.
- **Technical skills shortages are widespread**, with over 60% of respondents citing recruitment and retention challenges in this area.
- **Mid-scale touring drama and musical theatre are scarce**, and unaffordable guarantees make risk-taking harder.
- **Community and amateur activity has declined**, reducing earned income and community links for many venues.
- **Networks are fragmented**, with few venues actively engaged in the larger national ones, and a wide range of local and informal connections instead.



RECOMMENDATIONS FOR THE LOCAL THEATRE TOURING ALLIANCE

- **Initiate strategic dialogue with local government**
Engage the Local Government Association (LGA) and Chief Cultural & Leisure Officers Association (cCLOA) to advocate for the role of theatre in place-based development, arguing for stronger cultural priorities in local strategy and investment.
- **Address the technical skills shortages**
Develop a coordinated initiative to grow and retain technical talent across the sector – potentially through apprenticeships, regional training hubs, and shared recruitment strategies.
- **Reconnect with the amateur and community sector**
Open up a national dialogue with amateur theatre networks and local cultural groups to understand their changing needs and explore collaboration in programming, audience development, and shared use of space.
- **Map and assess theatre networks**
Audit the current landscape of national and regional networks to understand overlaps, gaps and levels of engagement – then support more accessible and purposeful connections between organisations.
- **Pilot new models to get more work on the road**
Test ways to commission, co-produce or share the touring of mid-scale drama, musicals, opera and dance, with an emphasis on affordability, shared risk, and geographic spread.



ABOUT THE LOCAL THEATRE TOURING ALLIANCE (LTTA)

The Local Theatre Touring Alliance was established in May 2025, following six months of intensive conversations among theatre professionals concerned about the fragile and often overlooked ecosystem of mid-scale touring in the UK.

It is a growing, open network of people and organisations committed to making high-quality live performance available to audiences in towns and smaller cities across the UK. It brings together venues, producers, promoters, touring companies, and anyone who cares about the health and future of local theatre touring.

LTTA is driven by a shared belief in cultural opportunity for all — that geography should not limit the kinds of stories people can access live, on stage, in their own communities. Its members are passionate about sustaining a vibrant and diverse touring ecology, and about supporting the relationships between artists, audiences, and places.

The alliance champions practical collaboration, open conversation, and mutual support. It aims to ensure that organisations often excluded from national conversations — especially those operating outside metropolitan centres — can be heard, connected, and strengthened through shared insight and action.

LTTA's work is guided by four foundational values:

- **Trust** – We commit to honest, open dialogue.
- **Transparency** – We share information and decision-making processes.
- **Collaboration** – We work together to create long-term solutions.
- **Respect** – We value every person's insight and contribution.

Because the Alliance is not based on membership, **supporters can join at no cost**, as long as they stand behind these values.

Please visit www.localtheatretouringalliance.com

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