Workforce Review of the UK Offstage Theatre and Performing Arts Sector

Final Report

June 2017

by

Nordicity and Alistair Smith (editor of The Stage)

for

UK Theatre and Society of London Theatre

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Acknowledgements

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We would also like to express our gratitude to **Julian Bird**, **Cassie Chadderton** and the staff at SOLT and UK Theatre for their support and input throughout the review.

Report Commissioners

UK Theatre is the UK's leading theatre and performing arts membership organisation. The organisation promotes excellence, professional development, and campaign to improve resilience and increase audiences across the sector. UK Theatre supports organisations and individuals in the performing arts at any stage of their career, through a range of training, events and other professional services. Whether it's through sharing knowledge, bringing the sector together with the right people or providing practical advice, UK Theatre supports you and your work.

Society of London Theatre (SOLT) is an organisation that works with and on behalf of our Members to champion theatre and the performing arts. SOLT delivers a range of services both to assist our members and to promote theatregoing to the widest possible audience.

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Nordicity is an international arts, cultural and creative industries consultancy specialising in strategy, policy, economics and evaluation. Nordicity supports public, private and third sector organisations with robust evidence-based decision-making.

Foreword

The Workforce Needs of Theatre and the Performing Arts

We are rightly proud in the UK of our dynamic and world leading theatre industry, and of the success of productions, actors and creative talent around the world.

However, if we want to see our industry continue to thrive in ten or twenty years' time, we need to make sure that we have the right skills in place, and that we are training and developing those working now, and attracting the right diverse mix of people for the future.

As a result, some months ago, UK Theatre and the Society of London Theatre (SOLT) commissioned a major piece of research from Nordicity, working with Alistair Smith, to give us much needed evidence of the current and future training needs of our workforce.

The report affirms what as a sector we have known for some time – there is a need to change the way we value and invest in training and development at every level, from the earliest stages of new careers, to development and actions of our sector's leaders.

We also need to take steps to improve entry and development routes, including careers' advice, so that we see increased diversity across the workforce to improve our talent base, our relevance, and our resilience.

This evidence gives UK Theatre and SOLT a roadmap to work with government and employers, and on behalf of the industry, to address the requirements of the growing workforce.

We will use it as the basis for a workforce development strategy to be taken forward by employers across the industry, working alongside sector bodies such as Creative and Cultural Skills, the National Skills Academy, and the new National College for Creative and Cultural Skills, and bringing in the wealth of talent in other companies from the not for profit and commercial sectors, and drawing from the education and union organisations.

Over the next few months, I will chair a consortium of industry employers with the aim of agreeing this approach that we will then seek to get supported by government and other trust funders, and which we intend to be seed funded by the Theatre Development Trust (SOLT's sister charity). We will announce more details about this in the weeks to come.

As part of this we will review and make changes to UK Theatre's own training programme, such that our existing offer is brought up to date with today's workforce challenges.

Together we have the commitment, knowledge and resources to bring about significant change, and to make sure that in 10 years' time we can talk about the progress we've made to ensure the health of our industry.

Julian Bird, Chief Executive SOLT and UK Theatre

Executive Summary

The Society of London Theatre and UK Theatre commissioned Nordicity and Alistair Smith, editor of The Stage, to undertake research and analysis to help inform the development of a workforce strategy for the theatre and performing arts sector.

Methodology

When developing the report, the team undertook an extensive review of existing sources of research, data and evidence. This was followed by an online survey of 550 workers and employers from the offstage theatre and performing arts sector. Information from our survey was both analysed on its own and used to inform more in-depth discussion in three focus groups with 34 stakeholders and one-on-one interviews with 18 key figures from across the sector. Further stakeholder engagement with key groups was undertaken throughout the process with groups including Skillscene, the UK Theatre board and the SOLT board.

The UK theatre industry

The UK theatre and performing arts industry is a mixed ecosystem of not-for-profit and commercial organisations. Many not-for-profit organisations receive significant levels of public funding.

Box office performance across the UK is strong, with theatres reporting growing revenue that now accounts for more than £1 billion of ticket sales annually. More than 60% of those sales are focussed in London, where much of the workforce is also located and interacts with the sector across the UK.

The offstage workforce – which incorporates a vast range of job roles and skills – regularly moves between not-for-profit to commercial sectors and around the country. In this sense, the industry can be regarded as an ecosystem, with larger organisations in both the commercial and not-for-profit sectors often relying on talent that has been developed in smaller companies. The theatre and performing arts sector also serves as a significant training ground for those who go on to work in the UK's TV and film industries.

Theatre and the performing arts is a key part of the UK's creative industries, which have been identified as a one of five "world leading sectors" that the Government intends to prioritise in a post-Brexit Britain. It is a major tourist draw – especially for visitors to London – and is also recognised as an important factor in the UK's soft power and global recognition abroad. In 2015, there were 642,000 jobs in the UK's cultural sector with 286,000 of those estimated to be in music, performing and the visual arts.

Key findings and challenges identified in the research

Participants of our survey, focus groups and interviews identified many remarkable aspects of an offstage career in theatre and the performing arts, such as the positive and thought-provoking impact that theatre can have on people's lives. There were also a number of consistent challenges identified.

Workforce culture

Our research revealed a workforce that is passionately engaged with the sector and takes huge satisfaction from their work. This extended from senior management level to junior staff and freelance workers alike. However, there were also a series of consistent challenges raised by both workers and employers about the culture of working in theatre and the performing arts in the UK.

- Low pay, which is the primary reason that people said they would leave the sector and appears to prevent the industry from attracting skilled workers from other rival sectors.
- A lack of long-term strategic thinking and capacity building, with organisations often focussed on short-term or project oriented goals (e.g. the next show) at the expensive of other longer-term considerations.
- A culture of over-work promoted not only by employers but also peer pressure.
- Freelance workers, which make up a high proportion of workers in the sector, can be treated as an expendable resource rather than one to be developed and nurtured.
- A two-tier workforce in which offstage workers in roles perceived to be 'non-creative', feel undervalued in comparison to their 'creative' colleagues and onstage talent.

Professionalism

While UK theatre and the performing arts has a global reputation when it comes to the work it creates on stage, one of the key themes to emerge in the research was of a perceived lack of professionalism from both employers and workers when it comes to organisational culture. This perception is heightened among those who have worked in other industries.

A lack of professional attitude and practices contribute to the problems of representation, holding back the workforce from developing their skills, and appear to be contributing to an actual talent drain out of the sector.

- Stagnant organisational culture and leadership sometimes seemingly resistant to drive through change.
- An almost complete absence of CPD (continuous professional development) culture.
- Antiquated attitudes to flexible working, which particularly affects workers (often female workers) with caring responsibilities of all types.
- Old fashioned recruitment practices, including narrow recruitment processes, often using exclusive language (jargon) and unnecessarily prescriptive requirements.
- Use of out-dated systems, software and equipment in back-office roles.
- A lack of good employment practice entering the sector from other industries due to a reluctance to look outside theatre and the performing arts for talent.

Training

While some training providers and schemes were spoken of favourably by those we consulted, there is a general perception that the training landscape (both at pre-career and in-career stages) can be seen as patchy and un-coordinated. There is a perception that for workers and aspiring workers, good practice is often difficult to distinguish from bad.

- Routes into the offstage sector are poorly signposted, with training of varying standards. There is a lack of guidance for potential workers about which training routes will make them 'job-ready'.
- Unpaid routes into the sector are rife and appear to be increasing.
- Careers advice for those looking to enter an offstage career is perceived to be substandard.
- Most of the current training for routes into the sector present high barriers to entry, militating against a more diverse workforce.
- Apprenticeships suffer from a fragmented approach, confused guidance from government and are still a minority pursuit, despite being generally popular with the sector.
- There is a shortage of in-career training (and CPD and retraining) and careers advice options, especially for freelance workers. This appears to be resulting in some loss of talent from the sector.

Skills shortages

Unlike for onstage roles where there is a perceived oversupply of talent, there are very few areas of the offstage workforce where there is generally believed to be an oversupply of skilled workers. In fact, the sector faces a number of perceived skills shortages. These vary across the UK, however there were three areas that stand out above the others.

- A shortage of skilled technical workers, especially outside London.
- A shortage of workers with skills that are transferable to other industries e.g. marketers, accountants.
- A shortage of skilled senior managers outside London.

Representation

The results of our survey, supported by anecdotal feedback in focus groups and interviews, suggest that while there are many positive aspects of the offstage workforce to be celebrated, it currently underrepresents the general public, and therefore a broad talent pool, in a number of ways.

This is a fundamental issue for the sector to address, and one which is by and large shared by the cultural sector as a whole. In order to build a sustainable, resilient and globally competitive workforce for the future it must represent our diverse and changing population. Theatre and the performing arts is likely to struggle in the future if it only reflects the talents and tastes of part of society.

- Low representation of workers from black, ethnic and minority backgrounds.
- Very low representation of disabled workers.
- Over-representation of people from more affluent backgrounds.
- Over-representation of people with undergraduate degree-level education or above.
- Under-representation of people with caring responsibilities.
- It is a generally younger workforce, with some evidence of a drop-out from the sector when workers are aged in their 30s or early 40s.

Exclusion

Despite repeated efforts by the sector to address the problem, certain groups are being excluded from the sector due to current practices and working conditions, resulting in the issues of representation identified above.

- Cost of training and an expectation of high education levels from employers is excluding those who cannot afford to train. This barrier gets imposed upon roles where – upon reflection – a high level of education may be deemed to be unnecessary.
- Unpaid entry routes and low pay levels – especially at the start of careers – mean that applicants from more affluent backgrounds have an unfair advantage of getting a first step on the ladder, this is further exacerbated if they have networks into the sector, and therefore, are more likely to know of these routes and be offered positions.
- The sidelining of the arts in education and poor careers advice threatens to further restrict the possibility of a career in theatre reaching the widest possible group of people.
- The sector has traditionally been and continues to be reluctant to hire people from outside the sector, especially in London, where many perceive it to be a closed 'theatre community'.
- An endemic culture of networking and closed recruitment practices is effective at creating good short-term results, but means that the make-up of the sector is self-perpetuating and exclusive. This culture unintentionally works against piecemeal attempts to improve diversity in the sector.

Next steps

Some very promising work is already underway, led by organisations including SOLT, UK Theatre and Creative and Cultural Skills, and further work is anticipated to address the challenges highlighted in this report. While this report does not extend to formal recommendations, we have made some propositions for further consideration.

These are recorded in full within the body of the report (**Section 10)** and cover a range of topics. Some are small, impactful steps that could be easily achieved, some will need to take place across a 20-year horizon, some are about advocacy within the sector and influencing government, some require the sector to organise and support itself better, and others require assistance from outside the sector.

It should also be noted that many of the challenges we have identified are not new. There are some challenges that the sector has identified in previous reports – most notably the Creative and Cultural Skills Performing Arts Blueprint in 2010 – but has done little to successfully address.

There is now an urgent and overarching need for a sector-wide strategy that recognises what needs to be done and how it can be implemented.

Much of this will have to be driven by the sector itself. There is also a need for the sector to regularly check on this progress as a baseline to avoid the same challenges identified in this report from being highlighted again in another report in five or 10 years' time.

1. Introduction

British theatre and the performing arts is a booming, billion-pound industry

Last year, across the UK, more than 30 million tickets were sold for theatre productions, generating more than £1 billion of box office revenue.

Internationally, the industry is regarded as a paragon of artistic and commercial success, with China and other emerging theatre markets looking to flagship companies such as the National Theatre and Royal Shakespeare Company for skills development and collaboration.

British performers are world famous. But UK theatre's offstage workforce is held in just as high regard around the globe. Like their onstage partners, they are in demand outside the sector too for both TV and film jobs as well as international theatre work.

Across the UK, despite a challenging funding climate, theatres up and down the country are growing their audiences, with venues outside London reporting nearly 19 million ticket sales in 2016, generating £465m in revenue.

London, which dominates theatre activity in England, recorded a 13th year in a row of record revenues in 2016, a year that saw the opening of Harry Potter and the Cursed Child, one of the biggest commercial shows the West End has ever seen.

This expansion has brought with it a requirement for new skills in addition to traditional ones, as has the introduction of increasingly complicated stage technology into live productions. Meanwhile, the performing arts have expanded successfully into the digital sphere. There has been a quantum change in the consumption of theatre and performance art in the 21st century with live and pre-recorded screenings of performances now a staple of many cinemas and a significant source of revenue for theatre producers.

Theatre is now a nationally and internationally important industry and is part of one of the fastest growing sectors of the UK economy.

This may seem like a golden age, but it is not without its challenges.

UK theatre is an ecosystem that relies on a delicate interplay between the fringe, not-for-profit and commercial sectors, as well as between a central London theatre district, boasting more than 240 theatres, and smaller hubs across the rest of the country.

As was observed recently by Will Quince MP in a Westminster Hall debate on regional theatre, "The West End is often the showcase of our best theatre, but it does not exist in a vacuum; it exists because it is fed and sustained by the talent of regional theatres across the country. Regional theatre is the grassroots of the theatre system in this country, but critically it is also the home of excellent theatre in its own right. Innovative, challenging and thrilling theatre is being created to an exceptionally high standard, rivalling any nation in the world."[1]

The West End is undoubtedly flourishing, but there are severe challenges elsewhere – in parts of the sector that the West End relies on both for product and talent development.

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[1] House of Commons on 05 January 2016: https://hansard.parliament.uk/commons/2016-01-05/debates/1601056000002/RegionalTheatre

British theatre's top commercial and not-for-profit productions rely on a pipeline of skills and talent development that starts at school age and then stretches through vocational training and into years of work at local and regional theatres before – in some cases – that talent progresses to work in the West End or at major subsidised theatres such as the National or RSC. There is then a regular movement of talent and product between the commercial and not-for-profit sectors, as well as around the country, with all sectors benefitting from the success of the others.

It is at the earliest stages of this pipeline where the challenges are most acute.

Cutbacks to the arts in education have been recognised as a major challenge by Arts Council England chairs past and present. It was the subject of Liz Forgan's valedictory speech in 2013, when she warned we were at risk of "robbing a generation of its birthright and failing in the duty we all have to continue our culture". Peter Bazalgette in 2016 picked up the theme, stressing it was "vital that arts and culture are not squeezed out" of the education system. This view was then echoed by his successor, current incumbent Nicholas Serota, who said in a 2017 speech: "We must ensure every child can achieve their creative potential."

This is a particular concern for the performing arts, as was illustrated at the 2017 Oliviers, London theatre's top awards ceremony, this year, where a string of winners took the chance to speak out against cuts in arts education.

The lack of diversity within the industry has also been highlighted as a major concern by leading figures within the sector – most recently in a report by the Andrew Lloyd Webber Foundation that described British theatre as "hideously white", but also in the Government's Culture White Paper, which warned the cultural sectors would not be truly diverse until there is a "leadership committed to sustained change".

The changing political and economic landscape, such as the UK's withdrawal from the European Union and the recent national elections, present both challenges and opportunities for the sector. The Creative Industries Federation's Brexit Report identified issues and opportunities around talent and skills, funding, and trade and investment, setting out a series of recommendations for how the creative industries could 'survive and thrive' post-Brexit.[2]

The government's industrial strategy consultation in the context of a post-Brexit UK, identifies the importance of developing skills and the cultivation of world-leading sectors. The creative industries (which include theatre) was highlighted as one such sector and the sector welcomed the work that Sir Peter Bazalgette has started in developing a Sector Deal for the creative industries.

Some of the other challenges the sector faces come from without (severe cuts in local authority funding, the rising cost of living for a workforce focused in London) and some come from within (a lack of openness to change and difference, rigid structures and old-fashioned practices).

To ensure the long term health and sustainability of the sector, SOLT and UK Theatre commissioned this report, which investigates and assesses the obstacles the theatre industry faces where they relate specifically to skills gaps or shortages in the offstage workforce.

Many of the concerns highlighted in this report will come as little surprise to anyone who has spent a significant amount of time working in or around theatre. Indeed, in the course of our research, there was a remarkable level of consensus from those we spoke to about the obstacles

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[2] Brexit Report. Creative Industries Federation, October 2016.

they face as employers and workers, and the urgency required to tackle them. Some of the challenges observed in this report have been identified by the sector before, but not addressed.

We hope that this report represents an opportunity for the sector to maintain the high level of performance it has achieved in recent years and build on it.

UK theatre is a success story driven by an engine room of remarkable offstage talent. If it wants to stay that way, it must address the challenges that this crucial part of its workforce now faces.

2. Methodology

The methodology for this review was based on both primary and secondary research, including a literature review and desk research, sector stakeholder consultation followed by a synthesis and analysis of findings.[3]

The sector stakeholder consultation adopted a staggered and iterative approach using early learnings to inform subsequent stages, comprising 18 one-on-one interviews, three focus groups with 34 individuals, a survey with 550 responses, and a number of targeted questionnaires. In addition, the consulting team engaged with stakeholders in other ways, including consulting with the project steering group, the boards of both UK Theatre and SOLT, and participating in two meetings hosted by Skillscene.

2.1 Desk Research

The desk research was undertaken throughout the project and comprised more than 35 sources. Following an iterative process, the desk research was instrumental in informing the design of the primary research, such as our survey, interview and focus group design. Instrumental in the analysis and synthesis of data, the desk research was used to compare, contrast and validate the findings from our primary research, and contributed to the report as a whole. Where possible, comparisons were made between the sample of our consultation with that of pre-established research.

See the appendices for a complete list of desk research references.

2.2 Interviews

Interviews were conducted with 18 stakeholders from across the theatre and performing arts sector throughout the UK. The interviews consulted with strategic decision-makers, employers, employees and training providers and contributed towards the research, analysis and conclusions.

See the appendices for a list of stakeholders consulted.

2.3 Survey

An online survey was designed, beta tested and distributed to offstage theatre and performing arts workers, employers and training providers. It achieved 550 responses from across the sector with a good geographical spread of respondents.

As with any self-selecting survey, it is important to note the limitations of the findings and to assert that survey findings are based on our own data set, and do not necessarily reflect the whole offstage sector in its entirety. Our survey sample contains diversity in terms of gender, disability and sexual orientation, while the sample size for some data segments such as ethnic

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[3] See the Appendices for a complete list of consultees and list of references.

diversity was too small to be used, despite frequent and highly targeted promotion and distribution to these groups. The challenge in effectively reaching these groups is an important research finding in itself.

Despite the limitations of self-selecting surveys, the vast majority of our survey data was deemed sufficient for the purposes of our analysis. The significant efforts made to reach as far and wide an audience as possible resulted in a strong sample, and one which mirrors patterns in the Labour Force Survey (LFS).

The Nordicity Survey was distributed by direct email to key stakeholders and reached 1,420 subscribers to the UK Theatre newsletter and 310 subscribers to the SOLT newsletter. It was also shared widely by sector partner newsletters to more than 50,000 recipients, and promoted actively on social media for a period of one month, in winter 2016/17.

When referring to results to this survey in the body of the report, we refer to it as either 'the Nordicity Survey' or 'our survey'.

See the appendices for a list of stakeholders consulted.

2.4   Focus Groups

A series of three focus groups were conducted with a total of 34 sector stakeholders in January and February 2017. A diverse range of individuals were identified and invited from across the breadth of the UK's theatre and performing arts sector ecosystem, including employees, freelancers, employers, training providers and other key stakeholders. Significant efforts were made to engage with stakeholders from across the nations and regions, and with individuals with, and organisations focused on, protected characteristics. Despite these efforts, some skewing in the composition did occur, for example those participants who were able to attend the focus groups were weighted towards those working in London. Each focus group discussed different key themes emerging from the research and was delivered using the ORID Focused Conversation Method, a facilitation framework for delivering a focused conversation to reach agreement or clarify differences (Objective, Reflective, Interpretive, Decisional).

See the appendices for a list of focus group participants.

2.5   Other Stakeholder Engagement

In addition to our interviews, survey and focus groups, the consulting team engaged with sector stakeholders in other ways throughout the review. A number of targeted and bespoke questionnaires were distributed to sector stakeholders to solicit views from specific individuals and thoughts on specific topics, including those who were unable to participate in our interviews, survey or focus group. The consulting team also engaged regularly with other stakeholder groups, including participating in three Skillscene meetings.

3. Skills Shortages

The impetus for SOLT and UK Theatre to commission this report came from concerns that the theatre and performing arts industry was suffering from skills gaps and skills shortages in certain areas of the offstage workforce, which could be exacerbated in future years. This is a long-standing concern and was reported in the Creative and Cultural Skills Performing Arts Blueprint in 2010. However, since then, significant advances have been made in the industry from a technical perspective – especially around stage technology and digital screening. Meanwhile, there have also been changes in the training sector, with the advance of apprenticeships and in the increase in the cost of tuition fees.

As part of our survey, we asked employers in the theatre and performing arts sector for which types of roles they have difficulty recruiting competent staff and in which roles they anticipate having difficulties in 10 years. This was followed up in focus groups and interviews, with many of the results of our survey backed up by individual respondents.

3.1 Overall

Before discussing the skills shortages that employers believe they face, it is worth taking a step back and considering the context of where those employers are based and what types of organisation they are.

The recent *Analysis of Theatre in England* by Arts Council England (ACE) though only covering England, nonetheless, provides some insight into a wide-ranging sector.

The most significant features of the producing/presenting ecosystem in England is summarised below. [4]

- 985 companies (with more than one staff); 774 sole traders; and 414 venues, as well as 65 festivals that programme theatre,

- These are predominantly clustered around core urban areas and affluent smaller cities and towns, particularly London, the M62 corridor, Birmingham and Bristol.

- Nonetheless, London dominates significantly by share of venues and activity, even after taking account of its population share: 47% of all performances (2014) and 43% of all venues.

- Even within London, there is a concentration in the inner boroughs.

- When considering touring productions, these were also mainly to urban centres.

- There has been the emergence of a 'super-venue' touring circuit, focusing on large-scale, popular shows with high audience occupancy rates.

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[4] Analysis of Theatre in England, Arts Council England, October 2016, http://www.artscouncil.org.uk/theatreinengland.

The most significant shortages identified by employers in our survey responses were in technical offstage roles. This was the case both for current and future skills gaps.

In fact, looking at the overall results (**Figure 1** and **Figure 22**), there were not many significant differences between where employers currently believe there to be skills gaps and where they anticipate there will be skills gaps in the future.

In 2007, Creative and Cultural Skills forecast that there would be a significant skills shortage of offstage/backstage roles by 2017. The results of our survey indicate that when it comes to specialist technical roles this prediction has come true.

A shortage in technical craft skills includes both traditional craft skills and technology skills. These skills cannot be viewed in a silo, as an effective workforce today requires a rounded skillset encompassing both technical craft skills and organisational/entrepreneurial skills. Harder organisational skills, such as management, finance, accounting and marketing, are not only important for operating sustainable organisations and good governance, but are also increasingly needed by workers themselves. This is even more true for a sector shifting towards more freelance and casual work, whereby entrepreneurship becomes vital to one's career, and through self-employment the workers operate increasingly as micro-enterprises.

Of the technical craft skills, one employer noted that the gaps in traditional craft skills (such as carpentry, welding, costume, hair and make-up crafts) were in some ways harder to address than those related to technology skills (such as digital projection and computer animated design).

The shortages in many traditional craft skills facing the theatre and performing arts sector have been noted by the Heritage Crafts Association in the Radcliffe Red List of Endangered Crafts (2017), where categories of risk included armour and helmet making, carpentry, furniture making, jewellery making, lace making, leatherworking, puppet making, signwriting, tailoring and upholstery and soft furnishings. Whilst these were listed as currently viable, they are not risk-free in terms of future sustainability, and when looked at through the lens of a specific sector such as theatre, the challenges become more acute.

The issues affecting the viability of these endangered crafts cited by the Heritage Crafts Association are: (i) training issues and the general lack of training opportunities, (ii) recruitment issues for new entrants, (iii) an aging workforce with few or no younger people entering the craft, (iv) loss of craft skills in the way the craft is practiced and taught, (v) market issues such as reduced demand or insufficient economies of scale, and (vi) general small business issues within a highly freelance-based sector such as suitable and affordable workspace, the need for business skills, succession planning and taxation or business rates.

While technology skills remain an important facet to training in the workforce, some employers remarked how the younger generations of workers are entering the sector well equipped technologically and digitally savvy.

Alongside technical craft skills, soft skills are integral to a productive and harmonious work environment. One employer noted that soft skills, such as interpersonal skills, are crucial and often developed in a worker's first year on the job when they are first exposed to the workplace culture and have the time to learn and acquire them. And with the barriers to entry on the rise, and the shift towards freelance and casual work, the opportunities for new entrants to develop their soft skills is diminishing.

Stage automation, sound, lighting and production all feature heavily as shortages in responses to our survey, as do senior management roles. There are only two categories where there is a general perception of a sufficient or oversupply of skilled staff: directors and casting directors.

One Survey Respondent said, in explaining the difficulty in recruiting for positions as a major employer in Wales, "There are no stage carpenters in Wales who work in theatre, there are very few competent lighting technicians. There is a sufficiency of lighting designers but the TV industry has hoovered up all the backstage talent".

The views expressed in response to our survey were widely backed up by reports in our interviews and focus groups. However, there was also one area that was raised as suffering from a significant shortage but was not a separate option in our survey: finance staff. A number of commercial producers, especially, reported struggling to find good book-keepers. This is an area where there could be competition from other industries, as well as a lack of awareness that such jobs exist in theatre.

One survey respondent observed that "finance is the hardest [job section] to recruit for."

Human resources (HR) was another area that was not separately identified in our survey but which was raised in discussions around skills shortages. However, this had less to do with a perceived shortage of skilled HR staff in the job market and more to do with the sector not placing great value on following acknowledged good practice in other sectors and therefore, not seeking to employ good HR practitioners, or indeed any HR practitioners in many cases.

Offstage roles were identified in consultation with UK Theatre, and during our research it became clear that certain roles would have warranted separate identification from a broader category, such as accounting and bookkeeping which was previously part of 'Other: Theatre Administration'.

Figure 1: Current Skills Gaps (Employers)
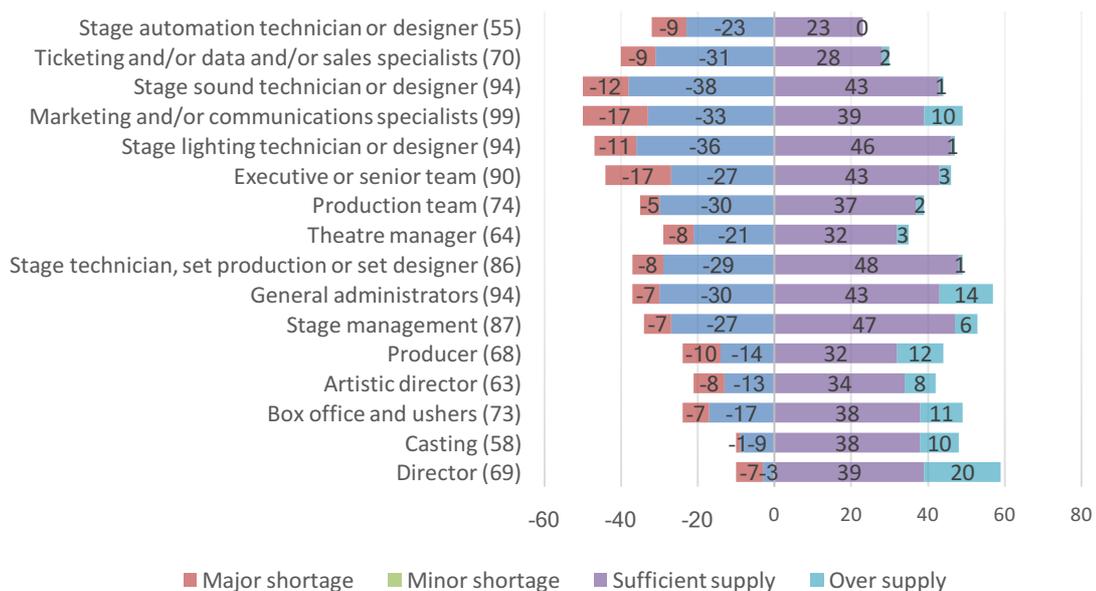
Source: Nordicity Survey (2017)

3.2 London

If we split employers between London and the rest of the UK, some patterns begin to emerge. For a start, the perceived shortage of skilled workers is generally lower in London than the rest of the UK. This is unsurprising given the how much of the theatre industry is focused in the capital.

Figure 2: Current Skills Gaps (Employers, London)
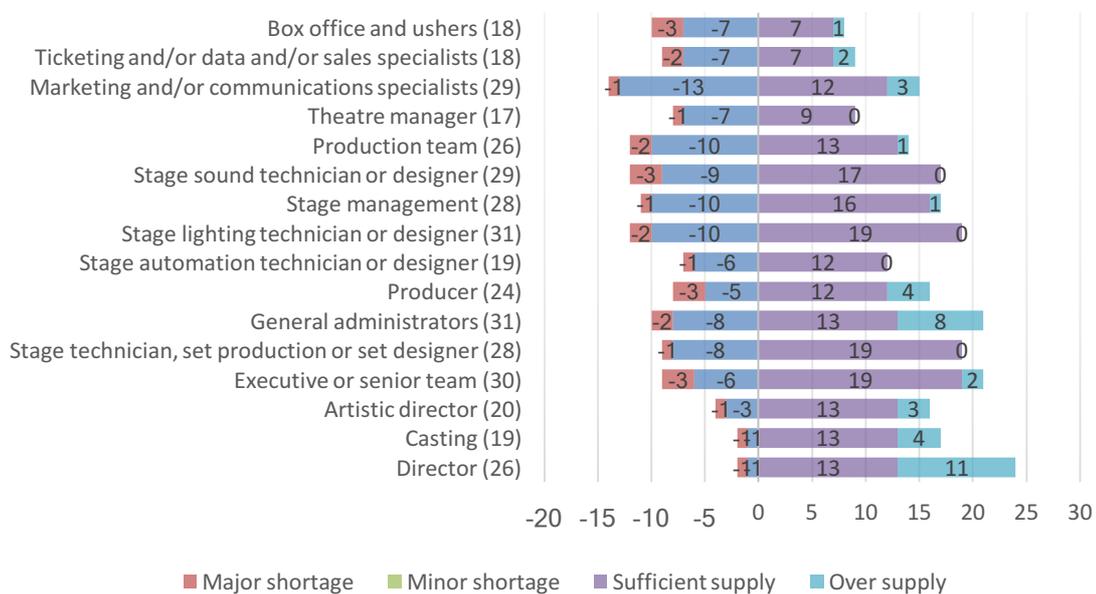
Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Box office staff and ushers – which are a minority concern in the overall list – are a more significant shortage in London. Conversely, many of the technical offstage roles that feature highly in the overall list are less of a concern to our survey respondents in the capital. Instead, ticketing and marketing feature more highly amongst our survey respondents, and continue to be a concern in the future. Seeking to enhance venue operations, an apprenticeship for box office staff is being considered by industry members modelled on existing customer service frameworks.

3.3 The rest of the UK

It is outside London where the shortage of skilled technical staff is most keenly felt, although many shortages seem to vary from one area of the country to another. In our focus groups and responses to our survey, shortages of skilled technical staff tend to be associated with the specific area of the UK in which the employer is located, rather than an observation of a more general trend outside of London.

For example, one Nordicity Survey respondent observed: "There are no stage carpenters in Wales who work in theatre, there are very few competent lighting technicians. There is a sufficiency of lighting designers but the TV industry has hoovered up all the backstage talent".

Meanwhile, another respondent to our survey claimed: "There is an unavailability within Scotland`s culture infrastructure of skilled technical theatre staff able to meet required quality thresholds. A similar shortage exists regarding senior management team personnel and marketing/PR professionals".

There also appears to be a greater shortage of executives and senior managers outside London; this was also remarked upon in our focus groups and interviews.

There is a perception that when it comes to theatre-specific roles there is a talent drain to London, where most of the principal theatre employers are based. It was also observed that there is a talent drain to the national companies (e.g. National Theatre and Royal Opera House), as they are able to offer job security, better working conditions and relatively high pay (for the sector). This would point to a system where talent has traditionally been developed regionally with the best then often being cherry-picked by employers in London. This happens in creative roles (for example Almeida Theatre artistic director Rupert Goold who has spoken of developing his career by running a regional theatre before moving to London) but also in technical positions.[5]

Speaking about technical offstage staff, one interviewee observed: "More people come to London because it pays better, there are more opportunities. There are not that many cities that have enough theatres for there to be an industry and significant opportunities. If you live and work in Stratford upon Avon, there's one employer. "

"Outside of London, specialist skills would be hard to find. If you have a specialist skill, you'd probably come to London. It just sucks people in."

However, if you have skills that are transferable to other industries (e.g. marketing, accounting), it is likely that you will be able to earn more from working in those other industries. This could explain the difficulty in attracting skilled staff in some of these areas.

When it comes to ushers and box office staff, one survey respondent observed that theatres in major cities find themselves in competition with the retail sector, which is able to offer greater job security.

One employer observed that it struggles to convince staff to relocate from London to positions elsewhere in the UK because of 'the glamour attached to London' and because it is a known quantity. "Perhaps we are not making it appetising enough for people to relocate," they observed.

However, it was observed in our consultation that some people are starting to relocate from London to Manchester because of the increased living costs associated with London.

Those employers who had worked in multiple locations across the UK observed that the ease of finding skilled staff can vary significantly from place to place. Scotland, it was noted, has a reasonably buoyant local recruitment market in which people move from place to place quite freely. This was not thought to be replicated elsewhere in the UK.

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[5] Rupert Goold, The Stage, 9 January 2015: 'Directors will benefit if critics are supported in the regions'.

In general, the skills shortages outside of London tend to be for roles that are theatre- or performing arts-specific (e.g. technical roles) whereas the shortages in London tend to be in roles for which there is competition from other markets (e.g. marketing, ticketing, sales). Indeed, the House of Commons Culture, Media and Sport Committee reported in 2016 that "With a greater emphasis on revenue generation, there are greater demands for professional skills in areas such as fundraising, marketing and sponsorship."[6] It also noted initiatives such as Arts Council England's Catalyst fund responding to support organisations and their workers with skills in fundraising, and by allocating 70% of this support to the rest of England outside London.

Figure 3: Current Skills Gaps (Employers, Rest of UK excluding London)
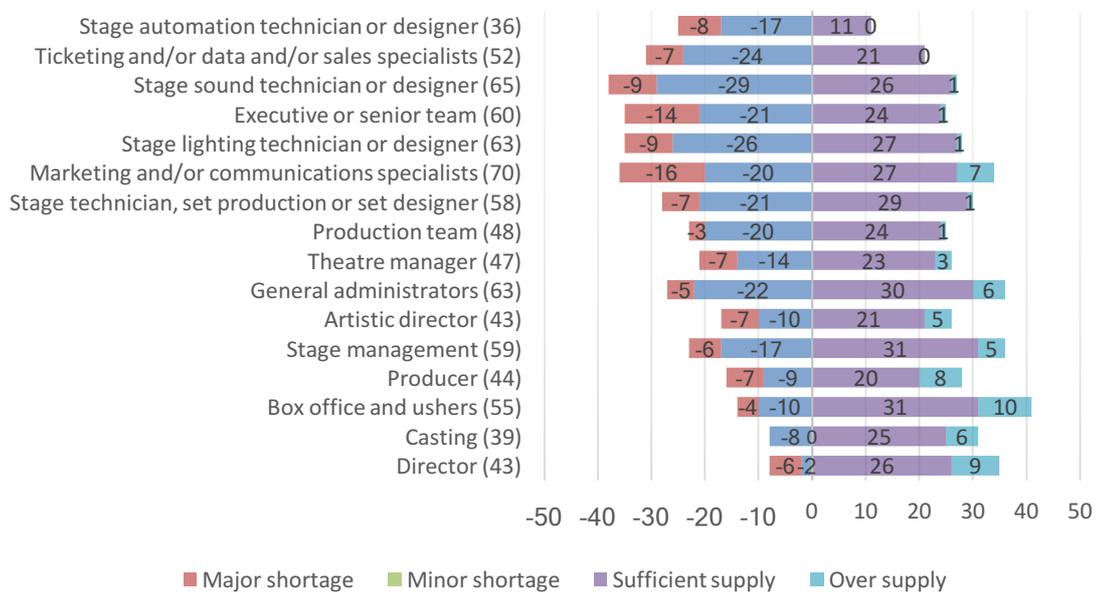
Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

A note on the 'hub model'

It has been suggested the 'Northern Powerhouse' or other 'hub' models for the creative sectors might provide the opportunity to develop more areas of the UK with buoyant local recruitment markets for theatre. The 'hub' model has been welcomed by stakeholders such as Arts Council England in their Analysis of Theatre in England report, which highlighted the role major new regional producing hubs around the UK could play in supporting stakeholders to collaborate, coproduce or tour work both within and beyond their region. This approach has also been welcomed by SOLT and UK Theatre.[7]

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[6] Countries of Culture: Funding and support for the arts outside London, Fourth Report of Session 2016-17, House of Commons Culture, Media and Sport Committee, 15 December 2016.

The hub model is gaining momentum in other parts of the cultural sector. Arts Council England's Creative Local Growth Fund, for example, was established for cultural organisations to work with Local Enterprise Partnerships to contribute to local economic growth. Meanwhile, Heritage Lottery Fund established the pilot Great Place Scheme to "enable cultural and community groups to work more closely together and to place heritage at the heart of communities".[8]

3.4   Comparing the commercial and not-for-profit sectors

There were also some interesting differences when employers' responses were split between the commercial and not-for-profit (NFP) sectors. The charts comparing these differences are illustrated in the appendices.

In the commercial and unfunded NFP organisations, there appears to be a more significant shortage in skilled theatre managers, especially in the unfunded NFP sector where the shortage is particularly acute. This could indicate that a shortage of skilled theatre managers is particularly acute in civic venues (which tend to be unfunded or run by a commercial operator such as Ambassador Theatre Group). Funded theatres will tend to be run by artistic directors or chief executives rather than theatre managers. It should also be noted that the role of a theatre manager can vary significantly from organisation to organisation in terms of seniority. In some, it can be the most senior person, responsible for the overall strategic running of an organisation and in others a more junior role, focussed on the operation of the theatre building.

Across the not-for-profit sector the shortage of skilled technicians appears to be significantly more acute than in the commercial sector.

Across all the sectors, people tend to think skills gaps will get worse rather than better, and that areas of oversupply will increase. This would tally with the concerns around offstage training raised in **Sections 6 and 8**.

3.5   Key challenges identified in this section

1. **A combination of technical craft skills, entrepreneurial skills and soft skills are all necessary together.**

   These skills cannot be viewed in a silo, as an effective workforce today requires a rounded skillset encompassing technical craft skills, organisational/entrepreneurial skills and soft skills. The sector has an increasing need for versatility amongst its workforce. This is even more true for a sector shifting towards more freelance and casual work, whereby entrepreneurship becomes vital to one's career, and through self-employment the workers operate increasingly as micro-enterprises.

2. **A shortage of skilled technicians, especially outside London**.

   Stage automation, lighting and sound technicians are all among the biggest skills shortages flagged up by employers and these are even more pronounced outside

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[7] UK General Election 2017: The case for a thriving theatre industry in the UK, UK Theatre and Society of London Theatre's General Election 2017 Manifesto, spring 2017.
[8] www.greatplacescheme.org.uk

London. Combined with the observations in **Section 6** about the perceived quality of some of technical theatre training, this suggests there is a challenge for the sector both in terms of attracting enough people to train to become theatre technicians and ensuring that the training is satisfactory. The particularly acute shortage in areas outside London could also indicate a skills drain to the capital. Given the demographic under-representation identified in **Section 4**, there are clear target groups from which to try to attract workers.

3. **A shortage of workers with skills that are transferable to/from other industries**.

   There are skills shortages in non-theatre specific but skilled specialist roles such as marketing, ticketing and finance. As these are roles for which there is a much wider market outside the theatre and performing arts industry, the challenges here are less likely to be linked to the quality of training or indeed a wider skills shortage, but more to the inability of the theatre sector to attract suitable applicants. This could be due to a lack of awareness that theatre needs these types of workers (and that there are job opportunities for them) and/or it could be that theatre is failing to offer attractive enough conditions to staff who can choose to work in other sectors, which offer higher levels of pay and more flexible or better working conditions and better opportunities for career advancement.

4. **A shortage of skilled senior managers outside London**.

   Outside London, our survey results also illustrate a clear concern around a shortage of skilled applicants for executive or senior team roles. This is likely to be linked to the shortage of in-career training to develop those figures within the workforce who could be suited to these senior roles, as well as a lack of mid-career advice to people in other roles who might be suitable to move into senior or executive roles.

   The general reluctance of the sector to look outside itself for staff could also be contributing to this perceived shortage. This situation is anticipated to get worse, which would indicate that while there are some well-respected schemes (such as the Clore Leadership Programme) training the next generation of leaders, there is still more to do.

   The fact that this shortage is thought to be more acute outside London also suggests that the rest of the UK could be suffering from a talent drain of both mid-career and senior staff to the capital, or staff moving to the capital to take up more senior roles having developed their skills outside London. Some of this drain may also occur closer to the early to mid-career stage, as younger workers are often more flexible in their working and more senior staff may have established roots and not be as easily able to relocate.

   Among unfunded not-for-profit employers, the shortage of theatre managers and executive or senior team appears to be particularly acute. This is an area of the industry that is less publicised than other parts of the sector (for example in national media), so there may be an issue of awareness here.

4. Who are the workforce?

Before we investigate the challenges that the UK theatre workforce faces, it is worth considering who that workforce is.

From those responding to our workforce survey (550 responses), the make-up of the offstage workforce is weighted towards certain characteristics. As this was a self-selecting data set, it does not reflect the sector as a whole. However, it does help illustrate where the demographics of the sector might differ markedly from those of society at large. The Nordicity Survey response mirrors many of the findings of the Labour Force Survey (2014), Goldsmith's Panic! Survey (2015), and the Parents in the Performing Arts survey (2016).

4.1 Surveyed workforce profile

The last time a comprehensive study of the theatre and performing arts workforce was reported was by Creative & Cultural Skills in their report, *The Performing Arts Blueprint: An Analysis of the Skills Needs of the Performing Arts Sector in the UK*, in 2010. This study included the onstage performance and creative workforce (34%) as well as the offstage, and reported a workforce that was 94% white, 49% female, 47% aged under 40, and 58% self-employed, with a concentration of the workforce in London and the South East of England (45%).

The off-stage theatre sector workers represented by those responding to our self-selecting survey differed to the general population in the following ways:

- **Younger**: Over half the responders were 35 or under (51%) as compared to 44% of the general population[9].

- **More female**: 56% female as compared to 50.7% of the general population[10].

- **More non-disabled workers, by a considerable measure**: 5% self-identified as disabled people as compared to 16% in the general population[11].

- **More white workers, by a considerable measure**: 93% white as compared to 86% for the general population[12], with no BAME group being greater than 1%. In absolute terms, we had 28 non-white respondents in total.

- **Fewer heterosexual workers**: 75% identified as heterosexual as compared to 93.7% of the general population.[13]

- **More workers of no religion**: 65% were of no religion as compared to 25% of the general population[14]. A further 23% were Christian as compared to 59% of the general population. No other religion had more than 1%.

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[9] 2011 Census.

[10] Population Estimates for UK, England and Wales, Scotland and Northern Ireland: mid-2015, Office for National Statistics.

[11] Disability Facts and Figures, Office for Disability Issues, Department for Work & Pensions, 16 January 2014.

[12] 2011 Census. Note census data refers to England and Wales only.

[13] 2011 Census. Note census data refers to England and Wales only.

- **More workers from middle or upper middle-class background, by a considerable measure**: 69% came from middle or upper-middle class backgrounds as compared to 29% of the general population and even more than the 50% of the Creative Industries as a whole.[15]

- **More workers who are educated to undergraduate degree level or above**: 67.4% were graduates (52.2% had attained a graduate degree and 15.2% a post-graduate degree) prior to starting their career in theatre, whereas 32.7% of the UK economy had a degree or equivalent in 2015 and even higher than the creative industries average of 59.9%.[16]

- **More workers without caring responsibilities**: 76% did not have caring responsibilities of any kind, and only 18% reported childcare responsibilities. Meanwhile, 40% of the economically active population of the UK have childcare responsibilities had dependent children[17], and approximately 10% of the UK population (6.5 million) were carers providing unpaid care for a friend or family member who cannot cope without their support.

- **More workers who are based in London**: 44% resided in London compared to 15% of the total labour force[18], 11% in South East England compared to 14% of the total labour force, 8% in Scotland which was equal to the total labour force, 7% West Midlands compared to 8% of the total labour force, 6% East Midlands compared to 7% of the total labour force, 5% North West England compared to 11% of the total labour force, 4% Yorkshire and the Humber compared to 8% of the total labour force, 4% East of England compared to 9% of the total labour force, 4% Wales compared to 5% of the total labour force, 2% North East England compared to 4% of the total labour force, 1% Northern Ireland compared to 3% of the total labour force.

- **Fewer workers who are employed full-time**: Nearly half of our survey respondents (249) identified as full-time employed as compared to 74% of the total labour force in employment.[19]

- **More workers who are self-employed freelancers:** Over a quarter of our survey respondents (166) identified as being self-employed employed on a freelance basis, as compared to 15% of the total labour force in employment.[20]

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[14] 2011 Census.

[15] Are the creative industries meritocratic? An analysis of the 2014 British Labour Force Survey, D. O'Brien, D. Laurison, A. Miles & S. Friedman, Cultural Trends, 25:2, 116-131, April 2016.

[16] Creative Industries: Focus on Employment, DCMS, June 2016,
Note: "Graduates" refer to those people who have left education with qualifications above A level standard. The population used in this report is all adults living in the UK who were not enrolled on any educational course on the survey date, focused on women aged between 21 and 59 and men aged between 21 and 64.

[17] 2011 Census.

[18] Labour market statistics summary data tables, ONS, release date 17 May 2017.

[19] Labour market statistics summary data tables, ONS, release date 17 May 2017.

[20] Labour market statistics summary data tables, ONS, release date 17 May 2017.

Figure 4: Current Employment Status

Employment Status	Count
Employed full-time (35 hrs or more)	249
Freelancer	166
Employed part-time (less than 35 hrs)	63
Zero hours contract	30
In education or training	19
Working outside theatre sector (intend to return to…	17
Volunteering whilst employed outside theatre sector	10
Unemployed and seeking work in theatre sector	7
Working outside theatre sector (do not intend to…	7
Volunteering whilst unemployed	3
Unemployed and not seeking work in theatre sector	2
Retired	1
Other	15

Source: Nordicity Survey (2017)
Note: 589 total responses. Respondents could select all that apply.

Figure 5: Respondent Carer or Parental Responsibilities

Category	Value
Prefer not to say	2.2
Carer of disabled child / children (under 18)	0.8
Carer of an older relative or disabled adult/s (over 18)	3.3
Carer of a child / children (under 18)	18.1
None	75.6
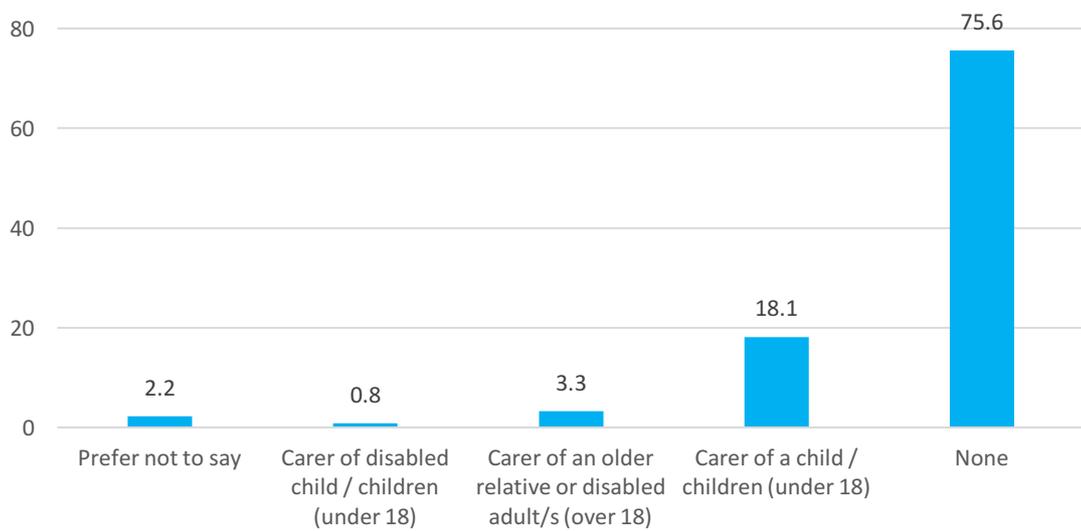
Source: Nordicity Survey (2017)
n = 491

Figure 6: Respondent Socioeconomic Background
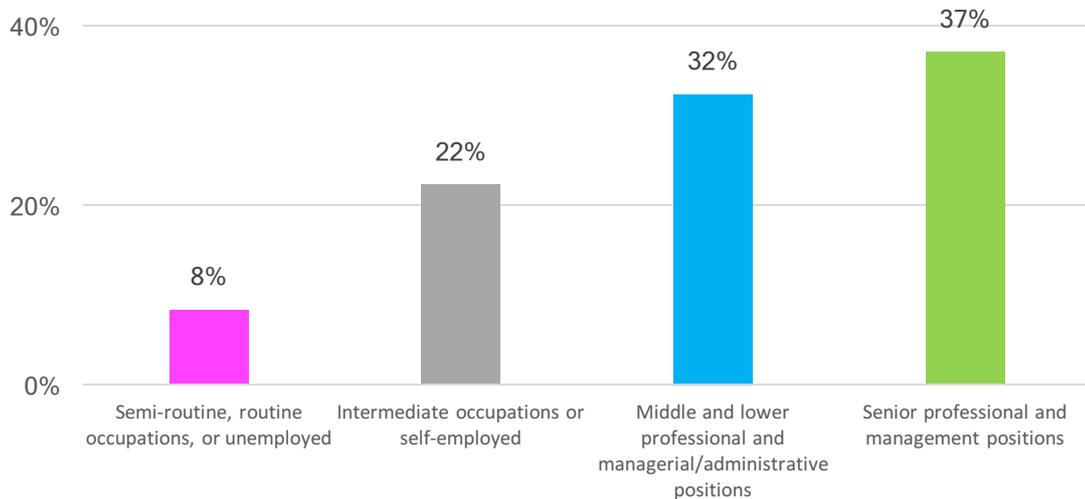
Source: Nordicity Survey (2017)
n = 494

Only 8% of respondents came from a working-class background (41 respondents) and a further 22% from a more senior working class or self-employed background (110 respondents), whereas, 69% came from affluent backgrounds – 32% (middle and lower professional) and 37% (senior professional). If theatre and the performing arts were to be representative of the population as a whole, the proportion of workers from a working-class background would be 35%, and those from an affluent background would fall to 15% and 14%, respectively.

Academic research has shown that for the creative industries as a whole, those from a working-class background constitute 18% of the workforce, and those from middle and lower professional background represent 24% and those from a senior professional background comprise 26%.[21] This indicates that the creative industries are strongly dominated by workers from affluent backgrounds. If our respondent population were to be representative of the offstage theatre workforce, it would suggest that it is *even more severely* under-representative of people from a working-class background than the creative industries as a whole.

This data tallies with other research. The same academics responsible for the research quoted above also put together the Panic! Survey for the Guardian and Create London in 2015. Though a self-selecting survey, they had over 2,500 responses from across the cultural and creative industries in the UK and like our survey they found that more than three-quarters of respondents had a parent who were working in a managerial or professional job (76%).[22]

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[21] Are the creative industries meritocratic? An analysis of the 2014 British Labour Force Survey, D. O'Brien, D. Laurison, A. Miles & S. Friedman, Cultural Trends, 25:2, 116-131, April 2016.
[22] Panic! Survey, http://www.createlondon.org/panic/.

Figure 7: Respondent Highest Education Before Starting Career in Sector

Category	Per cent
Postgraduate qualification	15.2
Undergraduate degree	52.2
Diploma	7.1
Vocational (e.g. BTEC, City & Guilds, NVQs)	5.9
AS Level or A Level (or equivalent)	13.6
GCSE (or equivalent) Grade C or above	3.0
GCSE (or equivalent) below Grade C	0.8
No formal education qualifications	1.6
Other	0.6
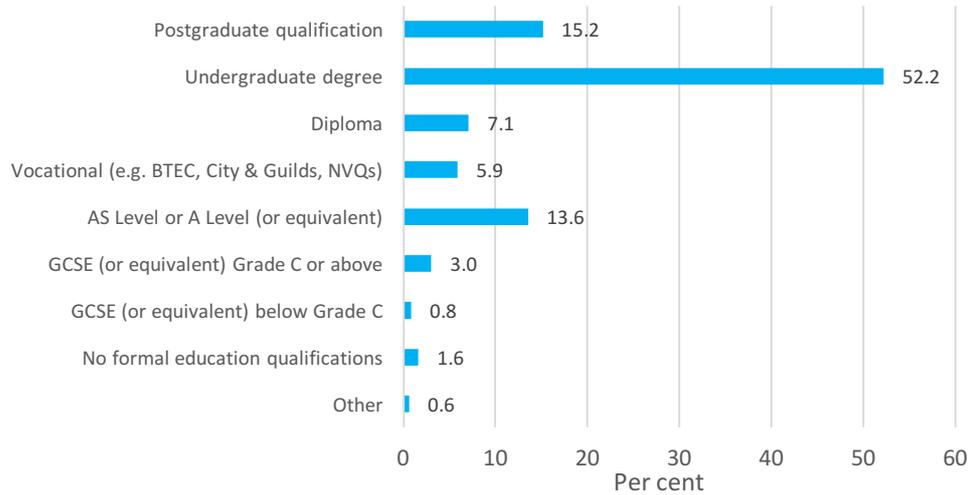
Source: Nordicity Survey (2017)
n = 494

The results of our survey revealed that two thirds (67%) of respondents had first or higher degrees. This is a very high percentage and is consistent with the profile identified in **Figure 6** where the workforce is heavily weighted to those with middle and upper-middle class backgrounds.

Even though our survey respondents were a self-selecting group, when the demographic data was shared with our focus groups and interview subjects it largely tallied with the majority of consultees own experience of working in the sector.

Furthermore, there was widespread acknowledgment that not only was the offstage workforce overwhelmingly white, but that it significantly lags behind the onstage workforce in terms of representing more diverse backgrounds of all sorts.

**Figure 8: Respondent Profile by Age and Carer Duties**

Age (years old)	No	Yes
16 to 35	227 (46%)	23 (5%)
36 to 55	117 (24%)	75 (15%)
56 and over	28 (6%)	11 (2%)
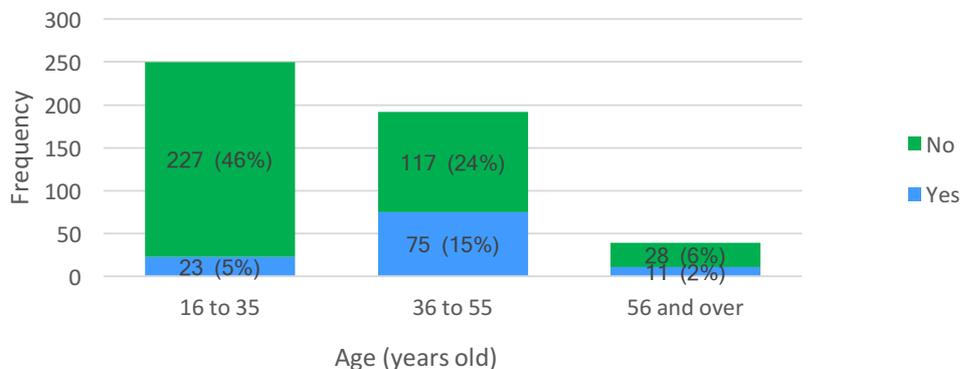
Source: Nordicity Survey (2017)
n = 492

The relatively low level of caring responsibilities revealed in our survey – especially childcare responsibilities – is surprising given the average age and gender profiles of our survey respondents.

The organisation Parents in the Performing Arts (PIPA) has embarked on a research project to try to understand the impact of caring responsibilities on the workforce within theatre. This work is in the early stages but some of their initial findings do provide insight into the situation, as it shows that there was a majority view that men and women were each treated differently when they became parents, that gendered assumptions were made about parenting responsibilities, and that only a very small number of men took on more than 40% of the childcare responsibility, whereas four times as many women as men took a 70% share. [23]

Men responding to the PIPA survey were more likely to be employed full-time than women respondents, whereas women were more likely to be self-employed or to work part-time. Moreover, the majority of employees with caring responsibilities responding had to turn down work (57%). This was very much more acute if they were self-employed (81%).

The importance of measuring the demographics of the workforce lies in establishing to what extent it represents or reflects its actual and potential audiences. And so, in a practical sense, diversity in theatre can be conceived as being diverse work produced by a diverse workforce and viewed by a diverse audience. Put simply: a more diverse workforce is likely to create work that appeals to a broader range of audiences.

Indeed, there is a hard economic case for the theatre and performing arts sector to diversify its workforce, as work by McKinsey[24] has shown that:

- companies whose **racial and ethnic diversity** is within the top quartile are 35 % more likely to have financial returns above their respective national industry medians;

- companies whose **gender diversity** is in the top quartile are 15% more likely to have financial returns above their respective national industry medians (the average percentage of women in the executive team was 12% in the UK)

- in the UK, greater **gender diversity on the senior executive team** corresponded to the highest performance uplift in any data set, across their international comparisons.

Dennis Layton, the co-author of the McKinsey report Diversity Matters, says: "In our research we saw a correlation between increased diversity and better financial performance as measured by EBIT [earnings before interest and taxes]. The research highlighted a correlation, not a causation, but we hypothesise that diversity has a positive impact on many key elements of organisational performance including: Winning the war for scarce talent, strengthening customer orientation, increasing employee satisfaction, improving decision making, and enhancing the company's image. These drivers may be especially important for media companies in the UK."

The Creative Industries Federation is intending to work with McKinsey to develop the analysis so that it is specific to the creative industries, which should inform understanding the theatre and performing arts sector.

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[23] Best Practice Research Project: Interim Report, T. Cornford, Parents in Performing Arts, December 2016.
[24] Diversity Matters, V. Hunt, D. Layton, and S. Prince. McKinsey, February 2015.

4.2   Key challenges identified in this section

1. **A lack of diversity.**

   Ethnic and class diversity, as well as the representation of disabled people, were extremely limited in our survey responses. There would seem to be large parts of the wider population who do not find working offstage in theatre as attractive a career proposition as they might or are unaware of the breadth of opportunities available. For more see **Section 9** on Exclusion.

2. **The creative and economic loss.**

   In a sector that receives significant sums of public investment, the lack of diversity, in its widest sense, is clearly an issue, but it is also a challenge for all types of organisation – not-for-profit and commercial – if they want to build a resilient workforces that can respond to the needs of a changing population. There is an economic case for the creative industries to diversify their workforces, and theatre is likely to struggle to appeal to the widest possible audiences if those who make it only reflect a small section of society. Meanwhile, it is going to struggle to attract a diverse workforce if it cannot offer a viable career to those who are not able to rely on existing wealth or contacts.

3. **An over-educated workforce.**

   There are very high levels of education throughout the sector. While this has some obvious benefits, is this really necessary for all positions in the offstage workforce? If not, has it become normal to expect a degree, and does this exclude people with a talent for the positions they wish to pursue, but who do not have degree level education? If there is not a need for degrees for all positions, many individuals are unnecessarily taking on very large student debts for little purpose.

4. **A talent drain of those with (or wanting to have) caring responsibilities.**

   See Challenge 2 in **Section 7**.

5. Initial routes into a career in theatre

Through the results of our survey and from our focus groups and interviews, we were able to investigate how workers first came to work in theatre and why. This also helps us to understand why certain groups are not being attracted to the sector, potentially leading to skills shortages. It can also give some indications as to why the demography of the workforce may be skewed in particular ways. Given our sufficiently high survey response rate of workers with theatre careers of varying lengths, we were also able to investigate how entry points to the industry have changed over time.

Theatregoers today become the theatre workers of tomorrow

Most offstage theatre workers first encountered the sector as audience members, which led to them getting into theatre via one of the entry routes identified in our consultation. The experience of watching a production (usually in childhood or through primary school) was cited as the main impetus for pursuing an offstage theatre career.

The connectedness of audience and creators (both offstage and onstage), therefore, is crucial to the talent pipeline of tomorrow. The sector has been wise to revive the issue around diversity first onstage, as this is where audiences first connect and identify with theatre, by seeing 'people like them' and stories that they can relate to. But, as a next step, it is critical to carry this momentum towards bold and impactful initiatives offstage to broaden and diversify the talent pipeline and strengthen the skills base of the future.

Diversity onstage will help better engage with the youth of today, both in content and in cast, but also in the delivery and mediums of the art form. For example, industry discussion at the Theatre 2016 Conference considered how younger audiences are migrating towards non-traditional performance spaces, ditching the traditional confines of building or stage based theatres.

One can also point to the growth in theatre being viewed digitally, which has had not only an additive effect on the audiences viewing theatre and performing arts, but also on the makeup of these audiences, drawing in younger and more culturally diverse audiences than the average theatregoer.[25]

Through efforts to counter the marginalisation of audiences, such as actively engaging BAME participation (a major gap identified by both the Arts and Humanities Research Council[26] and the DCMS[27]) the sector stands to gain not only a larger and more engaged audience, but the opportunity to recruit from a much larger, more skilled and more diverse talent pool of workers both onstage and off.

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[25] From Live-to-Digital: Understanding the Impact of Digital Developments in Theatre on Audiences, Production and Distribution, Arts Council England, Society of London Theatre (SOLT) and UK Theatre, 11October 2016.
[26] Understanding the Value of Art and Culture: The AHRC Cultural Value Project, G. Crossick, and P Kaszynska, Arts and Humanities Research Council, 2016.
[27] Taking Part focus on: Diversity Trends, 2005/06 to 2015/16, DCMS, 26 April 2017.

Coming full circle, onstage engagement with audiences will help reveal to the general public that roles in the spotlight are just the tip of the iceberg, and can demystify the career opportunities offstage and broaden talent pool of the future workforce.

5.1   Why do people work in theatre?

Overwhelmingly, people who work in theatre do so because they care about the sector. People working in theatre love theatre and love working in theatre. Those we spoke to in our focus groups and interviews referred to the "buzz" they get from working in a sector they love. Many participants – of varying seniority and working in a range of roles – also related how they are motivated to work in theatre through a desire to make the world a better place and the positive and thought-provoking impact that theatre can have on people's lives.

Figure 9: Career Motivation of Respondents
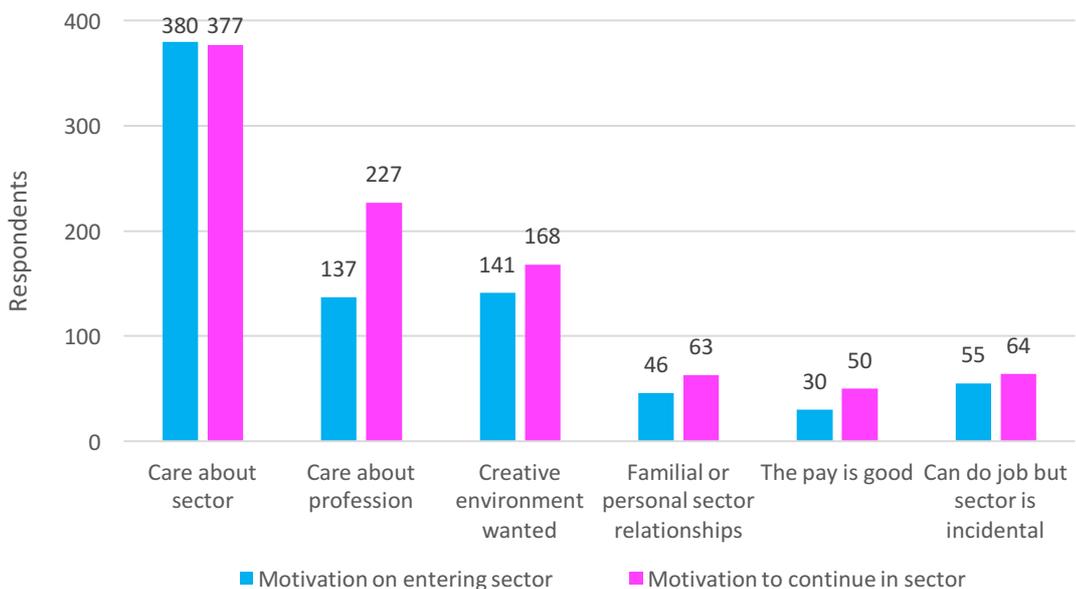
Source: Nordicity Survey (2017)
n = 490

Encouragingly, as well as being a key motivating factor for joining the industry, this continues to be the key factor in why people continue to work in theatre.

"There's never a boring day in theatre," said one focus group participant. Another participant – an offstage worker directly involved in theatre production – observed that audience feedback is a key part of making theatre a rewarding career for those involved in the creative process. "I genuinely think it's because you can hear people clapping – there's an immediate visceral reward".

Job satisfaction – in terms of enjoyment of the day-to-day function of a job – was generally high among everyone we spoke to. One observed: "It's a great industry – it's fun and exciting and live. But it does entail unsocial hours, low pay and job insecurity."

Very few people we spoke to are primarily motivated by money and it was the lowest motivation for entering the sector among our survey respondents (although we will show later in this report that it is one of the major factors in why people leave).

While caring about the sector at large is a consistent motivator for entering and staying in the sector, caring about a specific role within the sector (being a director, being a stage manager etc) increases with time in the sector.

This suggests that if workers can overcome the many challenges documented in this report and so remain within the industry, their commitment to the sector remains strong and their commitment to their specific role actually increases.

This is a point that is worth underlining. The workforce frustrations detailed in this report should be seen against a context in which workers expressed high levels of job satisfaction and a genuine love for their work. This suggests that while there are some major challenges that theatre faces (which we were tasked with identifying in this report) there are also many things the sector and its employers are getting right.

5.2   How do people get into theatre?

The most common first route of entry into the sector is from formal education in a related subject, according to our survey respondents. However, there are a wide range of potential entry points, many of which have quite high barriers to entry – whether that be the cost of undertaking degree-level training or the finances to accept low-paid casual work, unpaid internships or volunteering. Recent research by IPPR has noted the inaccessibility of internships to some young people due to 'connections, financial barriers, lack of experience, discrimination, lack of confidence in following opaque routes to internships, and knowledge of how to navigate the system'.[28]

In contrast, workers within the creative industries, including theatre and the performing arts, see them as being meritocratic[29] and they were described as such by Richard Florida in his work about the 'creative class'[30]. This is a view which academic research by Dave O'Brien presented in **Section 9** clearly challenges, with evidence of low representation of those from lower socioeconomic backgrounds and which is consistent with the high barriers to entry identified above.

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[28] The Inbetweeners: The New Role of Internships in the Graduate Labour Market, IPPR, April 2017.

[29] Culture is a meritocracy: Why creative workers' attitudes may reinforce social inequality, M. Taylor, M. and D. O'Brien, 2016.

[30] The rise of the creative class, R. Florida, Basic Books, 2002.

Figure 10: Single Most Recent Entry Point into Sector
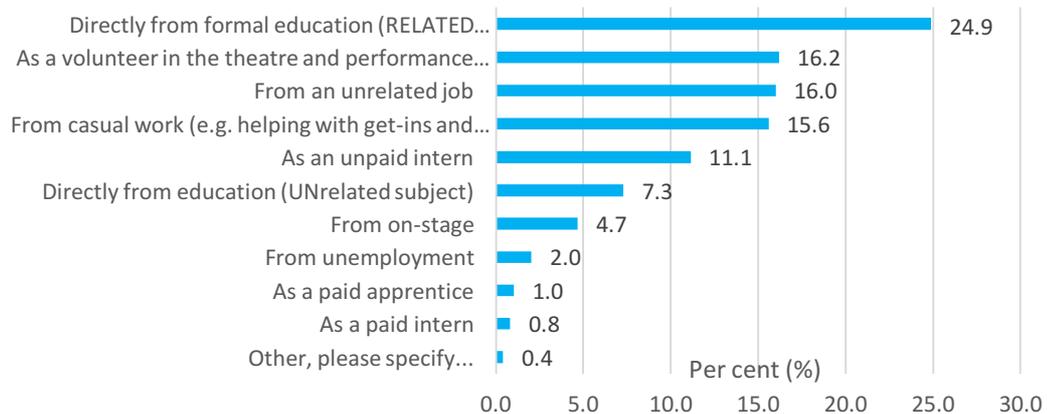
Source: Nordicity Survey (2017)
n = 495
Note: Respondents were asked to indicate the single most recent means of first entering the theatre and performing arts sector.

The English Baccalaureate (EBacc)

Many respondents expressed concern that opportunities to experience drama while at school had decreased since they were in education and they were concerned about where and whether the next generation of theatre workers would find inspiration to work in theatre. Specific concerns were raised about cultural education being side-lined from the curriculum and what this might mean for the diversity of the workforce.

"I think diversity is going to get worse before it gets better due to the EBacc. Cultural education is being crowded out, so it will become extracurricular. The government is pulling up the ladder," said one employee, working in an outreach role.

The fears expressed in our survey, focus groups and interviews echo those expressed across the creative industries, as concluded by organisations including SOLT, UK Theatre, Arts Council England, Bacc To The Future, Nesta and other sector bodies. These organisations have been lobbying the government to drop its target of 90% of students taking the EBacc. They argue that not only will the emphasis on the EBacc (which has no creative subjects) add to the decline in arts subjects, it will also act as a break on social mobility. A focus on traditional subjects to the exclusion of creative subjects is likely to most badly affect children from disadvantaged backgrounds or communities. Furthermore, they provide evidence that an education with creative subjects results in better qualified STEM (Science, Technology, Engineering, Mathematics) graduates. They claim the broadening of the curriculum is not only about positive economic impact but a matter of life chances for many individuals. [31]

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[31] Social Mobility and the Skills Gap - Creative Education Agenda Creative Industries Federation, October 2016.

The benefits of such interdisciplinary skillsets have been identified at the organisational level too, by Nesta and the University of Sussex in research, where the combination of arts and science skills results in demonstrable economic gains.[32]

Official statistics show that in 2016, the decline in students being entered for GCSEs in arts and creative subjects continued, with 8% (46,000) fewer entries compared with the previous year. With fewer GCSE exams being taken in art and design subjects, design and technology, drama, media film and TV studies, music, and performing/expressive arts.[33] This is in contrast to subjects that fall within the ambit of the EBacc.

In Professor Lacey (chair of the Standing Conference of University Drama Departments) and Bryan Raven's (vice‑chair of the National College for the Creative and Cultural Industries) oral evidence to the Skills for the Theatre Industry inquiry of the Lords Select Committee on Communications,[34] they emphasised the importance of STEAM over STEM subjects i.e. the integrated inclusion of Art alongside Science, Technology, Engineering and Mathematics, warning against the early channelling of pupils down narrow science or engineering routes as it risked driving out creativity: 'What we need are creative people who can apply technology' and '[the promotion of] the arts within broader education, not as a separate part. That would indeed involve exploring the connection between arts, as we traditionally understand it, and newer forms of technology and engineering. We can open some really interesting doors if we go down that route, and I would urge the Government to consider it'.

The importance of creativity at the heart of education was emphasised by Nicholas Serota in his first speech as the new Chair of Arts Council England, as part of a major new research initiative by the Arts Council into creative education.[35]

Looking at how the entry points into the sector have changed for our survey respondents over time also reveals some interesting patterns.

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[32] 'The Fusion Effect: the Economic Returns to Combining Arts and Science Skills, Nesta, 15 June 2016. This showed that company workforces that combined both arts and science disciplines delivered 8% higher sales growth than science-only firms.
[33] https://www.gov.uk/government/statistics/summer-2016-exam-entries-gcses-level-1-2-certificates-as-and-a-levels-in-england
[34] Stephen Lacey and Bryan Raven, Corrected Oral Evidence: Skills for the Theatre Industry. Select Committee on Communications, 14 March 2017. http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/communications-committee/skills-for-the-theatre-industry/oral/48994.html
[35] https://www.thestage.co.uk/news/2017/new-arts-council-chair-nicholas-serota-must-unlock-every-childs-creative-potential/

Figure 11: Entry Point into Sector by Career Length
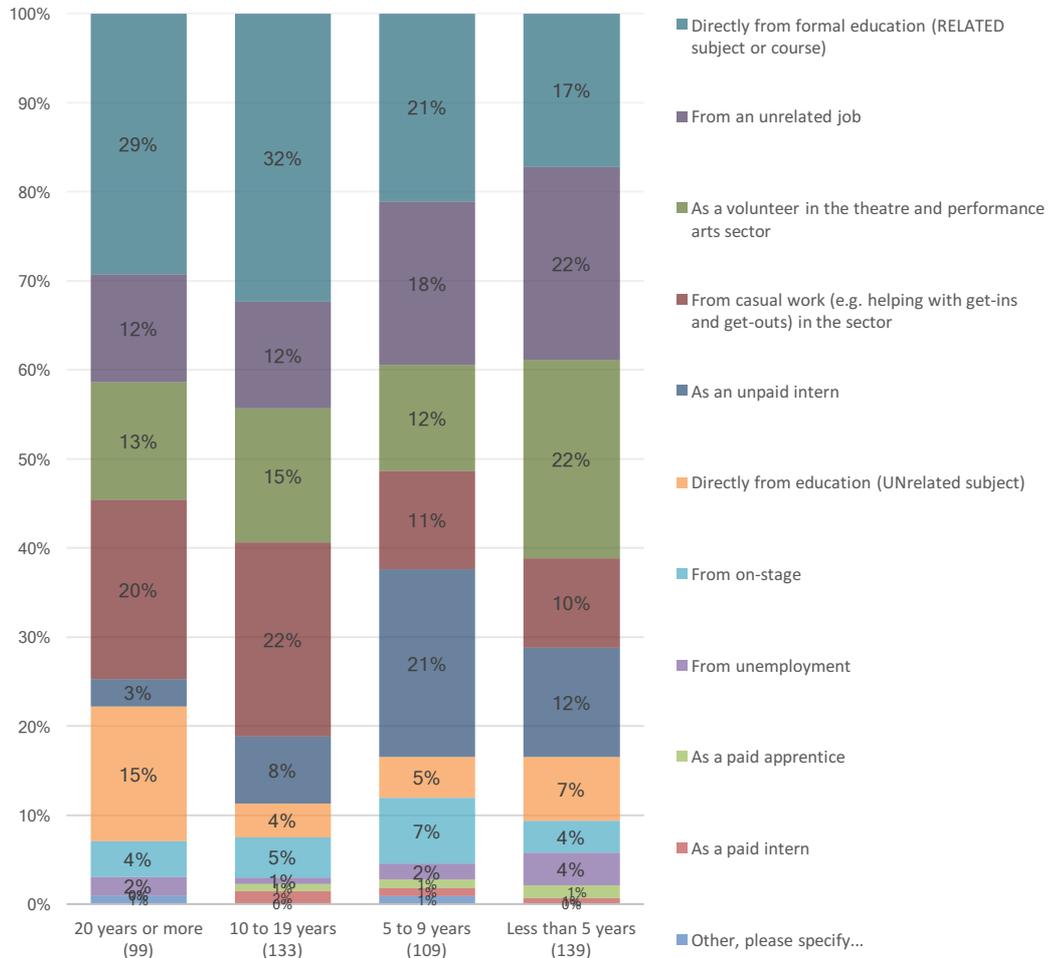
Source: Nordicity Survey (2017)
n = 99, 133, 109, 139

20 or more years ago, the main points of entry were from directly education, from a related subject (29%), casual paid work (20%), or from an unrelated subject in education (15%).

Today, the most dominant routes into a career in theatre that we found was through volunteering (22%) and from an unrelated job (also 22%, which had previously been 12% 20 years ago).

While the number of people coming into the sector from unrelated jobs appears to be growing, many London-based employers we consulted said that it was still rare to hire from outside the sector. Reporting a smaller pool to recruit from than their London counterparts, some employers outside of London indicated a greater likelihood to look for applicants from outside the sector

altogether. However, there was a general belief that the theatre sector was quite insular and did not regularly look to hire from outside.

"Moving in and out of theatre doesn't happen a lot," observed one senior manager.

Looking at the entry points into theatre as a whole, fewer people are coming directly into employment from education and significantly more are having to undertake unpaid internships or work as volunteers. While unpaid internships appear to be less prolific than 5-9 years ago, this reduction is outweighed by the increase in volunteering as an entry route to the sector (and it should be noted that the level of unpaid internships is many times greater than from 20 years ago).

Combining unpaid internships and volunteering, 20 years ago 16% came into the sector by these routes, and today it is 34%. This is likely to be a significant barrier to entry for people without financial resources and could be an explanation for why so few people working in theatre come from a working class background or from cultural communities not well-connected to the theatre and performing arts or the broader creative sector.

It was observed by many that the entry-level threshold was high in theatre with employers often expecting significant experience before securing a first job. This experience is often unpaid, so again those without financial backing and/or the networks to access these unpaid positions are at a structural disadvantage.

A common complaint was that it is necessary to have experience to get experience. It was thought that employers looking to fill entry-level roles have unrealistic expectations of the experience required by applicants.

The risk is therefore being shifted from the employer to the would-be employee, who is required to build up extensive work experience – at their own cost – before being offered a paid job.

Indeed, the unpaid opportunities entry route into the sector has increased significantly over time, mirroring findings by the IPPR across the creative industries[36].

One Nordicity Survey respondent asked: "There must be a way to encourage employers to give entry level roles to those who are actually at an entry level. My first full time and salaried entry level role in theatre administration didn't come until three years after I had left university during which time I took on a number of unpaid internships and volunteering in the industry whilst working in pubs/bars/offices on the side. I was lucky that I was able to live at home and have the support of my parents but I worry for those that don't have that luxury."

Apprenticeships, although an increasingly significant route into the offstage workforce and spoken of highly by employers per our consultation, are still very much a minority pursuit according to our survey results (see **Section 6.3, Figure 10, Figure 13** and **Figure 38**).

5.3   How do people find out about a career in theatre?

Nearly all the offstage theatre workers we spoke to first encountered theatre while they were of school age – either through school trips or from trips with their families. A number said that they pursued a career in theatre because they were not good at other subjects at school and drama was "the only thing they were good at and enjoyed".

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[36] The Inbetweeners: The New Role of Internships in the Graduate Labour Market. IPPR. April 2017.

Initially, for most, offstage options were not very visible and their focus was on performers and performance. Some initially intended to pursue a career on stage before switching to an offstage role.

Careers advice

Careers advice for the sector is failing and is overly focused on the performing aspect of a career in theatre. This was identified as a problem in The Blueprint for the Performing Arts in 2010, but little progress appears to have been made since then.

Those who had been given careers advice at school said that advisors didn't know about careers in theatre beyond onstage roles and that working in theatre was thought of as a high-risk career and actively discouraged. There was a lack of knowledge around career pathways not focused on becoming an actor. Several participants characterised careers advice when they were at school as "rubbish" and the general perception was that it had not improved much since then. This point was also made to the Lords Select Committee on Communications inquiry into Skills for the Theatre Industry by Bryan Raven: 'Our experience, both as an employer and in backstage training, is that careers advice is woeful'. [37]

In addition to careers advice provided in education institutions, there is also the National Careers Service, which respondents to our survey found to be 'not useful' (**Figure 12**). Creative & Cultural Skills, the sector skills council, provides a careers advice function, including an online hub of advice and opportunities for those wanting to work in a creative career, including an in careers service. Meanwhile, London plays host to the annual TheatreCraft, a major offstage career fair focused on people aged 16-25.

However, there was a widespread belief that there is a lack of visibility outside the sector of the roles beyond performance and that to find a suitable theatre role that isn't acting, is often the result of trial and error. Acting is frequently the primary route into theatre, often as a child, and then mentors direct and guide people in an *ad-hoc* or unstructured way. Many remarked on the fact that you need to find someone who can advise you how to find a route into theatre offstage and that this person is often discovered by chance – or via connections – rather than through a formal route. "You need an in," said one respondent.

These observations were mirrored in our survey results.

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[37] Bryan Raven is Managing Director of a technical production company and Vice-Chair of the National College of Creative and Cultural Industries. Source: http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/communications-committee/skills-for-the-theatre-industry/oral/48994.html

Figure 12: Utility of Careers Advice Experienced (per cent of respondents)
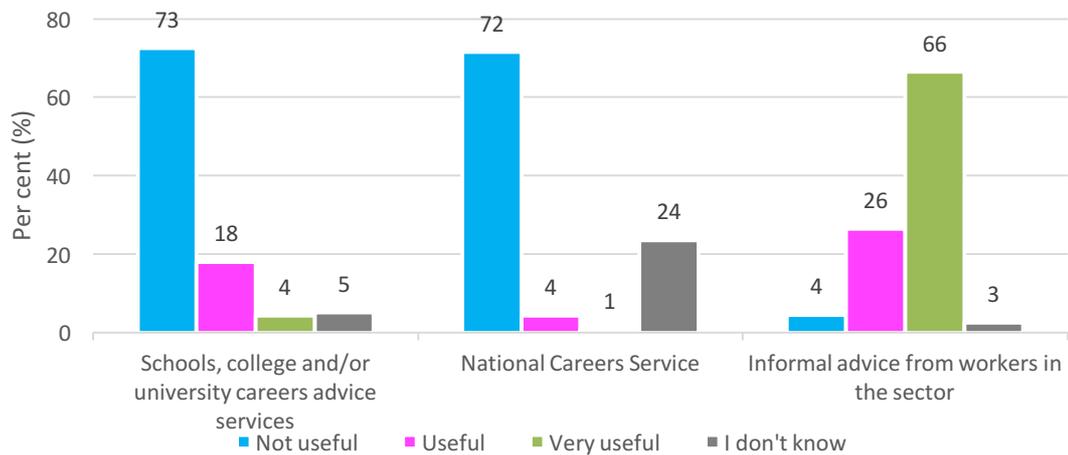
Source: Nordicity Survey (2017)
n = 433, 302, 468

Nearly all respondents had experienced informal advice from workers within the sector; 9 out of 10 had experienced careers advice services in education; and a majority (62%) had used the National Careers Service[38]. The size of each of the respondent groups was large.

Nearly three-quarters of our survey recipients had found the advice from both education and national careers advice services to not be useful, whereas, two-thirds had found informal advice from within the sector to be 'very useful' and a further quarter 'useful'.

See Text Box in **Section 6** for information about Creative & Cultural Skills.

The importance of advice from workers in the sector also underlines the importance of outreach and education programmes already undertaken by the sector.

Many theatre companies – especially those working in the funded not-for-profit sector – operate extensive education and outreach programmes. This is a part of the industry that has grown significantly in recent decades. For example, the Royal Shakespeare Company's education department has grown from a sole employee to a team of 16 and now operates across 1,800 UK schools.[39]

While operations such as the RSC's are significant, most education and outreach programmes within the sector operate independently of each other and on a smaller, local scale. There is currently little co-ordination between individual schemes.

5.4   Key challenges identified in this section

[38] The National Careers Service provides information, advice and guidance to help citizens make decisions on learning, training and work. nationalcareersservice.direct.gov.uk
[39] Shakespeare is global property – he works in diverse classrooms, J. O'Hanlon, The Stage, 9 February 2017.

1. **Lack of effective careers advice for non-performance roles.**

   There appears to be a clear role for the sector to devise a mechanism for feeding relevant advice into the careers services and to also offer it directly to individuals without contacts or existing networks. This is most urgent for those:

   a. In education or at the beginning of their working lives;

   b. In locations without strong theatre-going cultures or access to high quality performance; and

   c. From socioeconomic and ethnic groups without the networks that link in to theatre, and culture and the creative industries more broadly.

2. **Sidelining of arts in education.**

   There is a clear challenge around the lack of prominence being given to cultural education in the curriculum. If children from all backgrounds cease to be given exposure to the arts at a young age, this threatens to exacerbate many of the problems already facing the sector in terms of the (lack of) diversity of its workforce and reliance on networks and personal connections. In a sector already facing a persistent, culturally and economically narrow base of workers, and facing current and future skills shortages (see **Section 3**) a focus on the EBacc threatens the numbers and diversity of new entrants into the sector.

3. **Routes into the sector present high barriers to entry.**

   Most of the key routes into the sector have quite high barriers to entry – and this appears to be getting worse. Fewer people are moving directly into the sector from education, with more people taking unpaid positions (volunteering, unpaid internships) as a route into the sector. This limits the potential pool of applicants to those who are able to afford to work for free. Meanwhile, the increasing cost of degree-level training (and the apparent focus on employing graduates as illustrated in **Section 4**) also represents an increasingly high barrier to entry. Entry points with the lowest barriers to entry (for example apprenticeships) are still in the minority.

4. **Overly high expectations for entry-level applicants.**

   There are unrealistic expectations that new entrants need to have experience, even to get experience. While experience is likely to ease a new entrant into their role, the lack of focus on transferable skills means that individuals are being assessed in narrow terms. This is also likely to exacerbate the dependence upon people who are well-connected or financially supported, both in terms of being able to overcome a lack of experience but also in having gained experience through unpaid means.

5. **Lack of expertise and alternative ways of working coming into the sector from other industries.**

   While it has increased over the years, the number of people entering the sector from an unrelated job is still relatively low. When it comes to some of the challenges highlighted later in this report – especially around the lack of HR skills in the sector – it would appear that the offstage sector is missing out on expertise it could draw from outside the industry.

6. Pre-career training

There is a division between pre-career training that is led by the education sector (e.g. degrees in technical theatre) and some by the industry itself (e.g. apprenticeship schemes, internship schemes, work experience).

There are also pre-career training opportunities that straddle academic education and industry training (for example, work experience provided by employers as part of a university degree placements).

Many of the workers in the offstage workforce are entering the sector directly from formal education in a theatre-related subject. However, there is a huge variety in both the types of course on offer and the esteem in which they are held by the industry.

Even in 2010, *The Performing Arts Blueprint* raised the issue of the disparity between what the formal education sector was delivering and what the performing arts sector needed, and it also noted that the sector did not seem to be particularly engaged in addressing. The Blueprint identified that there was a pool of trainees that did not have the specific 'associate professional and technical' skills necessary to meet the sector's needs. This is a view that was echoed by the participants of our focus groups.

Work by Creative and Cultural Skills has in recent years been attempting to address the disparity between industry need and education product. This has most recently resulted in the launch of the National College Creative Industries (hitherto known as the National College of Creative and Cultural Industries) which started taking students in September 2016 (see text box later in this section about Creative and Cultural Skills). It is too early to see the effect of this initiative on the offstage workforce.

6.1   Provision of courses by the education sector

Universities and drama schools (many of which are affiliated to universities) offer both vocational and academic courses in theatre. Some of these are general theatre studies courses while others are focused on more specific skills e.g. directing or technical theatre.

Among focus group participants and interview subjects there was a widespread belief that it is not always clear to aspiring students which university courses are vocational and which are academic, and that (in terms of preparing students for a career in theatre) there is a significant difference in the quality of training on the vocational courses (which were deemed to be better) and the academic ones. The idea of employer accreditation of training courses was raised in focus group discussions and interviews and was generally welcomed. Work is currently underway at Creative and Cultural Skills where they are considering how they can develop a stamp of quality, which can then be awarded to training providers or courses that are delivering high quality and relevant training.

There were also concerns raised that even on vocational courses, students are often not being given a thorough grounding in the basics of working in theatre, with training often aimed at too senior a career level. There was a feeling that training does not prepare students for the reality of the workplace and early-career jobs in particular.

"I wish at drama school they taught you more than just the jobs in the West End," said one stage manager, who claimed that they had been ill-prepared for the multi-tasking approach of working in the fringe sector at the beginning of their career.

One interview subject, who regularly speaks at drama schools, observed: "As a generalisation, there's an awful lot of students that I've spoken to recently that are really focused on lighting design. And I think 'good luck with that one', because there are thousands of lighting designers out there. It might be great to do that, but you need to get the basics, because on your first day in the theatre you're not going to be doing the lighting design. Not enough are getting the basics. I was at a college a few weeks ago and was talking to the final-year students. I asked if any had actually worked in a theatre – it was only two out of 20. They're not getting enough practical experience."

That said, it was generally thought that the provision of training for backstage and technical roles is better and more widespread than the provision of training for administrative positions, which comparatively is lacking.

In England, the government is introducing new technical qualifications, called T-levels, for 16 to 19-year-olds to 'study in 15 sectors in subjects like hair and beauty or construction'. This potentially presents an opportunity for a new source of vocational training for the sector.

6.2   Provision of training by employers

55% of theatre organisations that responded to our survey still offer unpaid opportunities and a similar percentage offer internships. Currently, only 37% of employers that responded provide apprenticeships. Meanwhile, data provided later in this report shows that over half either meet the requirements of the old Apprenticeships Standards or will meet that of the new Apprenticeship Frameworks.

Figure 13: Employer Respondent Provision of Learning Opportunities
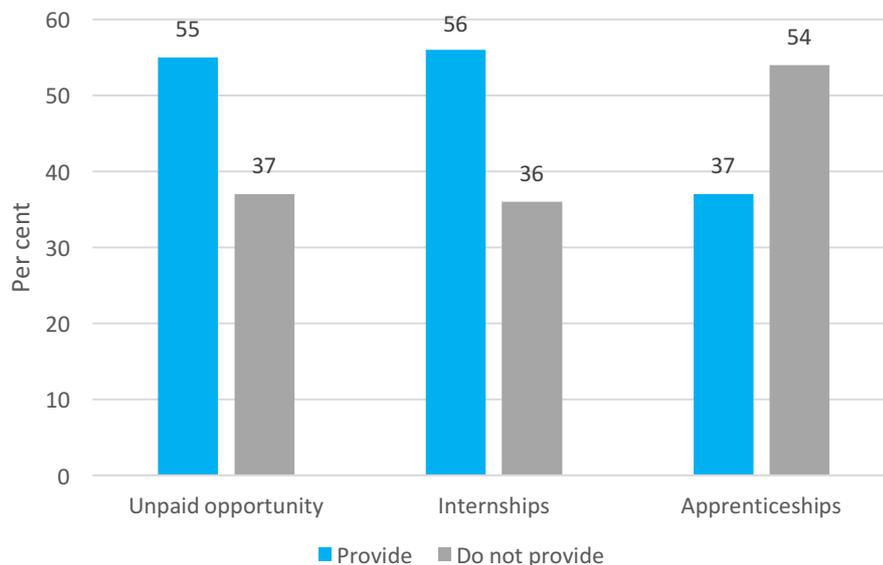
Source: Nordicity Survey (2017)
n = 92

A large majority of the apprenticeships are for 12 months, though they do vary from 2.5 months to 24 months (four are less than 12 months and five are longer than 12 months).

The duration of internships is more variable, but the large majority are either for three or six months, however, there is one for 24 months but the rest were no longer than 12 months. The length of unpaid opportunities varies wildly from a single day to 12 months.

6.3 Apprenticeships

Many of those we spoke to – both workers and employers – believed that a degree-level qualification should not be a requirement for a number of roles in the offstage workforce and that therefore apprenticeships could be a sensible route into the industry for many, especially in the technical offstage workforce.

A range of organisations currently offer apprenticeship schemes including the Ambassador Theatre Group, National Theatre, Royal Opera House, London Theatre Consortium (of 14 Off-West End theatres), Nimax Theatres, the Ambassador Theatre Group, Royal Shakespeare Company and the Chichester Festival Theatre.

While the data already mentioned above shows that there are still relatively few employees coming into the sector via apprenticeships (**Figure 10** and **Figure 38**), there is actually a broad enthusiasm and buy-in from employers for apprenticeships. Only 1 in 6 organisations we surveyed did not currently offer apprenticeships and definitely do not intend to in the future.

Because of the low level of respondents to our survey who had experienced apprenticeship training themselves, it is hard to discern how effective workers have found these schemes. The widespread perception among employers is that they are effective at training offstage employees who are well prepared for the workplace and that these training opportunities do not suffer from many of the same barriers to entry that apply to higher education.

However, participant organisations observed that there are major issues with apprenticeships at the moment since responsibility in government had been transferred from the Department for Business to the Department for Education. "The whole thing has fallen apart," said one respondent, who was closely involved with a theatre apprenticeship scheme.

It was observed that the Government wants to standardise all the categories of apprenticeships, but this is proving unhelpful for the theatre sector, as government keeps on rejecting proposals from the sector.

"Apprenticeships work, there's buy-in from the industry, but there is confusion around the Government scheme which is not fit for purpose and there is concern that the industry won't get back what it has to pay in [to the Apprenticeship Levy] if things don't change," said one employer.

There was a widespread belief from employers that the current government structure is letting the industry down. It is feared that apprenticeships will become more regulated and complex, and it will be difficult for employers to access the funding. As such, employers will need support to help them access the funding, to prevent the Apprenticeship Levy becomes a non-recoupable tax on them.

However, Creative and Cultural Skills do believe that the new system has the benefit of being more flexible than the previous regime and is working with government through the Creative Industries Council (CIC) for the Apprenticeship Levy to be used more flexibly. They believe it is an opportunity for the sector to come together, with UK Theatre/SOLT, Creative and Cultural Skills, the National College, and other leaders such as Skillscene, LTC, etc. to make the use of this resource.

Creative and Cultural Skills have been leading the work in preparing the sector for the new apprenticeships regime. This has entailed the development of three new apprenticeships specific to the sector (Creative Venue Technician, Live Technician, and Live Event Rigger) with two further in active development (Props Technician Standard and Costume & Wardrobe). Creative and Cultural Skills are also in discussions about apprenticeships for hair, makeup and prosthetics. These apprenticeships are being delivered by the National College Creative Industries.

Creative and Cultural Skills also believes that – even though a particular apprenticeship might not be badged as a 'theatre' apprenticeship – there are many others that would be appropriate for the sector to adopt, as the framework are flexible enough for the theatre context to be included. Such transferable apprenticeships exist for administration and fundraising, and the National College is transferring a customer service apprenticeship that would be applicable for ticketing and box office.

As an entry point into the sector, apprenticeships provide an excellent opportunity for the sector to address the lack of diversity in the workforce. By ensuring that recruitment is broad-based and actively tries to recruit from currently under-represented groups, the workforce will become more diverse and as a consequence of these new backgrounds being present will start to change the culture and help it become more inclusive. Given that our research has shown that apprenticeships are valued as an entry pint, providing more industry-ready recruits, the impact of this diversification is therefore likely to be more resilient workforce and may be a better long term investment.

The government's Social Mobility Commission has written on how apprenticeships in skilled trades, such as in the creative industries, have their challenges but should be encouraged, asserting that "skilled trades offer some of the highest non-graduate wage premiums, and trades such as carpentry, mechanics and electricians are facing significant national skills shortages...."[40] This might explain why there are shortages in the theatre sector which may not offer the same level of wage premiums.

Case Study – The LTC Creative Apprenticeship programme

The London Theatre Consortium (LTC)[41] designed an apprenticeship programme as part of a broader scheme run by Creative and Cultural Skills and supported by Arts Council England, called the *Creative Apprenticeships Programme*. LTC's programme focussed on talent and potential rather than experience and qualifications – rather than focussing on the traditional pipeline of:

> **University** ➔ **unpaid / paid internship** ➔ **entry-level job**

The programme explicitly targeted young people from under-represented demographic groups in an attempt to bring them into the cultural sector.

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[40] State of the Nation 2016: Social Mobility in Great Britain, Social Mobility Commission, 16 November 2016.
[41] The LTC comprises: Almeida Theatre, Battersea Arts Centre, Bush Theatre, Donmar Warehouse, Gate Theatre, Greenwich Theatre, Hampstead Theatre, Lyric Theatre Hammersmith, Royal Court Theatre, Soho Theatre, Theatre Royal Stratford East, Tricycle Theatre, Unicorn Theatre and Young Vic.

Over three years, the programme recruited 48 individuals, 62% of whom had come from non-white backgrounds and 27% had identified as disabled (mostly invisible or non visible impairment/conditions). It had resulted in: 21 'graduates' working in the sector, 11 still completing, 1 graduating from Level 2 to Level 3, with a further 2 going into further education. Two 'graduates' went into employment outside the sector and eight did not complete; the outcome for the remaining 12 was unknown.

A review of the programme highlighted a number of notable successes, including:

- it reached talented young people not currently attracted through the traditional routes;

- it provided a viable alternative to university and widening the recruitment pipeline; and

- it developed workplace skills including the building of networks and mentor relationships.

The programme was successful in establishing a deeper understanding of the limitations of and the dynamics between participants and programme, as well as identifying successful consequent adaptions. Over the course of the three years, they were able to distil their learning into a set of critical factors for success and recommended features that should be present in future programmes, including the following:

- pay Adult National Minimum Wage, critical to diversify intake;

- use longer periods for recruitment with more clarity about potential pathways, and a preparedness to support participants develop work-ready skills, if missing, at start of programme;

- offer job flexibility to allow growth in understanding and competence, and to accommodate learning opportunities, such as work shadowing;

- commit to a time commitment from employer: to line managers to actively manage; and to apprentices to college for off-site learning, seen as essential for a better learning experience;

- employ an engaged and iterative process: keep reviewing and revising programme and relationship as it proceeds, taking into account workplace realities and feedback from college; and

- include career planning early as part of apprenticeship.

Although the programme was delivered under the Apprenticeships Standards regime, the lessons learned remain relevant to the new Apprenticeship Frameworks regime and to any other organisation wishing to support *in situ* training.

6.4 Unpaid work experience

Unpaid work experience and unpaid internships as both learning experiences and a route into employment are still extremely prevalent within the theatre sector.

72% of respondents said they had undertaken unpaid work experience during their careers and 55% of employers said they currently offered unpaid work experience opportunities – some of

several months (and one of 12 months) in duration. It was considered the second most useful form of training by workers (after theatre-specific training).

Many people said that they got into the industry through unpaid opportunities and they found them useful. This points to the fact that work experience is useful for getting people into the industry, but at the moment favours those who can work for free, and is a significant barrier to those who cannot work for low or no wages.

Within our focus groups there was extensive discussion around the rights and wrongs of unpaid work experience.

"I did unpaid work experience. I didn't even question it," said one participant.

Unpaid work experience is thought of as a natural route into the industry. It is seen as the norm for many at the start of their careers.

Some said that university-organised work experience opportunities could be valuable for student and employer alike, but only if they are well structured, though many are not.

One respondent claimed that some employers are taking advantage of aspiring workers: "A lot of theatre companies take advantage of people looking for work experience opportunities. It's just unpaid labour. It's just people needing someone to work for free."

Another questioned whether universities are abdicating their responsibilities for training students to employers via placements.

"The universities are 'taking the piss' [sic]. They are taking £9,000 off the kids and then expecting arts organisations to train them for free [via unpaid work experience] - without support. It's disgraceful," said one senior manager. This was a view that was also shared by other people we spoke to.

Creative & Cultural Skills

Creative and Cultural Skills is a national charity and the sector skills council for craft, cultural heritage, design, literature, music, performing arts, and visual arts, thus, covering the offstage theatre and performing arts workforce. It works to open up entry routes into the creative industries for those with talent and potential, regardless of background or previous educational achievement. It is an independent, employer-responsive, UK-wide organisation whose duties include working with employers to:

- provide industry led and endorsed careers information, advice and guidance;
- develop new apprenticeship and paid entry level work opportunities, including the development of new apprenticeship standards and the delivery of apprenticeship training;
- grow the **National Skills Academy Creative and Cultural**: a network of employers and training providers working together at a local level to improve vocational and technical training delivery for the sector across the UK.

Creative & Cultural Skills has also played a central role in developing apprenticeships through both **Apprenticeship Frameworks**, developing a suite of **Creative Apprenticeships** in partnership with the industry and utilised by hundreds of employers across the UK to date (see

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LTC case study above); and the new **Apprenticeship Standards** as part of the Government's apprenticeship reforms in England, through employer **Trailblazer** groups. Future apprenticeship standards being developed include Creative Venue Technician and Cultural Learning and Participation Officer, amongst a number of others.

Creative & Cultural Skills tendered to set up the first **National College Creative Industries**, which was successfully awarded by the then Department for Business, Innovation and Skills in 2015. The National College started delivering its own specialist higher technical training and apprenticeships from September 2016, and now operates independently of Creative & Cultural Skills, running out of The Backstage Centre in Purfleet.

The **National College Creative Industries** offers a suite of technical training at different levels (apprenticeships and qualification at levels 2, 3 and 4), varying from one to three years, as well as addressing business skills and venue skills for the sector. These include a new Level 4 Professional Diploma, designed to provide students with the skills, knowledge and understanding necessary to work in the creative industries, which integrates automation, event management, production management, project management, senior technical, stage management, sales and hire account handlers, and service engineers. The College provides the framework for candidates to develop the practical skills and knowledge to take advantage of opportunities within the industry that typical classroom learning cannot provide.

The National College works to address the disparity between educational alumni and the theatre sector's need for industry-ready workers, which the 2010 Blueprint identified as a key challenge. Furthermore, Creative & Cultural Skills identified a need for the development of new technical skills, and in support of that effort developed a world-class technical training and rehearsal facility in Purfleet, Essex – **The Backstage Centre** – which has now been gifted to the National College Creative Industries to continue to take forward its original ambition to have technical training delivered as part of real life industry activity.

To help students, new entrants to the sector and workers in-career, Creative & Cultural Skills has developed the **Creative Choices** online hub of advice and opportunities for anyone who wants to work in a creative career including the theatre and performing arts sector.

6.5   Key challenges identified in this section

1. **Lack of clarity for students around which courses make them 'job-ready'.**

   There needs to be greater clarity for aspiring theatre workers around which university-level courses offer them vocational training for a career in theatre and which offer a more academic approach. Even on vocational courses, there is a concern from the industry that graduates are not 'job-ready'.

2. **Unpaid work experience still rife.**

   Despite efforts in recent years to clamp down on the practice (for example by Arts Council England) there is still a widespread culture of unpaid work experience as a route in and training route into theatre and the performing arts. As shown in **Section 4**, unpaid routes into employment are becoming increasingly common and this would be expected to have a knock-on effect onto the make-up of the workforce. If the offstage

workforce is to better reflect wider society, the sector needs to address the culture of unpaid work and work experience that is currently seen as a rite of passage into the industry.

3. **Development of apprenticeships as a widespread entry route into the sector.**

Apprenticeships are popular among employers and widely recognised as a suitable training route for a number of offstage roles, especially in the technical arena. They also provide an excellent opportunity to diversify the recruitment pipeline. However, there is fragmentation within the industry – a range of unlinked schemes run by different organisations not all sharing best practice – and confusion when it comes to the new apprenticeship frameworks and standards being introduced by Government. This is despite valuable work conducted by Creative and Cultural Skills in developing new apprenticeships and identifying current apprenticeship frameworks that could apply to the sector. Apprenticeships are currently a minority pursuit. If they are to be expanded, it will require greater clarity (especially from government) and cross-sector collaboration.

7. The culture of working in theatre

While in many aspects theatre is an expansive, forward-looking and innovative industry, it is also a heritage industry and quite a small, closed world. As a result, it has many peculiarities to its working practices. Many of those that were uncovered in the course of our research were highlighted as areas of complaint by some respondents, but regarded as 'just the way things are in theatre' by others. This variety of response applied as much to workers as it did to employers. It should also be noted that many respondents also highlighted the many positive aspects of theatre's working culture, including some that were the flip-sides of the challenges discussed below. There was also a particularly strong dimension to many of the focus group attendees' motivation for working in theatre, citing the power that theatre had, in an altruistic or highly personal way, to impact upon audiences, contribute to public discourse and act as a catalyst for social change for the betterment of society.

7.1 "The show must go on"

One of the most prevalent criticisms from the workers we spoke to – across both junior and senior members of staff and freelance workers – was of a working culture in theatre that expects staff to work long hours for low pay and is inflexible when it comes to working arrangements. Going above and beyond is considered the norm. This was a challenge that was also acknowledged by many employers we spoke to.

It was felt that due to the high demand from workers for jobs within the sector, workers (especially freelance workers) are sometimes treated as a disposable resource and are expected to work unsociable and long hours with little reward. It was observed that this is a culture that is promoted as much by colleagues as by employers: part of a general ethos within theatre. It was acknowledged that while this does have obvious benefits for the industry – for example a committed and hard-working workforce – it also has a number of serious downsides.

"There is a belief that if you don't work all hours, you are not as committed to the work as your colleagues. This is the negative side of the 'show must go on' mentality".

One focus group participant observed that burn out can be "almost seen as a badge of honour" within the industry.

Many observed that while this attitude can be sustainable during the early stages of a career, it often becomes untenable when responsibilities outside work (for example childcare) intrude. And so, the culture has a disproportionate effect on women, as a well as a negative impact on men who do have childcare responsibility, as employers assume that they do not.

There was not universal agreement on this subject though and some people felt that if you want to work in the theatre industry, you have to accept that hours will be long and unsociable.

One manager observed: "If my head of marketing didn't want to watch a show because they didn't want to work in the evenings, I'd think they shouldn't work in theatre, they should go off and market baked beans".

However, others stressed that while evening work (for example) is crucial for some roles, a more flexible approach could be adopted by employers when it comes to other roles. This does not happen, it was observed, because of a prevailing culture that is not open to the concept of flexible working – even when it is eminently possible.

One respondent observed: "Flexible working is not impossible. I think there are two problems. One is the attitude of employers who think about the negatives rather than the positives. I also think that flexible working legislation is unhelpful – you've got the right to ask and that's about it. I think changing that would be a big step in the right direction. Flexible working would enable employers to retain staff and would allow them to have a much more diverse workforce, certainly in terms of gender.

"Without a doubt, theatre is losing expertise because of this. Some people leave the industry, some go freelance, some get a 9 to 5 within the industry."

7.2   A "Peter Pan industry"

"Theatre is a young person's game - as a freelance designer as soon as you have children you do not have the flexibility to move to find work or be able to work the hours at night on tech week, also you cannot get a mortgage. I got my first mortgage only when I started teaching theatre design. My kid is almost grown up, so I have more flexibility to move to find work, but wages have not kept up with inflation and budgets are lower, so the workload has increased. People in the industry today are rich kids who can afford to work as interns for free. Theatre is smug – no longer a place that challenges the status quo – consequently theatre is dying," said one Nordicity Survey respondent.

Long-term career planning is often absent from workers' thoughts whilst succession planning is often absent from employers' thoughts. Like many artforms, there is an inherent culture of 'short-termism', a symptom of a sector focused always on delivering the next project. One stage manager said that there was a regular conversation among colleagues: "What will you do when you're done with theatre?".

There is a recognition that short-termism may also be a result of decisions made on limited investment, where the impetus is to make great art with available funding – rather than to invest in organisational development. This is despite the existence of support structures such as Arts Council England's Catalyst programme support organisational development by investing in fundraising and professionalisation.

Theatre is not seen as an industry that can sustain a full career by some offstage workers – especially freelance staff. Many commented that you reach a point in your career when you hit a ceiling, or your personal circumstances change and you opt out of the industry because of the late nights, long hours and low pay. This often coincides with wanting to start a family.

"For years everyone has been told that we do this for the love of it. That has become ingrained in the sector. But, when you have a baby, it hits you like a truck that you can't do that," observed a senior manager who had children.

One lighting designer said a question he often wondered about was "Where do old lighting designers go?".

There is a perception that for many technical offstage roles there is a limit on how far you can progress within the industry doing the job you trained for and were expert in. There comes a time when you either accept being stuck mid-career or you try to make a lateral move into a management position or office-based role, which may not suit all workers. This mid-career blockage not only stifles the individual but it also reduces the opportunities for younger technical offstage workers coming up.

Figure 14: Career Length of Survey Respondents
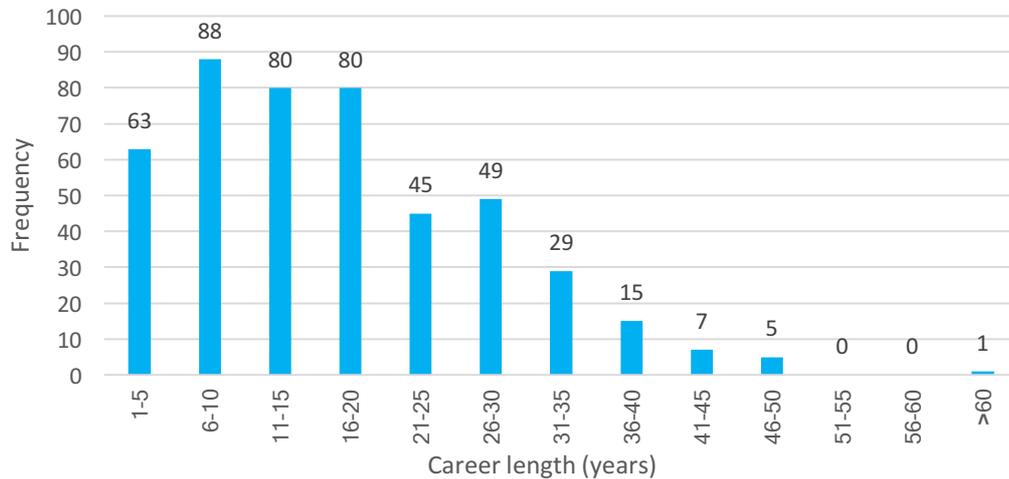
Source: Nordicity Survey (2017)
n = 462

Caring responsibilities

While the survey responses drop off significantly for people working in the sector for over 35 years, it is recognised that many people continue in their field beyond this. Meanwhile, as our working lives are getting longer and we're retiring older, our sense of a 'career' will also change.

However, there is an initial drop-off after 20 years in the sector for workers responding to our survey, which is perhaps more significant.

While this could be due to the self-selecting nature of the survey, it might be tied in to an age when caring responsibilities for children or older family members kick in with a consequent flow of people out of the sector. This would tally with the relatively low level of caring responsibilities from respondents to our survey, highlighted in **Section 4**.

Speaking to focus group respondents and interview subjects, this is particularly the case for women, although it should be noted that many male respondents also voiced the same concerns.

One focus group participant said: "Childcare and caring responsibilities is the biggest barrier to women in theatre".

Many of the women we spoke to for this report had personal experience of difficulties remaining within the industry when they had children – often in their mid to late 30s.

The reasons for this were multiple: pay levels, lack of receptiveness from employers to flexible working and the loss of networks during maternity leave were all raised as key factors. Many of these concerns were amplified for freelance workers.

One female freelance worker said: "I felt the need to keep my pregnancy secret. I worried that a line would be put through my name once people found out. I know very few mothers who work in my line of work. I'm eight months pregnant and I don't know if staying in my current job will be a viable option for me, so I've started to look at other things I might be suited for, but it's hard to know which skills might be transferrable."

It was observed that when both male and female workers hit this stage in their career there is a lack of advice available about how they can transfer their existing skills into other areas of the theatre and performing arts business. As the graph on 'why people work in theatre' shows (**Figure 9**), many staff are more keen to work in theatre than in a specific job in theatre, so lateral moves within the industry should be possible if employers are open to facilitating these alternative career moves.

Another female employee observed on returning to the sector after having a child: "I was absolutely appalled by the attitude to flexible working in theatre. I think there's an attitude that 'we're going to need the person all the time'. You are not buying a person, you are employing them."

Research from Parents in the Performing Arts has found that flexible working (often for accommodating caring responsibilities) is popular but largely untested, and where solutions had been found they had been at the behest of the employee and been arranged informally. [42]

There are some initiatives onstage, such as the Mercury Theatre in Colchester, which has introduced a crèche during its auditions, but, in general, industry childcare options are currently almost non-existent, although in Parents in the Performing Arts there is a campaigning organisation that is seeking to improve the situation.

7.3   Organisational culture and personnel management

Research by the UK Commission for Employment and Skills into productivity in the creative industries has highlighted the potential of "developing more formal and broader hiring practices" for improved productivity across the creative industries.

Meanwhile, the project-based business models seen in theatre production are common across the creative sector. They lead to a sector that is flexible and responsive. The downside is that staff have to dedicate time to tasks for which they are not necessarily trained and for which the structures are not necessarily in place to best support effective working. [43]

It was observed by many respondents to our research that while theatre shows a great ability and desire to innovate onstage, its attitude to recruitment, as well as conditions and working practices offstage is often outdated and inflexible. A fundamental issue for the theatre sector is to take professional skills, such as good governance, finance and HR, seriously.

"In theatre, the working practices are self-perpetuating. They don't innovate. They say 'this is the way we do things'."

"On the one hand we're about innovation, but if we were, we would be more like tech companies. On the other hand, we're part of the past."

These two observations from focus group participants were typical and was echoed by responses to our survey and in interviews.

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[42] Best Practice Research Project: Interim Report, T. Cornford, Parents in Performing Arts, December 2016.
[43] Understanding the future of productivity in the creative industries, R. Brighton, C. Gibbon and S. Brown, UK Commission for Employment and Skills, April 2016.

There was a widespread acknowledgment that HR and people management skills are seriously lacking and undervalued within theatre. Old fashioned attitudes from senior management and a lack of outside influence from other, more progressive, sectors was cited as a reason. It was observed that there is a lack of a CPD (continuing professional development) culture in the industry and middle-management "often don't actually realise they need to be managers", but are people who have been promoted because they have been in their job for a long period of time.

Professor Lacey, in his evidence to the Lords Select Committee on Communications, made the point that if there was investment in CPD, not only would skills shortages be more easily identified but they would be addressed at the same time, all part of 'a rounded ecology of training and education' in addition to pre-career education. [44]

It was felt there is a lack of a long-term approach to the workforce because theatre is so focussed on working from one show to the next.

"The play's the thing". One participant observed that this means that – even if an organisation is being badly run behind the scenes, if the show is deemed a success everything else is forgotten.

"People prioritise short-term returns and the work on stage rather than developing the workforce – it is a hand-to-mouth, show-to-show industry. We have to change this. You can't run an organisation the way you run a show."

There is a feeling that often people are promoted to management positions either because they've been around for a while, or they are very good at their profession, rather than because they will be good managers. Then they aren't properly trained.

There is also a widespread belief there is not enough churn within the sector and away from the sector. This means that once people get into roles, they can stay there for a long time. While this can have significant benefits in terms of experience, it also means that there are blockages for more junior members of staff and a lignification of attitudes due to a lack of exposure to new circumstances. It was also observed that when long-serving members of staff become stale, there was not a willingness or ability to move those people on, out of an organisation. This could be a result of the perceived shortage of HR skills in the sector.

One senior manager said that they believed theatre as a whole "didn't take HR seriously enough because demand for jobs is so high".

Another senior manager, who had worked in another unrelated sector prior to coming into the theatre industry working for a major national organisation, said that personnel management process and technology at the organisation they joined "felt like I'd gone back to the 1970s".

"The theatre industry is poor at devoting resources to people".

"As a sector, we're not very good at developing talent."

One former offstage worker responding to our survey, when asked why they left the sector, clearly highlighted some of the HR problems that had been flagged elsewhere.

"I got fed up with the poor human resource management in theatres."

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[44] http://data.parliament.uk/writtenevidence/committeeevidence.svc/evidencedocument/communications-committee/skills-for-the-theatre-industry/oral/48994.html

They went on further to say, "the industry needs to have a sensible discussion about what skills do full time staff need… [including] training for managers in Human Resource issues."

These were consistent complaints across all types of organisation and across both the subsidised and commercial sectors.

7.4   A two-tier workforce

There is also a widespread concern that some areas of offstage talent are not given the respect they deserve when compared to creative talent. One person spoke of a "two-tier system". There was a feeling that there is one rule for creative talent and another for everyone else.

It was observed that while employers are willing to invest in creative talent, when it comes to investing away from the stage – for example in so-called 'back-office' functions – costs are often cut, resulting in many theatre companies using out-dated computer software, for example.

This is a linked problem to the culture of short-termism highlighted above: a symptom of the same attitude that focuses on short term results of a show over the long-term benefits of a well-run organisation.

7.5   Why do people leave the sector?

In our survey we asked people what pressures might lead them to leave the sector. We also asked those people who had already left the sector what had caused them to leave. While the results from the latter segment (**Figure 40**) were from too few people to be statistically significant they did tally with the results from the graph (**Figure 15**) below.

Figure 15: Respondent Reasons They Might Leave the Sector
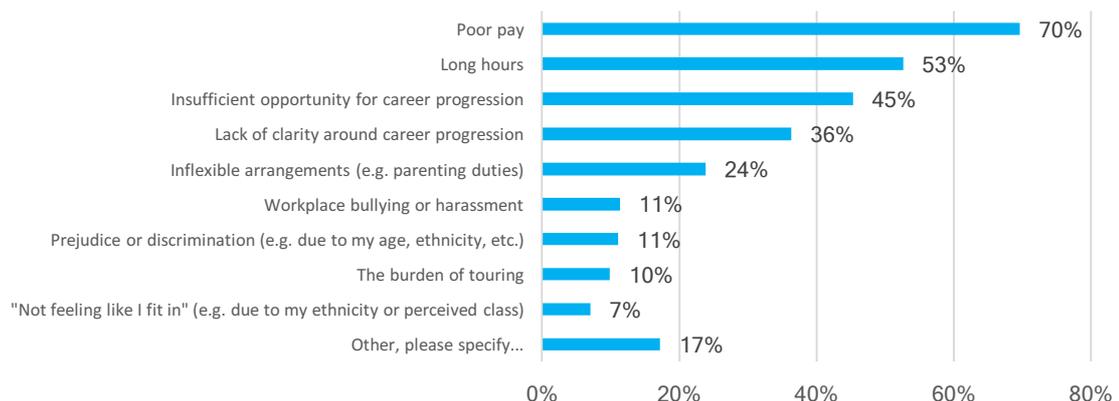
Source: Nordicity Survey (2017)
n = 423

It is notable that while very few people got into theatre for money, it was the most significant factor in why our survey respondents might leave the industry. There were some changes when the responses from those having left the sector was split between London and the rest of the UK (**Figure 40**). One major employer noted that "low pay felt like a large elephant in the room".

Figure 16: Current Offstage Worker Concerns by Geography
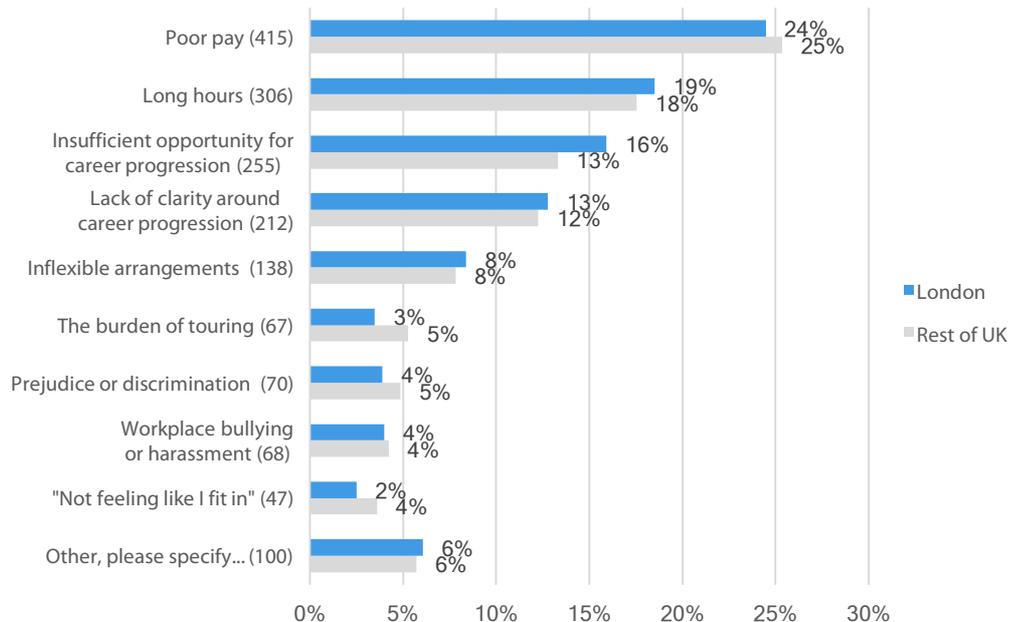
Source: Nordicity Survey (2017)
n = 473

In focus groups and interviews, the cost of living in London was repeatedly raised as a concern for workers and it was thought that the rates of pay in the sector had not kept pace with the increased cost of living in the capital. It was also noted that much of the theatre sector was focussed on the very centre of London where house prices were completely unaffordable for those working in the sector.

One interviewee commented: "There is a London premium when it comes to pay but it has been getting eroded. If you're in a major theatre in a big city in the UK outside London and you're full-time employed, you may well be better off than your contemporaries in London because of cost of living and quality of life."

"In London, in the subsidised sector, pay has not kept pace with inflation."

"I think part of the problem is that if you're younger in London, how the hell can you get a house? The cost of housing – even if you double or trebled some of the salaries people are earning – people are going to struggle to afford a house unless they move further and further out, but then you're working long hours and the travel time and cost increases."

7.6   Key challenges identified in this section

1. **Culture of over-work.**

   One of the theatre and performing arts sector's great strengths is its committed workforce. In most parts of the theatre industry there is not perceived to be a jobsworth culture and (as illustrated in **Section 4**) most people love working in theatre. However, it is clear that this high level of commitment from staff – and the expectation of this commitment from management – also has its downsides.

The willingness of staff to work long hours – often outside contracted work hours – creates a potentially unhealthy, all-encompassing working culture that can lead to burn out and can cause people to drop out of the industry when they have other external time-commitments, for example a family.

Maintaining a committed workforce, while protecting their wellbeing and creating a working environment that is suitable for workers with other life commitments outside their profession, is a challenge that, while leaders of the tech sector are making strides[45], theatre has yet to fully address.

2. **Inflexible attitude to caring responsibilities leading to talent drain.**

Linked to the above – and to the observations in **Section 4** – is the challenge of keeping skilled workers within the theatre industry. There appears to be a talent drain out of the offstage sector in workers' 30s and early 40s – after around 20 years in the sector. Paired with the low level of caring responsibilities, this could suggest that the theatre workforce is losing experienced – and talented – workers as they leave the sector to raise children or care for their families. This represents a loss of human capital – the investment in the skills of the workforce by employers and workers themselves. At the very least this is an opportunity cost and even if the outflow of new workers into the sector is offset by the inflow, this does not mean that the most talented workers are being retained or the less talented are leaving.

The theatre industry's inflexible attitude to carer responsibilities and the difficulties this causes workers, was repeatedly raised by participants of our focus groups and interviews. While this is by no means a problem unique to theatre, the frequency with which it was remarked upon was notable. The 'show must go one' culture of working in theatre has many positives, but its inability to allow flexibility in working arrangements for those who cannot adhere to antisocial working hours and practices is clearly resulting in a loss of skilled labour and is adding to the concerns and pressures for those that do remain within the workforce.

3. **Existence of a workplace culture where new entrants are exploited to get a foot in the door (a 'tournament culture' within theatre).**

As is common in other industries in which the demand for jobs outstrips the number of roles available, personnel are undervalued and HR processes fall short of best practice. In keeping with other 'glamorous' industries, like the media, there is what "some academics refer to as a 'tournament' culture where aspiring entrants compete with each other for no, or little, financial reward in order to gain the contacts that will enable them to find their way later on into a paid position".[46]

This 'tournament' culture extends from entry level, when entrants are expected to work unpaid before taking on low-paid entry level jobs for which they are often over-qualified. Workers are expected to work long hours, often for low pay, in a bid to progress within

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[45] In order to improve well-being and cultivate great leaders among staff, Google has developed a long-term study of its employees called gDNA, to gain insight into how happiness affects work, and vice versa.
[46] Understanding the future of productivity in the creative industries, R. Brighton, C. Gibbon and S. Brown, UK Commission for Employment and Skills, April 2016).

the industry; many then drop out of the industry at a point when they realise that they are unlikely to progress to where they want to be.

This system leads to a workforce that often feels disposable and undervalued. While there is an element of 'survival of the fittest' or 'the cream rising to the top', one would expect that the offstage workforce is also losing talented workers or those yet to fulfil their potential, due to the lack of value it is placing on personnel.

4. **Offstage workforce feels undervalued.**

There are parts of the offstage workforce that feel particularly undervalued when compared to their colleagues. Many believe there is a two-tier system at play within the offstage sector. Due to the primacy attached to the value of the creative process, those working in so-called back-office functions often feel undervalued when compared to their colleagues working in so-called creative roles. Compared to those colleagues, they are under-recognised both publicly and within their organisations. These are often the very people who will have skills that are directly transferrable to other industries in which they could probably earn more money, so if theatre wishes to retain and attract the best and brightest in these back-office roles then it needs to recognise their value.

Notably, there was a conscious effort do this at the Olivier Awards this year, while management categories are already incorporated into the UK Theatre Awards and The Stage has for some time recognised offstage talent through its Unsung Hero Award. At the time of writing, a new annual backstage awards is also being established to launch in 2018 by an industry collective led by the National Theatre, with an aim to "celebrate diversity and excellence in technical theatre production and seek to raise the profile of industry roles". To date, however, offstage awards remain less high profile than the sector's on-stage awards. Building on these strides, there also needs to be an increased effort to recognise these workers, and their value, within organisations.

5. **Culture of short-termism.**

Theatre and the performing arts excels at project-based working. Its stock-in-trade is creating shows. However, there is a difference in the skills, attitudes and approaches required to stage a successful show – often delivered in a very short time frame and with workers who have come together specifically for the project – and running a successful organisation on a long-term basis. The actions and reactions to the challenges a show may face day-to-day are not the same that would make an organisation (or the sector) resilient and efficient in the medium to long term.

A culture of short-termism prevents the sector from giving due prominence and consideration to the long-term development of organisations and individuals in the sector. This has resulted in a perceived lack of professionalism, especially in areas (for example HR) that other more traditional sectors take for granted. The sector must find a way to better balance the ongoing importance of short term goals (creating a successful show) with its long-term aims.

6. **Cost of London living and London-centric nature of theatre.**

The theatre industry is heavily focused on central London. There are many good reasons for this – for example tourism, infrastructure and heritage – but for a workforce that is generally low paid, this presents specific challenges.

House prices in central London are completely unaffordable to all but the most senior people working within the sector. As house prices increase, the workforce is being forced further out of central London, often in rented accommodation. While this is a problem for many people working in London, it is particularly acute for offstage theatre workers who often have to work unsociable hours before travelling out of central London late at night to where they live. While there is a London premium for those that work in the capital, this has not kept up with the increasing cost of living in London.

As theatre staff are not classified as key workers, they do not have access to certain lower-cost housing options that would allow them to live more centrally and closer to their place of work.

8. In-career training and development

If a workforce is to maintain and develop its skills, it is crucial that there are in-career training options available. In an industry such as theatre that has seen significant technological advances (e.g. stage automation, live screenings of theatre productions) and is expected to continue to do so (impact of augmented and virtual reality [AR and VR] for instance) this is even more the case. Meanwhile, if the workforce is to keep hold of its best workers, it must also offer development opportunities so that workers are able to progress in their careers. First through our survey and then through the focus groups and interviews, we investigated what training opportunities are available to workers and how these are paid for and scheduled.

8.1   What in-career training is available?

According to the results of our survey, employers offer a range of training opportunities for their staff, with only 5% not providing any. The types of training are quite varied and the mix covers unstructured (most prevalent but still a minority) and structured training.

However, this is in relatively stark contrast to workers' own stated experiences (the reality is probably somewhere in between). Workers said that employers encourage workers to develop their careers but do not provide much paid time off to do so.

Figure 17: Types of In-career Training Supplied by Organisations (per cent)
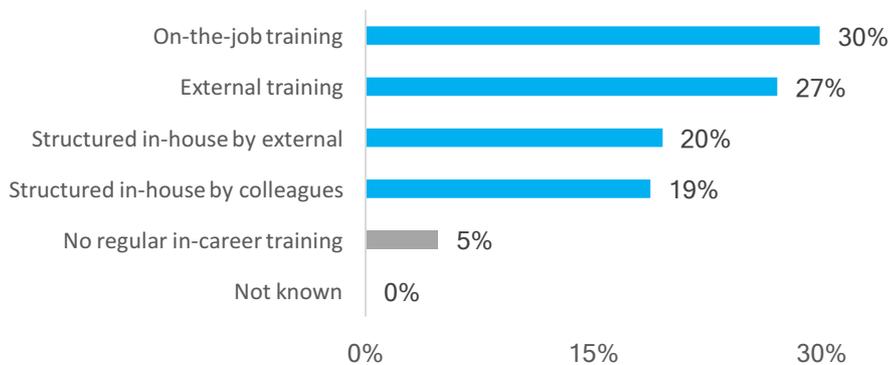
Source: Nordicity Survey (2017)
n = 251

This tallies with anecdotal evidence from the focus groups and interviews where workers said that the majority of in-career training was on the job, unstructured and *ad hoc*, except for in very specific areas such as health and safety training for backstage staff.

This last point might explain the higher incidence of paying for training compared to providing paid time off i.e. there are statutory requirements that mean that employers need to ensure the workforce is sufficiently skilled in specific health and safety areas, because without a qualified individual present a performance would not be allowed to proceed.

Lack of time and the cost of training were both cited as barriers.

One manager observed: "We're all just churning along and don't have time to train people".

For technical offstage workers, training is often through unstructured mentoring on-the-job, rather than structured training. "You have to take your own initiative and get other people to help you if you want to learn a new skill," said one worker.

Another, no longer in a hands-on backstage position, added: "In terms of career progression and in-career training, I never had any training and I worked in the industry for 20 years. You just sort of picked it up from colleagues. That has changed. There's a lot more health and safety training and vocational training with new technology, often that is offered by the suppliers. The biggest training change is around health and safety training which is now much more common."

It was observed that 5-10 years ago employers and union BECTU had attempted to secure a 'skills-based agreement'. However, the final proposals put forward by employers were rejected in a ballot of BECTU membership. An agreement of this kind may have encouraged greater training and skills development within the technical offstage workforce.

8.2   Focus on freelance staff

Part of the discrepancy between the amount of training that employers believe they are offering to staff and the lack of training that staff believe they are receiving could be due to a high proportion of freelance staff working within the sector.

Around a third of offstage and technical union BECTU's membership is freelance and it is the norm among many creative roles in theatre, and over a quarter of our survey respondents identified as freelance offstage workers. Indeed, many sub-sectors across the creative sector have high levels of freelancing and self-employment either supporting artistic content creation or in forming teams that are created for specific projects e.g. a touring theatrical production.[47]

Research by Parents in Performing Arts found that parents working in theatre were "much more likely to be self-employed than the average worker, with 45% of respondents declaring self-employment as compared to 15% nationally". [48]

In other industries, it would be expected that employers would pay a premium to freelancers and the freelance staff would up-skill themselves by paying for their own training in their own time.

However, in our focus groups there was a perception that this was not happening in theatre – principally due to low levels of freelance pay.

It was also thought that freelance staff were very rarely given feedback on their performance and were treated as a disposable resource. If a freelancer performed in an unsatisfactory way, they were more likely to not be hired next time than receive feedback on how to improve

For an industry relying so heavily on freelance labour, this is a serious concern – especially when it comes to ensuring that the technical workforce keeps up-to-date with advances in stage technology.

"People are better at briefing than debriefing in theatre," one respondent observed.

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[47] Understanding the future of productivity in the creative industries, R. Brighton, C. Gibbon and S. Brown, UK Commission for Employment and Skills, April 2016.
[48] Best Practice Research Project: Interim Report, T. Cornford, Parents in Performing Arts, December 2016.

One employer said that when they offered appraisals to freelance staff, "They always say it's the first time they've had appraisals".

One exception is on very long-running shows, where it was thought that producers often took steps to develop their long-term freelance staff.

Producer Caro Newling, writing in The Stage: "Over six years [on Charlie and the Chocolate Factory in the West End], I have seen the resident creative teams graduate to become associates, and go on to make their own productions. Assistant stage managers have become company managers and starters in automation departments have graduated to captain of the ship...long-running shows of scale are like universities where skills can be developed over time."

All the freelance staff we spoke to referred to the precariousness of their careers and how they lived from job to job.

The reliance on networking (see **Section 9**) to source work has particular problems for those in freelance positions – especially when it comes to taking any period away from the industry, for example to have a child. In a fast-moving industry, networks can melt away quickly and many parents we spoke to discussed their fears of losing networks either due to time off to have children or because of the difficulty of networking when they have childcare responsibilities. These difficulties are magnified if both partners in a relationship are freelance offstage theatre workers.

In a sector relying evermore on freelancers, notions of a 'gig economy' have arisen across the creative industries. However, the common notion of a gig economy differs from the reality faced by theatre and performing arts freelancers. At the time of this report, the Creative Industries Federation was undertaking a piece of research mapping the creative freelance workforce and demonstrating the importance of these workers to the health of the sector. Eliza Easton, deputy head of research and policy, Creative Industries Federation, noted that "This work will demonstrate the valuable contribution of creative freelancers and show the ways in which they are different from those working in the 'gig economy'. It will also address current policy issues affecting freelancers from visas to affordable workspaces and universal credit."

Indeed, the debate around the gig economy is very much alive, with new case law being developed around it. For many offstage workers, the flexibility afforded by freelance or casual work is seen as an important part of their working structure. And while zero hours contracts are appreciated by many, contracts with any exclusivity requirements are derided as unworkable in the sector.

Case-study: Freelance designer

"I am in a double showbiz couple. The all-encompassing nature of working in theatre means it can be hard to meet people not working in the industry, so the interesting question is whether there is a higher incidence of people working 'in showbiz' ending up in relationships with people working 'in showbiz' than of people in other industries.

"Once you get into a 'double showbiz' relationship and, particularly, if you end up with children, then that does significantly increase the complications. Having two people working long hours and/or into the evening at the same time is very hard. Since having children we have worked together on the same show at the same time once, towards the end of which our then-four-year-

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old had a medical emergency. Fortunately, it was late enough in the process of the show that we could take it in turns to be at the theatre or at the hospital, and the grandparents' network kicked in to look after the other kids. All of the people on the show were very understanding, but there was a clear sense that slightly different timing or slightly different people could have made for a very awkward work situation.

"Since then, we've been quite successful at 'offsetting' shows, so that one of us can be working on the planning stage of a show while the other is in production. That this has worked over the last year or so is more down to the luck of the timing of the shows than any master planning. We have no control other than by deciding which jobs to accept and which to turn down - except then there is that morbid freelancer fear of turning anything down, since declining something tends to not just be that job, but also possible future jobs. In other industries, you'd work around this by setting up companies that supplied suitable labour in your absence, but theatre generally seems not to want to work like this.

"Plus, because you're offsetting projects, there will inevitably come a time when one person is working and the other isn't - which means that you effectively drop down to being a single-income family rather than a double-income family. Except because of your self-employed status you can't necessarily then claim unemployment or other related benefits.

"Again, over all of this, is the fact that the government support system is stacked against the self-employed while at the same time employers are desperately trying to move people to being self-employed because it saves them the additional social care costs. This is a much wider problem than our industry.

" I suspect the long-term result might be one of the couple dropping out of showbiz to supply some stability. As I suspect is also true far beyond our industry, when children are involved, that person will often be the woman.

"Added to this, there is the sense that you need to 'make it' before you can turn to having a family etc. 'Make it' in this context usually means not just getting to the point of being recognised for what you do and regularly employed, but having some kind of commercially successful show that pays a weekly payment or royalty which forms the 'fall back' plan. This gives you a little regular income you can rely on that then gives you the freedom to turn down projects. Getting to that point, of course, takes time, effort and luck."

8.3   Key challenges identified in this section

1. **Lack of CPD culture.**

    There is an almost complete absence of a continuing professional development (CPD) culture from the theatre sector, certainly in any structured way. The most common form of in-career training is unstructured, on-the-job training. This is in-keeping with approaches to training pre-career and routes into the industry, which are often *ad hoc*, through networks rather than formal, structured routes. The lack of formal in-career training should also be seen in the context of the observations in **Section 7** around the lack of importance placed on HR and personnel issues, and the lack of a CPD (continuing professional development) culture. This is a cultural issue within the theatre sector, which appears not to place value on formal, structured approaches to personnel

development. Instead, training opportunities are often through networks and contacts, favouring those who already have access to those networks and contacts.

2. **Freelance staff insufficiently trained.**

   Theatre is heavily dependent upon freelance labour and so a business model that in part is passing the cost of human capital investment on to the individual without financial compensation, is at risk of stemming the flow of the skills pipeline. The sector already has skills shortages and anticipates those shortages becoming more acute. The underinvestment in maintaining and updating skills will only contribute to that further.

3. **Lack of feedback for freelance staff.**

   There is a linked challenge with regards the development of freelance staff when it comes to supplying feedback on performance. There is a contradiction at play between the perceived disposability of freelance staff and the perception of skills shortages in many areas that are served by freelance staff. This might suggest that due to a pervasive 'show-to-show' attitude and the fast-moving nature of theatre, there is currently little short-term incentive to invest time in feedback to staff with whom you may not work again, resulting in an underskilled workforce. Together with the challenges above, this feeds into a large section of the workforce that does not know how it can improve its performance and skills and is not being incentivised to do so.

4. **Lack of in-career training and advice.**

   The lack of in-career training opportunities should also be seen in the context of a lack of in-career advice for workers and the drop-off from the industry seen in mid-career highlighted in previous sections. There is a challenge – and a potential opportunity – for the sector here. Many of the workforce profess to love theatre more than their specific role within theatre, so there could be an opportunity for more in-career training options that help theatre workers make lateral moves within the sector far easier and on an informed basis – either to progress their careers, or to allow for changing life circumstances (for example the need for a 9 to 5, office-based job).

5. **More joined up careers advice**

   In addition to careers advice being lacking, where it is available it is either not being found or is found to not be useful. Therefore, any upgrading and expansion of careers advice will face a 'discoverability' challenge. This challenge not only applies to those looking for in-career advice but to students and new entrants from other sectors.

6. **Absence of a skill-based collective agreement**

   A major overhaul of the SOLT/BECTU collective agreement was first suggested in 2006 by independent consultant (and then Opera North operations and technical director) Ric Greene. He recommended that SOLT and BECTU tried to develop a skills-based collective pay agreement for offstage staff in West End theatres. It called for the development of an "agreement that rewarded additional skills learning and to underpin a structured career path [in order to] raise overall standards across the industry". It was acknowledged as a radical, long- term solution. However, notwithstanding the extensive work that was undertaken, eventual proposals were rejected in a ballot of BECTU membership. The challenges identified in 2006 by Greene remain.

9. Exclusion

One of the recurring themes of our research was of theatre as an exclusive world. This was backed up by the demographic data in terms of the people who responded to our survey, as discussed in **Section 4**.

Perhaps more startlingly, in terms of BAME representation, little appears to have changed since the time of Creative and Cultural Skills' Performing Arts Blueprint in 2010, (6% then and 7% in our survey), though female representation was at near parity (49%) then and is at 56% in our survey.[49]

At a sectoral level, the Analysis of Theatre in England study by Arts Council England reported that within the National Portfolio Organisations of ACE, the proportion of BAME workers (13%) is slightly higher than the overall workforce in England (12%), however, given that many of these organisations are in large urban areas where BAME populations are higher, there remains an under-representation in terms of the local labour markets in many areas (including London). Furthermore, BAME leadership is rare. Under-representation, both in the workforce and in leadership roles, of disabled people continues.

There has been, admittedly from a very low base, an increase in BAME representation of 34% between 2011 and 2015, which has exceeded the overall employment growth in this group of 20%.[50] However, when considering the most recent data, the growth in BAME representation appears to have slowed to 0.7% from 2014 to 2015, whereas, overall employment growth in the creative industries as whole has been 3.2%.[51]

Research conducted recently for the Andrew Lloyd Webber foundation, though focused mostly on onstage workers, also found the sector to be overwhelmingly white. It concluded that outright racism was rare but BAME individuals, nonetheless, had feelings of isolation, which would be heightened if they came from disadvantaged backgrounds, as well as how policy interventions had failed to increase the number of resilient BAME decision makers. A number of structural barriers and conditions that make changing the BAME mix difficult were identified, necessitating a need for strong leadership if change is to be delivered. A number of recommendations were made, which the sector should seriously consider.[52]

When it comes to disabled workers in the theatre sector, the London Theatre Consortium[53] has started a dialogue between disabled theatre artists and artistic directors, producers and senior decision makers within theatre. This has highlighted the intrinsic value in generating theatrical content developed by disabled artists and the opportunities for creative growth and novel ways of working and producing new works. For the inclusion of disabled artists or disability content, it suggests organisations need to engage with artists in a deep and meaningful way, the focus must

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[49] The Performing Arts Blueprint: An Analysis of the Skills Needs of the Performing Arts Sector in the UK, Creative and Cultural Skills, 2010.

[50] Calculated using official government data on the creative industries and restricting it to just the Creative Industries Group of 'music, performing and visual arts', which is still wider than just offstage theatre and performing arts.

[51] Creative Industries: Focus on Employment, DCMS, 20 June 2016.

[52] Centre Stage: The Pipeline of BAME Talent, D. Kean and M. Larsen, Andrew Lloyd Webber Foundation, December 2016.

[53] R&D: creative opportunities for Deaf & Disabled Artists, London Theatre Consortium (LTC), November 2015.

not be the meeting of legal requirements but a genuine open and engaged discussion leading to real cultural change.

LTC's work has culminated in a set of practical and strategic recommendations that the sector can draw upon in developing a more disability inclusive and integrated environment, focussing on reducing barriers, building expectations, networks and infrastructure, and the confidence of both artists and organisations.

Research from the film and TV sector [54], the Panic! Survey[55], and academic research[56] have all indicated that the under-representation of BAME groups, disabled people, and people from less advantaged socioeconomic backgrounds, is not exclusive to the theatre and performing arts sector but is present across the wider creative industries.

Recent academic work has also shown that cultural and creative industries are not as meritocratic as might be expected.[57] The work draws on new social origin data from the 2014 Labour Force Survey. It reveals that not only is there is a general and large under-representation of those from working class backgrounds but for those that do make it through, they also face a 'class origin pay gap'. The research also highlighted a gender glass ceiling and gender pay gap.

Data from this research is provided in the table below and shows the disparity between the creative industries and the population at large in terms of social class origins.

Table 1: Social Class Origins in the Creative Industries[58]

	Higher Professional & Managers	Lower Professional & Managers	Intermediate Occupations	Routine & Semi-Routine
Music, performing and visual arts	28.3%	25.0%	32.9%	13.8%
Musicians	38%	21%	30%	10%
Dancers and choreographers*	24%	24%	41%	11%
Actors, entertainers and presenters	22%	29%	29%	21%
Artists	21%	27%	38%	14%
Creative Industries as a whole	26.1%	23.9%	32.0%	18.0%
Population as a whole	**14.1%**	**15.0%**	**36.2%**	**34.7%**

* The sample size for Dancers and Choreographers is too small for any substantive analysis.

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[54] Succeeding in the film, television and games industries: Career progression and the keys to sustained employment for individuals from under-represented groups, BAFTA, Creative Skillset and BFI
[55] Panic! Survey, http://www.createlondon.org/panic/.
[56] Are the creative industries meritocratic? An analysis of the 2014 British Labour Force Survey, D. O'Brien, D. Laurison, A. Miles & S. Friedman, Cultural Trends, 25:2, 116-131, April 2016.
[57] Are the creative industries meritocratic? An analysis of the 2014 British Labour Force Survey, D. O'Brien, D. Laurison, A. Miles & S. Friedman, Cultural Trends, 25:2, 116-131, April 2016.
[58] Inequality and cultural work: A submission to the House of Lords Communications Select Committee Skills for the theatre industry inquiry, D. O'Brien, 6 April 2017.

The disparity also has a geographic aspect – the class pay gap is accentuated in London and is importantly was unaffected by level of education.[59]

9.1   The closed shop and cronyism

The industry has been quite vocal in its desire to become more open – with focussed schemes launched to attract more diverse talent to the sector. However, worryingly, there was a perception from those we spoke to in the course of our research that – overall – theatre had actually become more exclusive in recent years.

"It was easier to get into theatre in the 1990s when I started than it is now" - senior manager.

It was very clear from our survey and from the people we spoke to in our focus groups and interviews that a successful career in offstage theatre is widely dependent on networks. This is true of getting into the sector (see **Section 5.2** on 'How do people get into theatre') and progression through the industry.

For certain positions – specifically some technical and creative roles – it is very uncommon for posts to be filled via an open recruitment process, instead it is undertaken almost exclusively through networks.

Our research found there is a 'black book culture' in theatre which operates successfully on many levels. This is a major positive when dealing with the often fast pace of creating theatre productions but can militate against improving accessibility.

To take the example of a theatre programming a season: the artistic director might use his or her network to offer shows to specific directors who will then engage a creative team with whom they have worked before. A similar process is often followed for technical staff on a production, with managers engaging staff with whom they have worked before or for whom they have received a personal recommendation from someone within their own network. Open recruitment is often a fall-back option rather than a primary choice.

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[59] Cultural Capital: Arts graduates, spatial inequality, and London's impact on cultural labour markets, K. Oakley, D. Laurison, S. Freidman, and D. O'Brien, American Behavioral Scientist, 2017 - forthcoming.

Figure 18: Career Barriers: Top Fifteen Specific Barriers by Frequency

Barrier	Frequency
Poor pay	77
Contacts lacking	34
Sector experience lacking	32
Unpaid work	30
Gender	22
Few job opportunities	21
Career progression/development	20
Child care	19
Employers' preparedness to support training	19
Careers advice lacking or poor	16
Pigeonholing people	16
Few regional opportunities	15
Formal qualification needed	13
Cliques	13
Long and/or irregular/inflexible working hours	12

Source: Nordicity Survey (2017)
n = 469

From the results of our survey, we can see that after poor pay, lack of contacts was the most common specific career barrier highlighted by respondents. Other linked barriers such as the prevalence of cliques, the inability to secure sector experience and the perceived requirement to undertake unpaid work (the last two help build contacts) were also identified.

Many respondents perceived not having personal or family connections to the industry as being a significant barrier to entry, a number referred to the industry as a "closed shop" or a "clique".

A typical comment was: "A significant barrier to entry is not being able to meet the right people to contact. The theatre seems more about who you know than what you know. Although knowing things is good, knowing people that vouch for others and their work ethic etc. are easier for employers to trust."

These views were all echoed in the interviews and focus groups.

One senior manager acknowledged that their recruitment process can often be informal – especially with creative posts. They acknowledged that this limits the pool of people that is drawn upon. "For head of marketing, I'd have to go through official recruitment channels, but for a director I'd go to people I'd already worked with," they said.

Several people we spoke to observed: "It's an industry that works on networks rather than qualifications".

When talking about the way technical offstage staff are hired, one respondent observed: "The level of nepotism is massive". When it comes to hiring freelance staff, it is "an old boys network" for offstage technical staff. "People get out the black book and call people they know".

There are some efforts being made to address this. For example, the Bush Theatre has introduced a clause into the contracts of directors it employs requiring them to "cast and appoint in line with the producer's commitment to achieving the widest diversity". The theatre also supplies a list of diverse artists and helps make introductions when necessary.

9.2   Lack of diversity

So, while the 'closed' nature of theatre and the performing arts can be a problem for many workers in the sector (as discussed above in Section 9.1), it is a particular problem when it comes to already under-represented groups.

The Analysis of Theatre in England report highlighted how a number of issues were all militating against entry into the workforce by those without socio-economic advantages. These included low pay, low-paid traineeships, arts education and proliferation of postgraduate sector-specific courses.

As we have seen in **Section 4** ("Who are the workforce?"), theatre is overwhelmingly white and able-bodied and working class people are significantly under-represented in the offstage workforce.

This is particularly perceived to be the case in leadership roles.

In addition, the lack of BAME role models of a wide variety of ethnicities, may be a major aspect in there being minimal pull factor, drawing talented BAME candidates into the cultural sector at large and this has persisted despite some 20 years of public policy support and funding of BAME organisations and BAME leaders.

However, BAME leaders themselves are not agreed as to the issues they face and how to address them;[60] and there is insufficient robust research available about the specific challenges that BAME leaders face (e.g. isolation and identity). Some of these challenges are the result of factors intrinsic to themselves and different from their white counterparts, others are challenges due to external factors that either place barriers in their way or neglect to provide institutional support specific to them as BAME leaders. This last point relates to peer networks, be they the professional networks from which they can learn from seasoned practitioners, or BAME networks from which they can learn how to overcome the shared challenges that BAME leaders face.

Because there are so few diverse people working in the sector, those who do often spoke of feeling "crazily heightened expectations" placed upon them.

At a senior level, "the spotlight is much brighter on BAME people running companies," said one focus group participant.

Following on from its Centre Stage report last year (see the beginning of this Section 9), the Andrew Lloyd Webber Foundation has this year announced a series of grants of over £600,000 going to 17 organisations, including more than £100,000 being awarded to black, Asian and minority ethnic trainee schemes. The awards focused on increased entry level access across a

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[60] A move towards self-determination: Could business hubs and hatcheries help address the current diversity imbalances in the arts, J. Doeser, Arts Professional, 8 December 2016.

spread of jobs: onstage, technical, sales and marketing.[61] These bold initiatives could help advance the pace of change in the ethnic diversity of the workforce, with BAME people able to increasingly see themselves reflected not only onstage but also the workforce offstage.

9.3   Systemic issues and other barriers to access

While there are a number of campaigns and initiatives such as Act for Change, Artistic Directors of the Future and Ramps on the Moon that aim to improve representation in the sector, it was felt that these schemes were working against a system that is stacked against piecemeal attempts to broaden the workforce.

Indeed, the prevalence of closed networks within theatre appears to be part of a systemic issue that stiffles efforts to improve diversity in the sector.

This was observed by many of the people we spoke to. One manager said that the system "militates against diversity in the workforce... These systemic issues of inequality are entrenched in the industry".

One Nordicity Survey respondent observed that the system of closed recruitment that is prevalent in the industry is even having a negative effect on those organisations who actively want to broaden their recruitment processes.

"The difficulty we face in recruiting across roles is not necessarily the lack of applicants, but the relatively small pool of diverse applicants who are actively working at a particular level in the industry. This is particularly true of tech and creative team roles for main house productions, as the tendency to work with tried and trusted teams negates opportunities for others to expand their networks and skillset."

It was observed that people from certain groups don't see themselves reflected in the sector and that the lack of flexibility around working practices (discussed in **Section 6**) also particularly disadvantages disabled people.

"If you look at the diversity of the workforce. That's a massive problem - it's always been like that and it has been tolerated forever. A black colleague of mine said 'why would I want to work in a white club?'. That's a big issue."

The lack of obvious career routes into and through theatre was also cited as something that is likely to put off people from more diverse backgrounds. Theatre is seen as a risky career choice and those that can afford to take that risk are often from more affluent backgrounds.

"To attract a more diverse workforce, we need to legitimise what we do. There is often no obvious vocational route into theatre. The people are there, they just don't know they can work in theatre."

Pay levels are also a barrier to broadening access.

One Nordicity Survey respondent said: "I am a chartered accountant. After my previous role in the pensions sector became redundant following a reorganisation I had another look at the charity sector and was pleased to find an opportunity in a theatre company. I do a fair amount of

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[61] Lloyd Webber pumps £100k into BAME training schemes, The Stage, 11 April 2017, https://www.thestage.co.uk/news/2017/lloyd-webber-pumps-100k-bame-training-schemes/

performing on the amateur stage so there was crossover with my outside work interests. The pay is relatively poor for an accountant but as my mortgage is paid; my children are through university and working; and I have some pension savings in place, I could afford to take a 40% drop on my previous salary."

The above comment highlights a common theme throughout our research, which is that people who work in the sector are often only able to do so because of external financial security or support. It points not only to a sector workforce challenged by pay, but to a lack of professionalism and professional development within the sector – painting a picture of theatre and the performing arts as a passion project that people with existing wealth are able to undertake rather than a genuine meritocratic career opportunity for people from all backgrounds.

As identified earlier in this report, the high cost of training is already regarded as a barrier, as are the number of low or no pay opportunities at the beginning of careers in the sector.

It was questioned whether – with the increasing cost of degree-level training, as a result of increased tuition fees – the whole system of university-level training works against diversity in the sector and many questioned whether degree-level training is in fact necessary for many roles in the sector.

"The whole thing is about what you can afford. How can working class people afford to take that risk?" asked one focus group participant.

There was a feeling that some progress is being made on improving the diversity of the offstage workforce but that progress is slow.

Moreover, as previously stated, it was felt that greater progress is being made to improve the diversity of the onstage workforce than the offstage workforce.

"I do think it's slowly changing. I think the threats from the Arts Council about improving diversity or you will lose funding is something that a number of employers are taking note of. What other publicly funded organisations would get away with employment practices that are so outmoded? Organisations get millions but there has to be some social responsibilities that come along with it. I'm talking about lack of diversity, lack or equal opportunities in terms of flexible working. I think it's slowly changing, but it's very slow."

Recruitment practices

While several employers reported that they struggle to find diverse applicants, other employers said that it was down to organisations to find more imaginative solutions if they want to improve diversity in the offstage workforce.

"Sometimes, it just takes the employer to take a punt," said one. "You just have to try a bit harder to find them [people from under-represented groups]. They might not have RADA training, but they are there. Maybe look to the music sector. Lateral thinking is required. Organisations need to make a commitment."

Several employers said it was important that organisations rethink the way they write job descriptions if they want to attract a diverse pool of applicants. Some employers, for example, reported marked increases in the volume and diversity of job applications by making simple changes to the language used in the job descriptions to be understood by and more appealing to those from outside the sector, such as changing the jargon-y role of 'box office attendant' to the more widely understood and inclusive sounding job role of 'customer service agent'.

Another sign of employer flexibility was cited by a regional theatre, who changed an advertised full-time role to two part-time roles, thereby increasing the volume and socioeconomic diversity of their applicants by making the role appeal to those who could also then claim in-work benefits.

"People are too prescriptive. If you want to broaden the workforce, this has to stop. Don't put elements in that aren't required, for example a degree requirement which is not needed for many jobs," observed a focus group participant.

When it comes to finding staff from under-represented groups, it was stressed that employers need to be proactive and not expect to find people from different backgrounds using traditional recruitment techniques.

"You have to actively swim upstream. You have to be proactive in finding people with disabilities [sic]" observed one.

Concerns were expressed that recent changes to state cultural education provision could result in an even less diverse workforce in theatre in the long term (see **Section 5**).

However, there was also a belief expressed that this could be used as an excuse by the sector not to take action itself.

"Not all the emphasis should be on schooling. As a sector if we want to make change, we could and we should. There are people in power who can make change, but they won't," said one focus group participant.

It was observed that some good progress was being made increasing representation onstage. There was a feeling that some of the advances being made in onstage representation could have a delayed effect in improving offstage diversity because people will see themselves represented onstage and will therefore consider the possibility of a career in theatre.

In an effort to advance diversity onstage, UK Theatre and Tonic Theatre have undertaken a planning tool to "help theatres cast from a broader and more diverse range of people". Working alongside Equity, ITC, LTC and Act for Change, the initiative may extend through to "improve diversity through recruitment, or in programming, or for other aspects of our business."[62]

"The National is now putting disabled people [sic] on stage, I'm sure that will get them disabled people in their offstage workforce." By presenting different stories on stage, one can attract new audiences – those who, after seeing people like themselves on stage, might see that theatre could be for them.

9.4 Key challenges identified in this section

1. **Theatre's endemic networking culture.**

   Theatre relies heavily on a culture of networks – particularly when it comes to hiring freelance creative and technical teams. Networking is a structural feature of employment within the sector. There are good reasons for this and, in many ways, the system works well for the industry, especially when *in extremis*. Theatre is a fast-moving industry when it comes to the creation of work on stage. This culture of networks allows for creative

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[62] One Year On , C. Chadderton, UK Theatre, 26 January 2017 https://uktheatre.org/who-we-are-what-we-do/uk-theatre-blog/one-year-on-cassie-chadderton/

teams to be assembled quickly and with a degree of confidence – a shorthand develops between colleagues who have worked together before. In an industry in which deadlines are often short and budgets tight, it is a natural impulse (and on many levels a sensible one) to fall back on the tried and tested. However, this is also an exclusive system and it militates against any attempts to broaden the make-up of the offstage workforce. If theatre wants to make genuine strides in developing a more open and representative workforce – and not persist with a closed shop that self-replicates – then it needs to find ways to replace this system, or at the very least make this system more porous. This is a huge challenge for theatre – perhaps the biggest single challenge for theatre. It will not be straightforward and will require the overhaul of many decades of custom and practice.

2. **Narrow recruitment processes.**

   For some offstage job roles – especially permanent roles – there is already a more open (relatively) recruitment process occurring. However, employers still say that they struggle to attract a diverse set of applicants for these roles. For these types of roles, employers need to re-assess their recruitment procedures if they are to broaden the pool of applicants. For example, employers may need to reassess their recruitment criteria (especially around required qualifications), advertise for roles more broadly and more imaginatively, be open to applicants from other sectors, thinking in terms of transferable skills rather theatre experience, and be more flexible with working conditions (what is operationally necessary).

3. **Uncompetitive pay rates.**

   Theatres should aspire to be in competition with other creative industries when hiring the best talent and should consider the pay and working conditions on offer within those industries as an indication of what they need to offer to attract the brightest and best. This is not simply an issue of social responsibility, but also one of attracting the best, most diverse talent to the offstage workforce.

4. **Lack of awareness around range of jobs on offer.**

   There is a general (and quite severe) lack of awareness about the variety of roles available in theatre. This is even more the case among groups that are currently under-represented in theatre audiences and the theatre workforce. If theatre is to attract a broader pool of applicants, its first challenge is to make that potential pool of applicants aware of the various opportunities available offstage in theatre. There is also a challenge to make it clear that it can be a viable and attractive career option by helping to better explain the opportunities available for offstage workers throughout their careers and ensuring that blockages into the sector are removed (for example the requirement to work for free at the early stages of many careers). In the dissemination of any such information, it will be necessary to make sure that the medium is attractive to the target audience through language or visuals, and feels either reflected or included.

5. **Take a wider, more holistic view of diversity.**

   When discussing diversity and inclusion, a wider and more holistic view should be taken. Too often the focus on diversity has been limited to ethnicity, disability and gender; the sector needs to consider diversity in its full breadth, especially socioeconomic background. Indeed, addressing socioeconomic inclusion may in part help inclusion in other areas of cultural diversity, as financial (and social) barriers to entry are significant.

6. **How to increase diversity**

The challenge lies in how increased diversity, when there are currently insufficient role models for underrepresented groups, can be achieved without tokenism towards a minority group or perceived unfairness to the current majority. This is not just a matter of senior leadership, as producers, directors and creatives have a role to play on-the-ground here too. Actions identified by the sector include: colour-blind casting, commissioning more BAME writers, using technicians trained to work with BAME actors e.g., in regard to lighting and make-up.

7. **Pace of change**

The pace of increased inclusion has been slow at best and some would argue retrograde in some areas, and so there is a challenge here for funders (and philanthropists) in how they can effect change, is there a role for increased emphasis on inclusion criteria in fund applications?

8. **The sector doesn't yet fully appreciate the business case for diversity**

As reported in **Section 4.1**,

10. Propositions for consideration

Subsequent work is anticipated to supply fully formed strategic approaches to address the challenges raised throughout this report. We would like to offer some starting points for further investigation. All will need further development and consultation with the sector before they are put into practice.

It should also be noted that many of the challenges identified within this report echo similar concerns raised in previous investigations into the sector – most notably Creative and Cultural Skills Performing Arts Blueprint. That report was published in 2010, and while our research would suggest that very little progress has been made in addressing the identified challenges, in some cases those challenges have become even more acute.

10.1 Pre-career propositions

A. Careers Advice

    a. There is a role for the sector to provide authoritative information about the full jobs available within the sector, including creative, technical, administrative, digital, specialist be it onstage or offstage. Equal billing should be given to all. The industry might like to consider how other sectors facing skills shortages have tackled this issue, for example the Army's recruitment campaign stressing variety of roles beyond soldiering. Given some of the crossover in backstage roles with the film and TV sector, Creative Skillset also could provide useful information. There is a potential opportunity here for coherent, cross-industries creative industries recruitment drive.

    b. This resource, and human resource, needs greater channelling into the careers advice services, both in education (schools, colleges, universities, conservatoires), outside (National Careers Services), and across both education and outside (The National Skills Academy Network, Creative & Cultural Skills, National College for the Creative Industries). Speakers for Schools is a good example of a pre-existing programme that works across industries.

    c. There is a need for sector trade bodies, Creative and Cultural Skills, and educational institutions to work together to identify how best to provide relevant, high quality advice and that information is presented so that it is relevant and readily accessible to students, new entrants from other sectors and in-career workers.

B. Education Courses Wizard

    a. There is a requirement for a one-stop-shop online resource detailing all available pre-career performing arts training, on and off stage. This should include courses directly related to the theatre sector, including academic/ vocational/ short-term/ long-term courses. But it should also include courses that relate to professions or jobs that operate in many sectors, including theatre and the performing arts e.g. marketing, accounting. The resource should be run independently of the training sector and it needs to use a cost-effective means of gathering/harvesting relevant information and maintaining the currency of the wizard.

    b. Education resources could also offer information about sources of funding available to and opportunities targeted at under-represented groups. However, in order to

reach the specific groups, it is critical to 'go where they are', as espoused in the Andrew Lloyd Webber Foundation report. In other words, direct and proactive engagement will reach individuals who might otherwise have discounted any opportunity in the sector because simply, 'it is not for me'. A passive resource will not suffice

C. **'Theatre Education Mark'**

    a. There is a role for a 'Theatre Education Mark' as accreditation for vocational education courses. This will inform prospective students which courses employers believe will make them 'industry-ready'. This could be extended across different types of education – for example degree-level courses, apprenticeships, even work experience placements and internships. It could also cover aspects other than industry readiness, for example it could approve / accredit both training provider and employer when working together on work placements. Creative and Cultural Skills are currently considering this issue as well, so the opportunity exists for the trade bodies to work with the sector skills council to decide how best to deliver this.

D. **Cultural education and outreach**

    a. The introduction of the EBacc and side-lining of the arts in education could have a serious impact on both the quality and diversity of applicants the sector is able to attract in the future (not to mention audiences). Clearly, there is role for the sector to continue campaigning against these policy decisions as well as trying to find other ways in which the arts can be maintained and indeed extended within the state education system.

    b. However, there is also a role for the theatre sector to make clear to the education sector just what education and outreach opportunities the sector already offers. There is a lot of excellent work being done by theatre companies across the UK, but it is often piecemeal and not joined up. As with so many things with the sector, it is fragmented. Family Arts Standards are good example of joined up thinking in the sector to present unified face to outside world. Could something similar be attempted for theatre outreach and education programmes?

10.2 Early career propositions

A. **Apprenticeships & internships**

    a. Fragmentation is a key problem here. There are some good apprenticeship schemes being run by individual organisations, but some form of central oversight could help make sure that good practice is shared and the sector's overall needs are being addressed in terms of the specific roles that are targeted. This could be done in partnership with Creative and Cultural Skills, which has been engaged in how the old and new apprenticeship system and policies work, and has developed new sector apprenticeships and courses alongside the new National College Creative Industries including a broad-based Level 4 apprenticeship. A sector-wide

apprenticeship scheme could be developed with a recognised best-practice guide for schemes to follow.

b. There is an opportunity for the new National College of the Creative Industries, which creates a natural focal point for a coordination of efforts through the education sector, and the sector to engage proactively with each other to make both the new Apprenticeship Levy and the National College a success. There is also an opportunity to learn from the Creative Apprenticeships programme, which was funded by Creative & Cultural Skills and implemented by the London Theatre Consortium over the last three years, having undergone an in-depth internal review of its programme.

c. For some roles, apprenticeships may not be the most sensible route into a career in theatre. The same body that gives oversight to the apprenticeship scheme could take responsibility for other learning opportunities, for example by matching interns with organisations. This could help minimise nepotism and improve the diversity of those being offered internships and ensure good practice is followed by organisations.

d. The sector should look at ways in which it can eradicate unpaid work experience and other unpaid development opportunities, except perhaps in very specific circumstances.

B. Support networks

a. Early career networking opportunities could help new entrants to the sector establish a network of contacts. This happens already – to some extent – for onstage workers via Spotlight and Equity, but there is relatively little for offstage workforce – aside from the TheatreCraft career fair, most events are more focussed on mid-career and senior employees.

b. Bearing in mind how useful people report finding ad hoc mentoring, there is perhaps a role for some kind of organised mentoring system, matching career entrants with more senior figures in the industry. UK Theatre organises a long-running mentoring scheme for members. Sector consultation revealed an opportunity for this model to be either expanded further or adopted by others to be implemented in other parts of the sector. This could particularly be focussed on entrants from diverse backgrounds without access to existing networks.

10.3 Mid-career propositions

A. Careers advice

a. There is an opportunity to offer more in-careers advice to offstage theatre workers. This could help address the current talent drain out of the sector in workers' late 30s / early 40s. This should be focussed on individuals who are either looking to make a lateral move within their careers because they have hit a ceiling within their current role, or who are looking for new opportunities due to a changed situation outside work e.g. caring responsibilities. There is relatively little support for people in such situations currently. One exception is the National Theatre's Step Change programme, but this offers a relatively small number of places and is focused on the

subsidised sector. There is an opportunity to build on this programme and expand it across the sector.

B. Training

a. While there is some difference of opinion between employers and workers as to the prevalence of in-career training, it would appear there is an opportunity to encourage both staff and employers to expand their commitment to training opportunities. A particular area of focus should be training of freelance staff, especially freelance technical staff. A large section of the workforce is freelance and at the moment, there is no concerted effort to keep these workers up to date with advances in technology or to help develop their careers. Perhaps there is a role here for a central body such as SOLT and UK Theatre to offer a bursary pot for freelancers looking to develop their skills in areas where there is an acknowledged skills gap. Alternatively, there could be a programme of subsidised training in these areas.

b. As part of the above, a culture of continuing professional development needs to be promoted within major employers. Again, some form of benchmarking scheme, or award could be helpful in highlighting employers that offer CPD to their workforce.

c. The observations made in the 2006 report by independent consultant Ric Greene remain valid in many cases. SOLT and BECTU should consider whether a skills-based agreement for the West End, linked to Government's new framework for apprenticeships and training could be negotiated. This could potentially be rolled out through the UK Theatre agreement.

10.4 Leadership propositions

A. Sector leadership

a. Given their common goals, the sector skills council and the sector trade bodies should develop their dialogue fostering an open and coordinated to sector support, such as careers advice, apprenticeships and training.

B. Executive leadership

a. While there are initiatives such as the Clore Leadership Programme that aim to develop the next generation of leaders, there is still a clear shortage when it comes to executive leadership, especially outside London. More needs to be done to identify and develop the next generation of these leaders and to incentivise them to pursue careers outside London. Much as a system of mentoring could be useful at the early stages of careers, there is potentially scope for a scheme to mentor future regional theatre leaders. More also needs to be done to celebrate the role of executive leadership in theatre – at the moment, the focus is almost overwhelmingly on artistic leadership of theatres.

b. More also needs to be done to diversify the executive leadership of the sector, both in terms of demographic make-up and skills and experience. The theatre sector should consider how it can better attract senior management from diverse backgrounds and from outside the theatre and performing arts sector.

10.5 Organisational culture and management propositions

A. Modernise organisational culture and management practices

    a. Strong organisational culture practices are integral to any sector, and instilling best practice across the ecosystem has a knock-on effect on issues such as recruitment and training, performance appraisals (for <u>both</u> staff and freelancers), motivating team members and maintaining a positive work atmosphere, provision of training, mitigating disputes/managing conflict, workplace communications, workplace safety, establishing positive public relations amongst team members and external parties.

    b. Good organisational culture practice should extend to human resources with freelance staff, especially considering how much of the workforce is freelance. A good practice guide of how to employ and get the best out of freelance staff could be helpful in this area.

    c. Theatre is currently resistant to the idea of flexible working. However, the introduction of flexible working practices could have major benefits for employers and the sector as a whole, especially around retaining talent within the sector. An awareness programme is needed to educate sector on the positive opportunities afforded by flexible working and the consequent conservation of human capital. This might include the production of some practical guidelines that provide potential flexible solutions. Key consideration should be given as to how flexible working can be used to retain workers with caring responsibilities.

    d. Organisational culture and human resources practices within the offstage theatre sector are generally antediluvian. There is a clearly a need to educate some senior management in the benefits of modern organisational culture practice for the good running (and success) of a business. This does not mean that all theatre employers need organisational culture or human resources managers / staff, but senior management should have a better understanding of what is expected from 21st century employees in the workplace. There is a clear role here for a body such as UK Theatre/ SOLT to offer training in good organisational culture and HR practice to senior employers in the sector.

10.6 Theatre culture propositions

A. Celebrating the offstage workforce

    a. More needs to be done to celebrate the technical and 'back-office' parts of the theatre workforce. These workers often feel like second-class citizens within their own industry. Leveraging efforts made onstage and the annual backstage awards being established by the National Theatre, there is scope for more technical backstage / offstage awards and, probably in addition, public recognition at existing awards ceremonies that recognise onstage and creative talent. This will serve the dual purpose of recognising the achievements of a key part of the theatre workforce while also raising awareness of these roles within the wider world.

B. Networks and inclusion

a. Radical solutions need to be found to break the culture of networks and networking that exists within theatre to become more inclusive – or at least make it significantly more porous – if the industry is to make any progress in diversifying its workforce. Open recruitment processes, including tailored recruitment to actively engage specific under-represented groups, blind recruitment processes and a re-assessment of the style, language and job requirements in recruitment advertising can all be helpful. However, there is a more fundamental challenge – reinventing the way that creative and technical teams are hired from production to production. There is a spectrum of options here – from insisting on an open recruitment process for all roles (which may be impractical in all cases) to a system of insisting that all assistant roles are hired via an open recruitment process (which may not have as significant an effect on opening up the sector). A sector-wide approach needs to be agreed and implemented otherwise other project-based efforts to diversify the workforce will likely fail.

b. The social and creative case for producing diverse work is being made but the business case needs to be further researched, developed and articulated. McKinsey's efforts to model the business benefits of diverse workforces and the positive impacts diversity in senior executive teams brings can be advanced for the theatre and performing arts sector, and indeed the wider cultural and creative industries. There is an opportunity to leverage and learn from industry initiatives already in place, such as the Andrew Lloyd Webber Foundation's investment in improving access to the sector by BAME individuals and the London Theatre Consortium's work with disabled artists to generate theatrical content. As some initiatives are already occurring, they should be shared, communicated and monitored for efficacy and if successful for adoption more widely across the sector.

C. **Skills balance**

a. The sector should ensure a rounded view of skills in its recruitment and training, upholding the need for all workers to be sufficiently skilled in each the technical craft skills and organisational skills, particularly amongst freelancers.

b. The sector should start to consider organisational and commercial skills as including entrepreneurial skills, particularly relevant amongst freelancers and smaller, not for profit companies.

D. **London**

a. The overwhelming focus of the sector on London is problematic for many reasons. But developing regional employment hubs – for example the Northern Powerhouse – could help offer alternatives for offstage workers looking to develop their careers outside London. At the moment, it is very difficult to build and develop a career exclusively in any specific area of the UK other than London, with the possible exception of Scotland.

b. The rising cost of housing in the capital is a specific problem for offstage theatre workers. Imaginative solutions need to be found here as pay is unlikely to be able to rise to keep in touch with the increasing cost of living in the capital. Is there the possibility of developing a sector-specific (or creative industries-specific) key worker housing scheme? The theatre industry already has connections to the property market through various new build developments, is there scope to partner with developers to create affordable housing for theatre workers?

E. **Better data**

a. When undertaking this research, we found that the sector was hampered somewhat by the lack of data that is held on the UK offstage workforce. While Creative & Cultural Skills are commissioning research to assess the future skills needs for organisations working within Arts Council England's sector footprint, including theatre and the performing arts, and while Arts Council England itself holds some data on the companies it supports, it would be useful for the sector to gather information on the size of its entire workforce and its profile, including its demographic make-up, especially when it comes to things such as gender, ethnicity, disability and socioeconomic background.

Appendix A: Consultation List

Organisations interviewed

1. Arts Council England
2. Arts Council Northern Ireland
3. Bectu
4. BFI
5. Creative & Cultural Skills
6. Creative Diversity Network
7. Creative Industries Federation
8. Creative Scotland
9. Creative Skillset
10. Equity
11. Goldsmiths University / The University of Edinburgh
12. London Theatre Consortium
13. The Musician's Union
14. Stage Directors UK
15. Theatre NI
16. UK Music
17. UK Theatre Board Member
18. White Light

Individuals consulted in the focus groups

1. Andrew Hurst, Chief Executive, One Dance UK
2. Andrew Shepherd, Executive Director, Theatre503
3. Anna Charles, Theatre Manager, Palace Theatre
4. Anna Ehnold-Danailov, PIPA
5. Bryan Raven, Managing Director, White Light
6. Cassie Raine, PIPA
7. Charlotte Jones, Chief Executive, ITC
8. Dan Bates, Chief Executive, Sheffield Theatres
9. Daniel de la Motte-Harrison, Taking Part Assistant, Young Vic
10. David Warwick, Technical Manager, Arts Theatre
11. Emma Rees, Director, London Theatre Consortium
12. Graham Hookham, Stage Manager, Freelance
13. James Heaton, Operations Director, Nimax
14. Jane Crowther, Director of HR, Royal Opera House
15. Janet Powell, Senior Production Controller, Playful Productions
16. Jess Gow, Stage Manager, Freelance
17. Jo Royce, Executive Director, Gate Theatre

18. John Clark, Lighting Designer, Freelance

19. Jonathan Kennedy, Executive Producer, Tara Arts

20. Jonathan Suffolk, Technical Director, National Theatre

21. Judith Hartley, Finance Director Northern Ballet

22. Kate Lovell, Agent for Change, Theatre Royal Stratford East

23. Kerry Michael, Artistic Director and CEO, Theatre Royal Stratford East

24. Kirsty Patrick Ward, Director, Freelance

25. Lee Batty, Production Director, Bill Kenwright Ltd.

26. Lotte Wakeham, Director, Freelance

27. Lydia Cassidy, Director of Marketing & Communications, Chichester Festival Theatre

28. Mimi Findlay, Talawa, Administrator/Producer

29. Oscar French, Producer, Kings Head Theatre

30. Richard Matthews, Marketing & Development Manager, Graeae Theatre Company

31. Rob Halliday, Lighting Designer, Freelance

32. Robyn Winfield-Smith, Director, Freelance

33. Roshan Conn, Stage Manager, Freelance

34. Susan Jamson, Press & PR Manager, Chicken Shed

Individuals from the following organisations consulted in the Nordicity Survey

Ambassador Theatre Group

National Theatre

Playful Productions

Belgrade Theatre

Nottingham Playhouse

Birmingham Hippodrome

Watford Palace Theatre

GMX

Rifco Arts

GRAEAE THEATRE

New Wolsey Theatre

Theatre Royal

Shakespeare's Globe

Pitlochry Festival Theatre

Youth Music Theatre UK

Wolsey Theatre

National Theatre Wales

Bloomsbury Theatre

Spare Tyre

Rose Theatre Kingston

BON Culture

The Stand

Bond Performance Ltd

Polka Theatre

Bristol Old Vic & Theatre Royal Trust Ltd

Salisbury Arts Theatre Ltd (Salisbury Playhouse)

Bush Theatre

Taliesin Arts Centre

Cast

Told by an Idiot

Cheek by Jowl

Palace Complex

Cheshire Dance

Really Useful Theatres Group

Churchill Theatre

Royal Lyceum Theatre Company

Colchester Mercury Theatre

Siobhan Davies Dance

Collective Encounters

Stephen Joseph Theatre

Curve Theatre Leicester

The Hammond Theatre

Dance East

Theatre Alibi

Dance Resource Base

Venue Cymru and Theatr Colwyn

Dance Umbrella

Orchard Theatre Dartford

DanceXchange

BECTU

Delfont Mackintosh

Queen's Theatre Hornchurch

Dorchester Arts

Richmond Theatre

Ellesmere College

Royal & Derngate, Northampton

English Touring Theatre

Royal Shakespeare Company

Evans Casting

Akram Khan Company

Fevered Sleep

SOLT

Freelance

Spektrix

Gate Theatre

SXW

Glasgow Theatres Ltd

The Ashton Group Theatre

Andy Jordan Productions Ltd

The Roses Theatre

APL Theatre Ltd

Theatr Brycheiniog Cyf

Great Barr Musical Theatre

Company

Theatre Royal Norwich

hÅb/Word of Warning

Undercurrent

Hounslow Arts Centre

Warwick District Council - The Royal Spa Centre & Town Hall

Illumination Theatre Services

One Dance UK

Illyria

Paines Plough

Just Jones &

Pentabus Theatre Company

Kind Productions

Almeida Theatre

Kings Place Music Foundation

PurpleCoat Productions

Lawrence Batley Theatre

Queens Theatre

Leicester Theatre Trust Ltd

Red Ladder Theatre Company

Lighthouse

Bike Shed Theatre

Lighting hire co.

Roundhouse Theatre

Little Angel Theatre

Royal Court Theatre

Live Art Bistro

Royal Opera House

London Theatre Consortium

Ryan Youth Theatre

Lyceum Theatre

Sell a Door Theatre Company

Lyric Theatre

Sheffield Theatres

mac birmingham

Slung low

Mahogany Opera Group

Some Kind of Theatre

MAIA Creatives

Special Operations Executive-Peripheral

Making Room

St. James Theatre

Mayflower Theatre

Swansea Grand Theatre

Metta theatre

Talawa

Milton Keynes Theatre

Tamasha Theatre Company

Motionhouse Dance Theatre

The Cockpit

Apollo Victoria Theatre

The Marlowe Theatre

National Theatre of Scotland

The Space

West Yorkshire Playhouse

Theatr Ardudwy

Wexford Festival Opera

Theatr Clwyd

Artsadmin

Blackpool Grand Theatre

Association of British Theatre Technicians

TheatreNI

Barbican

Toonspeak

Newcastle Theatre Royal Trust

Unicorn

Northern Ballet

Vivacity Culture & Leisure

Battersea Power Station
Development Company

Blast Theory

O'Mara Productions Ltd.

Old Vic Theatre

White Light Ltd

National Youth Theatre of GB

York Theatre Royal

Neuadd Dwyfor

1623 theatre company

New Vic

Appendix B: Additional Nordicity Survey Charts

Note: The following skills gaps charts show the job skills for which employer respondents experience (or expect to experience) the most difficulty in recruiting new workers. These data have been arranged such that the most difficult skills for organisations to recruit, relative to demand, are listed in descending order down the vertical axis. The actual values displayed in the charts show the number of employers responding to each question. As such, the size (overall horizontal length) of each bar expresses how widely the shortage/surplus for a given skill is felt by organisations. Taken together, a large bar listed near the top of the chart denotes an acute shortage that is felt by many organisations. Note that the skills shortage/surplus is reported at the level of job function, and is therefore not indicative of the actual number of workers for which a shortage/surplus exists.

Figure 19: Current Skills Gaps (Employers, Commercial)
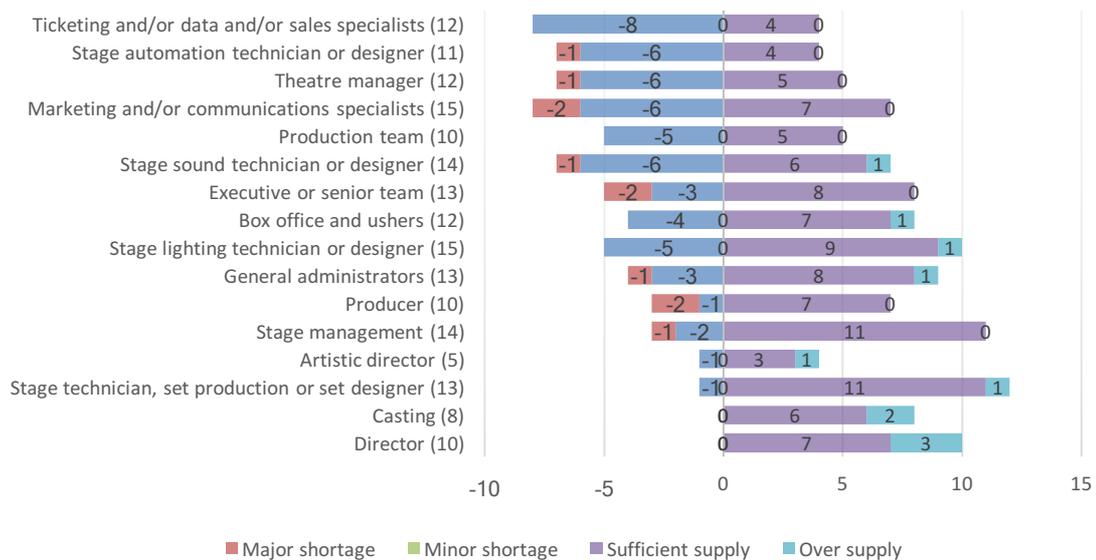
Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 20: Current Skills Gaps (Employers, NFP Funded)

Stage automation technician or designer (31)	-5 -14 12 0
Stage lighting technician or designer (59)	-7 -26 26 0
Ticketing and/or data and/or sales specialists (43)	-5 -19 18 1
Stage sound technician or designer (60)	-7 -25 28 0
Executive or senior team (57)	-12 -18 26 1
Stage technician, set production or set designer (53)	-5 -22 26 0
Marketing and/or communications specialists (60)	-11 -17 24 8
Production team (51)	-2 -21 26 2
Stage management (56)	-5 -18 28 5
General administrators (58)	-2 -21 25 10
Artistic director (44)	-6 -11 22 5
Theatre manager (40)	-3 -11 24 2
Box office and ushers (45)	-2 -13 21 9
Producer (43)	-5 -9 18 11
Director (45)	-6 -2 24 13
Casting (40)	-1 -5 29 5

■ Major shortage ■ Minor shortage ■ Sufficient supply ■ Over supply

Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 21: Current Skills Gaps (Employers, NFP Unfunded)

Theatre manager (12)	-4 -4 3 1
Marketing and/or communications specialists (24)	-4 -10 8 2
Stage sound technician or designer (20)	-4 -7 9 0
Production team (13)	-3 -4 6 0
Ticketing and/or data and/or sales specialists (15)	-4 -4 6 1
Stage management (17)	-1 -7 8 1
Producer (15)	-3 -4 7 1
Stage automation technician or designer (13)	-3 -3 7 0
Stage lighting technician or designer (20)	-4 -5 11 0
Executive or senior team (20)	-3 -6 9 2
Stage technician, set production or set designer (20)	-3 -6 11 0
General administrators (23)	-4 -6 10 3
Casting (10)	-4 0 3 3
Box office and ushers (16)	-5 0 10 1
Artistic director (14)	-2 -1 9 2
Director (14)	-1 -1 8 4

■ Major shortage ■ Minor shortage ■ Sufficient supply ■ Over supply

Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 22: Future Skills Gaps (Employers)
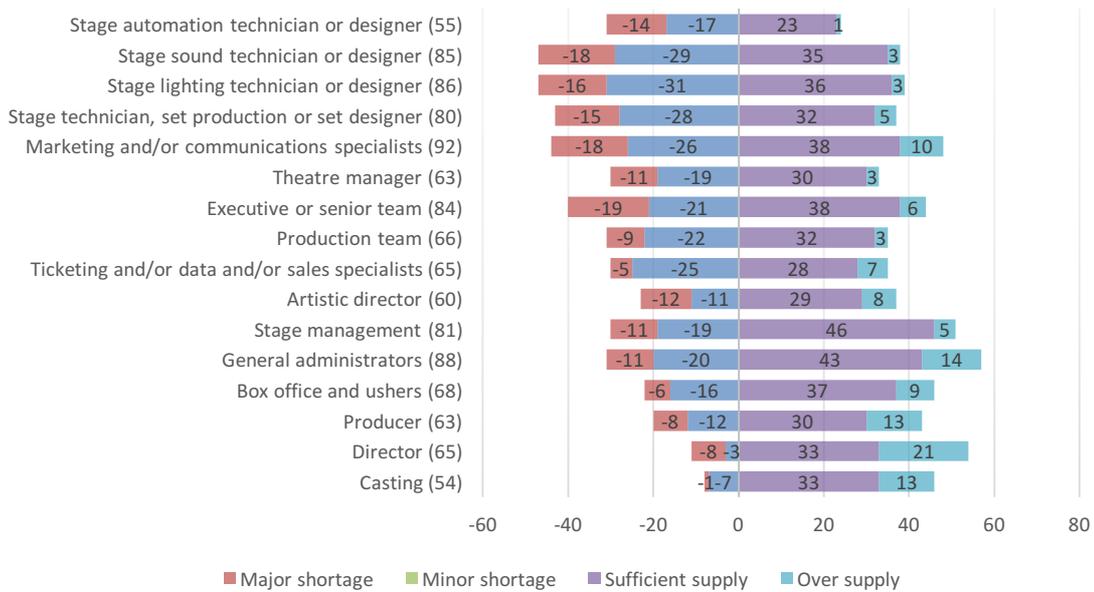
Source: Nordicity Survey (2017)
N = 103

Figure 23: Future Skills Gaps (Employers, London)
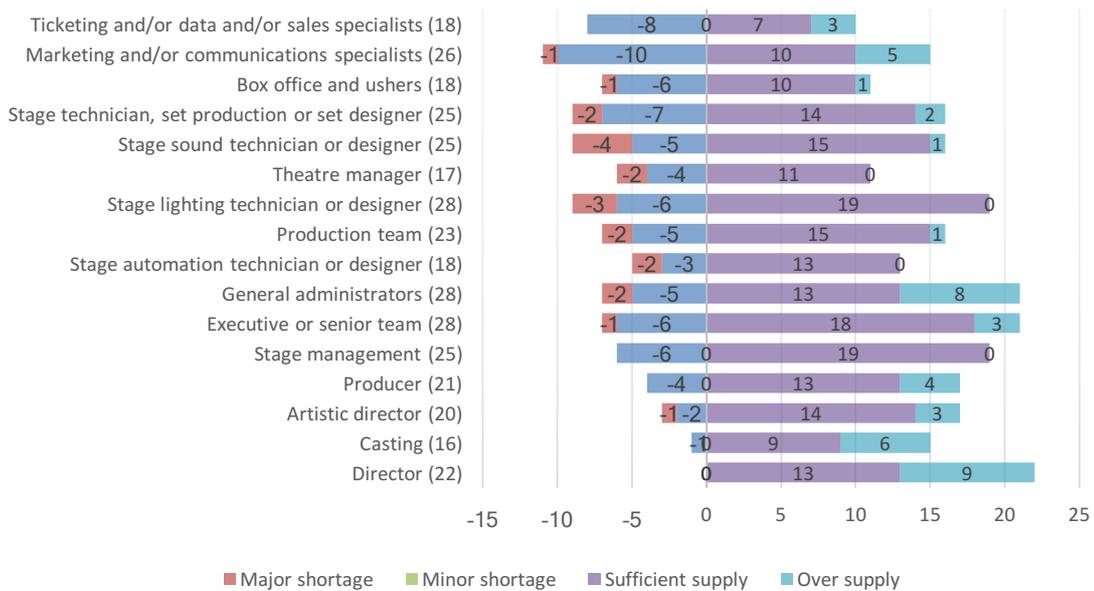
Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 24: Future Skills Gaps (Employers, Rest of UK excluding London)
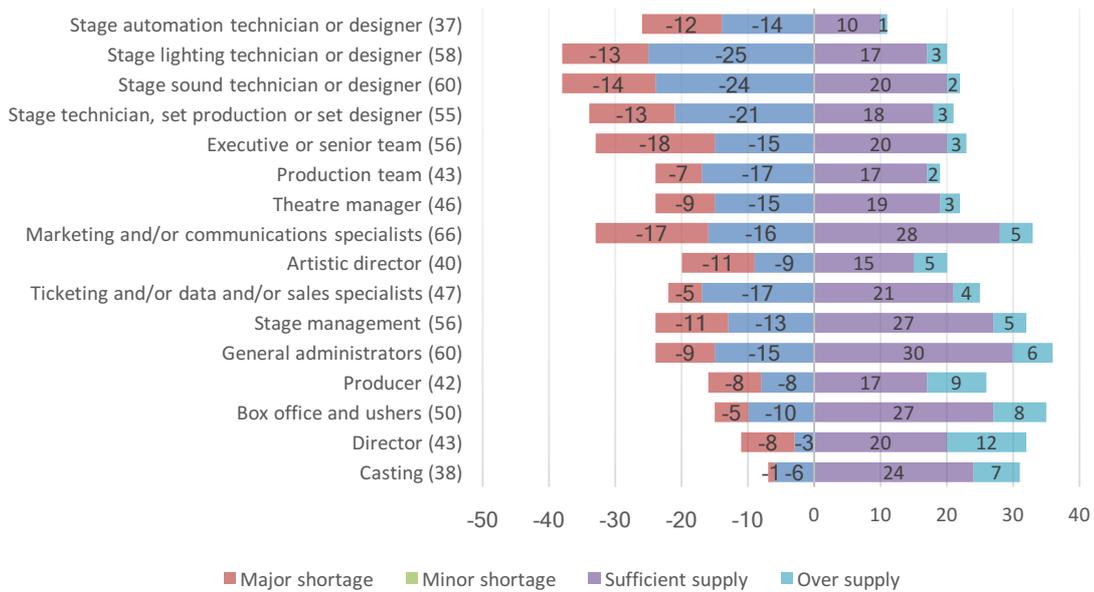
Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 25: Future Skills Gaps (Employers, Commercial)
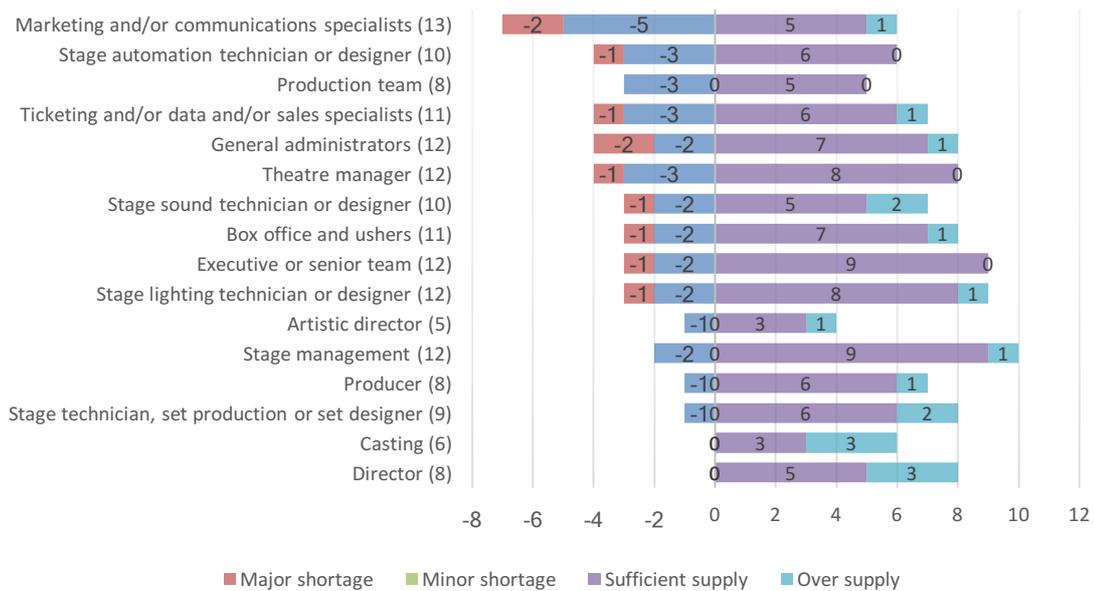
Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

**Figure 26: Future Skills Gaps (Employers, NFP Funded)**

	Major shortage	Minor shortage	Sufficient supply	Over supply
Stage technician, set production or set designer (51)	-11	-22	15	3
Stage lighting technician or designer (54)	-11	-23	19	1
Stage automation technician or designer (32)	-9	-11	11	1
Stage sound technician or designer (55)	-13	-18	23	1
Executive or senior team (52)	-14	-13	21	4
Artistic director (42)	-11	-10	17	4
Production team (45)	-5	-17	20	3
Ticketing and/or data and/or sales specialists (39)	-2	-17	15	5
Marketing and/or communications specialists (56)	-12	-14	23	7
Theatre manager (39)	-6	-11	20	2
Stage management (51)	-9	-11	28	3
Box office and ushers (41)	-4	-10	20	7
General administrators (55)	-6	-12	27	10
Producer (40)	-4	-7	19	10
Director (43)	-7	-2	20	14
Casting (38)	-1	-5	25	7

Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 27: Future Skills Gaps (Employers, NFP Unfunded)

	Major shortage	Minor shortage	Sufficient supply	Over supply
Theatre manager (12)	-4	-5	2	1
Stage sound technician or designer (20)	-4	-9	7	0
Stage automation technician or designer (13)	-4	-3	6	0
Producer (15)	-4	-4	5	2
Executive or senior team (20)	-4	-6	8	2
Stage lighting technician or designer (20)	-4	-6	9	1
Marketing and/or communications specialists (23)	-4	-7	10	2
Ticketing and/or data and/or sales specialists (15)	-2	-5	7	1
Production team (13)	-4	-2	7	0
Stage technician, set production or set designer (20)	-4	-5	11	0
Stage management (18)	-2	-6	9	1
General administrators (21)	-3	-6	9	3
Box office and ushers (16)	-1	-4	10	1
Casting (10)	-2	0	5	3
Director (14)	-1	-1	8	4
Artistic director (13)	-1	0	9	3

Source: Nordicity Survey (2017)
Note: n-values appear in parentheses.

Figure 28: Worker Experience with Employer Career Support
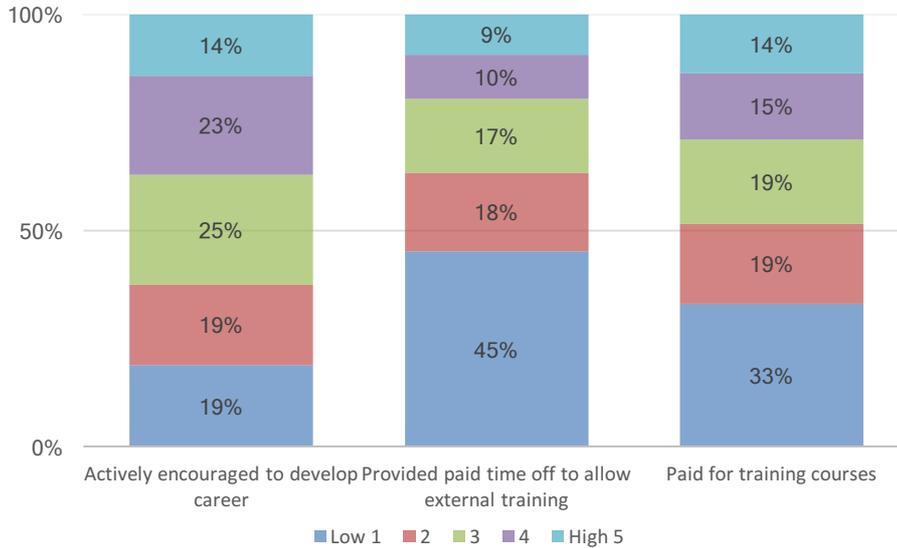
Source: Nordicity Survey (2017)
n = 445

Figure 29: Worker Experience of Their Own Career Development
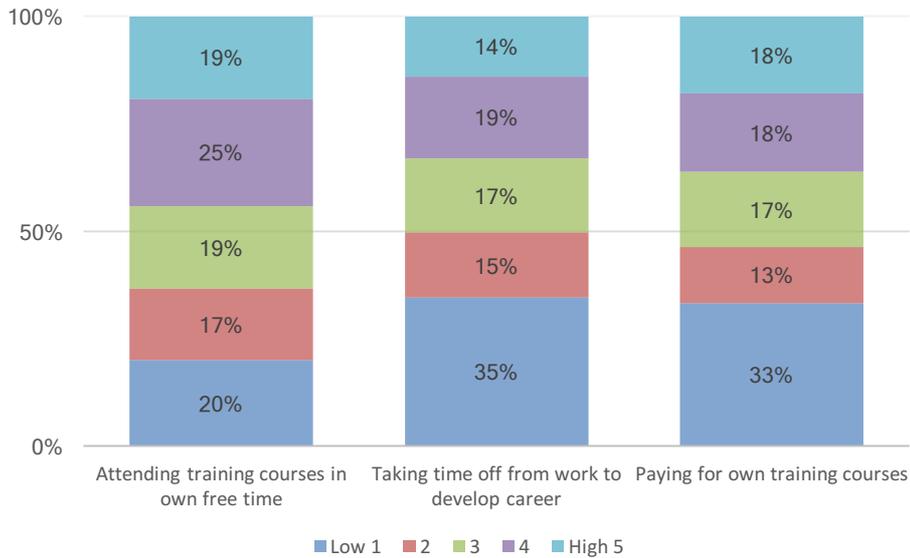
Source: Nordicity Survey (2017)
n = 444

Figure 30: Career Barriers by Significance (General Themes)

1 = lower significance   *5 = higher significance*
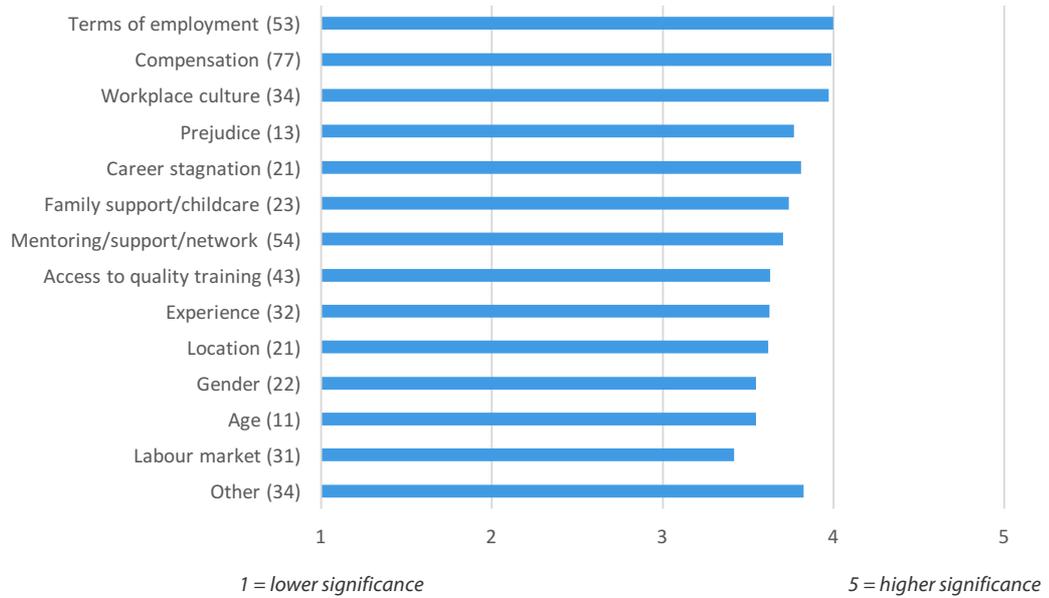
Source: Nordicity Survey (2017)
n = 469

Figure 31: Survey Respondent Age
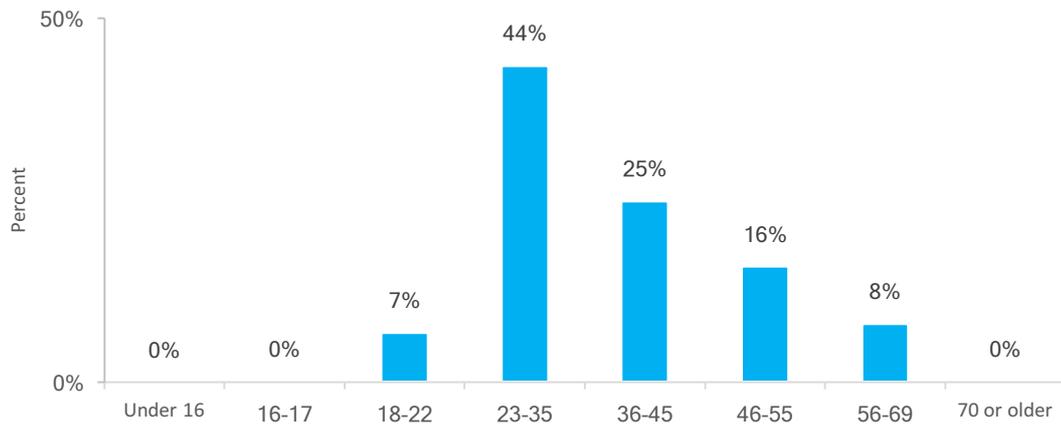
Source: Nordicity Survey (2017)
n = 493

**Figure 32: Survey Respondent Gender**
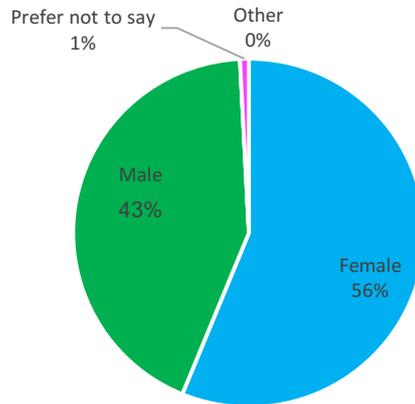
Source: Nordicity Survey (2017)
n = 493

Figure 33: Respondent Profile by Age and Gender
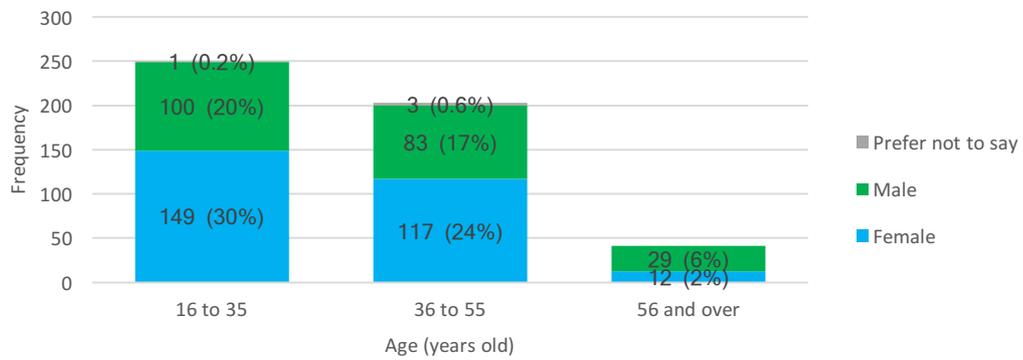
Source: Nordicity Survey (2017)
n = 494

Figure 34: Respondent Ethnicity (per cent)

Ethnicity	Per cent (%)
White – British/ Irish	86.0
White – Other	7.3
Mixed – Other	1.0
Mixed – White and South Asian	1.0
Black/Black British – Other	0.8
Black/ Black British – Caribbean	0.8
Other	0.6
Mixed – White and Black Caribbean/ Black Other	0.6
Asian - Other	0.6
Arab or Middle Eastern	0.6
South Asian/ South Asian British	0.4
East or South East Asian/ East or South East Asian British	0.0
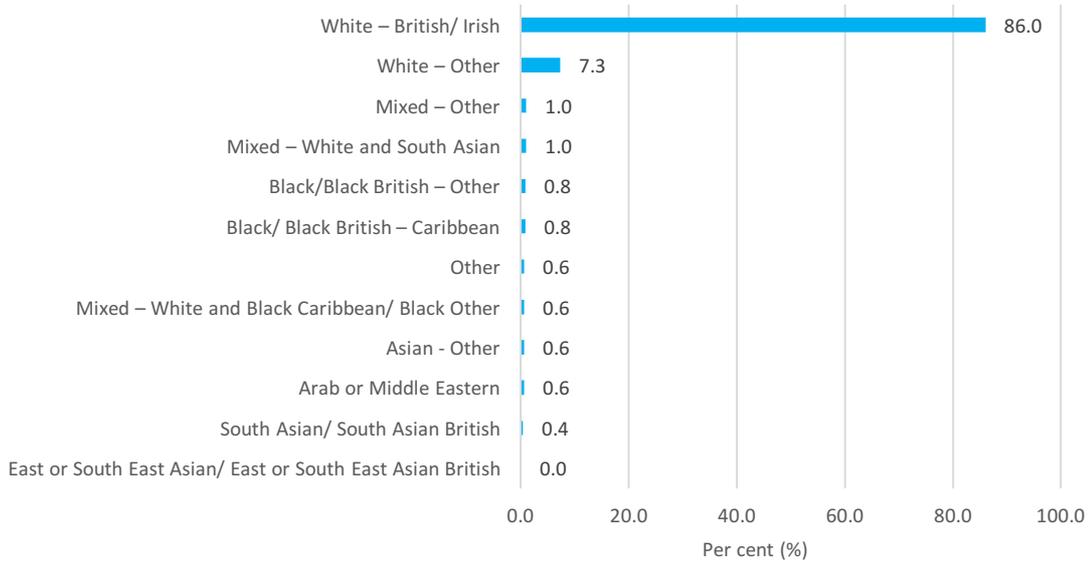
Source: Nordicity Survey (2017)
n = 494

Figure 35: Respondent Sexual Orientation (per cent)

Sexual Orientation	Per cent (%)
Heterosexual/ straight woman	48.8
Heterosexual/ straight man	25.9
Gay man	13.5
Bisexual woman	5.5
Other	3.3
Gay woman/ lesbian	2.0
Bisexual man	1.0
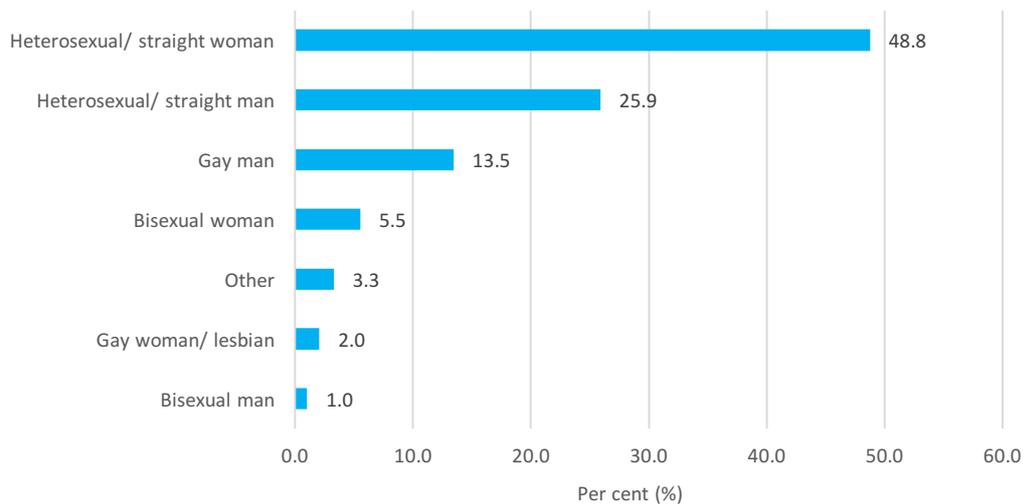
Source: Nordicity Survey (2017)
n = 490

Figure 36: Respondent Religion (per cent)

| Religion	Per cent (%)
No religion	65.0
Christian	23.4
Other religion	1.8
Buddhist	1.0
Jewish	0.8
Sikh	0.2
Muslim	0.2
Jain	0.2
Hindu	0.0
Prefer not to say	7.3
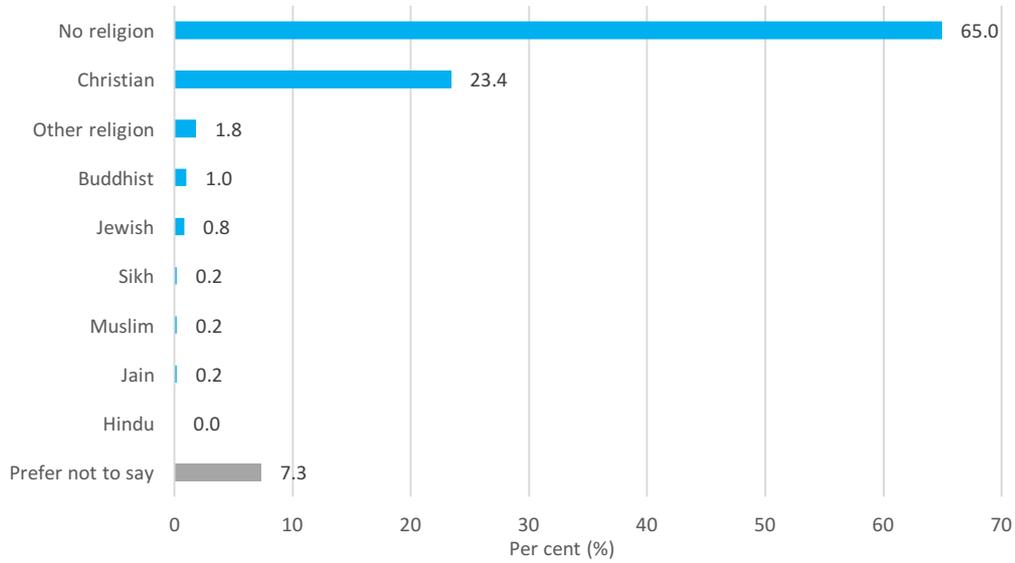
Per cent (%)

Source: Nordicity Survey (2017)
n = 491

Figure 37: Careers Advice Experienced by Respondents (per cent)

Category	Per cent
Schools, college and/or university careers advice services	89
National Careers Service	62
Informal advice from workers in the sector	95
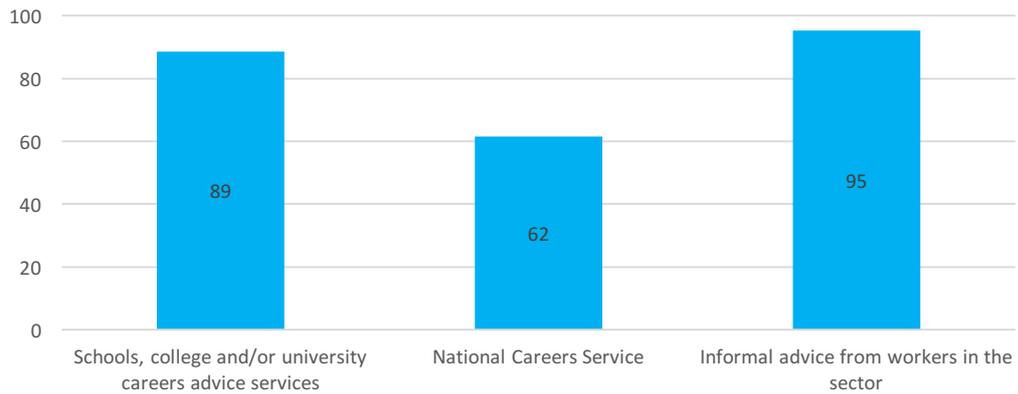
Source: Nordicity Survey (2017)
n = 489, 491, 491

Figure 38: Learning opportunities experienced by workers

Category	Percentage
Unpaid work experience	72%
Theatre-specific training qualification	61%
Workshops (incl. residential and non-...	57%
Non-theatre training qualification	57%
Work placement scheme	37%
Mentorship scheme	30%
Internship scheme	22%
Apprenticeship scheme	13%

Percentage of respondents (%)
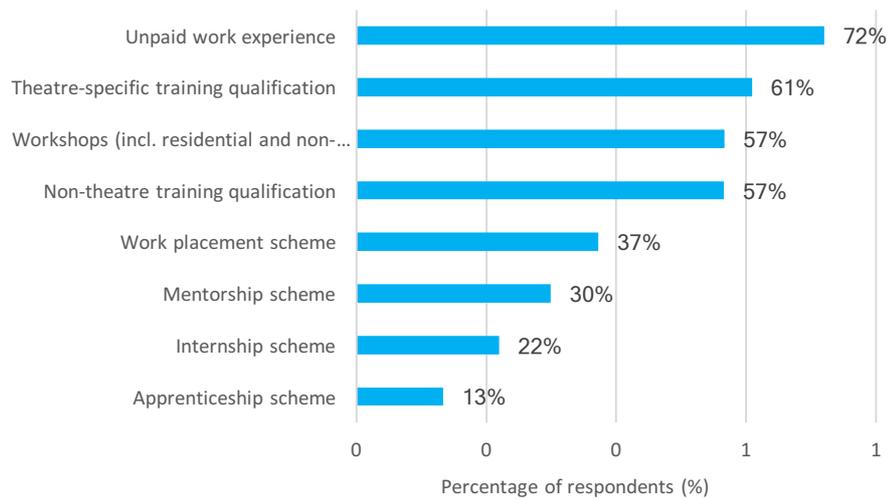
Source: Nordicity Survey (2017)
n = 489

Figure 39: Utility of Learning Opportunities Experienced by Workers
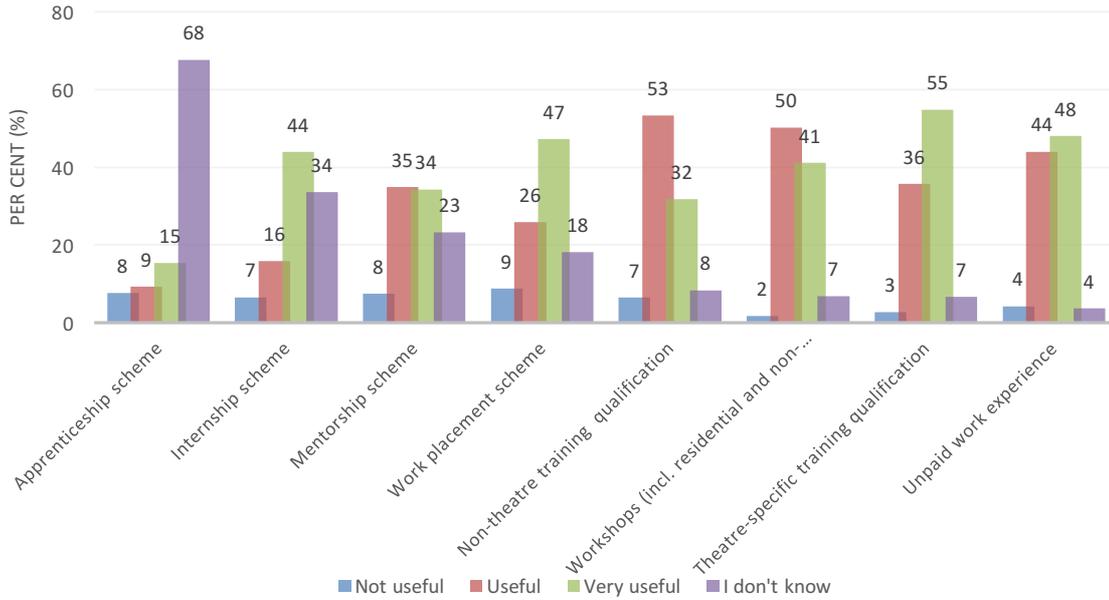
Source: Nordicity Survey (2017)
n = 352

Figure 40: Former Offstage Worker Concerns by Geography (Why they left the sector)
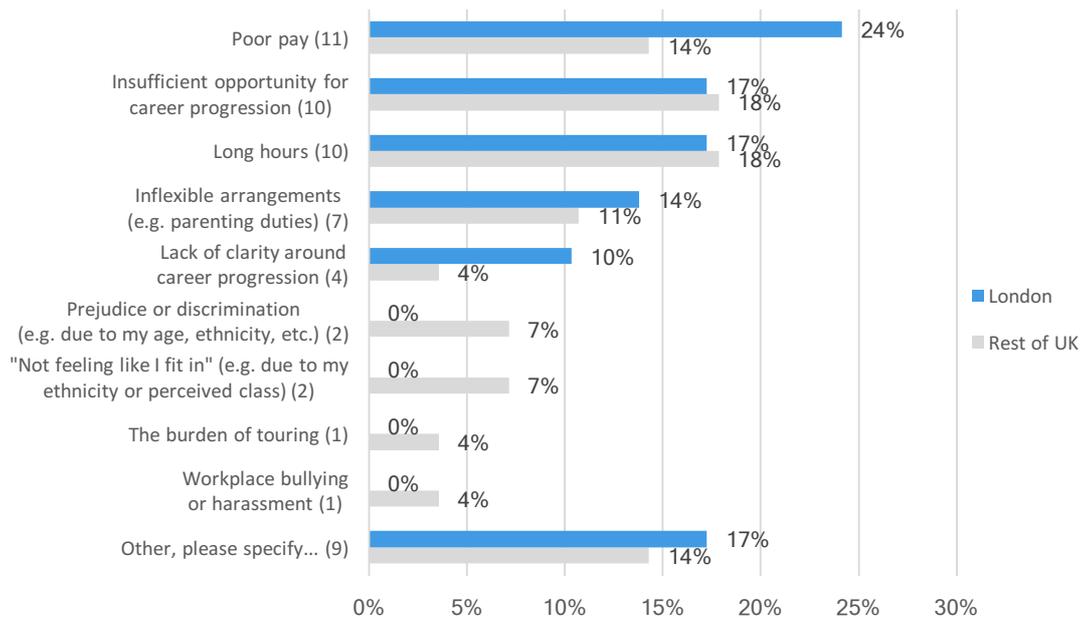
Source: Nordicity Survey (2017)
n = 29

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