

# **FREELANCERS MAKE THEATRE WORK**

## **INTERDEPENDENCE: FREELANCERS AND ORGANISATIONS, 2020**

**A REPORT OF SURVEY FINDINGS INTO THE  
RELATIONSHIP BETWEEN ORGANISATIONS AND  
FREELANCERS IN THE PERFORMING ARTS  
SECTOR**

**Author: Leo Wan  
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## 1. EXECUTIVE SUMMARY

### 1.1 Key Findings<sup>1</sup>

- 1.1.1 Prior to COVID-19, performing arts organisations spent 39.4% of their annual turnover on freelancers.
- 1.1.2 80.6% of the workforce on a typical production were freelancers.
- 1.1.3 91.8% of organisations reported that they are extremely or very concerned about the contraction of the freelance workforce.
- 1.1.4 77.6% of organisations reported that they are extremely concerned about sustaining and developing a diverse freelance workforce.
- 1.1.5 91.8% of organisations reported that they are extremely or very concerned about the loss of freelance experience and leadership.
- 1.1.6 83.7% of organisations reported that freelancers are essential to their organisations starting to make work again.
- 1.1.7 80.6% of organisations reported that freelancers are essential to their organisations' long-term recovery plans.

### 1.2 Introduction

- 1.2.1 This survey, carried out by Freelancers Make Theatre Work<sup>2</sup>, reveals overwhelming interdependence between freelancers and organisations in the performing arts sector.
- 1.2.2 This relationship is symbiotic – without the contribution of the freelance theatre workforce, organisations are unable to stage theatrical productions and unable to generate income via ticket sales. The prospect of a talent drain from the freelance workforce will have considerable effect on the long-term recovery of the sector. Likewise, freelance theatre workers are unable to generate income unless organisations stage productions. Most have been without work since March 2020 and will continue without work whilst theatres remain closed.
- 1.2.3 Prior to March 2020, performing arts organisations spent **51.2% of annual turnover on production** and **39.4% of annual turnover on freelancers**. However, the government has reported that it expects only 12.5% of the

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<sup>1</sup> The findings of this report are compiled from a survey of 96 producing organisations throughout the UK, including the National Theatre, Royal Shakespeare Company, and Sheffield Theatres. A full list of responding organisations can be found in the Appendix. This data was collected between 27 August 2020 and 16 December 2020.

<sup>2</sup> This survey was originally conceived by members of the Freelance Task Force, Freelancers Make Theatre Work, the Public Campaign for the Arts and Fuel Theatre.

business costs of Cultural Recovery Fund recipients will go to freelancers<sup>3</sup>.

- 1.2.4 Though the government has provided investment to the sector in recognition of the specific crisis it faces, it has not provided a mechanism for this investment to reach the freelance workforce whilst live performance is restricted. Without such a mechanism, the freelance workforce (and therefore the wider sector) remains in crisis.

### 1.3 More Than Viable

- 1.3.1 The performing arts sector in the UK has been a success story. In 2018, SOLT and UK Theatre member venues generated ticket revenue of £1.28 billion, reaching an audience of 34 million people<sup>4</sup>.
- 1.3.2 In 2019, the ONS reports that the performing arts added £7.9 billion to the nation's GVA<sup>5</sup>.
- 1.3.3 Government figures show that the creative industries contributed £111.7 billion to the UK in 2018, with growth at more than five times greater than across the UK economy as a whole<sup>6</sup>.
- 1.3.4 Beyond the clear economic argument, the performing arts sector also adds value and benefits to education, to health and wellbeing, and to society<sup>7</sup>.
- 1.3.5 If the performing arts sector is to return to its former strength, it will be reliant on freelance theatre workers. In our survey, **84.4% of respondents reported that freelancers are essential to their organisations starting to make work again** and **80.3% of respondents reported that freelancers are essential to their organisations' long-term recovery plans**.

### 1.4 Cultural Recovery Fund

- 1.4.1 In England, only 7.9% (£123.5 million) of the £1.57 billion Cultural Recovery Fund has been distributed in grants to the theatre sector<sup>8</sup>; however, these funds are not designed to – nor can they – provide direct support for the freelance workforce<sup>9 10</sup>.

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<sup>3</sup> <https://hansard.parliament.uk/lords/2020-12-15/debates/C658099D-171D-4A04-8430-467A8B7632F0/Covid-19ArtsSector>

<sup>4</sup> <https://uktheatre.org/theatre-industry/news/2018-sales-data-released-uk-theatre-and-society-of-london-theatre/>

<sup>5</sup> <https://www.gov.uk/government/statistics/dcms-economic-estimates-2019-gross-value-added>

<sup>6</sup> <https://committees.parliament.uk/writtenevidence/14495/html/>

<sup>7</sup> <https://www.artscouncil.org.uk/exploring-value-arts-and-culture/value-arts-and-culture-people-and-society>

<sup>8</sup> <https://www.artscouncil.org.uk/publication/culture-recovery-fund-data>

<sup>9</sup> The Welsh Government has dedicated £7m to directly supporting creative freelancers (<https://gov.wales/cultural-recovery-fund-essential-support-making-difference>).

<sup>10</sup> The Scottish Government has dedicated £8m to directly supporting creative freelancers (<https://www.creativescotland.com/funding/funding-programmes/hardship-fund-for-creative-freelancers>).

- 1.4.2 Only organisations that elect to undertake production activity can support the freelance theatre workforce. We assume that the Cultural Recovery Fund was determined on the basis that production activity would be possible. However, any scheduled activity is either cancelled or at risk as a result of the recent COVID-19 restrictions.
- 1.4.3 On 02 December 2020, more than half of regional theatres moved into Tier 3<sup>11</sup> and therefore lost the freedom to stage productions. Despite briefly being in Tier 2 between 02 December and 15 December 2020, in London only 15 theatres were operating during that time<sup>12</sup>.
- 1.4.4 The Cultural Recovery Fund was negotiated and agreed in July 2020, within the context of the Culture Secretary's roadmap towards the reopening of the performing arts sector<sup>13</sup>. However, progress along the roadmap has stalled. 'Operation Sleeping Beauty'<sup>14</sup> has failed. The context has changed. The facts have changed.
- 1.4.5 Whilst restrictions on live performance remain in place, the government must recognise that the terms and conditions of the Cultural Recovery Fund are no longer viable if they wish to support the freelance workforce. This unprecedented investment will not protect the sector unless the Arts Councils and performing arts organisations are allowed and empowered to use these funds to support and protect the freelance workforce.
- 1.4.6 Outside of the Cultural Recovery Fund, Arts Council England (ACE) is severely limited in its ability to provide emergency support to the workforce. The government itself has stated ACE has reached only 4% of the freelance workforce with non-CRF funds, including the Emergency Support Scheme<sup>15</sup>.
- 1.4.7 Support should not necessarily be tied to performance. It can and must support other creative activity and career development.

## **1.5 The Freelance 'Problem'**

- 1.5.1 The performing arts sector is a freelance sector: 71% of the performing arts workforce is freelance or self-employed. This compares to the national average of 16%<sup>16</sup>.

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<sup>11</sup> <https://www.thestage.co.uk/opinion/opinion/theatre-cannot-be-turned-on-and-off-like-a-tap--we-need-consistency>

<sup>12</sup> <https://www.theguardian.com/world/2020/dec/13/tier-3-or-not-tier-3-hard-hit-west-end-shows-await-the-covid-fate-of-london>

<sup>13</sup> <https://uktheatre.org/theatre-industry/news/culture-secretary-announces-a-roadmap-towards-reopening-of-the-performing-arts-sectors/>

<sup>14</sup> <https://www.dailymail.co.uk/debate/article-8701877/OLIVER-DOWDEN-People-waiting-wings-shows-Christmas.html>

<sup>15</sup> <https://hansard.parliament.uk/lords/2020-12-15/debates/C658099D-171D-4A04-8430-467A8B7632F0/Covid-19ArtsSector>

<sup>16</sup> <https://www.gov.uk/government/statistics/dcms-sectors-economic-estimates-2019-employment>

- 1.5.2 The government has supported the UK economy and workforce via the Coronavirus Job Retention Scheme (CJRS) and the Self-Employment Income Support Scheme (SEISS).
- 1.5.3 Within the performing arts sector, approximately one-third of freelancers and the self-employed have received no support from government since theatres were shut down in March 2020<sup>17</sup>. Equity estimates that for those who *have* received support via SEISS, around 70% have received less than £200 per round<sup>18</sup>.
- 1.5.4 The government has recognised the particular and specific crisis that the performing arts face through the Cultural Recovery Fund. However, it has not provided the mechanism for these funds to plug the gap in employment support in our sector.
- 1.5.5 In June, we warned that a third of freelancers were likely to leave the industry<sup>19</sup>. Already there have been 55,000 job losses (including freelancers) in music, performing and visual arts. This represents a 30% decline<sup>20</sup>.
- 1.5.6 Amongst the organisations that responded to our survey, **91.7% of respondents reported that they are extremely or very concerned about the contraction of the freelance workforce.**

## 1.6 The Diversity ‘Problem’

- 1.6.1 As we reported in our *Routes to Recovery* document, ‘an investment package that is pointed at institutions without freelance conditioning will target money directly towards an 82% white identifying permanent workforce and away from the group which contains 86% of all people of colour working in National Portfolio Organisations’<sup>21</sup>.
- 1.6.2 That report also highlighted that people from underrepresented communities were most at risk of leaving the industry, with 42% of D/deaf and disabled workers and 47% of all Stage and Company Management who identify as people of colour reporting as likely to leave the industry.
- 1.6.3 It is within this context that **78.1% of respondents to our survey reported that they are extremely concerned about sustaining and developing a diverse freelance workforce.**

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<sup>17</sup> <https://freelancersmaketheatrework.com/study-routes-to-recovery/>

<sup>18</sup> <https://committees.parliament.uk/oralevidence/1237/pdf/>

<sup>19</sup> <https://freelancersmaketheatrework.com/study-routes-to-recovery/>

<sup>20</sup> <https://www.pec.ac.uk/blog/how-covid-19-is-impacting-the-cultural-sector-with-the-loss-of-55-000-jobs-in-the-arts>

<sup>21</sup> <https://freelancersmaketheatrework.com/study-routes-to-recovery/>

## 2 THE SURVEY

### 2.1 Context: The Interdependence Between Freelancers and Organisations

#### 2.1.1 Table 1

What percentage of your annual turnover is spent on production?	51.9%
What percentage of your annual production spend is paid to freelancers?	57.4%
What percentage of your annual turnover is spent on participation and additional artistic activity?	14.8%
What percentage of your annual turnover is spent on freelancers?	39.4%
How many freelancers did you employ that year?	
Average	165
Total	16053
How many salaried staff did you employ that year?	
Average	69
Total	6715

## 2.2 Freelancers Are Essential

2.2.1 Table 2

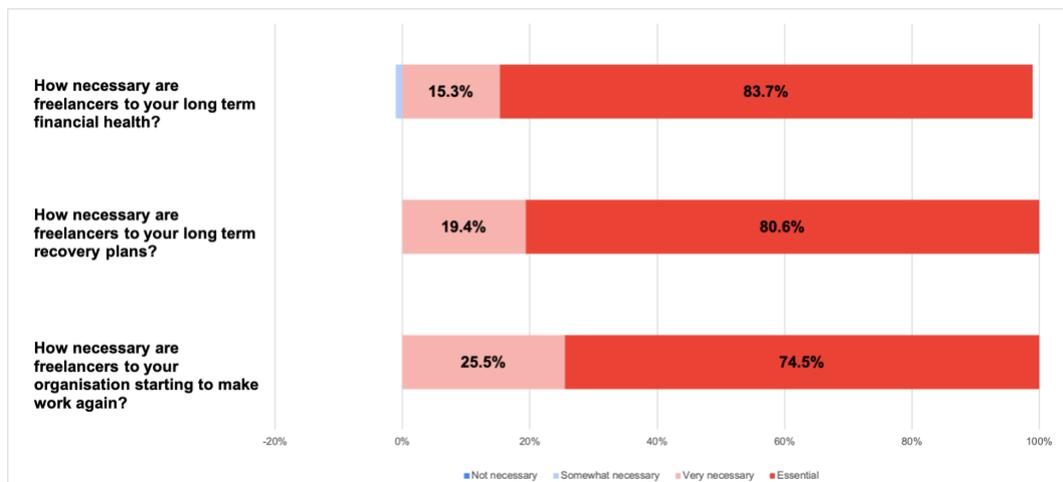
	Not necessary	Somewhat necessary	Very necessary	Essential
Pre-COVID-19, how necessary were freelancers to your ability to produce?	0.0%	0.0%	10.2%	89.8%
Pre-COVID-19, what percentage of the work you produced on stage could NOT have happened without freelance theatre workers?				94.4%
Pre-Covid-19, what percentage of the workforce on a typical production were freelance theatre workers?				80.6%

## 2.3 A Recovery Built on Freelancers

2.3.1 Table 3

	Not necessary	Somewhat necessary	Very necessary	Essential
How necessary are freelancers to your long term financial health?	0.0%	0.0%	25.5%	74.5%
How necessary are freelancers to your long term recovery plans?	0.0%	0.0%	19.4%	80.6%
How necessary are freelancers to your organisation starting to make work again?	0.0%	1.0%	15.3%	83.7%
What percentage of the workforce required to start making work again do you expect to be freelancers?				78.0%

2.3.2 Figure 1

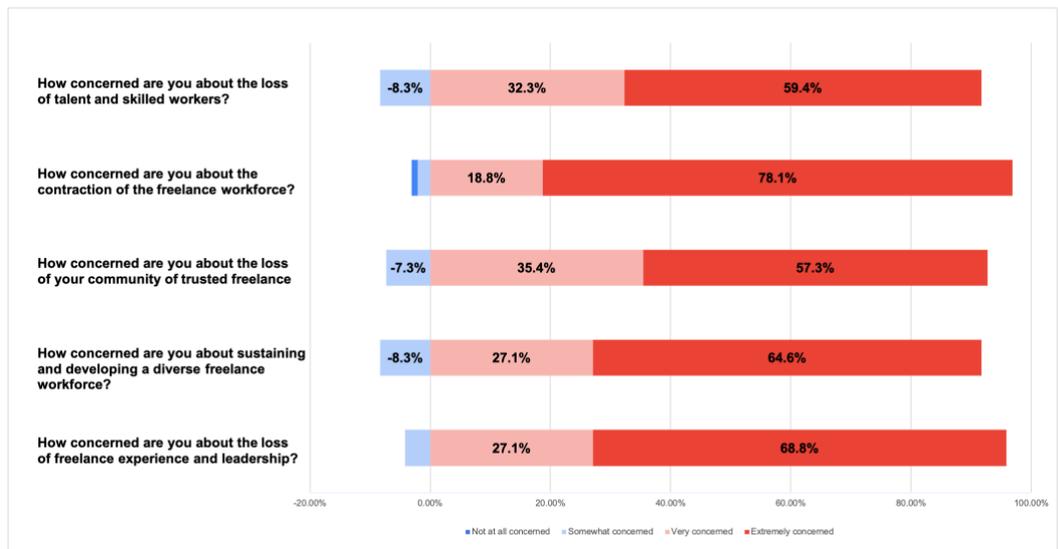


## 2.4 Organisations' Concerns about the Freelance Workforce

2.4.1 Table 4

	Not at all concerned	Somewhat concerned	Very concerned	Extremely concerned
How concerned are you about the loss of talent and skilled workers?	0.0%	4.2%	27.1%	68.8%
How concerned are you about the contraction of the freelance workforce?	0.0%	8.3%	27.1%	64.6%
How concerned are you about the loss of your community of trusted freelance colleagues and collaborators?	0.0%	7.3%	35.4%	57.3%
How concerned are you about sustaining and developing a diverse freelance workforce?	1.0%	2.1%	18.8%	78.1%
How concerned are you about the loss of freelance experience and leadership?	0.0%	8.3%	32.3%	59.4%

2.4.2 Figure 2



## Appendix A: Contributing organisations

Data was gathered from the following organisations:

1927	National Theatre
Action Hero	National Theatre Wales
Activate Performing Arts	New Theatre Royal
Actors Touring Company	New Wolsey Theatre
Almeida Theatre	Northern Broadsides
Arcola Theatre	Northern Ireland Opera
Battersea Arts Centre	Northern Opera Group
Birds of Paradise Theatre Company	Nottingham Playhouse
Boundless Theatre	November Club
Boy Blue	Opera A La Carte
Bradford Fringe Festival	Opera della Luna
Bridport Arts Centre	Perth Theatre at Horsecross Arts
British Youth Music Theatre	Proteus
Bush Theatre	Queens Hall Arts
Cambridge Handel Opera Company	Red Ladder Theatre Co
Camden People's Theatre	Royal & Derngate, Northampton
Caspa Productions	Royal Opera House
Chanje Kunda productions	Royal Shakespeare Company
Cheshire Rural Touring Arts	Shakespeare's Globe
CHROMA	Sheffield Theatres
Citizens Theatre Ltd	Shoreditch Town Hall
Coney	Silent Opera
Cultured Mongrel (Creative Handle)	Soho Theatre
Curious Monkey	somethingGraphic Ltd
D'Oyly Carte Opera Company	Southbank Centre
DanceEast	Spare Tyre
Donmar Warehouse	Stellar Quines Theatre Co
dreamthinkspeak	Talawa Theatre Company
English National Opera	Talking Birds Theatre Company Ltd
English Touring Opera	Tangled Feet
Exeter Northcott Theatre	Tête à Tête
Fuel	The Arts Development Company
Further Than the Edge	the egg, Theatre Royal Bath
Garsington Opera Limited	The JMK Trust
Gecko	The Old Vic
Hampstead Theatre	The Opera Story
HGO Trust	The Yard Theatre
HighTide	Theatr lolo
J Clare Productions	Theatre Centre
Jermyn Street Theatre	Turtle Key Arts
Kali Theatre Co.	tutti frutti productions
Kneehigh Theatre	Unfolding Theatre
London International Festival of Theatre (LIFT)	Unicorn Theatre
Lou Brodie	Vanishing Point
Lung Ha Theatre Company	Visible Fictions
Lyth Arts Centre	Vital Xposure
Mercury Theatre	Welsh National Opera
Mimbre	Yellow Earth Theatre
Minack Theatre	Z-arts