



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## Subject: The Impact of COVID-19 on the UK's Theatre Industry

Dear Oliver,

Copies for response sent to: Carál Ní Chuilín MLA, Fiona Hyslop MSP,  
Dafydd Elis-Thomas MS

21 December 2020

**Christmas has been cancelled for many families across the country eagerly anticipating a panto or live entertainment at their local theatre, and for thousands of freelance theatre workers who are unable to take advantage of the furlough scheme. The recent announcement of new restrictions covering London and the South East will only exacerbate those difficulties and disappointments, especially for those communities with lower case rates that now face heightened restrictions due to higher rates elsewhere in their county/region.**

We understand, of course, that public health must come first. But fresh cancellations and last-minute changes have cost theatres and producers dearly. They have underlined the challenges the sector faces to mobilise for a full reopening next year.

The Theatre APPG is writing to you all jointly because the theatre sector needs your help to introduce some consistency for the theatre industry across the UK, not least to help tours that move between Scotland, Wales, England and Northern Ireland. We, of course, appreciate that health and arts powers are devolved, but the inconsistencies between the devolved nations are causing additional difficulties for the industry, especially when moving between different jurisdictions. The APPG is working with theatre bodies from across the UK and this issue has been raised with us regularly. We know that some universality between devolved administrations, even if it is on a temporary basis, would be warmly received.

### Chair & Registered Contact:

Giles Watling MP

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### Vice Chairs:

Matt Western MP

Baroness Hamwee

Stephen Metcalfe MP

Lord Kerslake

Andrew Lewer MP

Baroness Whitaker

Tracy Brabin MP

Nickie Aiken MP

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[uktheatre.org/theatreappg/](http://uktheatre.org/theatreappg/)

Twitter: @TheatreAPPG



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## The Current Situation

### ***Wales***

In Wales, guidance has classed theatre as a performance space/venue. This has given theatres no flexibility to deliver for example community arts activities in their buildings, which involve much smaller numbers and could be safely run. Theatres further fall under entertainment venues, which following the new regulations announced this week, can only reopen in Alert Level 2 (Medium Risk). The return of performances with audiences, however, is tied to test events, which will not take place until the early months of 2021. This significantly challenges business planning for theatres and performance venues and risks their sustainable recovery.

### ***Scotland***

Scotland are currently in Phase 3 of the Scottish Government's Route Map out of lockdown. The Scottish Government has introduced as of Monday 2 November 2020 a 5-level Protection Levels Framework across the country. Only venues in Level 1 are currently able to open, and only up to a maximum capacity of 100. For most, re-opening a venue for performance to a live audience remains non-viable artistically or financially.

### ***England***

Theatres and producers in the UK have lost at least £1.04 billion in box office and retail revenue since March. Nonetheless, producers resolutely scheduled performances under Stage 4 guidance only to suffer millions of pounds in additional losses from the November lockdown in the absence of either private market or government-backed cancellation insurance and again following more areas being moved into Tier 3 in the leadup to Christmas.

Producers had been actively encouraged by government to rehearse Christmas shows and pantomimes in order "to bring back some of the magic of theatre for families" on the basis of previous Stage 4 restrictions.<sup>1</sup> They have devoted vast sums to ensure theatres remain a safe environment and have now been dealt a further, devastating blow as a result of the new Tier restrictions.<sup>2 3</sup>

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<sup>1</sup> <https://www.dailymail.co.uk/debate/article-8701877/OLIVER-DOWDEN-People-waiting-wings-shows-Christmas.html>

<sup>2</sup> <https://officiallondontheatre.com/see-it-safely/>

<sup>3</sup> <https://www.thestage.co.uk/news/theatres-and-circuses-report-no-covid-cases-since-reopening>



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## ***Northern Ireland***

Theatres have been closed since mid-March. Working within guidelines, they have supported rehearsals, readings, and other activities without audiences. The sector supports that public health is the priority and look forward to working towards clarity on guidelines and a clear plan for when safe and controlled events in theatres, some arts and other centres can return.

## **The Task Ahead**

Despite initiatives such as the furlough scheme, the pandemic has decimated organisations' reserves. Whilst the APPG is truly grateful for your efforts, and those of your Department, when it came to establishing the Cultural Recovery Fund, which has been welcomed by all, 'Theatre' has received just £123.5 million in grants to prevent them becoming insolvent this financial year including £12.5 million to independent commercial producers and productions who are responsible for generating 80% of all economic activity in the sector.

The Chancellor recently warned that the UK's "economic emergency" has only just begun, with the economy not expected to reach pre-crisis levels until the end of 2022 at the earliest. The theatre sector is normally responsible for directly and indirectly generating approximately £1 billion per annum in VAT revenue for HM Treasury, not including additional revenue in the form of PAYE and NI contributions. It will therefore play a vital part in the nation's recovery but will also be affected by those adverse economic conditions.

The problems facing the sector do not stop with a full restart. Indeed, that will raise a new set of existential threats. This autumn's setbacks have shown that reopening will not be straightforward.

To ensure that theatre across the UK can play its part in the economic, social, and mental health recovery of our nation, the following is necessary:

1. **A government-backed insurance scheme.** A government-backed UK-wide insurance scheme, without which many of the large-scale productions simply cannot commence or resume performances. SOLT & UK Theatre have provided DCMS with extensive evidence and data to support this. Whilst producers have announced dates for 2021 to build advance ticket sales and provide with some degree of certainty, the majority of productions will be unable to proceed without insurance that the market is currently unwilling to offer until 2022 despite the rollout of the vaccine.<sup>4</sup>

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<sup>4</sup> <https://www.ft.com/content/abe9164d-fe99-4cf8-82af-6f2d0e473332>



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2. **An expansion of Theatre Tax Relief.** To fully contribute to the nation's recovery in the midst of the current "economic emergency", an expanded definition of eligible core costs for Theatre Tax Relief to include marketing and operating expenses is necessary.<sup>5</sup> Furthermore, it will generate additional jobs and greater economic output essential for the economy as a whole.
3. **A continued reduction in VAT.** Whilst the extension of a VAT rate cut on admissions until March 2021 was welcome, it is of limited value for theatre given the ongoing restrictions on activity. To ensure that production activity is sustainable despite a challenging economic climate, a further extension of this rate cut until the end of 2021 is vital.
4. **Nil or reduced VAT on repairs and capital improvements to theatres.** A reduction or nil VAT on repairs and capital improvements would support theatres to invest in necessary upgrades in a challenging fundraising climate, ensure our unrivalled network of theatres remains fit for purpose and incentivise environmental retrofit contributing to the UK's overall climate reduction targets.
5. **Regular COVID-19 tests for workers.** Vaccines will not entirely eliminate COVID-19 risks in the near term. Given the uncertainty concerning the efficacy of all vaccine types to prevent transmission, providing theatres and productions with free, regular testing of workers will help further mitigate such risk and help hasten a return to normal life.
6. **Extension of Business Rates relief.**
7. **Support for freelancers.** Continued and sustained as funding/investment requirement across all UK nations.
8. **Work with the industry on a 'comeback campaign'.** A joint campaign is needed across the cultural sector to encourage audiences to return and to emphasise the social value of the sector.
9. **A clear roadmap for reopening that is consistent across all four UK nations.**

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<sup>5</sup> <https://hansard.parliament.uk/Commons/2020-11-25/debates/6437F778-628F-48A1-ADF3-C06BA1C09EBA/SpendingReview2020AndOBRForecast#contribution-8B84F35D-8167-4B50-B98A-5BC6B755B23C>



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## Case Studies

In the following pages you will find case studies and information from across the UK provided by Federation of Scottish Theatre, UK Theatre and SOLT, Creu Cymru, Theatres Trust, Theatre and Dance Northern Ireland and Community Leisure UK. They bring to life and demonstrate the impact of COVID-19 on the theatre sector on workers, venues and our communities. These include:

1. [The Lyric Theatre Belfast](#)
2. [Awen Cultural Trust](#)
3. [Aberdeen Performing Arts](#)
4. [Theatr Clywd](#)
5. [HOME](#)
6. [Witness for the Prosecution](#)
7. [Freelancer Perspective](#)
8. [Independent Theatre Director](#)
9. [Theatre production, touring and presentation](#)
10. [Theatres Trust: Under-capitalisation, Delayed and potentially cancelled capital projects, Placemaking value and impact of capital investment on wider regeneration and recovery.](#)
11. [Community Leisure UK](#)

In addition, we have provided you with examples of some programmes which the sector has implemented in response to the crisis.

12. [Theatre Artists Fund](#)
13. [See it Safely](#)

**Finally, we invite you to attend the APPG for Theatre session on 26 January to discuss these matters. Please email [giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk) for details.**

Yours sincerely,

Giles Watling MP, Chair, Theatre APPG  
Matt Western MP, Vice-Chair, Theatre APPG  
Baroness Hamwee, Vice-Chair, Theatre APPG  
Stephen Metcalfe MP, Vice-Chair, Theatre APPG  
Lord Kerslake, Vice-Chair, Theatre APPG  
Andrew Lewer MP, Vice-Chair, Theatre APPG  
Baroness Whitaker, Vice-Chair, Theatre APPG  
Tracy Brabin MP, Vice-Chair, Theatre APPG  
Nickie Aiken MP, Vice-Chair, Theatre APPG

Julian Bird, Chief Executive, Society of London  
Theatre & UK Theatre  
Niamh Flanagan, Executive Director, Theatre &  
Dance NI  
Jennifer Huygen, Rheolwr Polisi ac Ymgysylltu -  
Lloegr a Chymru / Engagement and Policy Manager  
- England & Wales, Community Leisure UK  
Lucy Mason, Interim Chief Executive Officer,  
Federation of Scottish Theatre  
Louise Miles-Payne, Director / Cyfarwyddwr, Creu  
Cymru



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## Case Studies

### 1. The Lyric Theatre Belfast

As the only full-time producing theatre and development house, the Lyric Theatre holds a unique position in the cultural landscape of Northern Ireland. Described as the de facto 'National Theatre of Northern Ireland', the Lyric Theatre has been at the centre of the cultural life of our community for over 50 years, and we play an important role in nurturing and supporting the wider society. Each year the Lyric draws international talent and audiences, welcoming over 100,000 visitors, and engaging with over 14,000 more through participation and outreach. We are the largest employer of freelance arts workers in Northern Ireland, with 450 freelancers working with the theatre every year. We produce up to 10 Lyric productions each year, and 5 large-scale education and outreach programmes, led by our award-winning Creative Learning department. We provide a 5-star visitor experience and are committed to touring Northern Irish theatre nationally and internationally. Just as COVID-19 hit, we were preparing for an international tour of Good Vibrations: new work developed through our Literary department, this was a showcase of exceptional Northern Irish talent which had been chosen to open the new Irish Arts Center New York.

The COVID-19 crisis has had a significant impact on the theatre with the closure of the building in March the first time in the theatre's history, and it still remains shut. All scheduled on-site live productions through to February 2021 have been cancelled resulting in the direct refunding of c£164k in advance sales and forecasted lost ticket revenue of c£1.03m across all cancelled events. We've also incurred cancellation costs of £69k, notably on contracted artists and creatives for productions which were in progress, which we were able to honour in full.

Our ACNI and Belfast City Council annual grants and fundraising activities remain our predominant sources of income, with earned income from our Café Bar & Kiosk, Advertising, Sponsorship and Hire services all ceased. Earned income makes up two-thirds of our total revenue each year – this was down £650k in the period to September 2020 and projected to be down c£1.554m for the year ended March 2021. We have continued to incur costs of £60k per month to maintain the venue even whilst closed, as well as staffing costs of up to £80k per month by retaining all core staff.

We availed of the Government Job Retention Scheme, furloughing 96 eligible employees (58 of which were casual workers, who we supported through the scheme until August), which enabled us to manage our staff with no redundancies during the period to October 2020. All salaried staff



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have since been recalled from furlough from November as we prepare the building and continue our outline programme, and we expect to retain them through the end of the year.

Through the pandemic we have managed our financial situation through a combination of cost controls, increased fundraising activities, exploring new revenue streams and partnerships, and monetising our online output. We've developed an online programme including a series of paid audio plays and moved some of our Creative Learning educational program online. This has been a consistent source of income recently generating over c15k in gross sales, and our focus for the short-term is on how we develop this model. The crisis has given a renewed focus on fundraising and philanthropic giving, which has resulted in c£20k in individual donations to September 2020. Since March, we have implemented cost saving initiatives by reducing or postponing non-essential services, negotiating payment breaks and introducing tighter budgetary controls. We continually reviewed staffing levels and have explored all options available to us including the CJRS. However, as we return to operations and prepare to reopen these overheads and direct costs will increase. Despite these mitigations, the COVID-19 crisis has had a direct impact on the theatre's financial position, resulting in a projected pre-depreciation deficit of £126k for the year.

For as long as social distancing restrictions remain, traditional models of programming and producing need to be re-imagined. Since March 2020, the Lyric has been creating new ways of producing art, employing artists and engaging audiences. Through our digital programmes New Speak: Reimagined, Splendid Isolation: Lockdown Drama (Nominated for a Royal Television Society NI award for Best Drama), Listen at the Lyric and our Creative Learning programme, we have reacted quickly and creatively to the pandemic's barriers to live performances with audiences. Importantly, our digital programme throughout lockdown has enabled us to employ almost 200 freelancers and reach a combined online audience of 150,000, 50% more than our annual live audience. This is a game-changer in many ways, discovering audiences who might never have engaged with the Lyric in the past, or who are unable to attend the theatre. We can harness digital to explode the barriers faced by many people and communities in accessing culture, whether those barriers be financial or geographical, racial, psychological or generational.

The most urgent consideration for the Lyric Theatre in 2021 is to invest in our digital infrastructure, skills and capabilities, as we envisage this new way of programming will continue into 2021 and potentially 2022. The first of our projects within our digital programme for 2021 is Sadie by David Ireland, which we have developed in association with Stephen Rea's Field Day Company and will stage and record under strict COVID-19 guidelines at the Lyric, for BBC Four broadcast in Feb/March as part of the BBC's Lights Up season. As a co-production with the BBC, it will help up-skill our in-house staff to work directly on a live performance for digital broadcast to the highest level.



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We are also concerned about increased (and thereby unsustainable) insurance and liability for the theatre, and theatre tax relief extension for digital content. Theatre tax relief would typically be a significant part of our income.

We are committed to live performance, and a key consideration for the Lyric Theatre right now is how we open safely to our artists and our audiences. We require a period of research and development to explore how we can safely and professionally rehearse, present, and record a large-scale traditional play - whether that is with a live audience or for high quality livestream or online/TV/cinema delivery. And while our digital programme has enabled us to continue to employ the freelance art workers, they are short-term contracts which are not sustainable for the long term. Getting back to live theatre in a safe way is the only viable way to support our pool of actors and theatre practitioners in the long-term.

Currently, we are planning to open the theatre again to audiences in April 2021, but this will be based on government guidelines.



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## 2. Awen Cultural Trust

Awen Cultural Trust has run arts and culture services on behalf of Bridgend CBC since 2015, managing a number of facilities and outdoor spaces across the South Wales valleys.

At the heart of our business is the Grand Pavilion Porthcawl, a theatre and arts centre built in 1932 and pre-COVID-19, a busy regional touring house with an equally busy programme of participatory and community activity. This has included a wide spectrum of targeted, funded work including workshops, community arts, drama classes, youth theatre meetings and visual arts sessions.

Located centrally, these activities rely on the Grand Pavilion to host them as a professionally operated and highly accessible venue. Operating throughout the week, throughout the day and into the evening it contributes to the local daytime and night-time economies as well as contributing to Porthcawl being a safe, destination town throughout the year.

Working with our partners in public health services, we have achieved combined funding over the years to increase our impact regionally as well as locally to deliver on our shared wellbeing and prevention ambitions. Funded and placed locally, working together we are agile in our delivery, local knowledge and making the most effective use of our combined skills, experiences, buildings and resources. These projects have included work with those living with dementia, support for their friends and families, babies and early years, mental health issues and tackling loneliness and isolation. These connections and projects have proved invaluable during the pandemic as a base to work from, moving online and ensuring communities stay healthy and connected, again, through shared working and collaboration with public services.

The Grand Pavilion, as with many theatres, is a listed, heritage building with a long history – it is a shared focus of civic pride for the whole region and its prolonged closure will continue to have a negative effect on the town's morale. Though our services have continued online, it is clear from feedback that audiences and users want to see the building open safely and the return of a shared experience of enjoying a performance, a workshop or a community project together as soon as possible. It is our concern that the longer our venue remains closed, the greater user confidence will reduce. Our work is well established in removing social, economic and geographical barriers to participation that keep communities together, healthy and going forward, supporting the recovery of communities' post-COVID-19.



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It is imperative that as a Trust we continue to receive funding and support into 2021. This will enable us to continue to deliver programmes that have a successful, proven track record in dramatically improving users' wellbeing and reducing the demand on public services in the long term. It is equally important that our local authority also continues to receive support to enable us to continue our partnership effectively. Combined, our work is well established in removing social, economic and geographical barriers to join communities together, healthy and supportive of the post-COVID-19 recovery and going forward in the near- and long-term future.



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### 3. Aberdeen Performing Arts

Aberdeen Performing Arts is the cultural hub for the arts in the North-east of Scotland. We run three venues, three festivals, a production company, a creative learning programme, a talent pipeline for artists and creatives and a box office service for more than 50 venues in the North-east. In 2019/20 we staged 815 performances to a paying audience of 365,000 and welcomed more than 1,250,000 visitors through the doors. We supported 284 creatives through our talent programme, 55 work placements and 20,348 participations through our creative learning programme.

Eighty-eight percent of our turnover is earned income from sales. For every £1 of public subsidy we received in 19/20 we generated another £7. Our turnover for 20/21 was forecast at over £13M, our highest ever, and we employ a workforce in excess of 300. As a consequence of the COVID-19 pandemic, our stages are dark, we have furloughed 287 staff, 96% of our workforce, and have been battling insolvency since March 2020.

We have raised £1.8 million in total towards avoiding insolvency and protecting the jobs of our 300 strong workforce. Wherever we can, we have provided opportunities for freelance artists and practitioners and have tried to maintain some kind of online creative presence.

We are contending with show cancellations at His Majesty's Theatre right through 2021 into February 2022. We have had to cancel or reschedule 503 performances to date across our venues equating to 150,000 ticketholders with a ticket value of £4 million. We have lost a total of 26 weeks of programming from 2021 already. The end of the Job Retention Scheme without the ability to trade at anywhere near normal levels in Q1, Q2 and likely Q3 of 21/22 means we face a cliff edge again and places 300 jobs at risk.

With continued social distancing restrictions, touring productions of scale are unlikely to be available until at least the late summer 2020, at the very earliest. Notwithstanding, social distancing and the cap on theatre volumes in Scotland at 250 in Level 0 and 100 in Level 1, make our large scale 1400 capacity auditorium financially unviable.

Our loss to the touring circuit in Scotland will be far reaching. His Majesty's Theatre and Eden Court Highlands are the only two number one theatres North of the Central Belt in Scotland. Between us we uniquely serve an urban and rural population in excess of £1.5M. Without us there is no large-scale touring circuit in the North of Scotland, no means of receiving work produced by Scottish and UK artists and theatre makers.

Key regional stakeholders have identified culture as vital to the economic regeneration strategy in the North of Scotland. Our artists and audiences contribute an estimated 30,000 bed nights in the city. We are a critical part of the cultural ecosystem, many smaller arts and cultural



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organisations and artists depend on us and we are key partners in the delivery of the local outcome improvement plan.



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## 4. HOME

HOME is an art centre for Manchester – and one of the few organisations in the country to produce, commission and present work in film, theatre and visual art. It houses 5 cinemas, 2 theatres, 500 square metres of visual art space, bar, restaurant, shop and a vibrant public realm. When it opened five years ago, it was amongst the first new buildings on the site of a former gasworks in the First Street development. It has since acted as a catalyst for this regeneration and drawn business to the area to form a thriving new economic centre for Manchester. In its five years HOME has always been amongst the most visited attractions in Greater Manchester.

HOME was created as a place to bring people together, and in its first five years it has triumphed as such. And 2019/20 was our most successful year to date, with nearly 900,000 visits to HOME and around 7,000 events taking place. This was combined with an economic impact to the city of £26 million. We also engaged 1,000 artists and provided participation activity to over 20,000 people in our communities – especially those in traditionally hard-to-reach areas.

The March closure due to coronavirus was a devastating blow to a thriving artistic centre for the region. The impact on trading surplus for this year will be up to £1.5m – funds that we desperately need to deliver the objectives of the charity. However, through creativity and bravery, HOME has responded to the COVID-19 challenge. We initially pivoted programme online, continuing to deliver film, theatre, visual art and participation programmes in a digital form – and ensured that the communities in need were still able to access the arts in a time they were most needed.

When the opportunity presented itself to open with social distancing in place, we were amongst the first arts venues in the country to offer a full programme of theatre, visual art and cinema. Through consultation with audiences and stakeholders, we ensured measures exceeded the basic safety guidance – this included ensuring 2 metre distancing in theatres and cinemas and visible round-the-clock cleaning. The joy on the faces of customers upon our reopening in early September was extraordinary – with regular audience surveys saying it was the safest environment they had been in. Despite tens of thousands of visitors, we have not had one case of coronavirus linked to HOME.



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Greater Manchester is one of the areas of England hardest hit by coronavirus restrictions – and we have had the longest time with the toughest tier restrictions for arts venues. The task of opening, changing economic model to adapt to new restrictions, and then closing again has been challenging. Tougher still has been redrawing scenarios to adapt to new restrictions or closure periods, when it's not considering the measures in place or the benefit we can bring to recovery.

HOME's choice to reopen with social distancing was not for economic benefit, it was to show that life could continue despite the virus – and our colleagues in the city responded. Our reopening signalled the possibility of a return to normality and was described by one councillor as the "beacon of hope" that Manchester needed. Just as HOME stimulated regeneration of the area when it originally opened, now it was forming a critical part of the post-COVID-19 recovery of the city.

Just as significantly, research by Simetrica and the DCMS identified engagement with the arts as reducing GP visits and the use of mental health services. HOME's independently produced economic impact report calculates that the organisation generated a cost saving of £1 million per year for the NHS last year. We are working with the NHS to prove the positive health outcomes linked to arts and culture cannot be ignored, and (as Grayson Perry said) act as "gymnasiums for the soul" and require a similar lens to gyms and health centres.

HOME currently has around 160 employees, but we have had to carry out a restructure to achieve cost-savings for loss of trading. But there has also been a significant knock-on to the freelance ecology, with HOME working with up to 400 freelancers in a year – supporting the careers of technicians, artists, contractors and more. We have done all we can to support freelancers during this extraordinary period, including our new digital commissions Homemakers, but most importantly – we need to provide paid work to ensure the sector doesn't haemorrhage talent, subsequently destroying the cultural recovery of the region. The limitations on risk, especially with theatre producing, mean any events we create will only provide a fraction of the freelance opportunities. Without a mechanism to underwrite the risk in producing – the scale and ambition of programme will inevitably be impacted.

HOME is amongst the safest environments for people to be in – with no proven cases. We will be critical to the economic recovery of our city centre. When open, HOME will provide positive health outcomes where they are needed the most. And given the opportunity to get our artistic engine going, we can provide necessary employment for a sector on its knees.



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HOME's civic duty is to the city region and its people – and their health and wellbeing is more important than anything. We have a responsibility to put the safety of audiences before anything else. The vital intervention through CJRS and CRF have been so welcome. We are determined to put this investment to best use in playing our part in the national response to this crisis. We believe that Cultural venues have the capacity to serve this purpose of being “beacons of hope”, and given the necessary lead-in time, can play a central part to the national recovery post-COVID-19-19.



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## 5. Theatr Clwyd (taken from their Welsh Government Outdoor Performance Report)

Live performance in Wales forms a vital part of our culture. From major Eisteddfod's, through to music, opera ensembles, theatre and dance, we have a rich and vibrant live performance scene across Wales that offers learning, confidence building, creative thinking, economic impact, proven health and well-being benefits and thousands of jobs.

Or at least we did before March 2020.

At Theatr Clwyd we have found ourselves in the fortunate position of being able to open, even with social distancing, as we strive to keep audiences coming to our venue and in the habit of attending live events. To that end we prepared, and pitched, a series of outdoor test events in partnership with Welsh Government.

This high-level report offers insight into the measures we instigated, the feedback from audiences, freelance performers and core staff, as well as some learning for the wider sector, and some recommendations and views for colleagues in Government.

However, operational recommendations aside, there is an important point to note. Theatres are not currently allowed to open in Wales.

With the understanding that Ministers, Public Health experts and Government Officials have an increasingly challenging balance to strike, we do believe that theatres should now be allowed to re-open if they feel able to, or at the very least that Theatr Clwyd be allowed to continue this partnership and prove that our detailed, meticulous planning and delivery for this outdoor season can be applied indoors, and offer a road map for colleagues elsewhere in Wales.

Why should we be allowed to open? We have trained experts in developing health & safety measures and strong working relationships with Local Authority colleagues. Most pubs, bars and restaurants do not have this expertise but are already trusted to open. Our audiences are diligent, well behaved, and enter a fully controlled environment, unlike many patrons attending bars and pubs who are already trusted to open.

We have proven ourselves well organised in the key area of Track, Trace and Protect, with a sophisticated booking system and supporting infrastructure - most theatres in Wales have similar systems ready and in place. During the outdoor test events we had no cases across thousands of attendees.

As the biggest producing theatre in Wales, only ten miles from the English border, our major competitors in Chester and Liverpool are fully open (within English social distancing measures). This means that, not only are we losing the income to North East Wales through English



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling**  
**MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

audiences shifting their live performance habits to theatres in Chester and Liverpool, but we are also losing Welsh audiences to those venues as well.

We may never get them back unless we are able to act soon. We are already allowed to open as a cinema within social distancing measures and current guidance. We have proved that live performance, with the right measures in place, is no different. This now seems an anomaly left over from quick and decisive decision making in response to this crisis, and we cannot currently see the public health difference between these two areas of our operations.

The support and value Welsh Government has shown to the cultural sector is to be applauded, but unless we are able to begin operating again we will either see many major assets close for ever, or the need for further significant public money to survive.

We believe this outdoor test partnership has been extremely positive, with officials from the Culture, Sport and Tourism team offering high standards of guidance and advice. We are extremely keen to keep this partnership going with an indoor season so that live performance in Wales can emerge from this crisis in a responsible, well managed, and creative way.

<https://documentcloud.adobe.com/link/track?uri=urn:aaid:scds:US:bcabaf9b-c499-4766-887f-95f6e27277e3>



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 6. Witness for the Prosecution

### Background

Witness for the Prosecution is a medium-scale play in Central London that had played over 1,000 performances by March 15, 2020, with annual ticket sales of £6.2 million. The company was set up by two women under 45, and financed by private investment.

It was directly responsible for 45 jobs – of whom 25 were self-employed – and indirectly supported additional job at external supply companies, including press representatives, marketing agency, sound, lighting, and costume hire companies, as well as the producer and general manager's staff.

### Current Position

It currently costs £6,784 per week for the show whilst it is closed. In order to build a sufficient box office advance, tickets need to go on sale 16 weeks before the first performance. To re-open in mid-April 2021, it would therefore need to have gone on sale the week commencing 14 December. As a result of London going into Tier 3, plans to do so have now been suspended.

### To Resume Performances

In order to resume performances, the production needs to raise £650,000 in private investment, which includes re-mount costs and a cash flow reserve. However, it will be unable to do so without risk that the performances are suspended at any point due to government restrictions or risk of one or more personnel being infected with COVID-19-19.

A four-week suspension period as a result of government restrictions would cost the show approximately £130,000, which investors have deemed unacceptable without government-backed insurance.

We further anticipate a suppressed audience demand due to a lack of international tourists, and uncertainty regarding a domestic tourism market.

Extending the existing Theatre Tax Relief scheme to include operating would reduce weekly costs by £7,500, thus ensuring the show could remain sustainable in the face of this lower demand. Furthermore, by increasing the rate for pre-production costs or extending it to marketing costs would reduce the amount of capital required to resume performances.



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

---

**Giles Watling**  
**MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

These changes would help not only this production, but for the flow of new productions throughout the UK, especially touring shows.



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 7. The Freelance perspective: Key findings from the Freelance Taskforce in Scotland / Freelancers Make Theatre supplied by Emma-Jayne Park, independent choreographer based in Scotland.

The reputation and success of UK theatre depends on the strength and health of its freelancers, a group comprising 70% of the total theatre workforce. We make the plays, musicals and live experiences that are part of the fabric of British life. We are a workforce of 200,000+ playing to a theatre-going public of 34 million. We are the point of connection with audiences up and down the land and the engine of the industry's economic growth. We work in partnership with each other and with theatres, commercial organisations, charitable trusts, schools and local groups. This crisis has forced financial hardship on all parts of the sector. But that hardship has fallen disproportionately on the freelance theatre workforce.

According to a survey undertaken by the Taskforce, 40% of the freelance workforce in Scotland are likely to leave the industry.

The move to digital work has disproportionately impacted the backstage and front of house departments, who are not employed to build sets, work rigs or create costume, whilst simultaneously bringing the sector into a complex new era of contract law that has witnessed the distribution of creatives work without remuneration.

For artists who had relied on venues-based audience relationships previously... that audience connection has been lost which leaves a hole in many communities – particularly rural communities.

Rural freelance theatre workers who have moved out of the city for affordable living during the austerity years disproportionately impacted as venues receiving direct support are largely located in urban areas and looking to employ within city limits. If the sector continues to be under-resourced there is fear that the additional expenses of these freelancers (travel and accommodation) could result in them being employed less frequently.

For many touring companies, working internationally was a huge revenue source, making some small-scale subsidised productions a longer-term commercial success, particularly in the Theatre for Young Audiences sector. This is no longer possible yet many of these companies are not eligible for relief to cover this direct loss.

SEISS Conditions unfairly impact those who were transitioning from PAYE to freelance, new graduates and those who work in a mixture of roles, come PAYE some freelance which may include part time University Lecturers. The short reach of SEISS disproportionately impacts creative teams and artists (not administrators) who are less likely to be employed due to the structure of the sector. Without artists, there is no work.



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**Secretariat: UK Theatre & Society of London Theatre**

---

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

An insufficient consideration about the spread of resource means that those from lower socio-economic backgrounds cannot return to the sector as one week of theatre work could mean sacrificing a more stable their job, in spite of having maintained (in some cases) decades of work in the sector.

Lastly, in order to produce quality art and engagement experiences many creative roles require the maintenance of a practice (voice, physical work, dance). Without support for these to be maintained the quality of work returning to our stages will not be world leading as the Government wish it to be. Without a diverse range of high quality offers upon reopening, the economic recovery of the sector and its contribution to the economy will be weakened.



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Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 8. Magdalena Schamberger, Independent Theatre Director based in Edinburgh, Scotland.

I am an Independent Theatre Director, specialising in the creation and touring of high-quality collaborative performances for people living with dementia in theatres and care homes across Scotland.

The initial and immediate impact of COVID-19 on myself as a freelance artist was, that I had to withdraw a proposal for Creative Scotland funding for my fully developed *Dreamcatchers* project idea, at the end of March and two weeks after submission. The plan had been to engage people living with dementia in care homes by co-creating performances and opening up the care homes to audiences from the wider community. Due to lockdown and enforced restrictions this was considered not feasible and meant that I had to withdraw my funding application without it even having been considered. I had spent two months of my freelance time, unpaid, to develop the idea and write the proposal, without the chance of any creative or financial return. This was more than disheartening.

I am currently researching and developing *In the Light of Day*, a new care home project for people living with dementia. I was unable to have any meaningful contact with care homes in the run up to writing and submitting my project application. Even though I have an extensive track record with theatre venues and care homes, this has meant that scheduling, or even considering, producing a tour to reach audiences affected by dementia became impossible. Furthermore, due to COVID-19 restrictions and challenges, I have also been unable to have any meaningful level of connection and communication with care homes and residents on the project so far. I had planned to involve residents, staff and close family members creatively, not only as artistic inspiration but to co-create meaningful content for the project.

Culture is inherent to human dignity and identity and creativity is a fundamental human right, whatever the diagnosis. People affected by dementia often find themselves marginalised and excluded, even more so in the current pandemic and shielding restrictions than in 'normal' times. Due to infection prevention, people living with dementia, and those who care for them, have currently lost all access to theatre performances since the beginning of COVID-19. In Scotland over 90,000 people currently live with a diagnosis of dementia, two thirds of them are still living at home. They have had to shield and isolate, whilst residents in care homes have frequently had their living space restricted to their bedrooms only. This has impacted negatively on health and wellbeing and many people affected by dementia have deteriorated quickly and beyond a point of return. In my opinion a lack of stimulation, social contact and access to/participation in cultural activity and theatre has contributed to this fact.



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Secretariat: UK Theatre & Society of London Theatre

**Giles Watling**  
**MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 9. Impact of COVID-19 on theatre production, touring and presentation in Scotland - Federation of Scottish Theatre

Scotland is rich in venues that programme theatre, dance and opera for the benefit of audiences the length and breadth of the land. We pride ourselves on the tradition of storytelling that people enjoy in small, rural venues at the heart of our Highland and Island communities and in large, commercial venues in our thriving urban cities. These stories are told through dance, theatre, opera and ballet and at the Federation of Scottish Theatre (FST) we are privileged to represent members whose work adapts to the smallest island village hall to the largest lyric stages.

COVID-19 has seen all touring activity stop. No theatre was able to open its door from 23<sup>rd</sup> March 2020 to 2nd November 2020. The venues now able to open, in our Level 1 areas, can play to a maximum of 100 people. This is a blanket capacity that takes no account of the size of the auditorium.

With the abrupt halt to our production pipeline, our industry has been decimated. The work of all freelance performers, designers, directors, production managers, producers, composers, choreographers, writers and technicians has dried up; and staff at all venues have either been furloughed or laid off. Venues which were previously in receipt of earned income from ticket sales, ice-creams, programmes and drinks at the bar, have lost millions of pounds of income. The supply chain has completely broken and there is no clear route for re-building confidence and opportunity.

Whilst FST completely respects the caution of the Scottish Government and the public health agenda which underpins the current restrictions, without a prospective date for more venues to re-open; without the prospect of venues being able to set their own maximum audience capacity that is proportionate to the scale and footprint of their own venue; and without the prospect of any venues having the financial means to programme future work – there is no hope. Without hope, our industry will falter and audiences and community groups will lose the opportunity to gain the solace, entertainment and stimulation that comes from attending or participating in the performing arts.

We urgently need the playing field to be levelled – for venues in Scotland to be supported with funding that matches that of England and for COVID-19 safety measures to be applied consistently across all four UK nations. We need the major producers of theatre, dance and opera across the UK and overseas to have the confidence to book their work into large venues



# THEATRE

**Secretariat: UK Theatre & Society of London Theatre**

---

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

in Scotland. At the moment, the risks are too high – the venues are closed or only able to play to capacities that bring no financial return and there is no insurance that can cover the requirement to cancel shows or weeks of performances due to illness, local restrictions and last-minute changes to a schedule.



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Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 10. Theatres Trust

### Under-capitalisation

Theatres have largely managed to survive the impacts of COVID-19 so far. We have only seen a handful of theatres fall into insolvency. This is largely thanks to theatres' heavy reliance on the Job Retention Scheme and the Culture Recovery Fund. Of course, this picture does not account for the major impact on people with thousands of redundancies and many of our large freelance workforce without income and in some cases unable to access support through SEISS.

This also hides the greater vulnerability of our theatres as we start to emerge from COVID-19 in 2021. We know that over half of our theatres across the UK are run by charities and analysis of charity commission entries in 2019 demonstrates that pre-COVID-19, 59% of theatres had less than three months' operating reserves. The position now will be considerably worse and the majority will have low/nil reserves and in some cases will be in debt for many years to come. This presents all sorts of risks and issues. Theatres are going to be less resilient over the next few years and more vulnerable to shock. It may well be that we see more failures 'post-COVID-19' than we have during the pandemic. Also there will be issues for investing in staff, new talent, education and building maintenance. On top of that meaningful capital investment in necessary upgrades including environmental improvements will be severely hampered if not deferred indefinitely.

### Delayed and potentially cancelled capital projects

Maintaining and improving our unrivalled national network of theatres buildings, which serve communities in towns and cities across the UK, is vital if they are to remain fit for purpose. Capital projects keep theatres operational, improve their financial and environmental sustainability, improve access and provide new facilities for engaging with diverse communities. The impact of COVID-19 has severely impeded a large number of such projects causing delays, cost overruns, fundraising shortfalls and reduced or exhausted funds which had been previously allocated against building project delivery.

Through research undertaken by Theatres Trust earlier this year, we have identified that there are currently over 100 projects across England which are either in advanced stages of planning (82 projects, of which 28 have planning permission) or actually on site (24 projects). They range in size and value from £100,000 up to over £60m. We have financial data on 71 of these projects which have a total value of £795m.



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

Theatres in England responding to our nationwide survey reported severe impacts on their capital project due to COVID-19 and the lockdown. 72% responded that they will no longer be able to secure the fundraising needed to complete the works. This is due to the anticipated reduction in the availability of grant funding both from public and charitable sources in the post-COVID-19 financial climate. 69% of theatres reported that reserves intended for their capital works have had to be diverted to cover the total loss of revenue during the coronavirus lockdown period. The Capital Kickstart Fund has thankfully helped a lot of theatres who are currently on site. However, there is a longer term issue for the theatres that are not yet on site, but at an advanced stage of preparation. 74% reported that their projects will experience delays of an average of 18 months while they try to bridge funding gaps caused by COVID-19.

## Placemaking value of theatres and impact of capital investment in theatres on wider regeneration and recovery

Theatres often occupy important central sites in towns and city centres and play a major role in supporting the local economy, both through direct employment, use of local services and suppliers and through associated high street spend by their audiences. Based on the Shellard Report commissioned by Arts Council England in 2004 and allowing for present day prices, outside London the average additional visitor spend (AVS) by every theatregoer on associated local businesses including transport, cafes, restaurants and bars is £11. Theatres should be at the centre of infrastructure investment through the government's Build Back Better and Levelling Up agendas to contribute to the wider recovery. As the recent Culture Cities recovery report states "Capital investment in culture can catalyse sustainable economic development in places. Places should take full advantage of their cultural and heritage property assets and unlock value from these assets to underpin sustainable regeneration of left-behind areas and generate returns for reinvestment."

Theatres Trust recently commissioned analysis by consultants Nordicity to evaluate the social and economic impact of investing an average of £11m per theatre in 50 theatres across England focused on core improvements such as repairing and upgrading building fabric and services systems, retrofitting for improved environmental performance, and modernising front of house and community facilities. Theatres reported that such improvements would increase their annual revenue and community engagement by 22% leading to 2,991 new full-time equivalent jobs. They would also jointly reduce their carbon emission by 1,675 tons globally and each theatre would reduce their energy and maintenance costs by around £51,000 per annum. As well as increased revenues and savings to the theatres themselves, the impact on the high street for associated businesses such as bars and restaurants would be an additional £72m



# THEATRE

**Secretariat: UK Theatre & Society of London Theatre**

---

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

over twenty-one years and would create an additional 1,603 full time equivalent jobs. Likewise the construction industry would receive a boost of £598m and the creation of 8,847 jobs. The overall economic benefit of such an investment would total almost £880m over 21 years.



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 11. Community Leisure UK COVID-19 Impact Report - November 2020

Charitable trusts in Scotland, England and Wales are significant players in the local arts and cultural landscape. They usually provide a range of services from arts and culture to sport and leisure on behalf of local authorities. Almost a third of Community Leisure UK members - all non-profit distributing organisations - manage theatres and performance venues as part of their portfolio.

Charitable trusts have been significantly hit by the pandemic. After having reopened in late summer, charitable trusts continue to accrue deficit due to the restrictions on attendance numbers, facilities that can reopen, increased costs to make places COVID-19 secure and decreased customer confidence. It is anticipated that by the end of this financial year in March 2021, Community Leisure UK members will have, on average, accrued a total of £2.8 million.

From March 2020 until late October 2020, trusts have lost 42% of their reserves. It is expected that by the end of this financial year (March 2021), unrestricted reserves will have plummeted even further, with, on average, Community Leisure UK members having negative reserves (-£235k). This will significantly limit them in their ability to invest in their sustained reopening and recovery of services.

To manage the financial pressures caused by the pandemic, trusts have made some significant changes to their staffing structure. Most commonly, staff are working on reduced hours. In addition, the majority of trusts have planned and confirmed redundancies or, in the case of casual staff, not offered any work, affecting over 6500 people. The age groups most affected by these changes are young people between the ages of 18 and 34.

### *Finance impact breakdowns per country:*

- In England, pre-COVID19, our members had, on average, £295k in unrestricted reserves. Currently, trusts have, on average, a deficit of £336k in reserves. It is expected that by the end of this financial year (March 2021), this will have tripled to an average of £900k reserve level deficit per organisation (-305%).
- In Scotland, pre-COVID-19, our members had, on average, £22million in unrestricted reserves. Currently, trusts have, on average, lost 17% of their reserves. It is expected that by the end of this financial year (March 2021), Scottish trusts will have lost 89% of their unrestricted reserve levels.
- In Wales, pre-COVID-19, members had, on average, £589k in unrestricted reserves. Currently, trusts have, on average, lost 49% of their reserves. It is expected that by the end of this financial year (March 2021), Welsh trusts will not have lost more of their



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**Secretariat: UK Theatre & Society of London Theatre**

---

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

reserves than they already have. This stabilisation is expected thanks to the investment of the Culture Recovery Fund and the ability for leisure trusts to access the Hardship Fund for local authorities.

<https://communityleisureuk.org/wp-content/uploads/2020/11/Community-Leisure-UK-COVID-19-Impact-Report-November-2020.pdf>



# THEATRE

Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 12. Theatre Artists Fund – UK Theatre / Society of London Theatre

The [Theatre Artists Fund](#) launched in July, spearheaded by Sam Mendes, and through generous donations from Netflix, The Estate of Sir Peter and Lady Saunders, private donors and public fundraising, so far we have supported 2,600 theatre freelancers affected by the crisis with £1000 grants.

**Who received the grant in Round 1 and 2?** The grant recipients were from all over the UK, from the Scottish Isles to Cornwall, Northern Ireland, Wales, London, and many cities and towns in between. Over half of the grant recipients (53.6%) were based outside of the capital.

Recipients were from a wide variety of socio-economic and educational backgrounds and worked in various onstage and offstage theatre roles including Writers, Prop and Set Designers, Stage Managers, Actors, Casting Directors, Technicians, Comedians, Dancers and Costume Makers.

Some recipients were more recent graduates or were at the beginning of their careers, others have been working in the theatre sector for many years.

*“Hearing the individual stories of those for whom we have managed to provide short-term financial relief is a stark and moving reminder about why we created this fund in the first place. Their passion and refusal to give up have made us want to continue to push for more support from the public and the industry alike. So for all those out there, who are on the verge of giving up, we have one message: Don’t.” – Sam Mendes*

### Key statistics

In a recent survey completed by 632 grant beneficiaries, over 70% of respondents said they had not been able to secure any professional theatre work since lockdown in March. 85% of participants said the Theatre Artists Fund helped them pay their bills, mortgage or rent, with 62% saying it helped them put food on the table. 36% said they had used their creative skills to help the NHS or their local community.

### Below are some of the individuals who benefited from the fund in Round 1.

‘The grant is a lifeline. It allows me to still survive this with my family and hopefully do all I can to protect them until our industry opens successfully again’ – CJ Mitchell (*Youth & Stage Manager*)



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Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

'I was in a really difficult financial situation as I wasn't eligible for any government help. A lot of money, just for living, has gone out over the last five months so being able to have some money in my account to stay safe during this time in case something else happens has been so helpful' – Tess Letham (*Dance Artist*)

'When the theatres do reopen, it will mean that I get my job back again, and not only my job, but the space in life that keeps me going. The space that I love. Theatre is medicine, if I'm honest' – Loussin-Torah Pilikian (*Actor*). Find out more about how the fund helped Louissin-Torah Pilikian in an interview [here](#).

'The grant itself has proved invaluable. It is an invaluable contribution to my living costs, for outstanding utility bills and family sustenance so it's been an enormous respite despite the odds that we face daily.' – Femi Elufowoju Jr. (*Director*)

'As someone that has dedicated their life to the theatre, I applied for the Theatre Artists Fund as I very much hoped that this might offer me some support at this difficult time, especially without knowing when we would next be able to work in a theatre environment.' – Amy Dolan (*Company Manager*)



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Secretariat: UK Theatre & Society of London Theatre

**Giles Watling  
MP for Clacton**

House of Commons,  
London SW1A 0AA

T 020 7 2190795

[giles.watling.mp@parliament.uk](mailto:giles.watling.mp@parliament.uk)

## 13. See It Safely

The Society of London Theatre (SOLT) & UK Theatre have launched a new scheme called **See It Safely**, to support venues as they navigate the challenges of re-opening, and to give audiences the confidence that venues are consistent in their approach and implementation of the latest guidelines. In order to display the See it Safely mark, venues have to sign up to a code of conduct to demonstrate that safety forms the foundation for their reopening plans. Once past an initial approval process that confirms a venue is operating in line with the latest Government guidelines and Public Health guidance, as set out in a COVID-19 Risk Assessment, all participating theatres will receive the toolkit. This includes a 'See It Safely' mark that can be displayed in venues and on promotional materials; an animated safety video; signage and recommended website copy. Training, on-going support and advice is also offered.

In addition to adopting the toolkit, theatres can sign up to a set of ticketing principles which have been designed to reassure audiences that in the event of cancellation they will be able to get an exchange, credit voucher or refund and if an audience member is feeling unwell they can exchange their ticket at least 24 hours prior to the performance for a later date.