British Theatre Repertoire 2013

Interim Report

In 2008, the British Theatre Consortium was commissioned by Arts Council England to undertake research into the amount of new writing presented in the English theatre between 2003 and 2009.

Between 1970 and 1985, new work had represented about 12% of productions in the English theatre. In the nineties that proportion rose to around 20%. We found that by 2008, in our sample of 65 regularly-funded theatres, the proportion had risen to over 40%, evenly divided between auditoria of under and over 200 seats.

By collaborating with UK Theatre and SOLT (the Society of London Theatres), we now have access to far larger and more detailed anonymised data sets asked more detailed questions for the of the whole of the membership of SOLT (covering the commercial, not for profit and subsidized sectors in the capital) and most venues who are members of UK Theatre (covering the vast majority of medium and large scale theatres and companies who perform in theatres, in the rest of the country), in for the calendar year 2013. These statistics cover 273 theatres in the United Kingdom, giving us, we believe, the most extensive and detailed statistical picture into Britain's theatre repertoire ever created.

We hope to publish our report in late February, and to launch and discuss its findings at a conference in April. However we have produced an interim report on our findings about the overall shape of the repertoire.

<u>Overview</u>

1. In order not to distort the picture of the current professional repertoire, we have excluded all amateur work taking place within professional theatres. We have also excluded shows which received only a single performance: this usually comprised gala performances, playreadings, and other occasional pieces.

2. Overall, in 2013, in our reporting theatres, there were:

    - 1,771 productions
    - 46,313 performances, and
    - 25,612,962 attendances

    Thus we can say that each production had, on average, just over 26 performances and was attended by just under 14,500 people over the run.

Although these figures are very welcome to those who wish the theatre well, we should add a note of caution, though: when we look at long-running shows, we find that the 36 shows which had 200 or more performances in 2013 represented only 2% of productions but 45% of all seats sold. In other words, the average figure masks very wide disparities in performance.

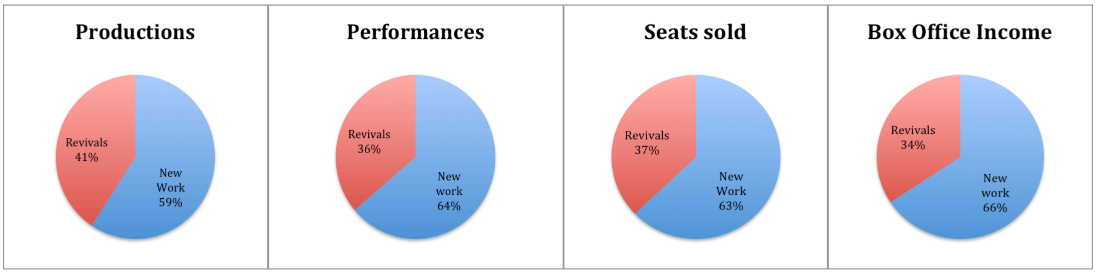
New Work

3. A very striking feature of these figures is the proportion of **new work** in the repertoire. New work constitutes:

   - 59% of all productions
   - 63% of all seats sold
   - 64% of all performances
   - 66% of box office income. (see fig. 1)

4. In other words, using all four measures – shows, performances, attendances, and money – our research shows that new work dominates the repertoire; it is substantially over half of the work programmed and generates almost two-thirds of our theatres' income.

Fig. 1



Straight Theatre[1]

5. In the full report, we will be exploring the large number of new musicals, pantomimes and opera (and indeed work performed by amateurs). In this interim report, however, we're concerned to see what proportion of all productions are what used to be called 'straight theatre', that is, shows that aren't musicals, pantomimes, opera, physical theatre/dance or installations. Taking out those sectors, we find there are:

   - 1,224 'straight theatre' shows (69% of all shows).
   - 26,890 performances of 'straight theatre' shows (57% of all performances)

[1] We have struggled to find an appropriate collective term to describe plays and devised work of a more or less serious kind. 'Plays and devised work' seems to set up an internal distinction that our survey does not bear out. 'Legitimate theatre' is clearly outdated. 'Straight theatre' has some unwelcome connotations. We would appreciate any suggestions for a better term.

- 9.1m seats sold for ‘straight theatre’ shows (35% of all seats sold)
- Generating £228m of box office income (24% of all box office income)

6. Of these ‘straight theatre’ productions, 839 (69%) were new work

   (We have debated whether to include installations and physical theatre/dance in this ‘straight shows’ category and have eventually decided on excluding them, on the basis that they cover a wide range of performances, some of which go far beyond theatre. In any case, both categories together constitute only one half of one percent of all performances and would therefore make minimal difference to the category.)

7. These figures can be broken down further:

   - 16,765 (62%) of the 26,890 individual **performances** of straight theatre shows are of new work
   - Just over 5m (55%) of 9.1m **seats sold** for straight theatre shows were for new work
   - £123.5m (54%) of the £228m of box office income was for new work

8. On every index, then, new work represented over half of British theatre product, audience and income in 2013.

   <u>New Writing & New Plays</u>

9. Given the concern raised in the sector about the threat to new writing, it is worth noting that in 2013, in all ‘straight theatre’:

   - 55% of all productions were of new writing
   - 56% of performances were of new writing
   - Just under 5m (53%) of seats sold were for new writing
   - £120.9m (53%) of the box office income was for new writing

10. In addition, within straight theatre, as a proportion of all new work, new writing contributes

    - 80% of all productions
    - 91% of all performances
    - 96% of all seats
    - 98% of all box income

11. ‘New writing’ as a category means all theatre productions in which a named writer has been involved (as a writer). This does not simply mean new plays, but also includes new translations, new adaptations,

some devised shows, and new work for children's and young people. Indeed, of the new writing category:

- 4 (1%) are devised shows with a named writer
- 202 (30%) were either adaptations or translations or both.
- 138 (21%) were plays for children or young people

These categories are not mutually exclusive; several plays for children are also adaptations; some translations are also for young people or adaptations; a few productions are all three. However, together this category constitutes 41% of all new writing.

12. What proportion of the repertoire is represented by new plays? The answer depends on how you define a new play. Do new adaptations count as new plays? Do new translations of old plays count as new plays? Should we subsume plays for children in this category or keep them distinct?

    - If we *exclude* adaptations and translations but *include* (non-adapted) children's work ('original plays'), then there were 467 new plays produced in these theatres, which represents 70% of all new writing.
    - If we exclude *all* children's work ('original adult plays'), there were 398 new plays produced, representing 59% of all new writing.
    - If we exclude all children's work, but include new adaptations and translations ('adult plays'), there were 531, representing 79% of all new writing.

    'Original plays' currently seems to us the most helpful definition of 'new plays' and that gives us the conclusion that new plays in 2013 formed

    - 26% of the entire repertoire
    - 38% of all straight theatre
    - 45% of all new work.

    All of these are calculated in numbers of productions.

    <u>Devised Work</u>

13. As a proportion of straight theatre work, new devised work has become a significant part of the repertoire. Devised work comprises:

    - 21% of new 'straight theatre' productions.
    - 16% of all new work
    - 14% of all straight theatre
    - 10% of the entire repertoire of British theatre

To take the first of these figures – probably the most relevant context for devised work – devised work, as a proportion of new straight theatre productions, makes up:

- 9% of all performances
- 4% of all tickets sold
- 2% of box office income

This fairly sharp declining pattern in the percentage of devised work measured by production numbers, performances, attendances and sales can be partially explained by devised shows having fewer performances in smaller houses. However, devised work generally achieves on average 50% of capacity, compared to 62% for new writing, 70% for musicals, 72% for opera and 74% for pantomime. It would be worth investigating how confident theatres are in marketing new work of this kind.

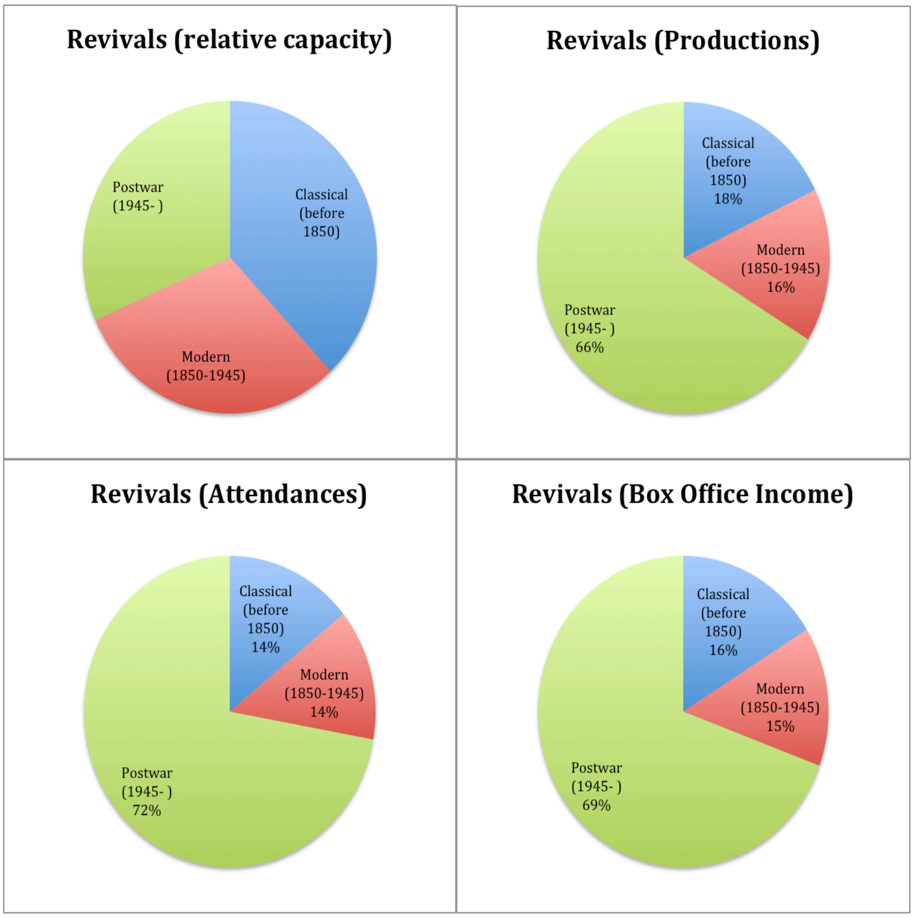


Fig. 2

<u>Revivals</u>

14. The amount of old work has declined. However its audience remains healthy. Compared with 62% capacity for new plays and 68% for new work as a whole,

- classical drama (including Shakespeare) achieved 77%

- postwar drama achieves 64%
- modern drama (including Chekhov, Ibsen and Coward) lags a little at 62%.

However, the proportion of productions and of ticket sales tell a different story. As fig. 2 shows, although achieving the highest capacity, classical work represents a fairly small part of the repertoire, performances, and box office. Postwar drama, however, dominates all revivals on all measures except capacity.

Conclusion

15. Despite the economic downturn in 2008, while other industries have seen a decline, both UK Theatre and SOLT report that audience numbers and levels of income at their member venues have proved remarkably resilient. This data analysis shows that the recent success of the theatre sector has been built not on reviving past success but on new work. If the UK is to maintain its dominant global position in the world of theatre it will be crucial to continue to support the development of new work and foster the talent of new generations of writers and other theatremakers.

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The 2013 British Theatre Repertoire project is supported financially by Arts Council England and is a collaboration between the British Theatre Consortium, SOLT and UK Theatres. The research has been carried out by David Brownlee, David Edgar, Clare Ollerhead, and Dan Rebellato.