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Theatres Beyond the Stage

*The Recovery of Regional Theatres as
Placemakers in the East of England*

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Xav Marseille, the Mercury Theatre, 2022.

01

Executive Summary

Theatres Beyond the Stage: The Recovery of Regional Theatres as Placemakers in the East of England was an intensive, time-specific research project running from April-August 2022 examining the evolving relationship of regional theatre venues to audiences and local communities in the wake of Covid-19 closures.

The project responded to the specific concerns and priorities of three theatres: the Mercury Theatre in Colchester; Queen's Theatre Hornchurch; and the New Wolsey Theatre in Ipswich. Existing reports on the impact of Covid-19 on theatres offer minimal investigation and little insight into the role of theatres as community hubs and social spaces. Our research produced conclusions about the role of theatre venues in generating and supporting a local creative ecology and as key placemakers for local communities.

Regional theatres play a particularly crucial role in serving local communities. The economic impact of theatre closures throughout 2020 and the restrictions on audience

numbers throughout 2021, however, have drastically limited the capacity of theatres to perform this important placemaking role.

Theatres have had to radically adapt and reinvent themselves with both resilience and creativity over the last 30 months to stay relevant in the endlessly shifting cultural landscape of the UK. This has varied from the widespread turn to digital theatre, innovative use of foyer and lobby spaces, and strategies to engage with potential new audiences in the wake of the pandemic. Audience behaviour however continues to fluctuate in response to unpredictable external influences, and theatres are faced with crucial choices relating to their creative and community practices.

This study provides a snapshot of the situation for regional theatres in summer 2022, approximately 9-12 months after our partner theatres reopened their doors to live audiences. The focus of this research is not on presenting the financial impact of the pandemic on theatres, which was devastating and relatively well-documented, but on the relationships between theatres,

their audiences, and communities, and the recovery and regrowth of this relationship in 2022. We are grateful to Queen's Theatre Hornchurch, the Mercury Theatre, and the New Wolsey Theatre for allowing and supporting us to conduct this research, which we hope will provide insight and benefit to them, their stakeholders, and other regional theatres across the country.

The research was organised with a mixed-method design: a survey of our partner theatre participants and audience members, totalling 2336 respondents; and focus groups that totalled 130 interviewed participants. In addition, targeted observations were conducted, and creative commissions undertaken.

The findings are grouped around three key themes: Placemaking and Community; Audiences; and The Digital. These offer a profile of audience patterns and priorities, investigating the regularity of theatre attendance as impacted by the pandemic, audience attitudes as they return to

theatregoing, take-up of digital theatre content, and the impact of regional theatres in terms of community recovery from the pandemic.

- Regional theatres perform important placemaking responsibilities through their role as 'community hubs'.
- There is a connection between the regularity of participants' theatregoing and their sense of belonging to the local community.
- Theatre foyers and peripheral spaces are key sites for placemaking practices through their role as social and reflective spaces.
- Changes in patterns of audience behaviour and trends in theatregoing in the wake of the pandemic are made evident, such as audiences booking later, being much more selective, and changes to theatregoing 'habits'.
- The research examines respondents' regularity of theatregoing and identifies a sub-group of previous theatre visitors who are now potentially 'lost' audience members. Around 18% of previous theatregoers have not booked a ticket for a theatre production (at any theatre) since before the pandemic and there is uncertainty as to whether they will return. A further 20% are booking considerably less.
- A small percentage of theatregoers have increased the regularity of their booking, driven by a desire to support their local arts organisations.
- The pandemic has created a 'fear-of-missing-out', driving new audience members to book theatre tickets for the first time looking to 'try something new'.
- The topic of digital theatre is oddly divisive, eliciting strong reactions from audience members both positively and negatively.
- Mid-scale regional theatres face stiff competition in terms of bookings for digital productions from large-scale organisations that can reach a mass market with very high-quality digital products.
- Digital theatre offers convenience and has the capacity to engage remote audiences and overcome geographic barriers, and to provide strategies of access for D/deaf and disabled audiences. Many audience members however find it lacks the 'event-ness' and thrill of live performance.
- In addition to the challenges of returning to theatregoing in the wake of the pandemic, the cost-of-living crisis will continue to significantly impact theatregoers' financial priorities.

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Introduction

Theatres are more than a venue or a stage; they are placemakers and community hubs that offer social spaces, outreach, and youth engagement.

Regional theatres play a particularly crucial role in serving local communities. However, the economic impact of theatre closures throughout 2020, the restrictions on audience numbers throughout 2021, ongoing challenges due to Covid outbreaks amongst theatre workers, and inconsistent audience numbers have drastically limited the capacity of theatres to perform this important placemaking role.

As Cara Courage sets out in the introduction to the 2021 publication, *The Routledge Handbook of Placemaking*, “placemaking represents a paradigm shift in thinking about planning and urban design, from a primary focus on buildings and macro urban form to a focus on public space and human activity – what happens in these spaces, why, how, and with and by whom, and not”.¹ These developments have been thrust into sharp relief during the pandemic due to national lockdowns, social distancing restrictions, and new patterns of labour that have subsequently emerged.²

This has been foregrounded by Courage, who observes that the “pandemic is anti-place: in particular, it is counter to the particularly urban design of collective occupation, and has created a fear of human proximity and taken from us our familiar collective experiences and sites of serendipitous encounter in the public realm”.³ Unsurprisingly, many regional theatres have found the nature of their audience and community engagement significantly disrupted by the pandemic.

Mutable and unpredictable characteristics in audience behaviour have persisted into the summer of 2022, providing barriers to theatres’ traditional placemaking roles. Simultaneously, the economic aftermath of Covid and the ongoing cost of living crisis has impacted the public’s ability to participate in the arts, particularly in terms of access in areas of deprivation and schools in low-income areas. Theatres are concerned about whether, and in what capacity, audiences will re-engage with live productions. Will those who have yet to return ever do so? Will returning audiences be risk averse? Is there interest in continuing the digital offer?

Our research investigates the recovery of three regional mid-scale producing theatres: Queen’s Theatre Hornchurch, the Mercury Theatre in Colchester, and the New Wolsey Theatre in Ipswich. Our research demonstrates and amplifies the role regional theatres play in providing social spaces and community hubs, how this provision has been impacted by the pandemic, the challenges facing audiences at this particular point in time, and the preferences and needs of audiences in engaging with digital theatre.

Theatres Beyond the Stage builds on the researchers’ previous involvement in the ESRC Covid-19 Rapid Response study, *Freelancers in the Dark: The Social, Cultural and Economic Impact of Covid-19 on Theatre Freelancers* (2020 – 2022), which was led by the University of Essex in partnership with Manchester Metropolitan University and Queen’s University, Belfast.

Freelancers in the Dark aimed to investigate, document, and analyse the experience of theatre freelancers across the UK during the pandemic.⁴

It focused specifically on the lived experience of freelancers, although it also included a national survey of theatre organisations and venues, as well as key findings suggesting the profound and ongoing impact of the pandemic on theatre venues and the critical role they play in providing placemaking and community engagement. Utilising a similar mixed-methods approach to *Freelancers in the Dark*, our project employs qualitative and quantitative data to expand focus to how regional theatres and regional audiences have reacted to the manifold challenges of the pandemic.

The findings of this report are structured around three key themes. Following an outline of the research methodology and contextual information regarding the partner theatres and their activities over recent months, findings will be presented in the following sections:

Placemaking and Community:

This section argues for the role of regional venues as performing important placemaking responsibilities and considers participant responses to the notion of a theatre as 'community hub'. The theatres' foyers and peripheral spaces are identified as key sites for placemaking practices through their role as social and reflective spaces.

Audiences:

Patterns of audience behaviour and trends in theatregoing in the wake of the pandemic are demonstrated, with findings presented around those audiences who have yet to return to theatre, and those who have booked for the first time since the pandemic.

The Digital:

This section presents findings regarding audience attitudes to digital theatre and the factors influencing their preferences, with

consideration both of their engagement with the digital offer during the pandemic and their interests moving forward.

The report then briefly acknowledges the limitations of the research and considers future directions before offering a concise conclusion of the overall project insights.

¹ Cara Courage, 'Introduction: What really matters: moving placemaking into a new epoch', in *The Routledge Handbook of Placemaking*, ed. Cara Courage, Tom Borrup, Maria Rosario Jackson, Kylie Legge, Anita Mckeown, Louise Platt, Jason Schupbach (Abingdon and New York: Routledge). 2-3.

² For example, the report 'Homeworking and spending during the coronavirus (COVID-19) pandemic, Great Britain: April 2020 to January 2022', noted how between 19 and 30 January 2022, 36% of working adults reported having worked from home at least once in the last seven days. <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/articles/homeworkingandspendingduringthecoronaviruscovid19pandemicgreatbritain/april2020tojanuary2022>

³ Courage, 'Introduction', 1.

⁴ For more information, see <https://freelancersinthedark.files.wordpress.com/2022/06/freelancers-in-the-dark-final-report-high-res-2022-1.pdf>

03

Approach

This research was undertaken with three regional producing theatres: the Mercury Theatre in Colchester; the New Wolsey Theatre in Ipswich; and Queen's Theatre Hornchurch. We employed a mixed-methods approach to collecting a detailed and varied response to how these theatres are recovering from the Covid-19 pandemic and the particular challenges they faced in summer 2022.

The research focus was developed in conjunction with our partners; in particular, early conversation with Mathew Russell, Executive Director at Queen's Theatre Hornchurch, led to emerging research questions around the role theatres play in providing a community hub, how this provision has been impacted by the pandemic, the priorities and preferences of audiences at this particular point in time, and responses to, and the future of, digital content provision. As dialogue developed with the three theatres, a key focus emerged on the priorities and challenges facing audiences returning to regular theatregoing, and the factors influencing their booking and behaviour. The research was undertaken intensively

between April – August 2022 and aimed to capture a snapshot of the circumstances for these theatres, their audiences, and local communities in summer 2022 in the wake of the pandemic. At this point in time, these theatres had reopened their doors to live audiences for coming up to 9-12 months. In addition to this report, an individual package of theatre-specific data has been provided to each of the three partner theatres.

Data collection involved the following:

Observation

Over a four month period we examined how the theatres' foyers and communal spaces were being used by audience members, as well as wider members of the general public. We also observed how spaces in the theatres' buildings were used for outreach and education programmes, including youth theatre groups, local choirs, senior social clubs, sewing groups, baby clubs and other workshops. Observations were made

regarding how the space was used for what activities, patterns of usage, behaviour within the space, and the demographic of visitors.

Surveys

A survey was constructed with questions targeting the key themes of the research. It was designed to give both qualitative and quantitative data points by using a range of question formats and was disseminated to the theatres' contacts by box office and marketing staff, who had access to the relevant data on booking patterns.

Tailored versions of this survey were distributed to different subgroups; three versions distributed online and one version in person available to foyer visitors. The sub-groups were: audiences who booked for the first time since March 2020 ('new audiences'); audiences who booked prior to the pandemic but haven't yet booked since (potentially 'lost audiences'), and everyone else (who had booked both before and at least once since the start of the pandemic). This last group were divided into two groups;

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those that conducted the survey online, and a sub-group of theatre visitors who undertook the survey in person in the theatre foyer via QR codes and laptop/tablets.

A core set of questions was presented to all sub-groups, with certain questions removed or additional questions asked based on the relevance of the question to the sub-group. The aim of tailoring questionnaires to sub-groups was designed to shed new light on why some people had stopped attending performances or workshops since the pandemic and to examine trends relating to new theatregoers who had emerged since venues had reopened after the national lockdowns. For example, new audience members who had booked a ticket for a production at the theatre for the first time since March 2020, were not asked questions comparing their engagement with the venue before and since the pandemic and were instead asked whether they had previously attended productions at other theatres, what made them book for their first show at this specific theatre, and about the nature of their engagement with other art forms

and cultural activities. Visitors to the theatre foyer were asked about why they visited the theatre foyer that day and how much time they anticipated spending there.

All survey respondents were asked about their engagement with arts and cultural organisations generally, their sense of belonging within the local community since the pandemic, their theatregoing patterns and influences on this, the type of theatre they are most motivated to see, their engagement with digital theatre options, the importance of Covid safety, and the value placed on the foyer spaces and theatre as a community hub.

2336

Total survey respondents including:

Potentially 'lost
audience' respondents:

611

'New audience' respondents:

201

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Focus Groups:

Focus group interviews were conducted with a wide range of participants. These took place both in person at the three participating theatres and on Zoom. On average they lasted around one hour and took a semi-structured approach. The sessions invited participants to articulate their own lived experiences of engaging with the respective theatre, to reflect on how the pandemic had impacted on their theatregoing habits, to discuss whether they had engaged in any of the theatre's digital productions since March 2020, and consider if they saw the theatre as playing a 'placemaking' role in their local community. Focus groups covered a wide demographic of participants, ranging from regular theatregoers, parents and carers of young people in the theatres' youth groups, potentially 'lost audience' members, and members of the general public who possibly had little engagement with the theatre.



Focus group interviews were conducted both online and in person (depending on the demographic of the group); each interview lasted approximately an hour and involved on average 6 participants. Across the project as a whole, **130 participants** were interviewed across **21 focus groups**:

Queen's Theatre Hornchurch Focus Groups:

- Over 50's Musical Theatre Dance Workout participants: 1 June 2022
- Parents and carers of youth theatre participants 1: 6 June 2022
- Parents and carers of youth theatre participants 2: 7 June 2022
- Local residents 1: 9 June 2022
- Local residents 2: 10 June 2022
- Potentially lost audiences 1: 21 July 2022
- Potentially lost audiences 2: 22 July 2022

Mercury Theatre Focus Groups:

- Senior Social Club participants: 16 June 2022
- Mercury Community Choir participants 1: 16 June 2022
- Mercury Community Choir participants 2: 16 June 2022
- Parents and carers of youth theatre participants 1: 20 June 2022
- Parents and carers of youth theatre participants 2: 20 June 2022
- 18-25 Youth Theatre participants: 4 July 2022
- Potentially lost audiences 1: 21 July 2022
- Potentially lost audiences 2: 22 July 2022

New Wolsey Theatre Focus Groups:

- Parents and carers of youth theatre participants 1: 27 June 2022
- Parents and carers of youth theatre participants 2: 28 June 2022
- Suffolk Refugee Support Sewing Group: 8 July 2022
- Unscene Singers: 18 July 2022
- Potentially lost audiences 1: 21 July 2022
- Potentially lost audiences 2: 22 July 2022

03 Approach

Creative Commissions

For each theatre, a local professional photographer was commissioned to respond to the research themes and the placemaking role of the venue. The photographers had meetings with the researchers and spent time in the theatre's foyer spaces, before producing images that both captured the way other visitors used and inhabited the theatre venue, and also incorporated their own individual response to the space and interpretation of the research questions.

Themes that developed through the photography included the transitional nature of the theatre foyer; its osmotic position between inside and outside; featured architecture; the use of light and shadow to animate the spaces; the facilitation of a sense of community and belonging; the space as a site of performance; the action and patterns of movement of visitors; and the foyer as space for reflection and thought.

The artists were Ipswich-based Gillian Allard (www.gillian-allard.com), Colchester-based Xav Marseille (www.xavmars.com), and Hornchurch-based Bradley Green (www.thesnapshotpeople.com).

The images generated are presented throughout this report.



Gillian Allard, the New Wolsey Theatre, 2022.

04

Brief Context: The Theatres 2020-2022

04 Brief Context: The Theatres 2020 - 2022

In June 2020, theatres submitted parliamentary evidence to the DCMS Inquiry on the Impact of Covid-19. Outlining the devastation of the pandemic on theatre finances and activities, they warned that recovery of the sector from the fall-out of the initial wave of Covid-19 and the first lockdown would take years not months.⁵

Over two years since, some productions originally planned for March 2020 have only just been realised, the touring of regional theatre productions has only recently recommenced, and many pre-pandemic theatregoers have yet to return.

The journey leading to summer 2022 has been profoundly challenging for regional and community theatres such as Queen's Theatre Hornchurch, the New Wolsey Theatre Ipswich, and the Mercury Theatre. Despite this, they have responded with a productive last six months, prioritising their programmes of engagement and community workshops as well as producing new work. The following section briefly introduces each of the three partner theatres and outlines their activities in the months leading up to our study in summer 2022.

5. See for example the New Wolsey evidence <https://committees.parliament.uk/writtenevidence/6937/pdf/> (accessed 20th August 2022).





Xav Marseille, the Mercury Theatre, 2022.

The Mercury Theatre

Originally opened in 1972, the Mercury underwent an ambitious £14.2 million renovation project between 2016 and 2021. Termed the Mercury Rising Project, the building's foyer space was rebuilt to include a new café bar that remains open throughout the day, a new rehearsal room, community space, offices, production space, and dance studio. The theatre's main auditorium was also redeveloped as part of the project to increase capacity from 483 to 540.

Having already closed for refurbishment works in 2019, the theatre remained shut until summer 2021. An original reopening date of September 2020 was postponed due to delays to the building work created by the pandemic. In August 2020, the theatre ran the Mercury Online Festival 2020, a free digital theatre weekend festival, together with the University of Essex, Signals and the Lakeside Theatre. The theatre's first in-house production after reopening was the Sherlock Holmes mystery

[*Baskerville*](#), which was performed in July and August 2021, followed by a new production of [*Antigone*](#) and the pantomime [*Aladdin*](#).

Since January 2022, the Mercury Theatre has staged a series of new and original productions in what is the theatre's 50th anniversary. In March, the theatre premiered a production of Charles Bennett's classic thriller play [*Blackmail*](#), reworked and rewritten by Mark Ravenhill. Also in March, the theatre produced a Covid commemoration concert to mark the date of the first national lockdown in the UK; the event offered a chance for reflection on the loss and disruption caused by the pandemic.

In May, the Mercury staged a new production of [*The Comedy Of Errors*](#), directed by the theatre's Creative Director Ryan McBryde. The following month in June, it staged Waleed Akhtar's new play [*Kabul Goes Pop – Music Television Afghanistan*](#), a co-production between Brixton House,

HighTide, and the Mercury. During this period the Mercury has continued with its full range of outreach and education programmes, despite the disruptions caused by Covid-19 at the start of the year.

The Mercury is located in Colchester city centre, between the Colchester Arts Centre, Roman Wall, Balkerne Gate and the Jumbo Water Tower, where the theatre is well placed to receive a large amount of passing footfall. The Mercury's new renovation has allowed the theatre to expand its participatory work, with local demand for workshops, classes and social groups at an unprecedented level.⁶ The theatre also stages a weekly 'Lates' programme in its new café bar, including, jazz, comedy and [*Cocktail Cabaret*](#) – Colchester's only regular LGBTQ+ night.

⁶ Interview with Steve Mannix, 4 May 2022.

Queen's Theatre Hornchurch

Founded in 1953, Queen's Theatre Hornchurch is located in the London Borough of Havering. The company moved into its current site in April 1975, which houses the 507 seat Main House theatre and the flexible Other Space, an intimate and accessible space in the theatre's foyer for the performances of new plays, poetry, and stand-up comedy. The theatre's prominent building and the sizeable green space next to it make it a central and eye-catching location in Hornchurch town centre and Queen's Theatre won London Theatre of the Year at the Stage Awards in 2020.

Queen's Theatre Hornchurch went dark on 17 March 2020, 6 days before the official announcement of the national lockdown on 23 March. The theatre rapidly moved its Outer Limits programme (a development project that spotlights theatre makers in Outer East London and South Essex) online.

In April, the theatre secured funding from Clarion Futures, the charitable foundation of Clarion Housing Group, to provide a series of digital classes and six weeks of weekly telephone-based workshops during the lockdown. Queen's Theatre Hornchurch premiered its first digital offering in June 2020, a live YouTube streaming of a piece entitled [Here I Am](#), a retelling of audience members' lockdown stories that had been shared with the theatre in the preceding months. In the same month, the theatre also offered a YouTube streaming of a previously recorded production of [The Hired Man](#), which had first been performed at Queen's Theatre Hornchurch in 2019.

As national restrictions began to ease over the summer of 2020, the theatre cautiously re-opened to the public on 3 September 2020.

This took the form of reopening the café in the foyer, restarting many of the building's workshops and social groups, and a planned season of live performances. These plans were derailed by the second national lockdown on 5 November 2020. Reacting to these new restrictions, Queen's Theatre Hornchurch live-streamed performances of the theatre's new productions [Misfits](#) and returned to hosting classes and workshops online. Instead of their Christmas panto, after the second lockdown ended, Queen's Theatre Hornchurch delivered an alternative seasonal special; [Christmas Allsorts](#) was a live family variety show with music, dance and comedy presented in person with a socially distanced audience of 200 per show. In February 2021, the comedy piece [Sharon n Barry do Romeo and Juliet](#) premiered on Zoom, directed by the theatre's then artistic director Douglas Rintoul.

04 Brief Context: The Theatres 2020 - 2022

Reopening on 17 May 2021, the theatre made a series of 'Catalyst Micro Commissions' aimed at helping local artists based in Outer East London and South Essex. [Aladdin](#), the theatre's pantomime for the 2020-2021 season, played between November and January, however a significant number of productions had to be cancelled; despite the theatre taking various measures such as bringing in additional cast members and having 'swings' in place, Omicron cases within the company were unmanageable. In May 2022, the theatre's co-production with Leeds Playhouse, [Maggie May](#), was performed for the first time after having originally been scheduled to be performed in March 2020, but had been cancelled due to the pandemic.



The Snapshot People, Queen's Theatre Hornchurch, 2022.

The New Wolsey Theatre

Founded in 1979 as the Wolsey Theatre, the building reopened as the New Wolsey Theatre in 2001. The New Wolsey underwent a £3 million renovation to its foyer space and front of house area between 2019 and 2020, which included the construction of NW2, a new building that houses the theatre's youth and participation activities that opened in November 2020. NW2 has recently won a RIBA East Award and RIBA East Client of the Year Award 2022.

The theatre closed its doors due to the pandemic on 20 March 2020. Over the following months it launched the StoryLine project, which encouraged participants to leave a recorded 'lockdown message' on a phone number provided on the theatre's website. This led to the creation of the short film [Scrubs](#) that was uploaded by the theatre to YouTube in July 2020.

Scrubs was followed by a variety of digital productions, including the live streamed performances [What a Carve Up!](#) in October 2020 and [The Picture of Dorian Gray](#) in March 2021. The theatre reopened its doors at the end of May 2021.

In early 2022, the New Wolsey Theatre was still contending with the impact of the pandemic in the form of cast illness and show cancellations. On 3 January, the theatre was forced to cancel the remaining performances of its pantomime [Jack and The Beanstalk](#), which had been due to run for another 6 days, due to positive Covid cases among the cast. 2022 has also involved a process of change for the New Wolsey with new Chief Executive Douglas Rintoul joining the theatre in June. Rintoul's production of [All My Sons](#), originally staged at Queen's Theatre Hornchurch, was staged at the New Wolsey in March.

Other recent productions have included, [The Birds and the Bees](#) and [Burke and Hare](#).

The New Wolsey Theatre runs an extensive outreach and participation programme collectively known as Creative Communities that offers a range of ways for local people to engage with arts and culture. The theatre also supports other local community groups and arts organisations to develop and grow their own work, and NW2 is fast becoming a community hub with groups including Suffolk Pride, UnScene Suffolk (a choir for the visually impaired), Suffolk Refugee Support, and NHS Family Support regularly using the space to deliver their own projects. In May 2022, the theatre created 'The Big Picnic' in collaboration with Suffolk Refugee Support. Over 700 people attended this free, all day, outdoor event that combined professional and community performance and arts activity with a free food offer designed by members of the local refugee community.



Gillian Allard, the New Wolsey Theatre, 2022.

Last Six Months

For theatres generally, the first six months of 2022 meant facing new challenges as the pandemic progressed. The year started with the closure of a number of high-profile productions and festivals as audience confidence remained low after the winter wave of Covid cases caused by the Omicron variant. Theatres also had to contend with outbreaks of Covid among their casts and other employees, leading to cancelled performances that wreaked havoc on theatres' already stretched budgets. While these cancellations and their economic impact are often reported in the national news, the extra labour that they generate for the venues has been understated and overlooked; theatres are required to liaise with all audience members from the cancelled or postponed performances, keeping them regularly informed with news of refunds or rescheduled shows.

This is in addition to the added labour involved in reassuring returning audiences and facilitating their safe return to the theatre.

In our discussions with senior management at our partner theatres, exhaustion amongst staff was mentioned as a significant and ongoing repercussion of the pandemic. Moreover, the pandemic's lasting impact on the freelance theatre workforce has come into sharp relief in 2022 as the sector deals with the loss of skilled workers to more secure forms of work and the trenchant fact that thirty per cent of workers in the music, performing and visual arts sectors lost their jobs within the six months following the first national lockdown.⁷ This skills shortage has significantly impacted regional theatres outside of the UK's larger cities, which have limited access to freelance workers and have found sourcing creatives and crew an emerging challenge in the currently precarious labour market.

As we will document in this report, audience behaviour has continued to fluctuate and remain unpredictable throughout 2022. Our project partners have reported that theatregoers have been attending performances less frequently, but also booking tickets far closer to events than prior to March 2020. This has been validated by the data produced in our questionnaires and focus group interviews, which underscores how theatre audiences are now more selective over what performances they attend and booking less far in advance.

⁷ See, Dave O'Brien, Gwilym Owen, Mark Taylor, and Siobhan McAndrew (2020), *The impact of Covid-19 on jobs in the cultural sector – part 2*, <https://www.culturehive.co.uk/CV/resources/the-impact-of-covid-19-on-jobs-in-the-cultural-sector-part-2/> (accessed 4 August 2022).

04 Brief Context: The Theatres 2020 - 2022

As well as cancelling, rescheduling, and revising their own productions, regional theatres have also had to contend with the rescheduling of community events, activities and productions, of different size and scale, cancelled throughout 2020 and 2021. At the New Wolsey, for example, a production of the musical *Sweeney Todd* by the community theatre company IODS (Ipswich Amateur Operatic and Dramatic Society) was finally performed in summer 2022, two years after it was originally programmed to run in June 2020. The delay and continual rescheduling of planned community activities has also of course impacted the communities themselves, and the return of these offerings and opportunities has been an important step in pandemic-recovery on a personal, organisational, and community level.



Gillian Allard, the New Wolsey Theatre, 2022.

The background is a solid purple color. Overlaid on this are several thin, white, abstract lines that form loops and curves, resembling stylized calligraphy or organic shapes. These lines are scattered across the upper and middle portions of the slide.

05

Placemaking and Community

Regional theatres play a particularly crucial role in serving local communities. The New Wolsey Theatre, Queen's Theatre Hornchurch, and the Mercury Theatre are part of a group of regional producing theatres that together submitted evidence to the DCMS inquiry in June 2020 as organisations producing work in venues from 200-800 seats across the country. In describing the shared qualities of the group, their evidence states:

“As well as being part of the national theatre ecology, we draw our distinctiveness from the fact that each of us operates in a specific community where we are typically the only or largest arts provider. This brings a community and place-making responsibility as well as artistic and audience responsibilities”⁸

The economic impact of theatre closures throughout 2020 and the restrictions on audience numbers throughout 2021 drastically limited the capacity of regional theatres to perform this placemaking responsibility. However in 2022, these theatres have significantly contributed to community recovery from Covid-19, helping people reconnect after Covid and recover quality of life, wellbeing, and sense of place. They have worked hard to become a vital community antidote to the epidemic of isolation and the scourge of solitude that followed the Covid pandemic.

The three project partners run expansive outreach programmes and host a diverse range of community groups within their buildings. Investigating the value and perception of the theatres for the local user groups and their role in facilitating connection to place and community, our study involved focus groups with many of the theatres' workshop and outreach participants, some of whom are mentioned below.

The Mercury Theatre's core Young Companies run from ages 5 to 25. Our focus group with participants of the theatre's 18-25 Young Company revealed that many members join as young children and remain part of

⁸ Written evidence submitted by Mid-scale Producing Theatres to DCMS inquiry on the impact of Covid-19 on DCMS sectors (2020), available at <https://committees.parliament.uk/writtenevidence/6991/pdf/> (accessed 20th August 2022)

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the youth company even after attending university outside of Essex. The Mercury also runs the Tots Stars and Tots Twinkles session for parents and children under 5. Alongside these the Mercury also runs a longstanding community choir, as well as a more recently established Senior Social Club for local residents aged over 55.

The New Wolsey's Youth Theatre groups are run for participants aged between 7 and 20 and the theatre also runs a variety of diverse community outreach programmes and classes, including the Unscene Suffolk drama group. The group, founded in 2013, is a participative arts organisation and community theatre company for adults with visual impairment and is run in tandem with the Unscene Singers. The participants we engaged with from this group spoke of their longstanding connection to it, many being original members since it was founded over 10 years ago. The New Wolsey Theatre also hosts the weekly Suffolk Refugee Sewing Group in collaboration with Suffolk Refugee

Support, showcasing their work alongside street theatre and children's entertainment at The Big Picnic event in May 2022.

Queen's Theatre Hornchurch also hosts a variety of outreach programmes. The theatre's QYouth youth theatre provides weekly workshops for young people between the ages of 6 to 14 to develop creativity. Queen's Theatre Hornchurch also runs the Performance Young Company and the Technical Young Company for participants aged 14-18. Highly popular Baby Sensory classes are also run at the theatre for infants aged between 0 and 13 months and their parents and carers. The theatre's Over 50's Musical Theatre Workout classes are also staged weekly. During the height of the Covid-19 lockdowns in the UK, the theatre's Learning and Participation team developed new creative online activity for socially isolated and vulnerable people, attracting 141,857 engagements.



Gillian Allard, the New Wolsey Theatre, 2022.

Venues as ‘Community Hubs’

Placemaking practices create collective resources for a shared community. Regional venues can contribute to placemaking by forming community hubs, creating sites of public space and offering social activities that revolve around the buildings themselves.

In the focus groups we asked a broad range of participants what the term ‘community hub’ represented to them. A response echoed across several participant groups is that a community hub is ‘welcoming and accessible to all people in the local area’. Our respondents also suggested that a community hub needed to appeal across different age boundaries, as well as on grounds of race and ethnicity. Moreover, it was important to our participants that these diverse and inclusive spaces should be sites where these different demographics could engage with each other in an edifying manner, where social and generational boundaries could be broken down and new discourses created:

“A community hub is somewhere that’s social, but where everyone should be able to access and feel safe. Different groups could go there benefiting from each other [...] And everyone should have access to that and be able to tap into it”

(Mercury Theatre ‘Parents and Carers’ focus group participant).

When we subsequently posed the question of whether participants felt their local theatre fulfilled the role of a community hub, the answers were varied and divergent. The replies we received demonstrate that each of our project partner engages and performs their role of placemaker in subtly different ways.

Focus group participants who were local residents in Colchester often pointed to the Mercury’s position in the city centre. They articulated that its location made it a key meeting place in Colchester and described the building as ‘welcoming’. As a parent of a child in the theatre’s youth group told us: “It has this community feel to it. If I wanted to meet a friend and have a coffee, I would choose there. We love to be there”. Respondents also reiterated that the building was set up as a place for anyone to come in and use and enjoy, not just those who were attending theatre performances.

This was cited as an important feature of the Mercury, one our participants frequently underscored:

"A community hub is a place that brings everybody together regardless of any background and just enriches their experience in the city in terms of it creating connections between people. I think the Mercury allows that to happen"

(Mercury Theatre 'Parents and Carers' focus group participant).

Participants from the Mercury's Senior Social Club particularly emphasised that the theatre was a crucial placemaker in Colchester.

The New Wolsey Theatre hosts diverse community groups in its buildings. Members of the weekly Suffolk Refugee Sewing Club

who participated in one of our focus groups at the theatre spoke of their long-standing connection with the theatre through the group. They spoke of the importance of the group as providing an ongoing support structure and social network in addition to offering a sewing workshop. Participants valued the group as a vital site of connection for the refugee community in Suffolk as well as being more broadly a place of social engagement in Ipswich. Like the Unscene Singers in another focus group, members of the Refugee Sewing Club expressed a desire to make further connections through the theatre with other community groups and were excited by the opportunities The Big Picnic event had enabled to do this.

Many of our Havering participants underscored the role Queen's Theatre plays within the local community in Hornchurch. A theme continually raised in focus groups was the intergenerational nature of engagement with the theatre. Parents of young people in the theatre's QYouth programme spoke of their previous involvement in Queen's Theatre Hornchurch's Youth Theatre as children

themselves and now taking their own children to participate. They spoke of how this life-long connection to the theatre through its outreach programmes was something they gave significant value to and that such projects cemented Queen's Theatre's role in the local community. A number of our respondents, unprompted by our questioning, referred specially to Queen's Theatre as a 'community hub', emphasising the theatre's wide ranging community outreach programmes and 'welcoming and safe' foyer space.

"I see Queen's Theatre Hornchurch as a community hub since it's a space that other groups use, not just in terms of the theatre productions [...] It's more than just a theatre."

(Queen's Theatre 'Community' focus group participant)

“For me Queen’s is Hornchurch. It’s the first thing I think of when I think of Hornchurch”

(Queen’s Theatre ‘Potentially Lost Audiences’ focus group participant)

The survey results further reiterated the role of the theatres in providing a sense of community connection and belonging. 65% of respondents felt their local theatre is “very important” to the community (the majority of the remainder feel it is ‘important’) and survey results revealed a clear correlation between theatre attendance and feeling ‘a part of the local community’. The covariation of information regarding whether people feel more a part of the community now than before March 2020 with information regarding the regularity of booking since the pandemic shows:

- Of those who ‘strongly’ feel less a part of the community now than before the pandemic, 36% have not attended theatre at all since the start of the pandemic and a further 19.2% have booked ‘considerably less’.
- Of those who ‘strongly’ feel more a part of the local community now than before the pandemic, only 8% have not attended theatre at all since the start of the pandemic and 26% said they were booking to see shows ‘considerably more’ than pre-pandemic.

These results present a connection between increased theatregoing and an increased sense of involvement in local community; those who attend theatre more regularly feel more ‘a part of the local community’ than those who attend less.

The Importance of Foyers

In their book, *Placemaking: The Art and Practice of Building Communities*, Lynda H. Schneekloth and Robert G. Shibley write: “As long as humans have dwelled on earth, we have found ways to make our places meaningful. The making of places – our homes, our neighbourhoods, our places of work and play – not only changes and maintains the physical world of living; it also is a way we make our communities and connect with other people”.⁹ In other words, they contend that places, particularly those that bring people together in the public sphere, are crucial sites of wider communication and relationship building.

During theatre closures, audiences not only lost access to in-person theatre but also to the important peripheral spaces that surround the auditoria. These spaces perform a key function in enhancing the theatregoing experience, but as identified in our research,

can also constitute destinations in their own right. The loss of these spaces was felt by audiences as well as by theatre makers.¹⁰

All three project partners – the New Wolsey, the Mercury, and Queen’s Theatre Hornchurch – have placed emphasis on the importance of their foyer spaces in recent years. As mentioned earlier, both the New Wolsey and the Mercury theatres embarked on significant capital redevelopment projects to renovate their foyer spaces in 2019. The foyer space is also integral to Queen’s Theatre Hornchurch audience experience, as indicated by our questionnaire respondents, and the theatre has won UK Theatre’s Most Welcoming Theatre at the Stage Awards three years in a row from 2016 to 2018.

Responses to our questionnaires indicate the vast majority of respondents value the theatres’ foyer spaces as a very important part of why they attend the theatre and as

part of the wider theatregoing experience. This corresponds with the majority of our participants in our focus groups, who spoke of the important communal function foyers play. As a participant from one of our ‘Local Residents’ focus groups in Hornchurch phrased it: “I think they’re a real part of the theatre culture”. Moreover, many of our participants who had engaged in watching online digital theatre during the pandemic, spoke of missing the communal engagement they would experience in the foyer and lobby spaces before and after the show.

⁹ Lynda H. Schneekloth and Robert G. Shibley (2008) *Placemaking: The Art and Practice of Building Communities*, (Kindle edition: John Wiley and Sons).

¹⁰ Maples, Edelman, FitzGibbon, Harris, Klich, Rowson, Taroff & Young, *Freelancers in the Dark Project Report*, available at <https://freelancersinthedark.files.wordpress.com/2022/06/freelancers-in-the-dark-final-report-high-res-2022-1.pdf>, (accessed 15th August 2022) 149.



The Snapshot People, Queen's Theatre Hornchurch, 2022.

These findings demonstrate how theatre audiences value the placemaking practices of theatre foyers, underpinned by social engagement and shared identity that revolve around the communal use of these spaces in the theatre. In this way, theatre foyers provide liminal spaces between home and work that build a shared identity amongst those that use them.

Contemporary shifts in working practice and forms of labour precipitated by the pandemic were also mentioned in our conversations with theatre users and focus group participants. Theatre foyers and cafés provide an important locus for the nascent group of remote and hybrid workers – those who maintain a flexible working model between home and the office – who require new sites during the day for both work and leisure.¹¹ Our data shows that remote and hybrid workers who use theatre foyers as site of work during the day, reported that in correlation with this their attendance of theatre productions had also increased. This was articulated by focus group participants across all three of our project partners. This key correlation between people spending

time working in the foyer during the day and attending productions was articulated by one local Colchester resident: "When I'm [at the Mercury working remotely], I'm constantly seeing the flyers and adverts on the big screens. I can see the variety of the shows they have [...] It makes me really want to see more".

Other participants also spoke of how working from home had improved their work-life balance, allowing for more free time during the week to attend productions at the theatre.

Our research also points to the quality of the foyer space and the theatres' cafés influencing participants' decisions to take classes and join outreach programmes at the venues. In the responses to our question about the value of foyer spaces, a number of our participants made it clear that this was an important factor for them. For example, one young mother who was a member of the baby sensory classes at Queen's Theatre, noted that it was important for her that there was a 'really nice café' to use after the class: "it is just lovely just to sit there and see lots and lots of

different sorts of people in their social groups meeting and drinking coffee. It feels like a warm and welcoming community space".

In the version of the survey completed by visitors in person at the theatre, just over half the respondents planned to spend, or had spent, more than sixty minutes in the theatre foyer. With the revamped foyer spaces at the Mercury and the New Wolsey, respondents spoke of a new awareness and appreciation of the theatres' social spaces, with some saying they will now arrive at a show well in advance to enjoy the foyer. However, some respondents in online focus groups made a point of talking about their disrupted relationship with both theatres and their wider public spaces due to safety concerns over Covid-19.

¹¹ For more on remote and hybrid working, see the recent report published by King's Business School and The Policy Institute at King's College London, *The WFH revolution: how new ways of working are changing London* (June 2022).

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Some participants spoke of reducing the time they spent in the foyer both before and after shows, while others were perturbed by the large crowds that gathered in the theatres' foyers prior to show time, leading them to scrutinise the use of these spaces and measures taken by the theatres to avoid bottlenecks when people entered the auditorium.

In the survey findings, while only 13.7% of survey respondents have increased the regularity of their show bookings (at any theatre) since the pandemic, 23.3% have visited their local theatre building more since the start of the pandemic than they did before, suggesting that around 10% of respondents are visiting their local theatre more than before the pandemic for reasons other than to see a show, perhaps more, as the regularity of show bookings figure is for all theatres, not just their local theatre.

Despite persistent Covid safety concerns, our research indicates that foyer spaces have become, even more so than before the pandemic, crucial sites of communal engagement, social networks, and practices of everyday life.

Shifts in working practices and remote working have made theatre foyers key sites of both work and play as residents re-navigate city and town centres in the aftermath of the pandemic. This feeds into wider audience behaviours and the potential for theatres to identify new audience bases.



06

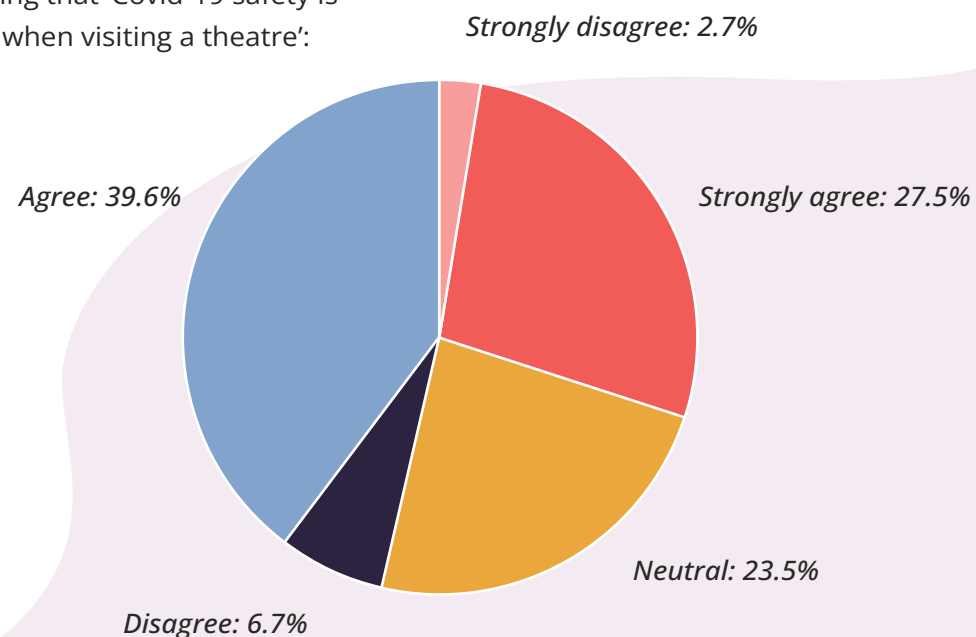
Audiences

In April 2022, the Audience Agency's Cultural Participation Monitor, which surveys the general population's attitudes to the creative and cultural sector, identified that a third of people expected to attend live performance closer to home than pre-pandemic. This 'persistence of localism' is likely related to work/life balance focusing more on the home, and the report states that this "trend towards increased local attendance and away from greater travel to cultural events holds across most art forms".¹² And yet for regional and community theatre such as Queen's Theatre Hornchurch, the Mercury Theatre, and the New Wolsey Theatre, in summer 2022 audience behaviour and trends have remained unpredictable.

Across the sector, low audience confidence has inevitably translated into poor ticket sales, which have contributed to the cancellation and closures of a number of high profile events at the start of 2022.

This has included the Vaults Festival which cited 'insurmountable financial vulnerability' for the last minute cancellation of the festival in January and the closure of *Pride and Prejudice** (*sort of) at the Criterion Theatre due to a lack of audiences attending London's West End theatres.

Covid safety remains a concern for potential theatregoers, with the majority of respondents agreeing that 'Covid-19 safety is important to them when visiting a theatre':

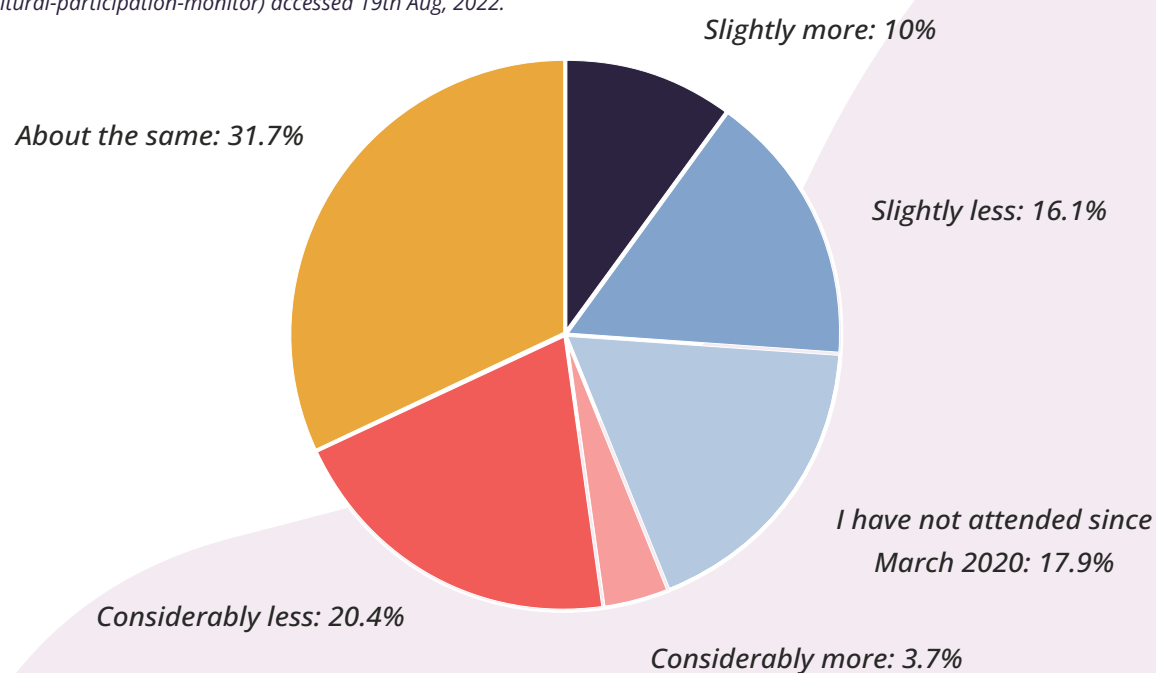


A higher percentage of those respondents who identify as D/deaf, disabled, or having a long-term health condition felt 'strongly' that Covid-19 safety is important (46.3%) compared to those who do not identify as such (24.7%). The percentage of those who felt strongly about Covid safety also increased incrementally with each age group over 45 years, with the 66-75 and 76+ age groups more strongly concerned, and the 36-45 age group least concerned.

Concern about Covid safety was listed by respondents as being the most influential factor in terms of negatively impacting their theatregoing, followed by an increase in personal responsibilities and health concerns (eg, concern for loved ones, caring responsibilities etc), followed at a distance by financial concerns.

The diagram below shows the regularity of theatregoing now in comparison to before the pandemic across 1901 survey respondents (new audience members since the pandemic are not included in these figures):

¹² Audience Agency (2022) *Cultural Participation Monitor*, available at (<https://www.theaudienceagency.org/evidence/covid-19-cultural-participation-monitor>) accessed 19th Aug, 2022.



The consideration of information regarding the regularity of attendance prior to the pandemic alongside responses to the question “have you booked to see more or fewer theatre productions since the start of the pandemic” (removing ‘new audiences’) reveals some association between regularity of theatregoing prior to the pandemic and increase or decrease in theatregoing since. For those that were monthly theatregoers prior to the pandemic, only 6.4% have not returned at all. Whereas, for those who only attended once a year prior to the pandemic, 30.8% have not returned at all. Of those who have not attended at all since March 2020, 46.9 % attended once a year prior to the pandemic, 50% attended ‘a few times a year’, with only 3.1% attending monthly. This suggests that those who have not returned were, in the majority, not regular theatregoers, likely to attend only once, or a few times a year prior to the pandemic.

For those who said they have increased their theatregoing since the pandemic (minus those identified as ‘new audiences’, who were polled separately), the two most selected reasons given for this across all respondents were ‘community – wanting to engage with local arts and cultural organisations’ and ‘wanted to support arts and cultural organisations’. For New Wolsey audiences, these two reasons were the most selected by a considerable margin. For the other two theatres, there were other reasons also selected worth mentioning here. At the Mercury, the third most selected option closely following the other two was ‘wanted to try new things’. For the Queen’s Theatre audience, the most selected reasons for increased booking were ‘community – wanting to engage with local arts and cultural organisations’, followed by ‘increased access – for example, because of digital availability’.

There has been greater impact on the attendance of those who identify as D/ deaf, disabled, or having a long-term health condition in comparison to those who do not. 53% of those who said they were D/deaf, disabled or had a long-term health condition said they had booked considerably less or not at all since the start of the pandemic, versus 35.5% of those not D/deaf, disabled or with a long-term health condition.

Through focus groups and a targeted questionnaire, we aimed to engage with theatregoers from our three project partners who had not booked to attend any productions at the theatres since March 2020. We termed this group ‘potentially lost audience members’. Recognising that there has been a huge shift in how people now engage with the arts compared with before the pandemic, we were keen to investigate not only why these lost audiences had stopped booking tickets for shows with our project partners, but what would attract them back to the theatres in the future – either in the short- or medium-term.

Potentially Lost Audiences

The surveys conducted revealed that, for each theatre, between 9% and 20% of respondents, all of whom had been prior theatre bookers, had not booked to see a single production at any theatre since the beginning of the pandemic. Across all three theatres, the average was 17.9% of respondents that have not yet returned to theatregoing. Consistently across all three theatres, an additional 20-21% are booking 'considerably less than they were before the pandemic'.

There is an expected increase in the percentage of respondents in the higher age groups who have not returned to regular theatregoing. Somewhat unexpectedly, the age group with the highest percentage of 'lost audiences' is 18-25yr olds (28% of respondents in this age category have not yet returned to the theatre). However there was a limited sample size (30) available for this group, and some caution is advisable in assuming this finding is representative of broader trends

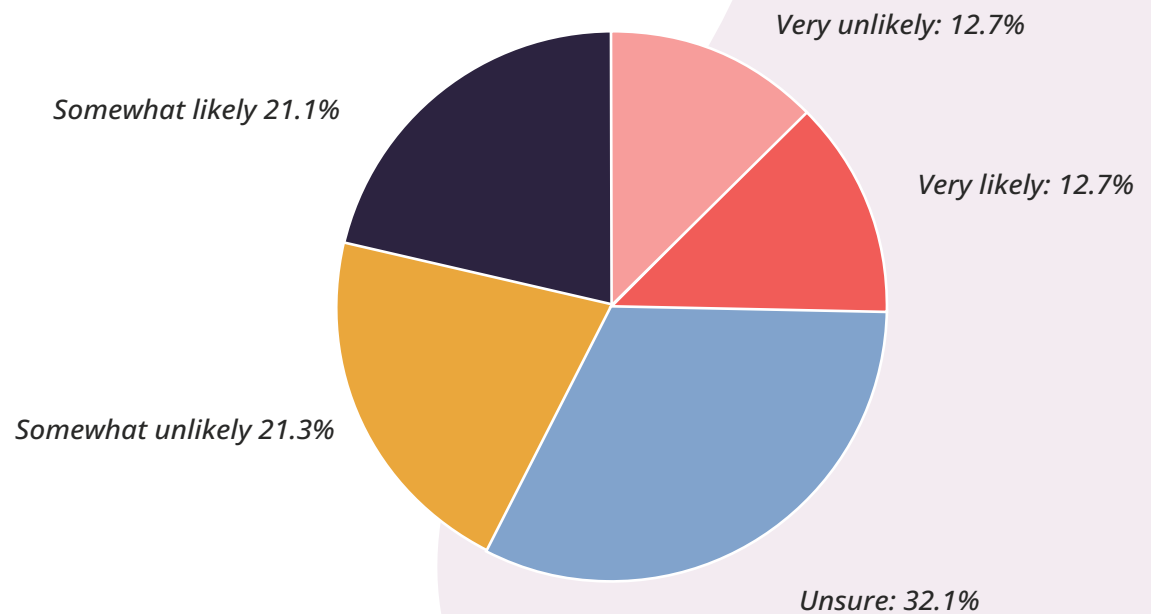
beyond the sample. The age group with the second highest percentage of potentially 'lost audiences' is the 76+ group (27.6% of this age group have not returned to theatre since the pandemic), followed by the 66-75 age group (20.4%), with the fourth highest percentage in the 36-45 group (19.1%).

To further investigate the circumstances of these non-returners, we sent out a questionnaire via the theatres specifically to those audience members identified as not having booked with them at all since the pandemic. While some of these audience members had been booking elsewhere, with a small percentage increasing the regularity of bookings (ie. likely those who have relocated or, as revealed in focus groups, commuting elsewhere for work), the significant majority said they had not booked to see any theatre at all or had booked considerably less overall.

These previous theatre audiences have turned their attentions elsewhere, and are not potentially 'lost' to these specific theatres only, but may be lost to the sector as a whole.

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There remains uncertainty in this group as to whether they are likely to return to more regular theatregoing in the next six months; just under a third said it is likely they will attend two productions in the next six months, just over a third said it was unlikely, and just under a third were 'unsure'. Below is the distribution for responses to the question regarding the likelihood of attending two productions in the next six months at any theatre (at their local theatre or any other theatre):



When asked what factor would most influence whether they return to theatregoing in the next six months, the most commonly cited reason by a significant way is that their return to theatregoing is going to be dependent on the theatre's programming and whether scheduled productions appealed to them. In focus groups however, much more nuanced factors and reasoning were revealed.

One of the key trends that emerged from our focus groups with lost audience members was that successive national lockdowns and the stop/start nature of pandemic restrictions imposed in the UK had led to many feeling that their engagement with the live arts had lost structure. Falling out of the habit of going to live theatre had impacted their desire to return once restrictions had been lifted. This was termed by one focus group participant from Hornchurch as needing to 'get back into the rhythm of going again'. This sentiment was echoed by a lost audience member from the New Wolsey who described how she had not found the 'momentum' to start again since venues had reopened.

Leading on from this, other lost audience members that we spoke to discussed how new hobbies and priorities that had emerged out of the pandemic had impacted on their time and ability to engage with the theatre. A selection of participants had spoken of becoming more immersed in watching sport on the television during the pandemic and that this had translated into attending more live sporting events once restrictions had lifted. A lost audience member from Queen's Theatre Hornchurch told us that they had rediscovered their interest in collecting jazz records during the pandemic, which financially had impacted on their recent theatre going activities. Other participants reflected the lockdown trend of becoming pet owners during the pandemic, which again subsequently limited the amount of time and financial resources they had to engage with the theatre. An additional factor on other lost audience members had been that they had moved out of smaller apartments and accommodation in town and city centres. This meant that they had less direct access to the theatre, which had impacted on their attendance.

“You just kind of had to put the brakes on it for the first time in life ever. And then having to restart again is almost kind of like relearning how to interact and engage with live events.”

(Mercury Theatre 'Parents and Carers' focus group participant).



Gillian Allard, the New Wolsey Theatre, 2022.

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"In terms of lifestyle, I used to live in [Ipswich] town centre literally 400 meters from the New Wolsey, so that's been a significant change for me. Now that I don't live right next to the theatre I'm not looking at what's on and I don't hear about shows from word of mouth in the same way. And then parking becomes an issue as well. I used to just walk to the theatre and it would be totally free and now I have to factor in paying for parking as well".

(New Wolsey 'Lost Audience' focus group participant).

Amongst those that our project partner theatres identified as potentially lost audiences, many cited being far more selective about what they were going to see or engaging with as a reason for not returning to the theatre. Reasons for this included concerns over exposing themselves to Covid, but also the perceived wider selection of events on in 2022 (compared to summer 2021) and the desire to seize the moment as Covid numbers dropped after March 2022. While those over the age of 65 predominantly voiced concerns over Covid safety, we also found many of our younger participants also cited this as a reason for their decreased attendance at the

theatre. As one 35 year old potentially lost audience member from Ipswich told us: "I think there's always a feeling with whatever we do, it's got to be worth it in terms of the risk of catching Covid. We are doing more low-key outdoors things where we know that social distancing will be okay. But then, if there's something we really want to do, we'll still do it and take the risk. I guess, perhaps going back to the theatre hasn't been not just as high a priority with Covid though". This was also voiced by a 33 year old lost audience member from Colchester, who told us that since the pandemic they will "only go and see the shows you really want to".

"I've been a regular theatregoer to the Mercury for 20 years. I've been involved with them in both writing and acting groups. It's been very valuable to me in terms of participation as well as developing my writing skills. But I haven't been since the pandemic started. I didn't feel old until I was told at the age of 84 that I should be very careful [around Covid]. So I haven't been able to go to the Mercury. And I really miss it and it's a big hole".

(Mercury 'Lost Audiences' focus group participant).

A wider range of respondents also reported that they were a lot more selective about what they went to see, resulting in less engagement with arts and culture in general, while others said that they were now more interested in trying to source the cheapest tickets to a performance that were available. One Hornchurch based respondent told us that even though they prefer the theatre, they were now attending the cinema more frequently as ticket prices were significantly lower:

“Of course, in the current time with the way money is, something’s got to be cut and I’m afraid attending the theatre has not been a priority”.

(Queen’s ‘Lost Audience’ focus group member).

The cost-of-living crisis has also highlighted sensitivities about the perceived value of theatre. This was articulated by one lost audience member who took umbrage with the theatre’s pricing policy:

“The recent brochure came through and it said book your pantomime tickets now because we operate dynamic pricing. That left me cold because it implied once the initial tickets had

sold they were going to charge more and more for them. I know it’s a business practice, but it’s not something I want my nose rubbed in when I’m thinking about purchasing tickets for Christmas for the family”.

(New Wolsey ‘Lost Audience’ focus group participant).

It is clear that moving forward theatres will need to address the anxieties of their existing audience base, as well as regaining lost audiences, as the cost of living crisis continues to significantly impact theatregoers’ financial priorities in the months to come.

During our focus groups we attempted to discover what might make individuals return to the theatre. Responses to this line of questioning were varied, but there were certain patterns of note which offered insight into how theatres might think about re-engaging this customer base.

We were told by a number of respondents that they felt disconnected from the theatre’s marketing. The ways in which this detachment from the theatre was felt varied, but it was often mentioned that participants perceived that they had stopped receiving

newsletters via email or seeing adverts for performances on social media platforms. However, due to the nature of our research it has been difficult to ascertain whether this is in fact due to a reduction in the material they were receiving, or simply the fact the respondents themselves had simply paid less attention to online promotional materials from the theatres. In addition, a proportion of older respondents informed us that they preferred to receive information about the theatre and upcoming performances through hardcopies of brochures. There was a perceived notion among this demographic that they were marginalised by not engaging more with the theatre through the internet and that there had been a reduction in the mail-out of physical promotional material.

Some of the respondents in our focus group also reported that they would be tempted to return to the theatre if there was the offer of more social events and workshops built around productions.

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It was noted that if organisations reached out to audience members and invited them to planned events they would be keen to connect in this way and that it would help to build local connections around the theatre. However, it should be pointed out that when participants from Ipswich were subsequently asked if they had attended the New Wolsey's 'The Big Picnic' event in May 2022 none of the 'potentially lost audience' focus group participants had. This was despite The Big Picnic event fitting the description of the type of events our participants said they would have liked to have seen more of.

Another suggestion made by our participants was that theatres could consider special socially distanced performances for those who still had concerns about becoming infected with Covid. While some respondents acknowledged that there would be financial barriers to such performances, they also mentioned that if implemented it would remove an important obstacle to their initial return to theatre attendance.



New Audiences

In contrast to the potentially 'lost audiences', our partner theatres reported an upturn in the numbers of audience members booking with them for the first time since the pandemic. Alongside a version of the survey targeting 'new audience' members as identified by our project partner venues, our focus groups provided insights into the motivations and demographics of those engaging with the theatres for the first time since the start of the pandemic.

- Approximately a third (29.5%) of new audience members say that the majority of the shows they have watched since the beginning of the pandemic have been online.
- 28.4% are 'interested' or 'very interested' in viewing digital theatre content from the theatre in the future.

- This also connects with the response to the question as to whether the respondent has physically visited the theatre to see a show since the beginning of the first lockdown, with 24.5% answering 'no' to this question.
- 15.2% of new audience respondents identified as D/deaf, disabled, or having a long-term health condition.
- 40% of new audience respondents identified as D/deaf, disabled, or having a long-term health condition said they have yet to physically visit the theatre.

Our new audience interviewees (those focus group participants who booked for the first time since March 2020) have offered diverse reasons for why they had begun to book productions at their local theatres since March 2020. One of the primary motivations that new audience members identified for starting to attend theatre performances was as a direct response to feeling they had

missed out on experiences during the national lockdowns and now wanted to broaden their participation in cultural events. A number of participants spoke of wanting to 'seize the moment' since Covid restrictions had eased, as well as highlighting the social and communal aspects of live theatre over watching television or streaming shows at home:

"I think before I would have thought...maybe I couldn't justify the cost. But now I think, we've missed out on so much it felt like we deserved or [my children] deserved to have that treat, so when I was able to have the money spare, I kind of splurged on really big theatre experiences".

(Mercury 'Parents and Carers' focus group participant).

“I think it’s such a nice atmosphere when you go and see shows compared to watching them at home. It’s nice to watch them at home sometimes, but for me it’s really [about] the atmosphere of going to see shows”

(Mercury 'Community Choir' focus group participant).

Other participants explained that shifts in their working practices, including either working remotely or flexible working patterns split between home and office, had allowed them more time and freedom to engage in the arts and attend theatre performances. They suggested that these changes had facilitated an improvement in their work-life balance, which had also resulted in more free leisure time. Our participants felt that working from home during the day, as well as spending less time commuting to and from traditional sites of labour, had allowed them to widen their interests and diversified how they spent their free time. Moreover, as we have noted in our section on foyer spaces, our interviewees who now worked remotely also discussed spending time in theatre foyers during the day to work. This has translated into them booking to see a production, as a result of being exposed to the theatres' advertisements either on large screens or on flyers placed around the theatre foyers.

Another new audience member of Queen's Theatre Hornchurch explained to us how their first production had been the theatre's pantomime production of *Aladdin* in December 2021. This participant had recently moved to the Havering area from abroad. They told us that previously in their home country they were regular cinemagoers, but had never been to a theatre performance before. They decided to attend the performance after being offered discounted tickets through a community outreach scheme run by Havering Council. Although the pandemic had not been a direct impact on their decision to visit the theatre for the first time, the participant spoke of how they enjoyed the communal and social aspect of the event, as they had attended with a group of friends. They mentioned that subsequently they had visited Queen's Theatre's café during the day to have lunch and noted that they were now keen to attend more performances at the theatre in future.

While new theatre audiences gave diverse reasons for their emergent engagement with their local venues, short and medium term impacts from the pandemic have driven their attendance. This ranges from immediate responses of wanting to engage more with events in their local area after the national lockdowns, as well as more long-term implications of the pandemic including significant changes to lifestyles and routine generated by the move to remote working practices.



07

The Digital

When theatres across the UK went dark in March 2020, the sector quickly responded by moving theatrical programming online and engaging audiences through new forms of digital entertainment. Theatres across the UK started streaming previously recorded productions, as well as content specifically created to be watched online.

The Audience Agency's Spring 2022 Cultural Participation Monitor report states that during the pandemic, 45% of the general population said they had taken part in an online cultural activity during the pandemic. The report also states that, "across nearly all online activities, the same percentages of respondents said they were doing this before the pandemic. Watching a live or recorded performance online is the exception, increasing from 23% to 28%".¹³

With the glut of digital content available for free during the early days of the pandemic from organisations as revered and far-reaching as the National Theatre, the Royal Shakespeare Company and Shakespeare's Globe, and a general lack of live entertainment, this 5% uptake in engagement with such

content is perhaps surprisingly low. This may be indicative of the competition for users from digital content providers and the dominance of streaming services such as Netflix and Amazon Prime.

Crucially however, the report also mentions that the figure of 45% engagement with online cultural activity is much higher in the 16-24 category and that those with some specific types of disability were more likely to engage online than the overall average, for example, those who are visually impaired or those with depression or anxiety. This capacity of the digital to engage the young audiences of the future, and its implications in terms of access, mean decisions about the future of their digital offer for regional theatres will be well-considered.

Our focus groups included questions regarding whether participants accessed or booked digital theatre content both from their local theatre and from other providers, and if so, of the nature of their experience.

We also asked if they would be interested in booking a ticket for future digital projects and if so, what type of digital theatre would most appeal. Coupled with insights from our questionnaires, we observed that the concept and experience of digital theatre is a divisive topic, and we encountered strong opinions and emotions from audience members.

The survey responses indicate that approximately a quarter of respondents had watched a digital theatre production presented by their regional theatre.

The digital engagement percentages differ somewhat between the three different theatres, varying from 18.2% at the Mercury Theatre to 35% at the New Wolsey Theatre. The digital engagement figures from the surveys indicated very slightly higher levels of engagement amongst those that identified as D/deaf, disabled or having a long-term health condition.

¹³ Audience Agency (2022) Cultural Participation Monitor, available at (<https://www.theaudienceagency.../digital-engagement>) accessed 19th Aug, 2022.

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There is also a significantly higher level of engagement amongst the younger age groups; survey data suggests minimal difference in digital engagement in the age groups over 45, but a considerably higher percentage of engagement in the groups below 45, for example, the percentage of all respondents that had watched at least one digital theatre production from their local theatre was 25.7%, however this rose to 56.2% for the 26-35 age group.

In addition to how regularly they have booked tickets since the pandemic, survey respondents were also asked how regularly they have been physically visiting the theatre building. Those who have visited the theatre 'more' or 'considerably more' since the pandemic, also have a higher rate of engagement with the digital provision than those who have visited less. Though one piece of a puzzle, this statistic would suggest that engagement with digital productions has not replaced in-kind attendance; engagement with the digital is higher with those also more regularly attending the theatre in person.



Attitudes Towards Digital Theatre

The figures on the previous pages indicate participant engagement with digital content specifically from respondents' regional theatres. However focus groups indicate that a significantly higher proportion of our research participants had engaged with digital theatre in some form from other providers.

Around half of our focus group interviewees responded positively to the digital work that our project partners produced since 2020. Participants spoke of how it was important for them to remain engaged with theatre and culture during the lockdowns and a general feeling that digital streaming and productions had been a vital part of this. As one of our interviewees from Ipswich told us: "lockdown was a brilliant thing in terms of how much online stuff there was for those people to feel connected, and it made me open my eyes to digital theatre". The ease of access and availability of digital theatre was another factor highlighted by our participants:

"From my personal perspective at this point in my life, I'm loving being able to do everything hybrid and digital. It's much more convenient for me, I haven't got to leave the house and it means I haven't got to worry about my daughter's childcare and I can still cook dinner. So I love the fact that I can see a play, especially as I am still quite nervous about Covid. I'm probably a bit more nervous than the majority of society, I still wear a mask outside. So the fact that I can still engage with culture but not have to be exposed to humanity and people I quite like that".

(Queen's 'Parents and Carers' focus group participant).

Another participant from Queen's Theatre Hornchurch expressed that: "For me, it felt like we didn't stop being part of the theatre. It did continue even though we weren't actually here. When it was reopened it was

like it didn't feel we're starting something new, it was just we're back. It was also good because it kept the routine".

In addition, participants we spoke to with visual impairments who were members of the New Wolsey's Unscene Singers also spoke about how the accessibility of digital theatre appealed to them. Another demographic who spoke positively about the potential of online productions were those who lived in more remote, rural communities. For these participants, digital theatre allowed more regular engagement with the theatres and allowed them to watch productions without the challenges of getting to the theatre.

One possibility for the higher rate of take-up of the digital offer at the New Wolsey may relate to the geographic demographic served by the theatre; New Wolsey respondents had a broad range of postcodes and focus group participants were dispersed across Suffolk and North Essex.

We also asked interviewees in our parents and carers focus groups if their children had participated in the theatres' virtual youth group classes and workshops that were run during the national lockdowns. In general, the response to these sessions was positive, with our participants reporting it allowed their children to remain engaged with both the theatre as well as the arts in general during the pandemic. However, parents and carers also noted that an important part of the youth theatre for their children was being in a creative space independent of their parents, which the digital sessions did not offer.

There were also, however, some participants who expressed a strong dislike, even animosity, towards digital theatre. Among our focus group interviewees this

manifested itself as three key criticisms of watching theatre online. Firstly, many of our participants were keen to highlight that the live, communal experience of theatregoing was a significant facet of why they would watch productions. One of our interviewees who was a member of the Mercury Theatre's Community Choir in Colchester stated that: "watching theatre, the whole experience is being in there with people, with the smells, just being a part of just everything".

"Part of the theatre is being immersed in it, isn't it? It's lovely when we were in lockdown to have the opportunity to see those things where they had been recorded, but ultimately you want to be in the theatre and you want to be part of it and experiencing that with everybody else and discussing the performance afterwards".

(Mercury 'Community Choir' focus group participant).

Secondly, the phenomenon of Zoom fatigue and digital burnout during the pandemic has contributed to a growing resistance towards virtual and online formats of entertainment and socialisation. Zoom fatigue and scepticism of digital work was also something we

observed among theatre freelancers in our *Freelancers in the Dark* study published in April 2022 and this was often echoed in the responses from our interviewees for *Theatres Beyond the Stage*. As one mother of a child in Queen's Theatre's QYouth programme told us:

"I'm completely sick of the whole Zoom thing [general agreement from other participants]. Not because I'm not tech savvy, just because the whole lockdown thing, the whole Covid thing, I'm so over it [...] It's almost a trigger for me now. It makes me feel really bad, so I wouldn't go near it".

(Queen's 'Parents and Carers' focus group participant).

"During the lockdown we were doing a lot on the screen anyway, having Zoom meetings with everyone we know. I'd reached saturation point. I thought, this laptop is going to be slammed shut and I'm not going to touch it again for a week".

(The Mercury Theatre 'Parent and Carer' focus group participant).

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Finally, leading on from this, the emotional impact of the pandemic was cited as a contributing factor to our respondents' reasons for eschewing digital theatre. Some of our interviewees felt that the trauma of the past two years was associated with online events and communication:

"You just associate it with that horrible time of life really [...] at the time was a great substitute for real life, but now that we've got real life, I don't want to do the digital thing".

(Mercury 'Parent and Carer' focus group participant).



Xav Marseille, the Mercury Theatre, 2022.

Further Challenges

We also observed that there were some respondents who had not been aware of any digital output from our three project partners. Those who reported this explained that they had 'tuned out' of what was happening in theatres and the culture sector more widely during the national lockdowns. This was due in part to other factors taking priorities in their lives during the pandemic and the assumption that as the theatres had shut their doors, they would not be producing any new material. These respondents expressed disappointment that they had not seen the digital work advertised and reported if they had been aware of it they would have considered engaging with it.

A likely reason respondents missed digital theatre marketing in addition to simply 'tuning out' of the arts, relates to the issue of digital fatigue discussed earlier. Some respondents reported that they were less interested in

checking social media and emails in the wake of the pandemic after a reliance on such communications during the initial lockdown.

Furthermore, as we have noted elsewhere in this report, our findings suggest that regional theatres face fierce competition for the online digital market from high profile institutions such as the National Theatre and Shakespeare's Globe, but also in the form of professional filmed productions of Broadway hits such as *Hamilton* on streaming services including Disney+ and Amazon Prime. Some respondents reported watching digital productions, but specifically those starring high profile actors from established London theatres, including NT at Home's *One Man, Two Guvnors* featuring James Corden and the Old Vic's revival of Duncan Macmillan's *Lungs* with Claire Foy and Matt Smith.



Future Planning

While digital theatre offered a welcome replacement for live theatre during Covid-19 restrictions, audiences are divided on its future. In the survey data, of those who engaged with digital productions distributed by their regional theatre, 53.9% of respondents who did engage are 'somewhat' or 'very interested' to do so again in the future. This percentage increases to 61% for respondents who identified as D/deaf, disabled, or those with a long-term health condition. In focus groups, respondents who did not necessarily identify as disabled but who lived rurally, also expressed appreciation for live content accessed at home. The following points will inevitably require consideration by theatres in their programming moving forward:

- The challenges faced by regional theatres in the UK in producing digital and hybrid work will be around how to monetize content as audiences remain concerned over finances and budgets as the cost-of-living crisis continues in the UK. Audiences are not prepared to pay the same kind of ticket prices for a live-streamed or accessed-at-home production as they would for a live in-person experience at a theatre. As such, the potential profitability of digital theatre for regional theatre remains a challenge, particular as quality content is costly.
- With a wealth of digital content available from large-scale providers such as The National Theatre and the Royal Shakespeare Company, mid-scale regional theatres face stiff competition from bigger organisations that can reach a mass market with high quality digital products. We know from comparisons of survey and focus group data that many participants

engaged with digital content from large theatres during the pandemic, and with a wealth of access to such content, were not looking for a more localised offer.

- In addition to competition from larger cultural institutions around the UK, regional theatres also face the precarity of having to compete with international streaming services as at Netflix and Disney+ offering high quality, easy access and relatively cheap content.

07 The Digital

Regardless of the challenges, the capacity of digital theatre to engage remote audiences, to overcome geographic barriers to enable audiences to access theatre they otherwise would not travel to, and to provide strategies of access for D/deaf, disabled, and those with health conditions, cannot be ignored.

Regional theatres will have to weigh up the cost of digital provision in the future with their responsibilities to ensure that theatre productions and other placemaking activities are accessible to all.

While many of our respondents were uncertain if they would want to engage in digital theatre in the future for the manifold reasons we have documented, others saw potential for new forms of hybrid and interactive theatre that make use of technology to engage audiences in new and exciting ways.



The Snapshot People, Queen's Theatre Hornchurch, 2022.

08

Limitations and Future Research

This study worked with three specific regional theatres and there is the potential for future research to extend the scope of the research beyond the East of England. While the challenges facing similar sized regional theatres across the UK are likely to be consistent with those explored in this research, and that the findings articulated here will likely apply beyond the case studies in this report, further research across UK regions may reveal geographical distinctions or national nuances. Different policy, funding, and support across the four UK countries may contribute to variations in the current situation for regional theatres.

Additionally, the three theatres examined are each 'producing houses', and further research could explore the inevitable repercussions of the pandemic and the financial crisis for receiving houses also. The three case studies in this project both receive touring companies and produce new work; those theatres that rely only on touring content will have faced extraordinary challenges given the paucity of available touring product. It is recognised that the use of surveys to gather data has

limitations. To target those sub-groups and audience members we wanted to engage and to avoid issues of data protection, the invitation to undertake the questionnaire was emailed directly to participants via the theatres, and in some cases, distributed via the theatres' social media with a call-out to certain groups. With links of different variations of the main survey sent to different sub-groups of participants, there is some risk of crossover; while theatres sent different links to different bookers, there was still some evidence of overlap. Possible overlap was anticipated and questions were posed within each of the surveys to identify subgroups; some overlaps were identified and the data interpreted accordingly.

Surveys rely on the motivation of recipients to complete the survey and various factors will have influenced the completion rate amongst certain groups (eg. age demographic, regular use of email, availability of time etc). As one means of mitigating this limitation, we not only distributed the general survey online but also in person to theatre visitors, which allowed for targeting a wide variety of age groups and

provided access to equipment. Despite this, the distribution of survey respondents was skewed towards a higher age demographic; the age groups most represented in the survey are 66-75 year olds and 56-65 year olds with a limited sample size of 18-25 year olds. It is uncertain how much this reflects the profile of the specific theatres' audiences, but it is recognised that this is a limitation of the research. A further limitation is the lack of responses from under 18 year olds; due to timing pressures and the acquisition of the required university ethical approval, the inclusion of under 18s was beyond the scope of this project. Future research could specifically examine the perspective and priorities of younger audiences.

08 Limitations and future research

The survey system used also relied on respondents providing accurate information and truthful responses; data collection was based at times on the precise recollection of prior facts and their genuine interpretation over time in responses provided. A mixed-methods approach to the research therefore tried to ensure data was collected using different tools to enhance consistency.

The range of focus group participants also goes some way to balance the age demographic of survey respondents. Younger audiences were included in focus groups, which included Mercury 18-25 year old Youth Theatre Group members, and the 'Parents and Carers' groups, Refugee Sewing Group, and 'Community' groups involved a younger demographic than the majority of survey respondents. In focus groups with audiences yet to return to theatres, a range of age groups were represented.



09

Conclusions

Covid-19 has, among many significant impacts, also instigated a paradigm shift in the way theatre institutions have operated and conducted their business over the past two years. The effects of the pandemic have challenged the economic viability of theatres, produced questioning of cultural assumptions about their communal value, and have shed light on their wider role as community hubs. The drastic repercussions of Covid-19 represent both threats and opportunities for the viability of regional theatres, which are sensitively positioned to rethink the meaningful role they play in their communities.

As theatres respond to unprecedented local demand for workshops, classes, and social activities¹, regional theatre buildings are a key site for placemaking practices. As Markusen and Nicodemus argue, placemaking is not solely about economic contribution but also about “bringing diverse people together to celebrate, inspire, and be inspired”², and it is this provision of interaction and inspiration, as conveyed through our research data, that establish our partner theatres

as central placemakers in their regions, playing a formidable role in community recovery in the wake of the pandemic.

Engagement with in-person workshops and outreach activities since theatres reopened has had a powerful impact on participants’ sense of community and connection. Interviewees talked about the reasons for joining groups like the Mercury Senior Social Club, driven by the desire to meet new people, take-up new challenges, and develop a sense of connection to community in the local area. The impact of the pandemic and the severing of some of these services or their shift online, was acutely felt by local users. The revitalisation of outreach and participation activities has been a major step in both the theatres’ and the communities’ recovery after years of disruption and uncertainty.

The three theatres that partnered on this project and that provide the case studies for the research share many comparable aspects and experiences. However, they also have distinct identities and serve different communities, with inconsistent concentrations

of potential audience members in varying proximity to the venue. The three theatres have inevitably had individual pandemic experiences, with two of the theatres having major capital projects that coincided with the pandemic, and variations in strategy and financial circumstances. Ultimately, however, the theatres have performed a comparable role within their region and experienced similar challenges in terms of delivering the responsibilities of this role as impacted by the pandemic.

¹ Interview with Steve Mannix, 4 May 2022.

² Ann Markusen and Anne Gadwa Nicodemus, “Creative Placemaking: Reflections on a 21st-century American arts policy initiative” in *Courage and Mckeown (2009) Creative Placemaking: Research, theory and Practice*, Oxon and New York: Routledge, page 22.



The Snapshot People, Queen's Theatre Hornchurch, 2022.

In this summer of 2022, there are numerous pressures that theatres and theatre audiences are having to contend with. Manifold factors over the months previous have resulted in difficulties engaging with core audience base and the need to rethink wider artistic strategies and programming in an unpredictable and unprecedented market for theatregoing. This research has identified and reinforced that for regional theatres looking forward, the anxieties of retained audiences, the need to reconnect and engage with lost audiences, and the need to engage with new potential audiences, remain major priorities.

The snapshot provided by this report is of a particular moment in time and factors beyond the pandemic are also impacting audience and community perceptions, priorities and behaviours. Our focus groups and questionnaires were conducted from early June to the end of July 2022, during a period of social and political upheaval in the UK. They provide important insight into the shifting cultural landscape in the

UK at the time, just as Covid numbers were surging again due to the emergence of the Omicron BA.4 and BA.5 variants.

Alongside Covid safety concerns and increased personal responsibilities, financial circumstances were often cited in both surveys and focus groups as a current challenge and a future concern for returning audiences. With inflation increasing and soaring energy bills, financial uncertainty now provides another significant challenge for theatres as they continue to strategise their recovery from the still on-going Covid-19 pandemic. The cost-of-living crisis is likely to continue to significantly impact running costs and theatregoers' financial priorities in the months to come.

The majority of retained audiences are now more selective in their theatre booking; with finances tight and Covid safety still a major consideration, returning audiences are prioritising seeing some productions over others. They are less prepared to take risks in their booking unless lured by a ticketing deal and are booking tickets much later. The constantly changing government

guidelines throughout 2020 and 2021 that resulted in theatre closures and cancelled activities, the cancellation of productions and major festivals in 2022 due to the impact of Covid on the workforce, and the ever-present reality for audience members of testing positive for Covid themselves, have created uncertainty for returning audiences who are not prepared to risk making a financial commitment well in advance.

This research has defined a group of potentially 'lost audiences'; those audience members who used to book theatre tickets before the pandemic and have not done so since. While our partner theatres could identify these individuals via booking records, they wanted to know why they had not yet returned and whether they ever would. The answers to these questions are layered, including combinations of various factors.

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The explanations from lost audience members include a much stronger sense of the same concerns about Covid safety, increased personal responsibilities, and finances, expressed by slowly returning audiences, but additionally include a sense of 'falling out of the habit' of theatregoing: prolonged disruption to the structure of their engagement with theatre has impacted their desire to return. Respondents felt they had yet to rediscover this cultural and social aspect of their lives, or 'get back into the rhythm' of attending the theatre.

The regularity of lost audience members' pre-pandemic theatregoing was once or a few times a year, and as their relationship with theatre eroded due to theatre closures, it has been replaced by other activities and engagement with more readily available content. These audience members are not lost only to their local theatres only, but the majority have not returned to theatre at all.



Xav Marseille, the Mercury Theatre, 2022.

There is uncertainty as to whether or when they will return, with approximately a third unsure, and a third believing it somewhat or very unlikely they will book to see two theatre productions in the next six months. The survey responses suggested that the single most important factor that will influence their return will be the theatre's programming, but focus groups revealed a much more nuanced situation.

For some, return will depend on finances; for others the preference is for outdoor performances or for a percentage of shows to include socially distant options. Others suggested they would be more likely to book to visit the theatre for a workshop or event than for a full production. A key way for theatres to reconnect with this demographic could be with a renewed drive in promoting the theatre's role within the local community as well as its wider position as a locus of cultural and social engagement. However, where the reason for reduced attendance related to personal circumstances unlikely to change, respondents felt their return to in-person attendance was very unlikely.

Evidence of the emotional toll of the pandemic was an undercurrent throughout the research, with many focus groups including participants who had lost partners or parents to Covid-19, inevitably impacting their engagement.

Across all audience sub-groups, a consistent narrative was that the pandemic had stimulated a 'fear of missing out'. While Covid safety remains a concern, the pandemic has introduced a sense of precariousness around the availability of, and access to, creative and cultural practice, and some of our research participants expressed a desire to 'seize the moment'. Whether it is lost audiences shunning local theatre to attend festivals further afield, or new audiences experiencing theatre for the first time, an appreciation of opportunities that in pre-pandemic times may have been taken for granted was repeatedly voiced. For new audiences, 'wanting to try something new' was a prominent reason for booking for the first time.

Despite up to 40% of respondents booking considerably less or not at all, approximately a third of respondents said the regularity of their booking since the pandemic remained the same and a further 14% actually increased their booking regularity. These retained audience members, a higher proportion of whom were regular theatregoers prior to the pandemic, have intimated a sense of loyalty and support towards their regional theatre. A key reason given by both new audiences and these now more regular theatregoers for having increased their theatregoing since the pandemic was 'wanting to support local arts organisations'.

While regional theatres are providing placemaking activities and aiding community recovery, the theatres' communities of regular, loyal audience members have expressed a desire to support their theatres.

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This suggests a reciprocal relationship, with commitment running both ways, and a relationship based on shared priorities and values.

As theatres deal with continuing practical challenges relating to the cost-of-living crisis and hope for a full run of Christmas pantos amidst packed Autumn seasons, we hope this research can help theatres to better understand the current views of their community and their audience members (whether retained, lost or prospective), to enhance their ongoing role as important placemakers in regional post-Covid communities, to enhance planning for the impacts of future unforeseen external events, and to support their ongoing success.



Xav Marseille, the Mercury Theatre, 2022.

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Theatres Beyond the Stage



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