

house southeast theatre network

2026 survey report

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Executive summary

This report gives a state-of-play from a variety of house members, with responding organisations including arts centres, multi-arts venues and theatres at small and medium scale. In particular, it shares the analysed findings from each of the three sets of respondents - Venue Leaders, Marketeers and Programmers - about their organisation. It also shows how they engage with house (e.g. programming, network events, regular communication, bursaries or training).

Broken down by each group of respondents, some headline findings include:

Venue Leaders

Funding: Within the range of respondents, just over half said they receive funding from a local authority; nearly two thirds receive funding from the Arts Council (40% NPO funding and 25% ACE project or other funding); a quarter of organisations receive funding from councils or local economic partnerships; and a quarter do not receive funding from any of these entities.

Staffing and volunteers: More than half of the organisations have fewer than 20 paid employees. 30% have between 20 and 59, while a small proportion (12%) have more than 80 paid employees. On average, 31% of paid employees work full-time hours. Half the organisations surveyed expect their team size to stay about the same over the next 6 to 12 months. Nearly a third expect growth, while a fifth anticipate a reduction in team size.

46% of organisations report that staff turnover has increased while 54% say it has decreased in the last few years. A survey of house members in 2024 showed that 47% organisations reported staff turnover increased, 41% said it stayed the same, and 11% indicated it decreased. Overall, therefore, the picture is relatively unchanged.

Placing this in a wider context, according to The Audience Agency's report on **The State of Touring** “consultees reported a net loss of experienced staff, especially freelancers in technical and production, marketing and communications, and producer roles”. Figure 16 in the State of Touring report shows the key challenges

drawn from that survey to the question ‘What do you think are the main challenges for performing arts touring at the moment?’. Open responses included “staffing and workforce wellbeing; skills and availability (esp. marketing, technical); staff churn; the need for support”. A detailed set of findings around recruitment and retention are included in **The State of Touring** report on page 69.

Just over half of the organisations have between 1 and 3 staff working in community development or engagement. Almost a third of organisations do not employ any staff in this area.

There is a mixed picture regarding volunteers. Just over a third of organisations report no significant change in their reliance on volunteers. A third say they are relying on them more, and just under a third are relying on them less.

Training needs: those identified include: marketing and audience development; environmental sustainability; building management and operations.

In terms of marketing training needs, this meets a finding in **The State of Touring** report (p82): “Many of the issues discussed elsewhere... (whether finances, staffing, programming, timelines or audience behaviour and preferences) converge in the marketing of touring work. This explains why it [marketing] was so widely referenced as a key challenge for the sector”.

Regarding environmental sustainability, there has been an increase in policies - from 75% in the previous house members survey in 2024, rising to 81% in this current survey. However, only 6% of respondents indicated they were 'very confident' in their ability to make a difference on sustainability, so this could be a clear areas of focus for support to increase confidence, especially as both budget and lack of staff capacity are cited as being key reasons.

Marketeers

Most marketing teams consist of one or two people (53%); the average size is 2.5 people, with a small number of medium scale organisations having marketing teams of up to seven. Amongst small scale organisations the average is 1.8, and at

mid-scale organisations the average is 3.2¹. Where data was available, marketers made up on average 13% of organisations' workforces (17% at small scale organisations, 5% at medium scale organisations).

The majority (57%) of marketers' organisations do not have an approach to bringing in new audiences – most often due to a lack of capacity. This raises a key question - how can venues grow audiences if almost two thirds aren't focussed on bringing in new ones alongside their regular attendees? Of those that do have an approach to bringing in new audiences, the majority (62%) updated it this year, and two thirds who have an approach have seen a change in audiences due to this activity.

It is also worth highlighting here the difference between venue leaders indicating a skills gap around marketing and audience development, and marketers who indicate there might be a lack of capacity.

Programmers

Most programming teams consist of one or two people (89%); the average size is 1.4 people, with a small number having teams of up to seven. Amongst small scale organisations the average is 1.4, and at mid-scale organisations the average is 1.6². Where data was available, programmers made up on average 11% of the workforce (16% at small scale organisations, 4% at medium scale organisations).

Programming: Nearly all venues' programmes are sourced in the following ways - re-programming theatre companies who have previously performed at the venue (94%), recommendations from colleagues (92%), seeing live performances (92%), the house tour programme offer (89%) or emails from companies with no previous relationship (83%). A minority of venues source programme via Associate Artists (36%) or produce their programme in-house (28%).

More than half of organisations book their programme 6 to 12 months in advance. In addition to producing or programming theatre and comedy, the vast majority also

¹ Scale of organisation self-identified; no data available for large scale organisations.

² See previous footnote.

produce or programme family work (97%), music (92%), community engagement events (83%) and/or workshops (81%).

Just over half of organisations do not plan to produce or programme new types of work, which raises questions about risk, viability and the breadth of the cultural offer to the public. Of those house member organisations that said they do plan to produce or programme new types of work, a third would introduce dance and nearly a fifth would introduce circus. Around half of organisations are prevented from programming new types of work because they are financially risky (57%) or they do not have enough funding (46%)³.

Audiences: On average, venues reached 62% capacity for all performances in 2025/26. Just over half of organisations decreased their theatre programming in 2025/26, largely due to a decrease in audience size (57%) or financial reasons (47%). This is lower than the c.76% typical for 'core theatre' at venues across the country, as reported in the [British Touring Consortium research report](#) (p21). This may indicate a need for further investigation. It is worth noting that ACE's small scale touring report (not yet published at the time of writing) may give further insights around this.

In terms of reductions in both **programming and audiences**, house's membership reflects types of venues that are likely to have seen reductions in touring programming, according to The Audience Agency's report on [The State of Touring](#): smaller scale, outside of major cities and including genres such as dance and drama.

Access: Almost all organisations offer access performances. The majority offer relaxed performances (86%), 63% offer BSL interpretation and nearly half offer captioned or audio-described performances. Around half of organisations are prevented from programming more accessible performances because of the difficulties associated with short runs (56%) and a lack of appropriate equipment (44%). This indicates an area for further support required to ensure accessibility.

³ The [British Touring Consortium research report](#) explores the many and varied factors around this (from pre Covid to 2025) in much more detail through a section focussed on new work (section 6, p66-87).

About the survey

Background

In spring 2026, a survey was conducted to understand more about the members of house southeast theatre network, made up of nearly 200 venues, and to help to provide a clear picture of the theatre ecology in the South East.

Following feedback on previous surveys, the 2026 survey was split into three shorter, separate surveys defined by role - Programming, Marketing and Venue Leadership - with the aim of making it easier for respondents to focus on their area/s of expertise, and to increase take-up/submission.

The survey was created and distributed by the team at house southeast theatre network, and the analysis undertaken by The Audience Agency. This report gives the results of the survey, with key findings highlighted.

Alongside this report, full charts, tables and open responses have also been provided for further analysis and reporting.

Responses

In total 111 responses were received to the three surveys; 102 responses were received from 60 known organisations, and in a further nine responses the organisation was not identified. A full list of responses per survey per organisation is available in the appendices.

35 responses were received for the Marketeers survey (from 26 identified organisations), 36 for the Programmers survey (from 34 identified organisations) and 40 for the Venue Leaders survey (from 39 identified organisations).

Given the complexity of the network, in terms of members size and scale, these results should not be taken to be representative of all house member organisations – they are a reflection of the responses of a group of house venues, rather than a representative sample of the entire house membership.

Survey results

Venue Leaders

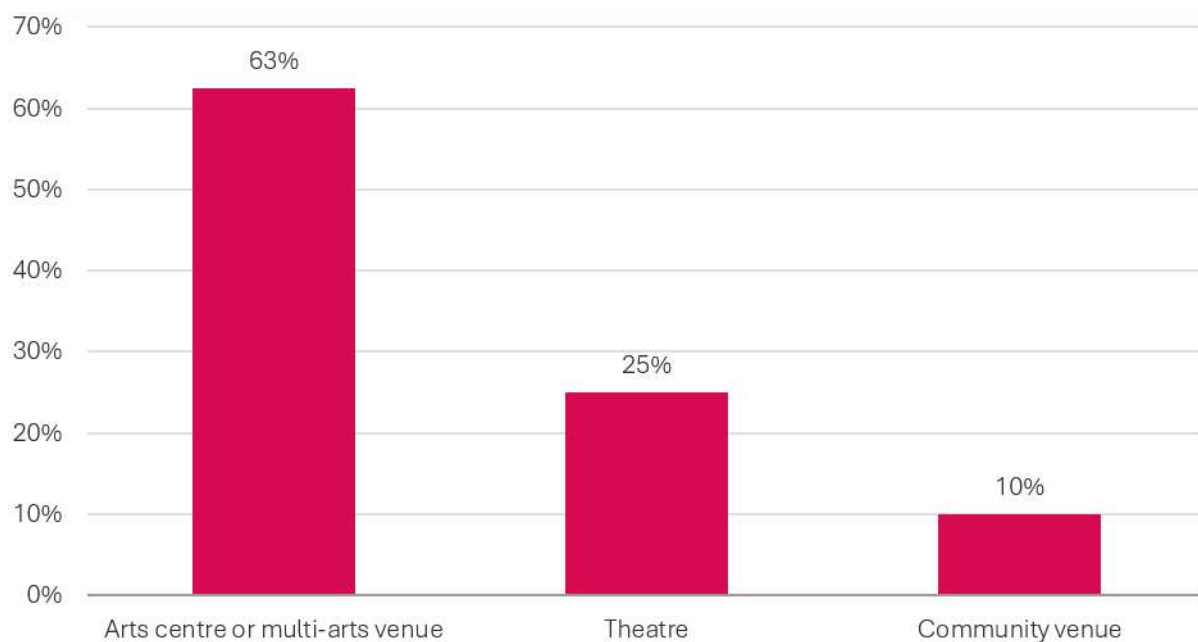
Key findings

- Two thirds of the organisations were arts centres or multi-arts venues and a quarter were theatres.
- Nearly two thirds were small scale and a third were medium scale.
- Just over half of the organisations surveyed receive funding from a local authority; nearly two thirds receive funding from the Arts Council (40% NPO funding and 25% project of other funding); a quarter of organisations receive funding from councils or local economic partnerships; and a quarter do not receive funding from any of these entities.
- A third of respondents work at venues owned or managed by a local authority.
- Just over half of the organisations have fewer than 20 paid employees. 30% have between 20 and 59, while a small proportion (12%) have more than 80 paid employees.
- On average, 31% of paid employees work full time hours.
- Just over half of the organisations have between 1 and 3 staff working in community development or engagement. Almost a third of organisations do not employ any staff in this area.
- Half of the organisations surveyed expect their team size to stay about the same over the next 6 to 12 months. Nearly a third expect growth, while a fifth anticipate a reduction in team size.
- 46% of organisations report that staff turnover has increased while 54% say it has decreased in the last few years.
- Just over a third of organisations report no significant change in their reliance on volunteers. A third say they are relying on them more, and just under a third are relying on them less.

- The majority of organisations (74%) feel staff need more training in marketing and audience development. Just over half also identified environmental sustainability and building management and operations as areas where additional professional development would be beneficial.
- The majority of organisations have policies on equality, diversity and inclusion (91%) and environmental sustainability (81%).
- Nearly all organisations (96%) focus on managing the venue more sustainably in their environmental sustainability policy. Nearly two third also focus on managing bars and cafes more sustainably and/or sustainable marketing.
- Organisations report a moderate level of confidence in their ability to make a difference on sustainability, with an average confidence score of 0.5 on a scale of 0 to 1.
- Just over a third of organisations identify budget and lack of staff capacity as barriers to doing more on sustainability.
- The majority of respondents engage with house via networking events (95%), communication (95%), and/or programming (89%). Just over three quarters have engaged with training and half have received bursaries for festivals or conference.
- The majority of organisations find out about house activity via direct communication (84%) or the email newsletter (84%). Nearly a quarter also use the website.
- 39% of organisations reported that the networking opportunities and programming offered by house were the most supportive factors in helping to deliver their ambitions. A quarter of organisations also cited the subsidised shows and 17% mentioned training.

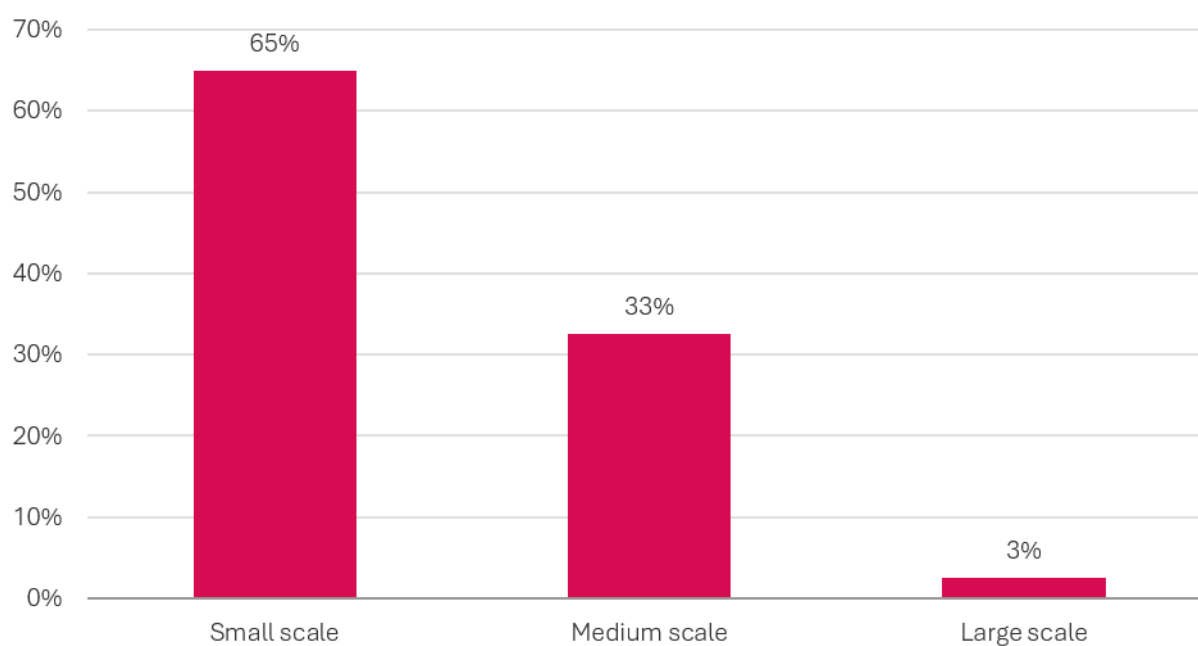
Full results

Which of the following best describes your organisation?



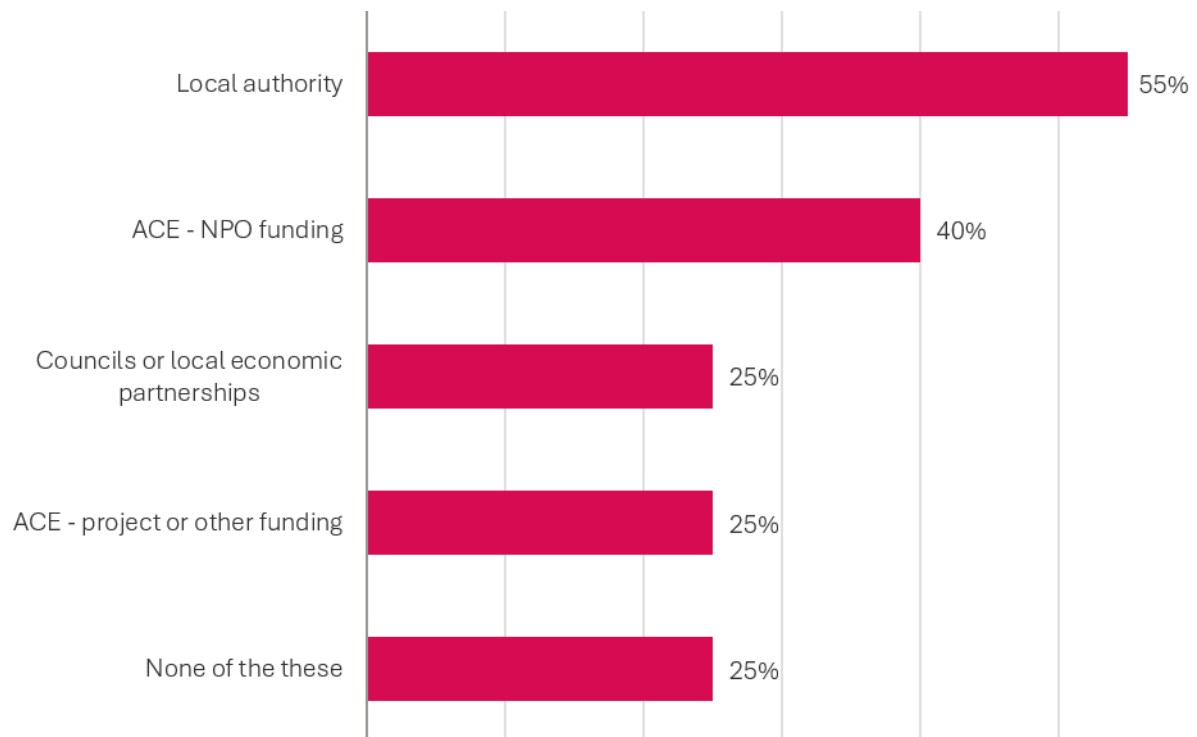
Base – 40 (all respondents)

Which of the following best describes the size your organisation?



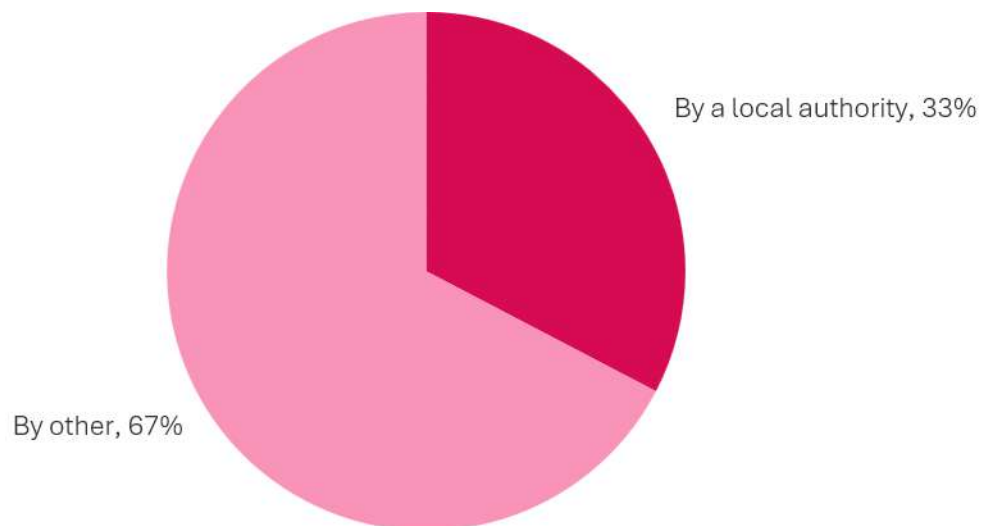
Base – 40 (all respondents)

Which of the following do you currently receive funding from?



Base – 40 (all respondents)

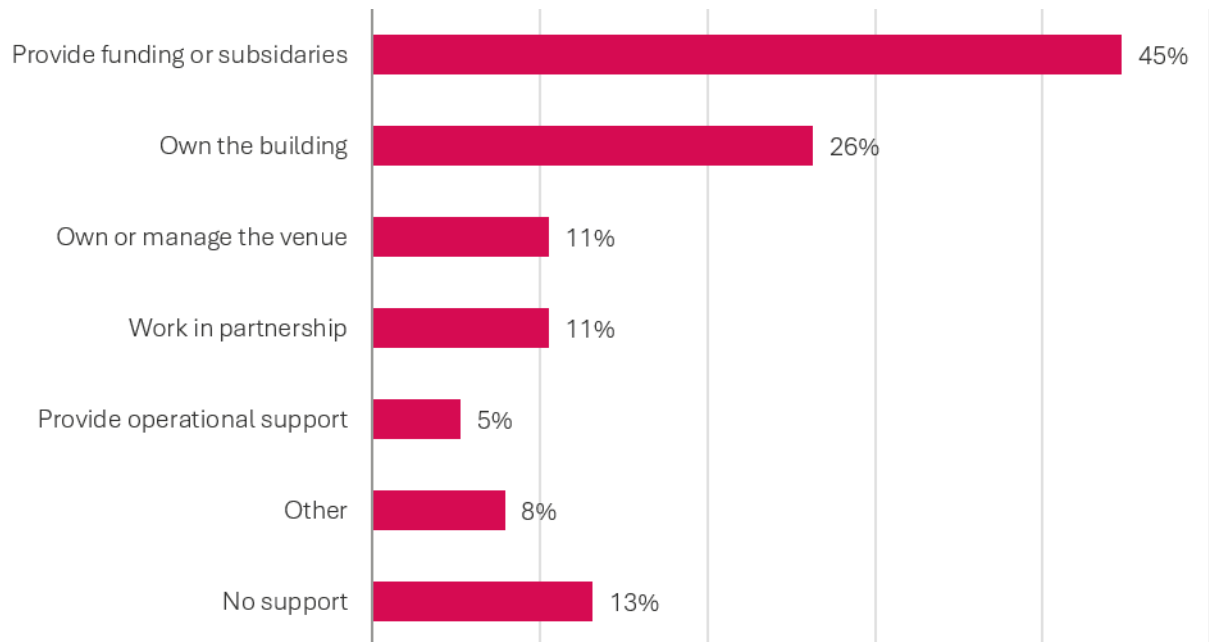
Is your organisation a local authority owned or managed venue?



Base – 40 (all respondents)

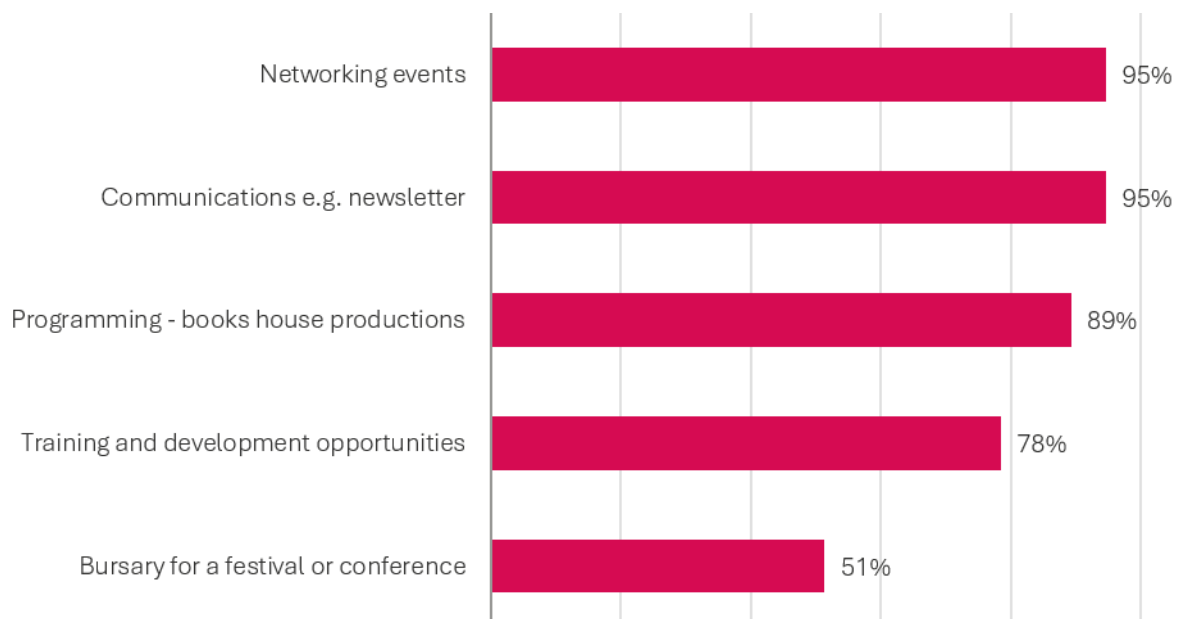
How is your organisation supported by the local authority?

Respondents were asked to answer this question in their own words. The following chart groups responses into categories. Please see the accompanying spreadsheet for full responses.



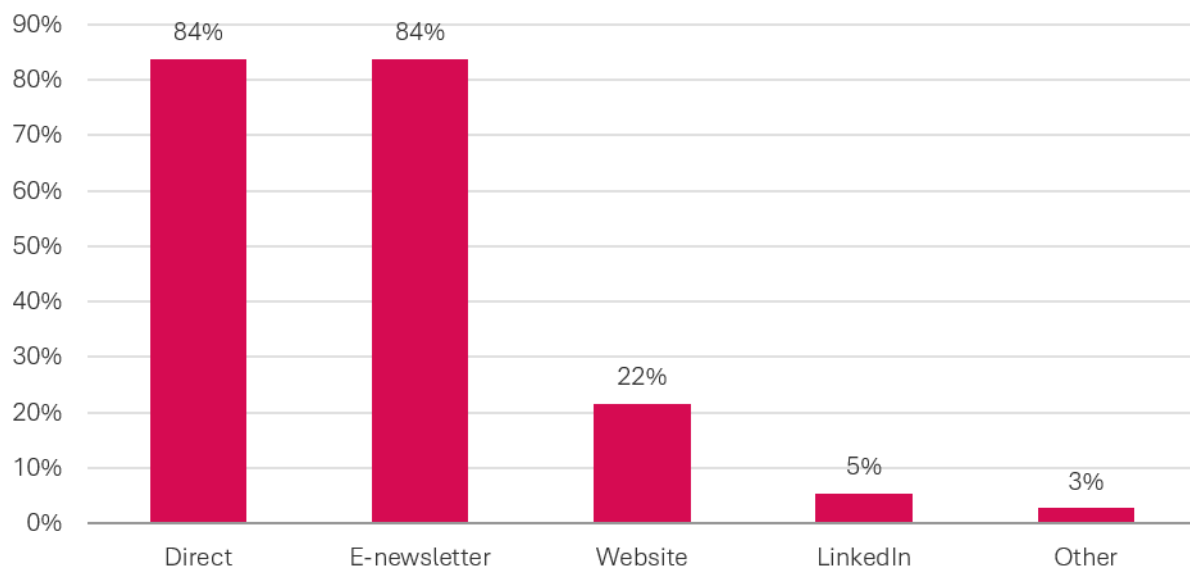
Base – 38 (all respondents)

How does your organisation engage with house?



Base – 37 (all respondents)

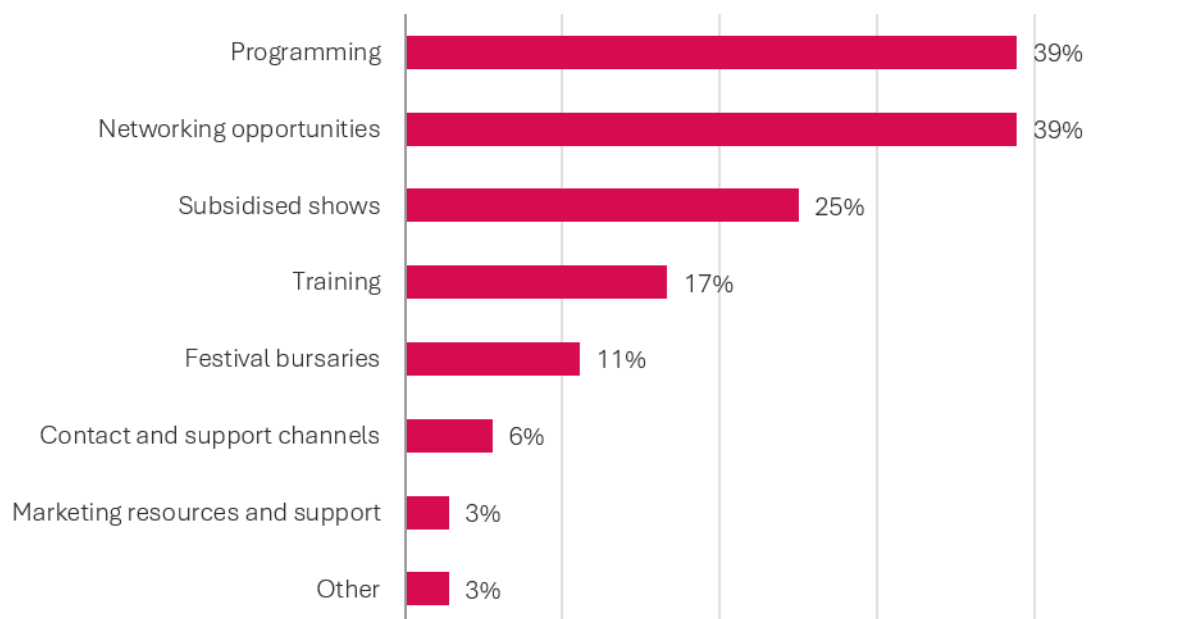
Which house channels do you use most effectively to find out about our activity?



Base – 37 (all respondents)

What activity that house offers do you find the most supportive in delivering your organisation's ambitions?

Respondents were asked to answer this question in their own words. The following chart groups responses into categories.



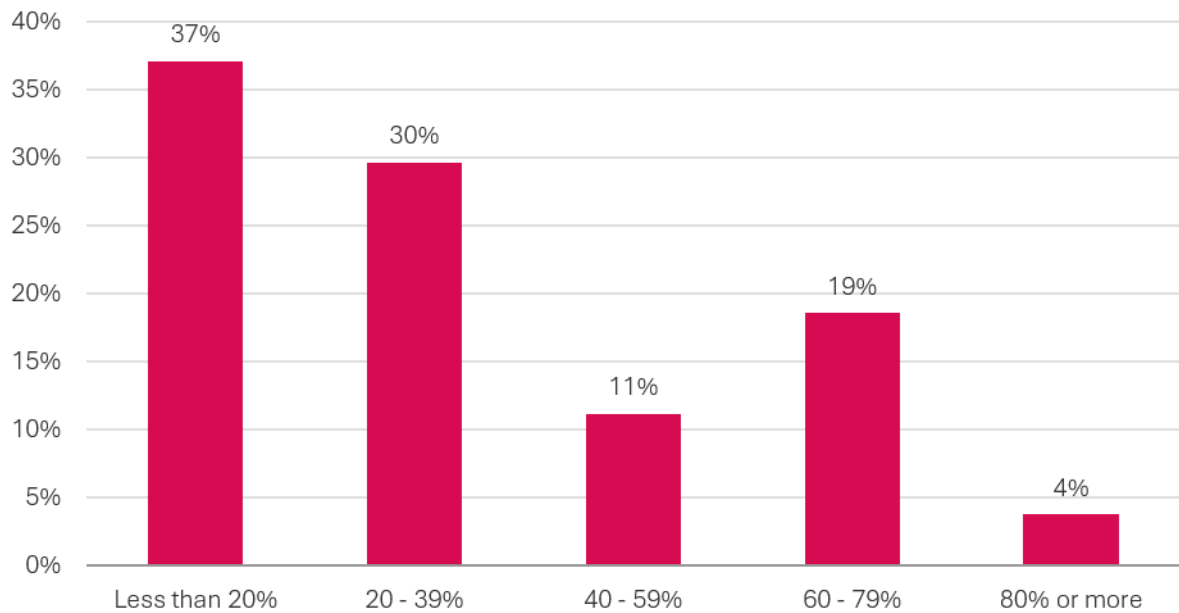
Base – 36 (all respondents)

'The programming opportunities and the peer to peer support and network etc.'

‘Creating opportunities for us to programme new and emergent work of a high quality to help grow and build new audiences for new content.’

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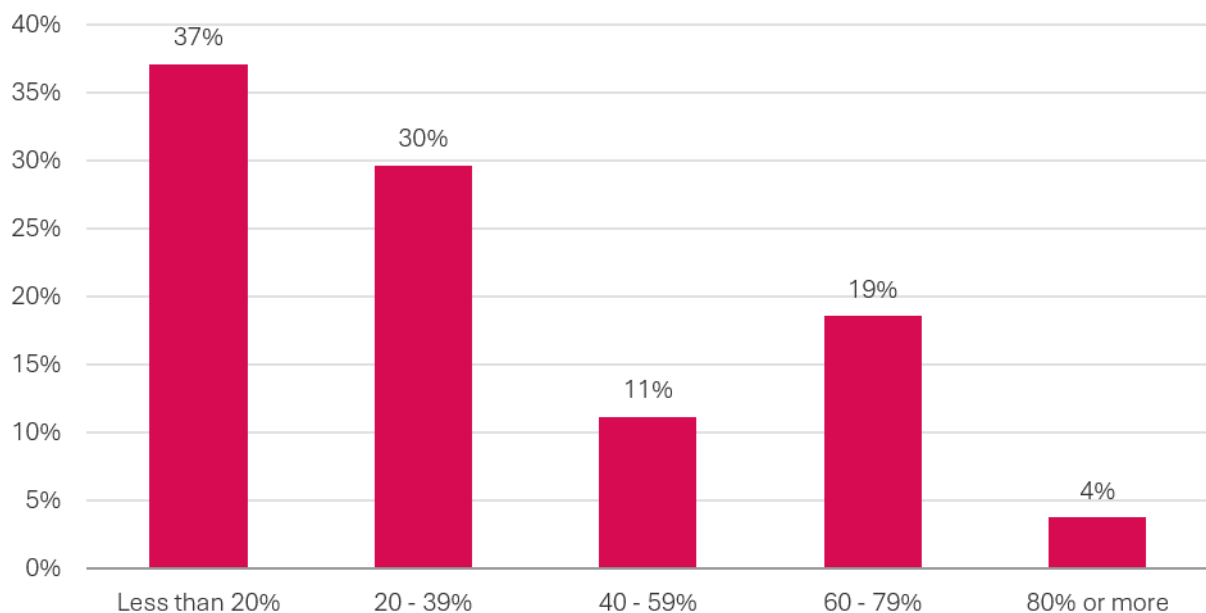
How many paid employees work for your organisation?



Base – 33 (all respondents)

The average number of paid employees is **30**.

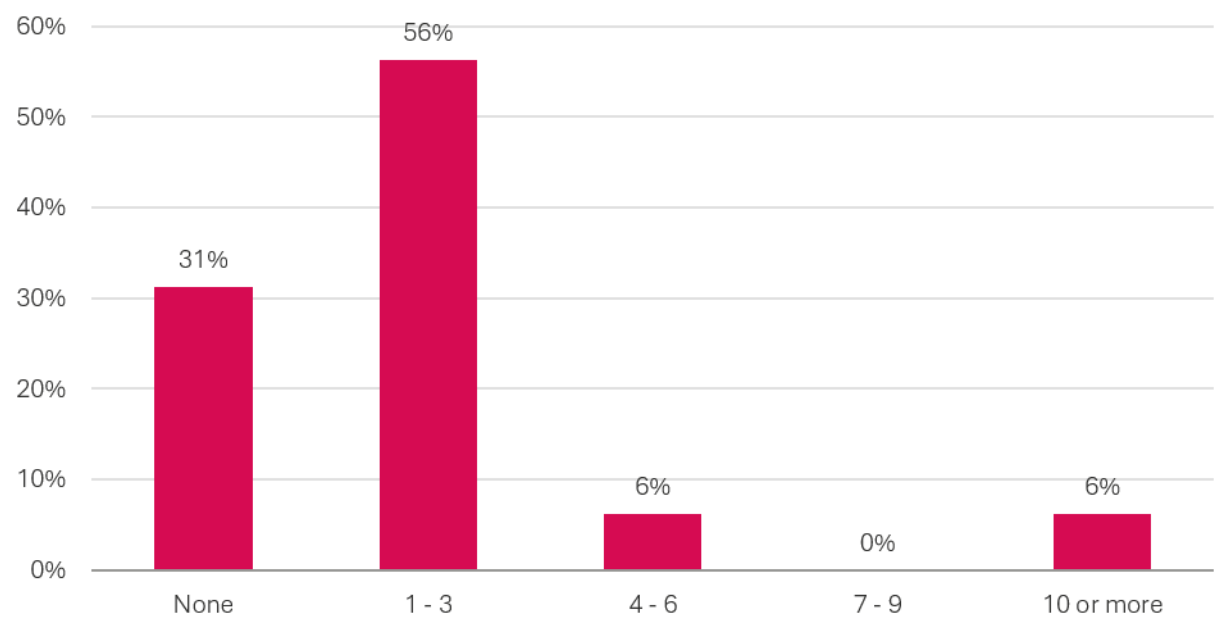
Out of those paid employees, what percentage are full time?



Base – 33 (all respondents)

On average, **31%** of paid employees are full time.

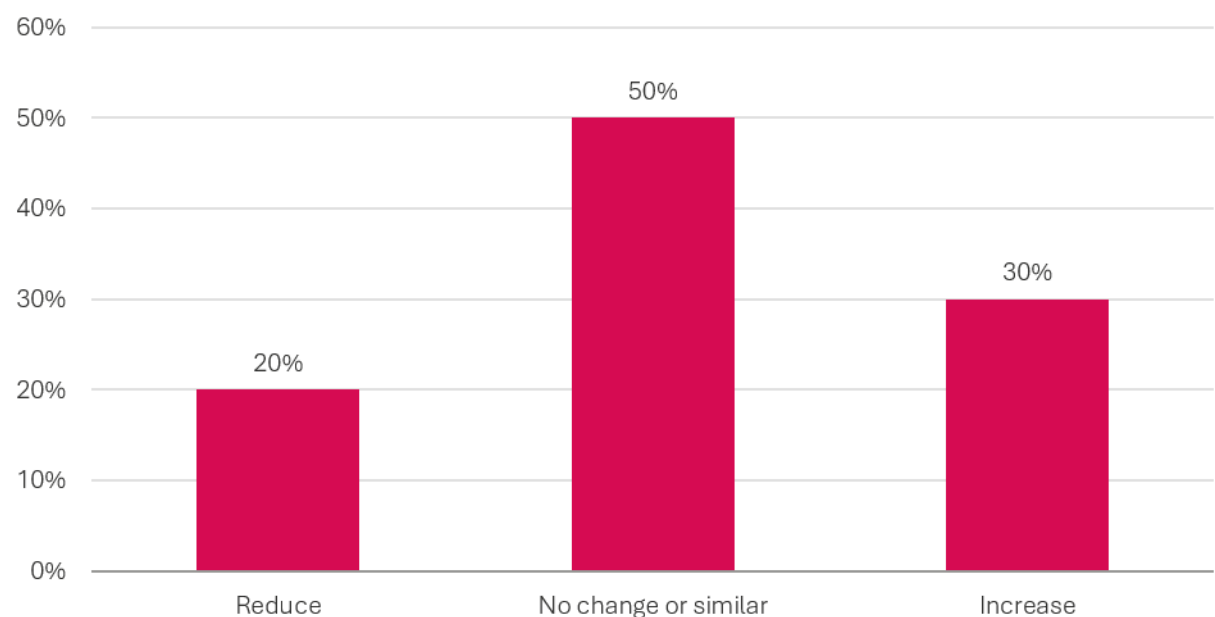
How many staff do you have working in community development or engagement?



Base – 32 (all respondents)

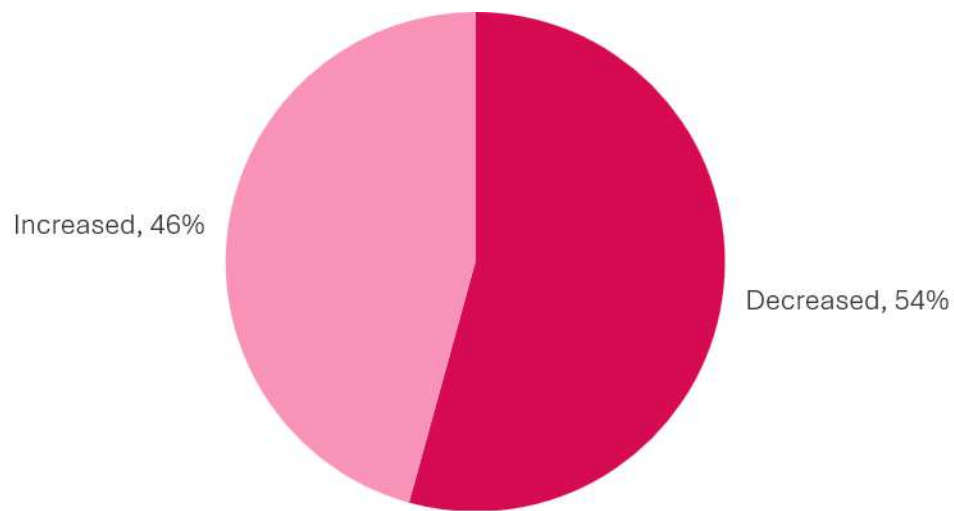
On average, **2.2** staff work in community development or engagement.

How do you think the size of your team will change over the next 6 - 12 months?



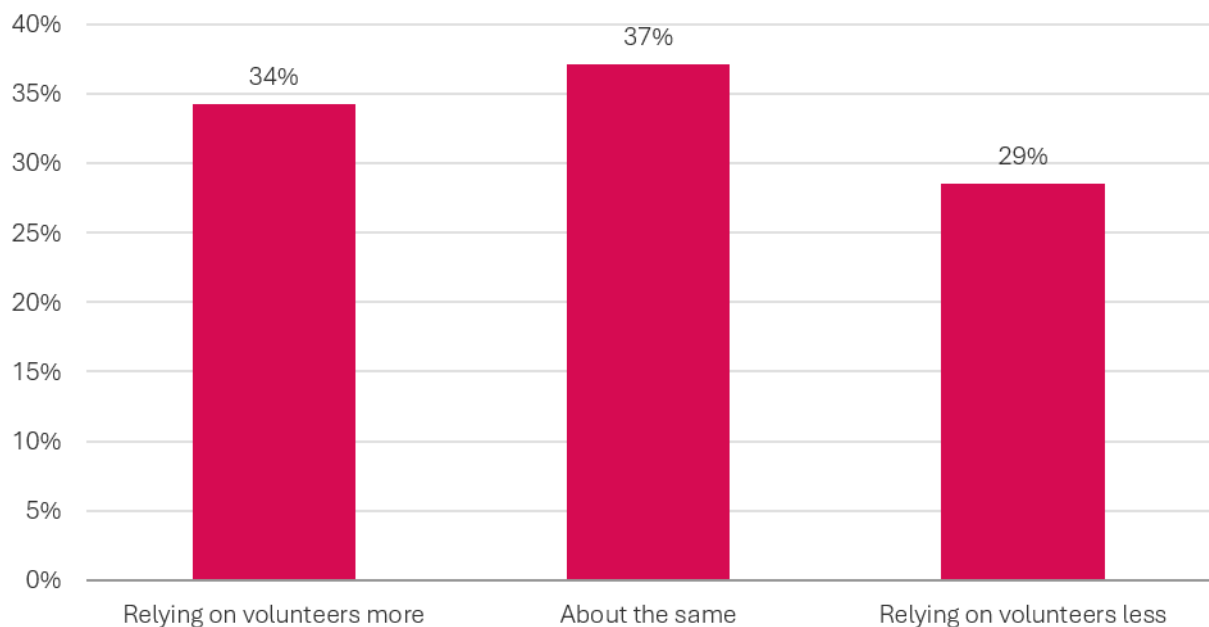
Base – 30 (all respondents)

Do you think staff turnover has increased or decreased in the last few years?



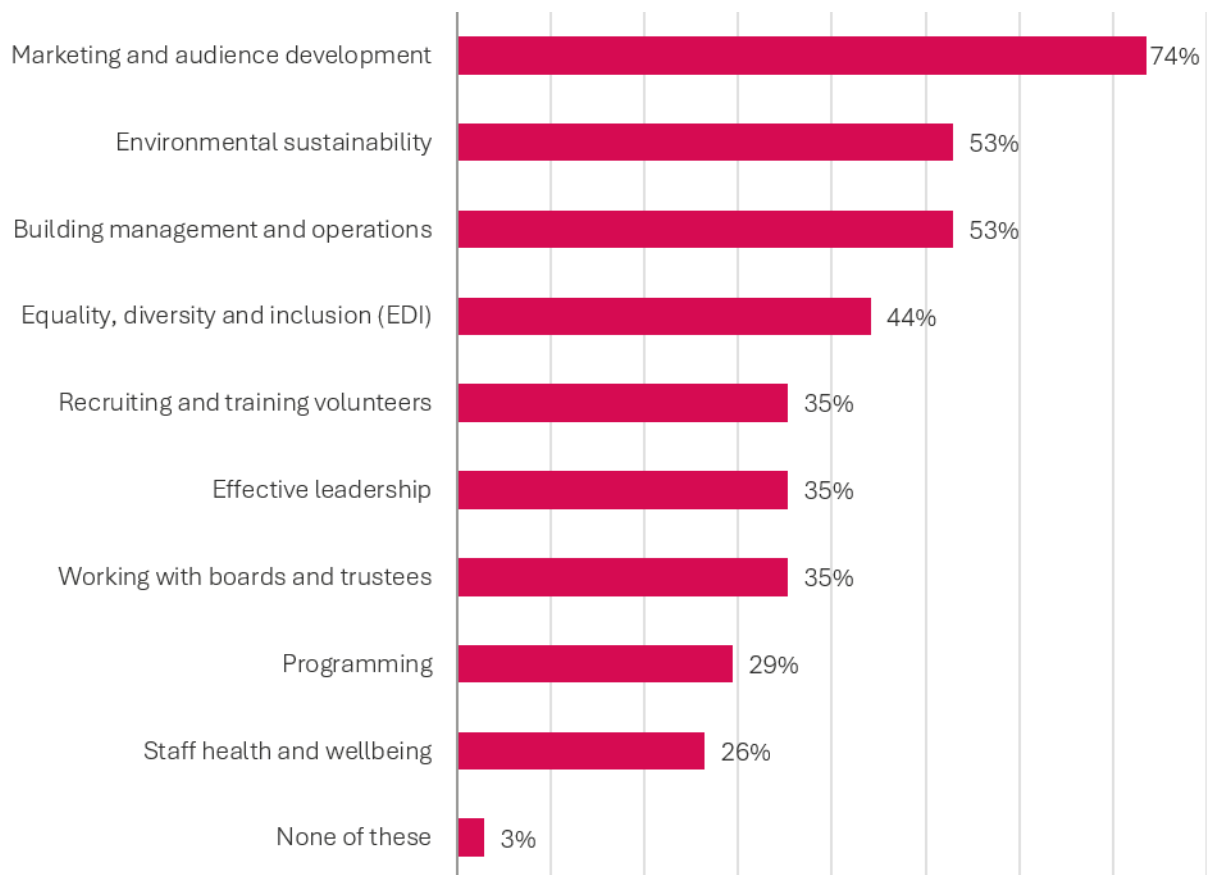
Base – 35 (all respondents)

Is your organisation relying more on volunteers than you have in the past?



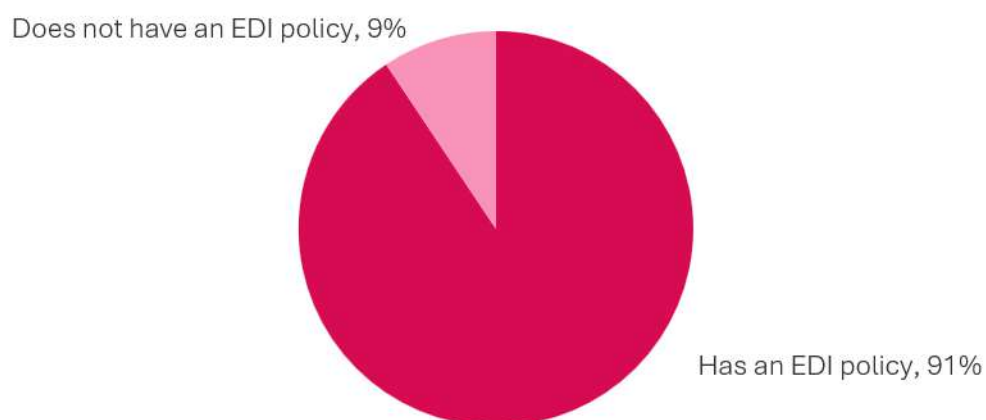
Base – 35 (all respondents)

In which areas do you feel staff need more training or professional development?



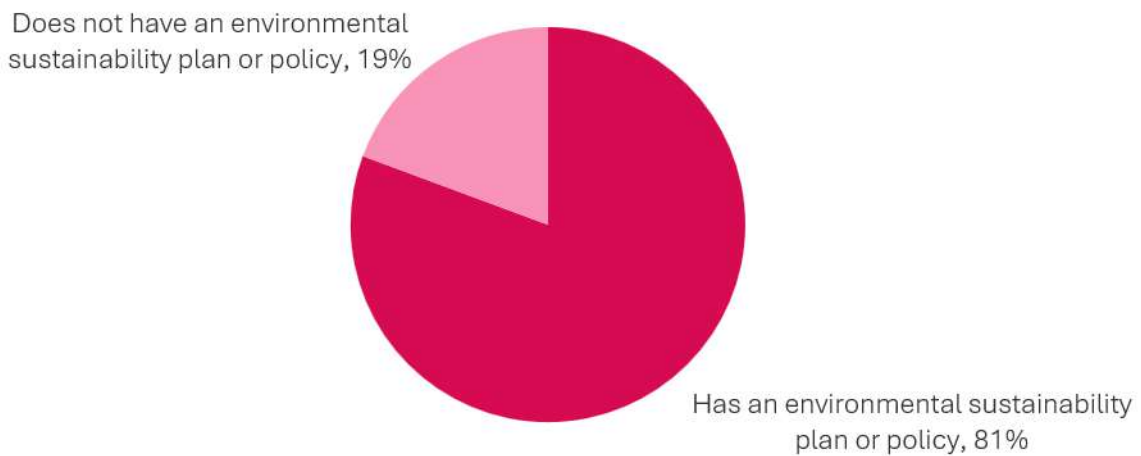
Base – 34 (all respondents)

Does your organisation currently have an EDI policy?



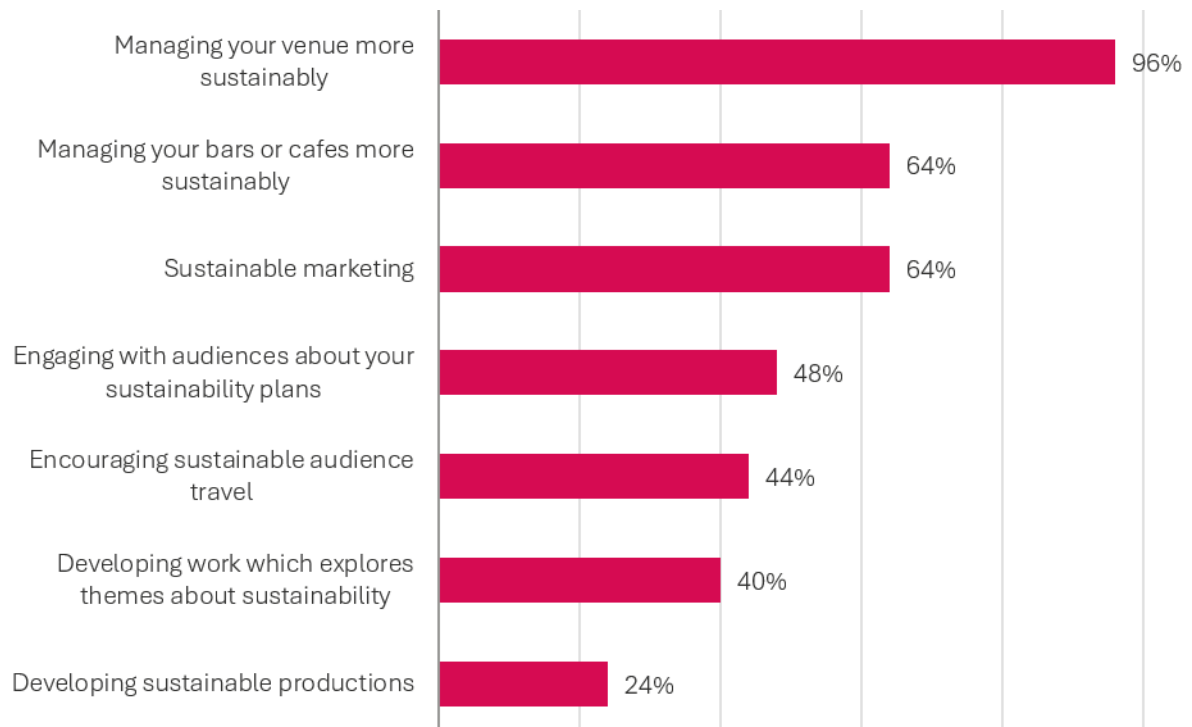
Base – 32 (all respondents)

Does your organisation currently have an environmental sustainability plan or policy?



Base – 31 (all respondents)

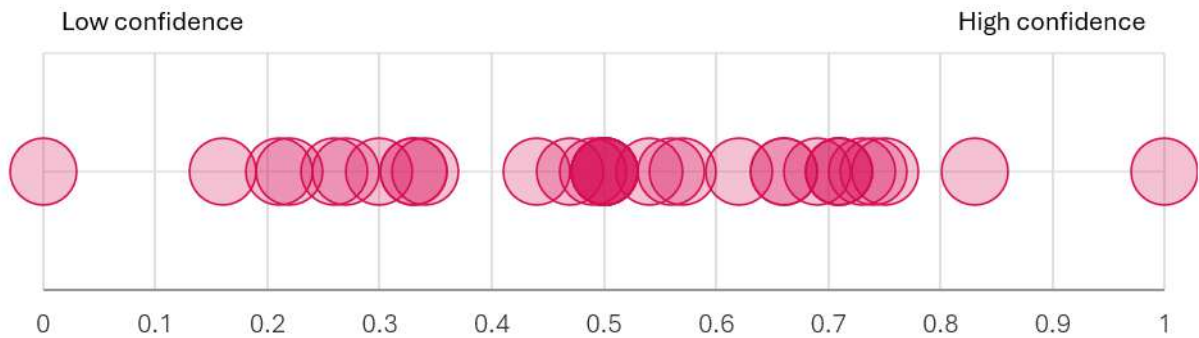
What areas are you focusing on in your environmental sustainability plan or policy?



Base – 25 (respondents who have an environmental sustainability plan or policy)

How confident do you feel about your ability to make a difference on sustainability?

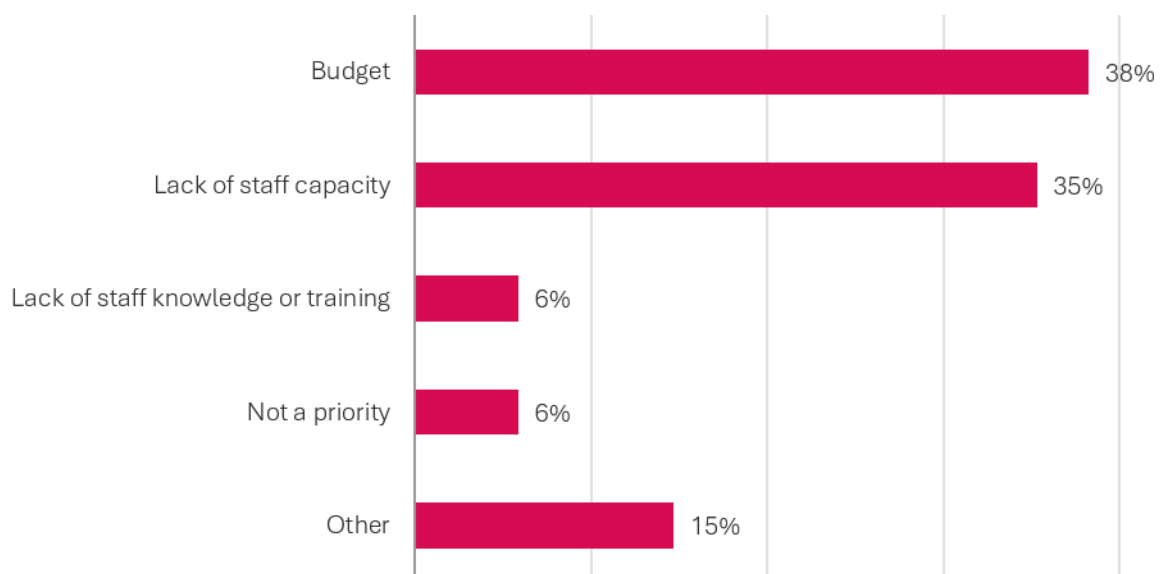
Respondents were asked to place themselves on a scale from 0 (low confidence) to 1 (high confidence). The following chart shows the distribution of responses.



Base – 34 (all respondents)

On average, venue leaders scored their confidence in their ability to make a difference on sustainability **0.5**.

What is stopping you from doing more on sustainability?



Base – 34 (all respondents)

The five respondents who gave an “other” response said:

‘Part of a larger school.’

'We have an older building in a conservation area, so cannot make physical changes to increase efficiency in heating or energy.'

'I think certain areas of the business do well on sustainability but it's more operational than elsewhere. All [org] buildings are being connected to [local] Heat Network which has been a huge project.'

'Lack of time.'

'Staff capacity and budgets.'

Marketeers

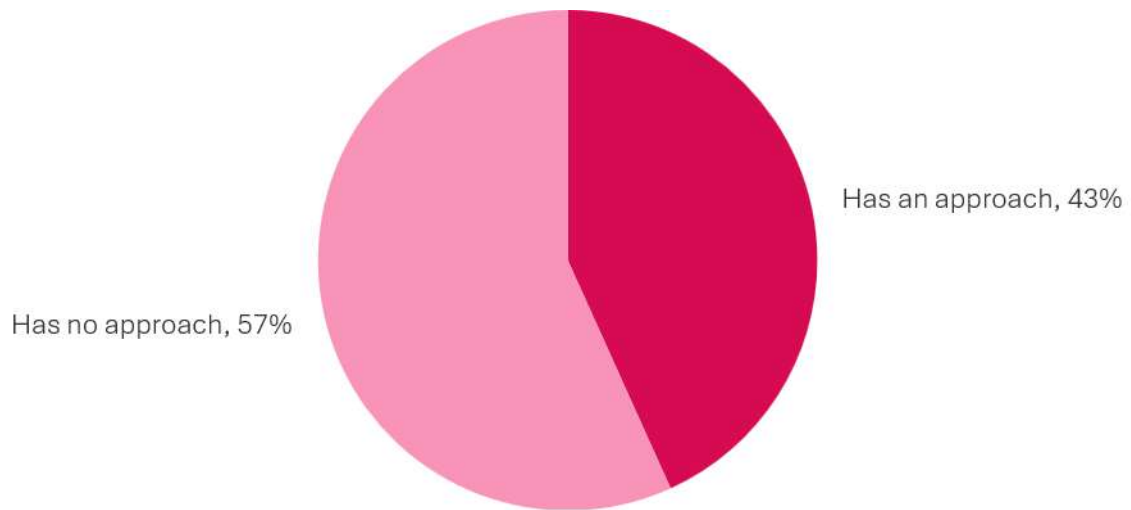
Key findings

- Most marketing teams consist of one or two people (53%); the average size is 2.5 people, with a small number having teams of up to seven.
- Amongst small scale organisations the average number of marketeers is 1.8, and at mid-scale organisations the average is 3.2⁴.
- Where data was available, marketeers made up on average 13% of the workforce (17% at small scale organisations, 5% at medium scale organisations).
- The majority (57%) of marketeers' organisations do not have an approach to bringing in new audiences – most often due to a lack of capacity.
- The majority (62%) of organisations who have an approach last updated it this year.
- Of those who have an approach, two thirds have seen a change in audiences due to this activity.
- Confidence in measuring the impact of these activities is relatively high, though around a third rated their confidence closer to 'Low' than 'High'.
- The majority of respondents engage with house via programming (94%), communications (56%), and/or network events (53%). Half use training or development opportunities, and around a third Coffee Club and/or bursaries.

⁴ Scale of organisation self-identified; no data available for large scale organisations.

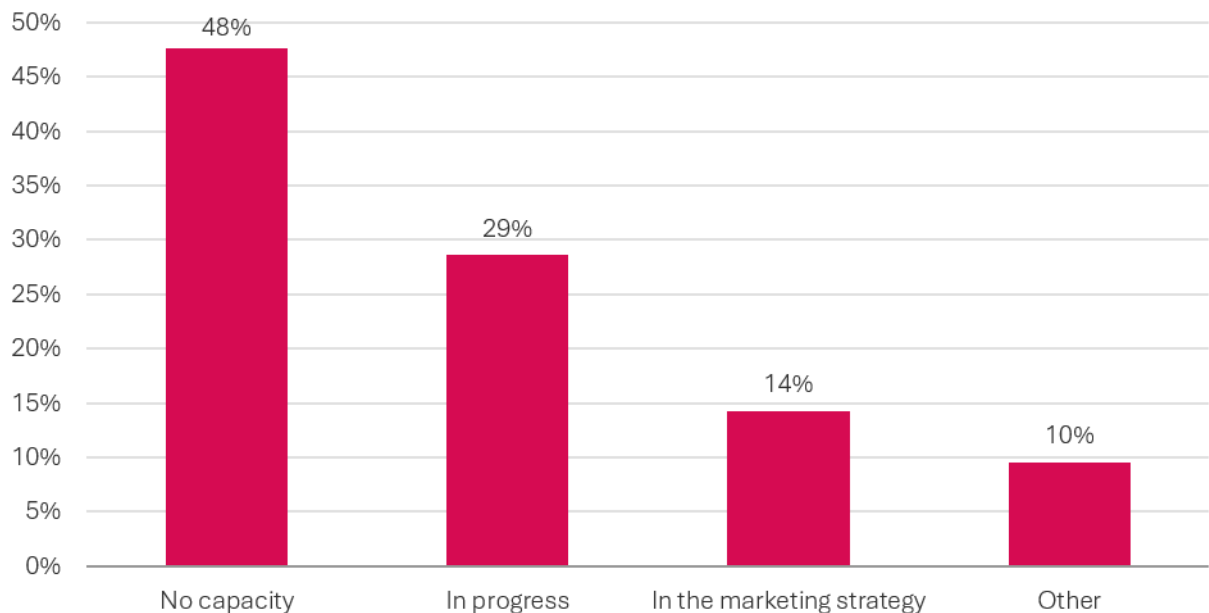
Full results

Does your organisation currently have an approach to bringing in new audiences?



Base – 37 (all respondents)

Why do you not have an approach to bringing in new audiences?

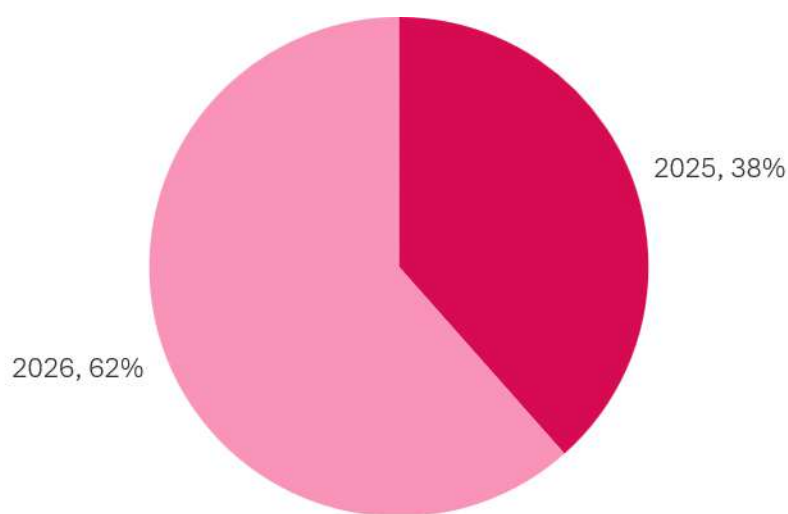


Base – 21 (respondents who do not have an approach to bringing in new audiences)

The two respondents who gave an “other” response noted limited capacity for outreach, and that - whilst eager to learn - help is required to develop an approach.

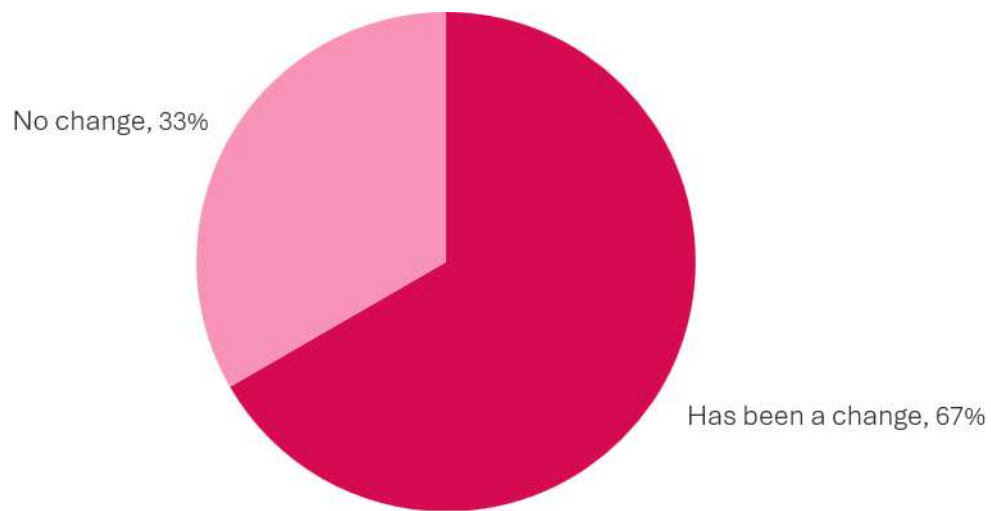
When was your approach to bringing in new audiences last updated?

Respondents were asked to answer this question in their own words. The following chart groups responses into years.



Base – 13 (respondents who have an approach to bringing in new audiences)

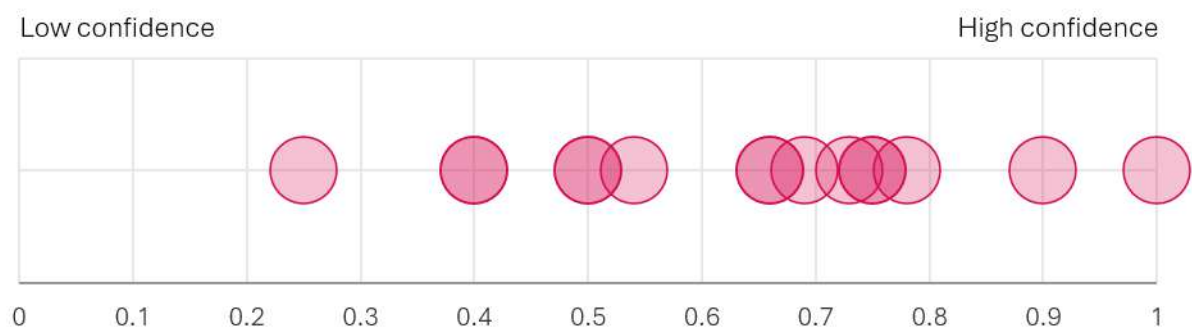
Have you seen any particular change or success as a result of this activity?



Base – 15 (respondents who have an approach to bringing in new audiences)

How confident are you in measuring the impact of your approach to bringing in new audiences?

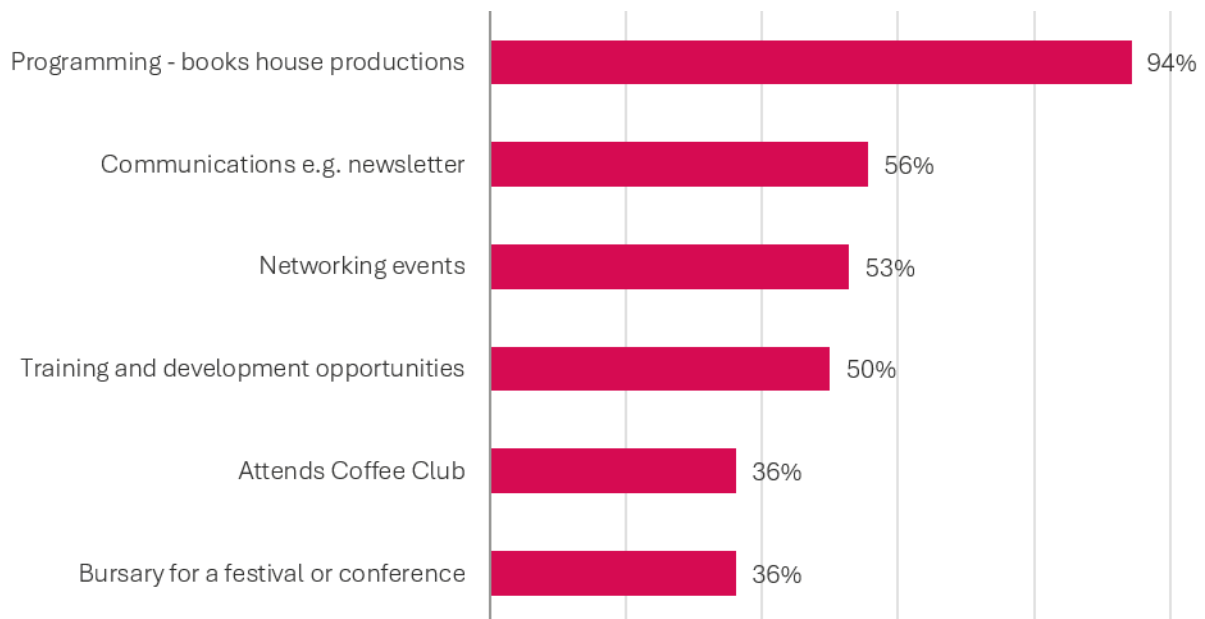
Respondents were asked to place themselves on a scale from 0 (low confidence) to 1 (high confidence). The following chart shows the distribution of responses.



Base – 15 (respondents who have an approach to bringing in new audiences)

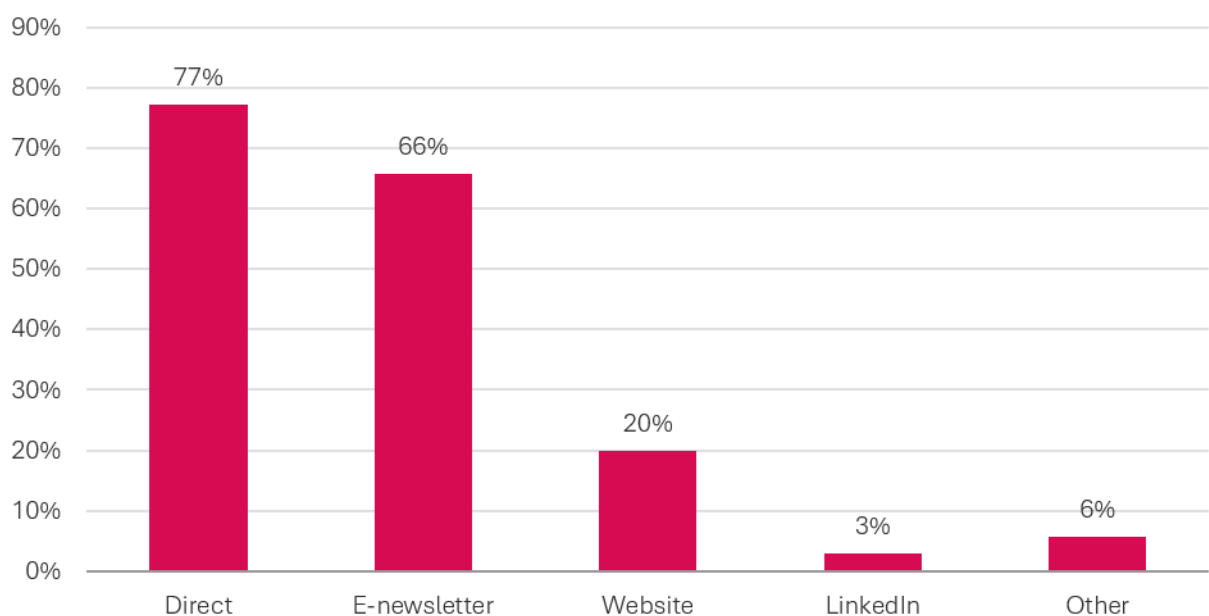
The average confidence rating was **0.63**.

How does your organisation engage with house?



Base – 36 (all respondents)

Which house channels do you use most effectively to find out about our activity?



Base – 35 (all respondents)

The one respondent who selected “Other” noted that they used the ‘Ticket booking system’ to find out about activity.

Respondents were asked to answer this question in their own words. The following chart groups responses into categories.

[illegible]

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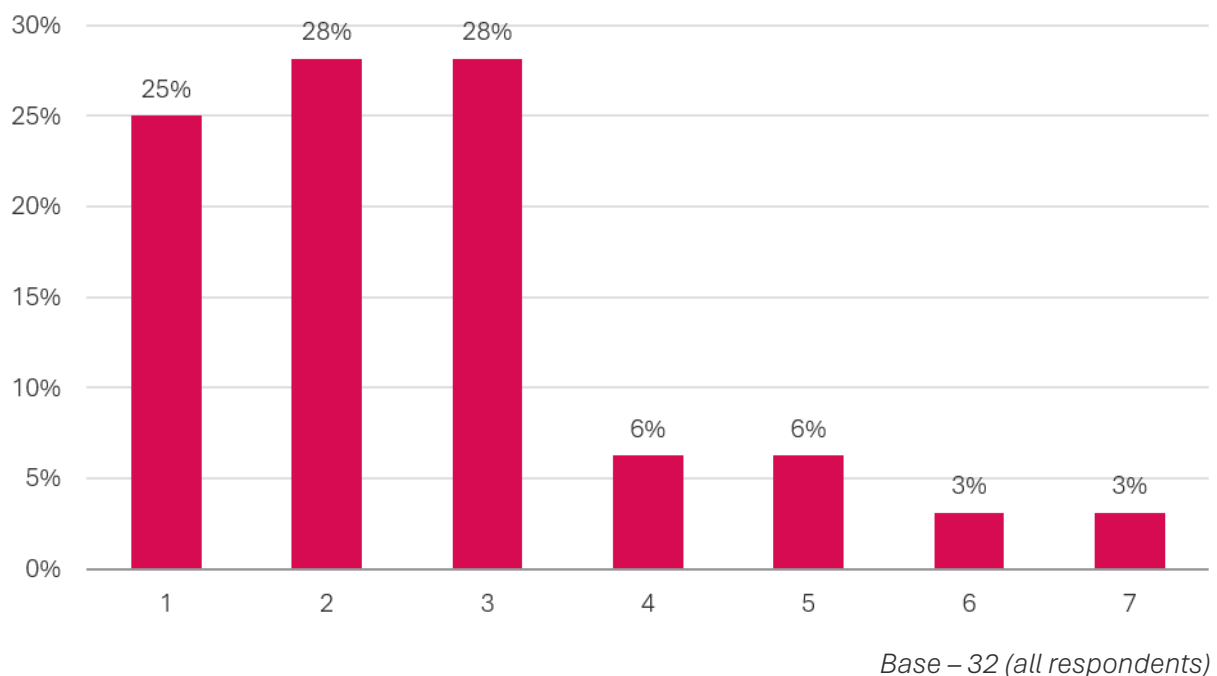
‘The Coffee Clubs are a really useful time to carve out space to think about topics and get advice from other professionals.’

‘Facilitating communication between the touring companies and venues.’

‘The marketing support offered by house is excellent and gives us the confidence to programme work that we wouldn't normally take a risk on - knowing that we'll get all the help we need in raising awareness of what we're doing.’

Full responses are available in the accompanying spreadsheet.

How many staff do you have in your marketing team?



On average, respondents had **2.6 staff** in their marketing team.

Programmers

Key findings

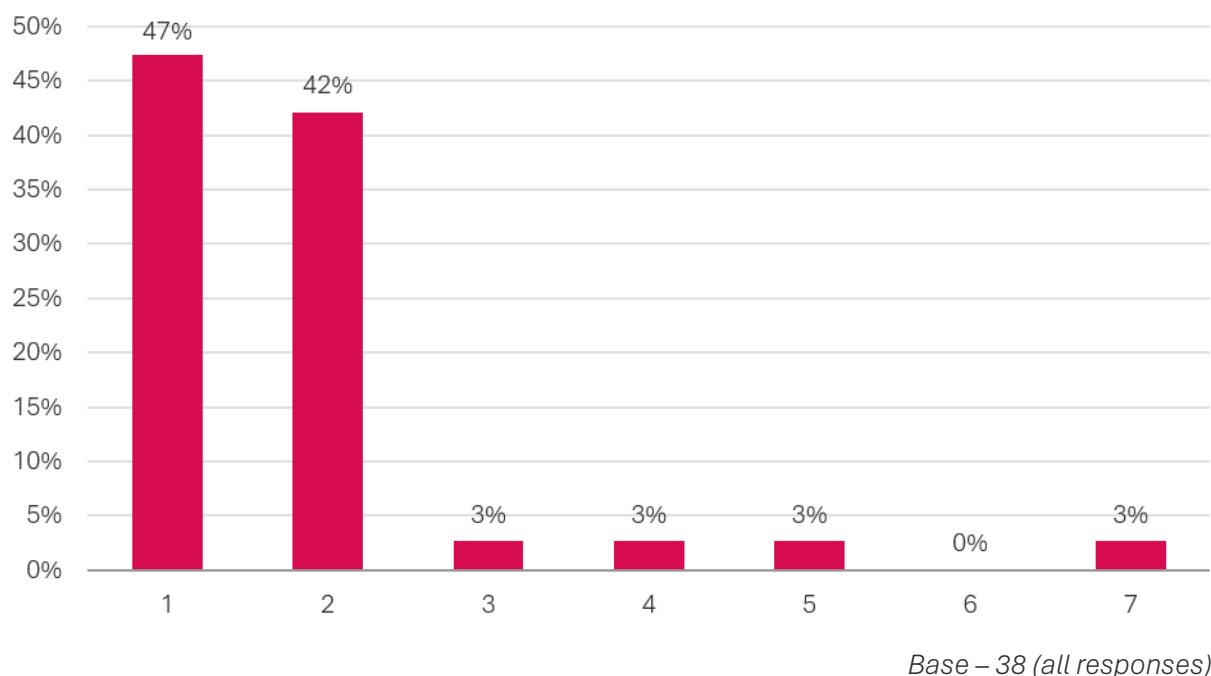
- Most organisations have one or two staff working in programming (89%); the average number is 1.4.
- Amongst small scale organisations the average number of programmers is 1.4, and at mid-scale organisations the average is 1.6⁵. Where data was available, programmers made up on average 11% of the workforce (16% at small scale organisations, 4% at medium scale organisations).
- Nearly all programmes are sourced in the following ways - re-programming theatre companies who have previously performed at the venue (94%), recommendations from colleagues (92%), seeing live performances (92%), the house tour programme offer (89%) or emails from companies with no previous relationship (83%).
- Just over half of organisations book their programme 6 to 12 months in advance.
- All organisations produce or programme theatre and comedy. The vast majority also produce or programme family work (97%), music (92%), community engagement events (83%) and/or workshops (81%).
- Just over half of organisations do not plan to produce or programme new types of work.
- Of those organisations that said they do plan to produce or programme new types of work, a third would introduce dance and nearly a fifth would introduce circus.
- Around half of organisations are prevented from programming these types of work because they are financially risky (57%) or they do not have enough funding (46%).
- Almost all organisations offer access performances. The majority offer relaxed performances (86%), 63% offer BSL interpretation and nearly half offer captioned or audio-described performances.

⁵ Scale of organisation self-identified; no data available for large scale organisations..

- On average, venues reached 62% capacity for all performances in 2025/26. Venues also reached 62% average capacity for theatre shows in 2025/26.
- Around half of organisations are prevented from programming more accessible performances because of the difficulties associated with short runs (56%) and a lack of appropriate equipment (44%).
- Just over half of organisations decreased their theatre programming in 2025/26. This was largely due to a decrease in audience size (57%) or financial reasons (47%).
- Nearly a quarter of organisations decreased their non-theatre programming in 2025/26. The majority (57%) said this was because of financial reasons.
- The majority of respondents engage with house via programming (88%), network events (84%), and/or communication (81%). Nearly three quarters have received bursaries for festivals or conferences, and two thirds have engaged with training.
- The majority of organisations find out about house activity via direct communication (91%) or the email newsletter (91%). Nearly a quarter also use the website.
- Nearly half of organisations reported that the networking opportunities offered by house were the most supportive factor in helping to deliver their ambitions. Almost third of organisations also cited the programming, festival bursaries and/or subsidised shows.

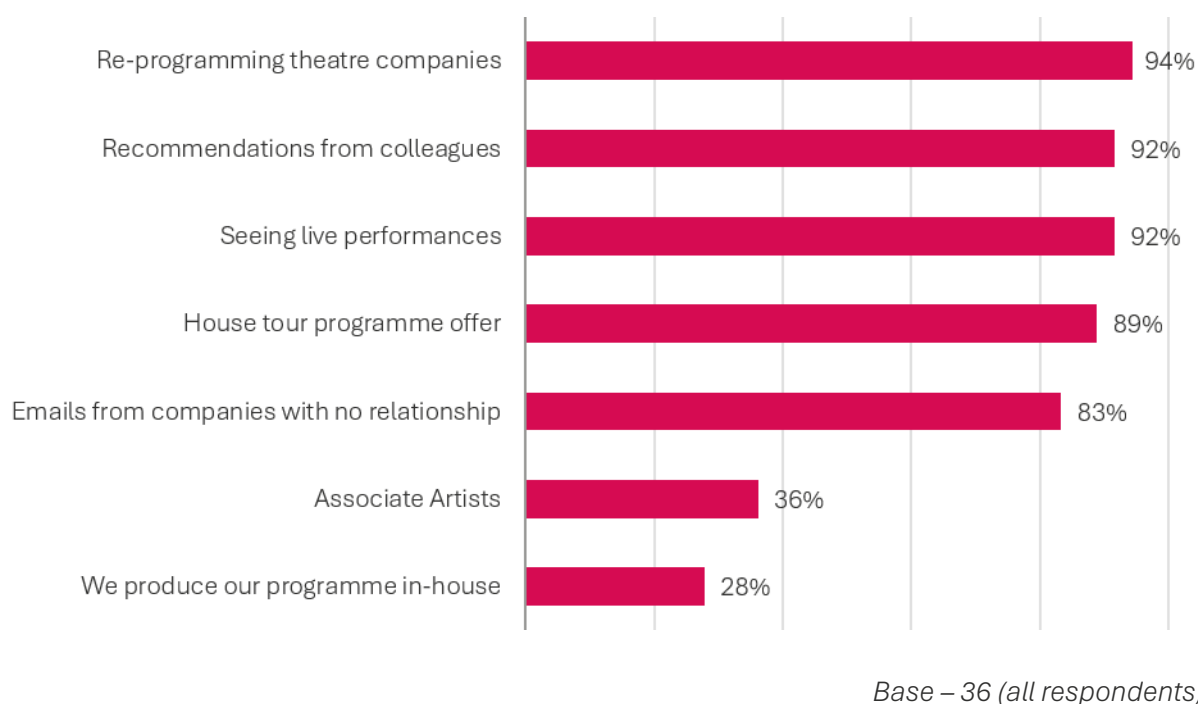
Full results

How many staff do you have working in programming?

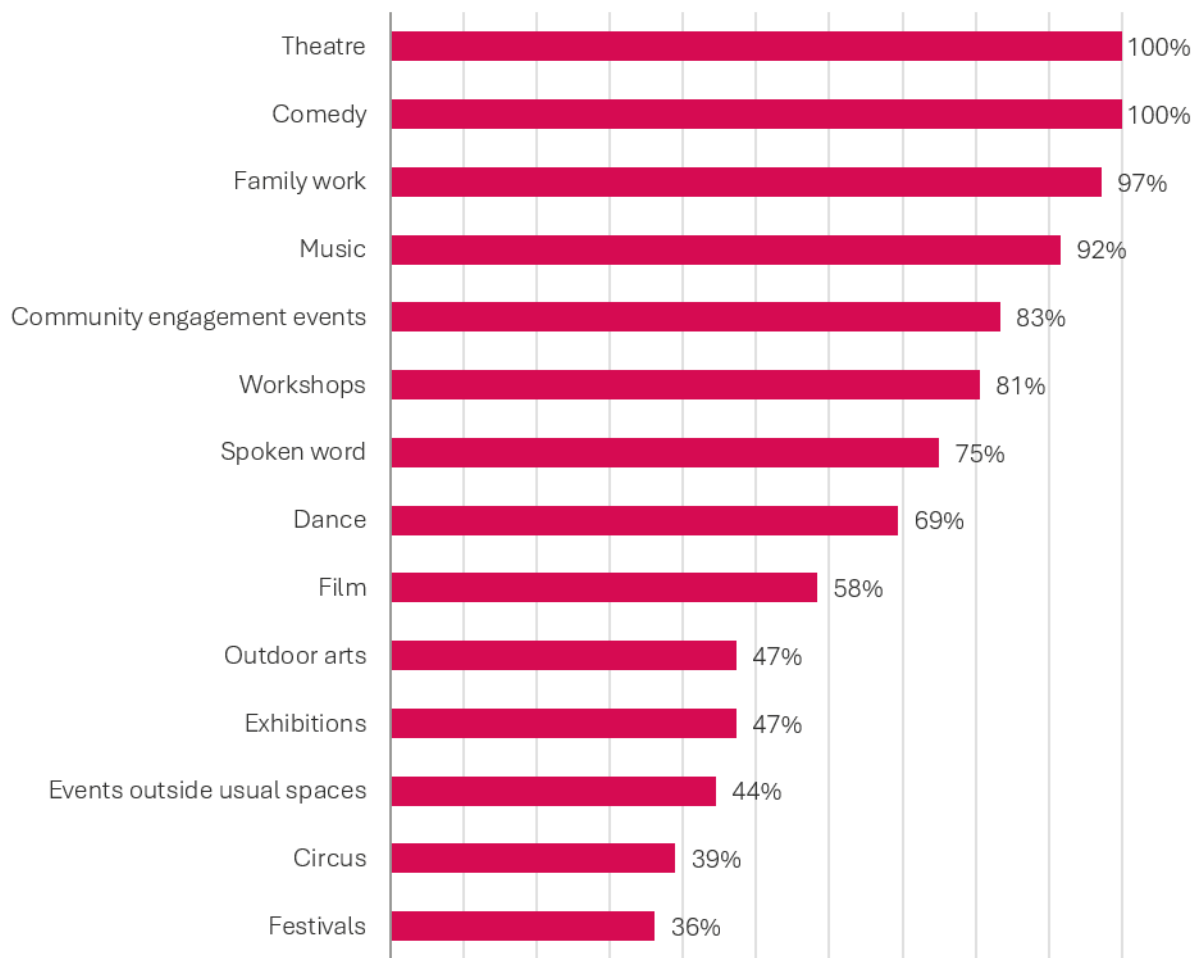


The average number of staff working in programming was **2**.

How do you tend to source your programme?

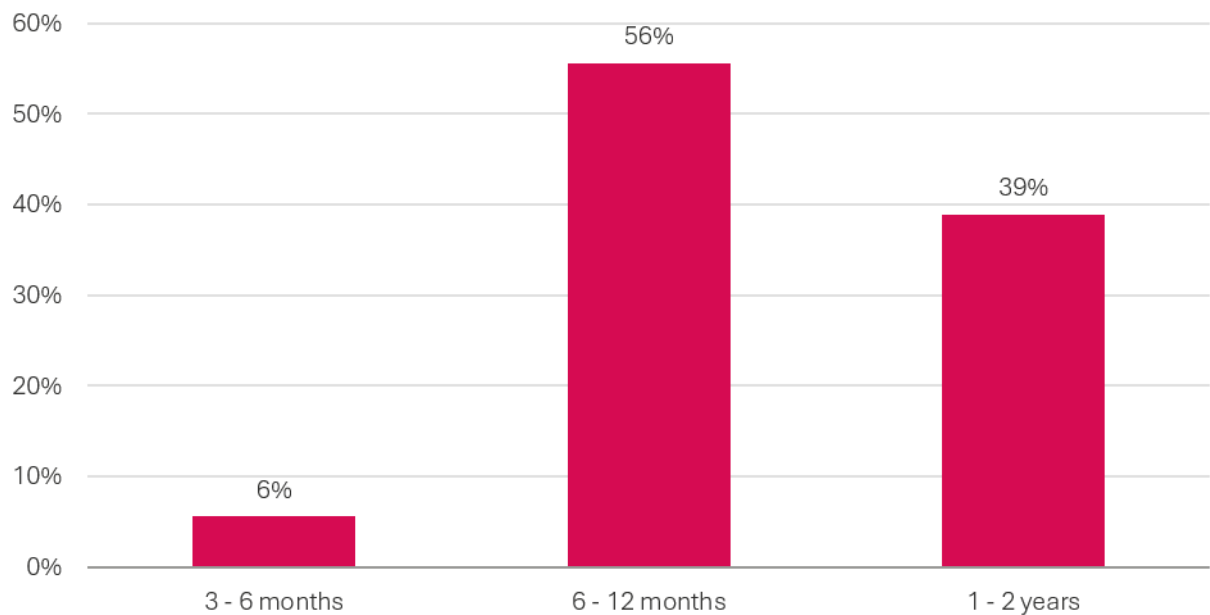


What type of work do you produce or programme?



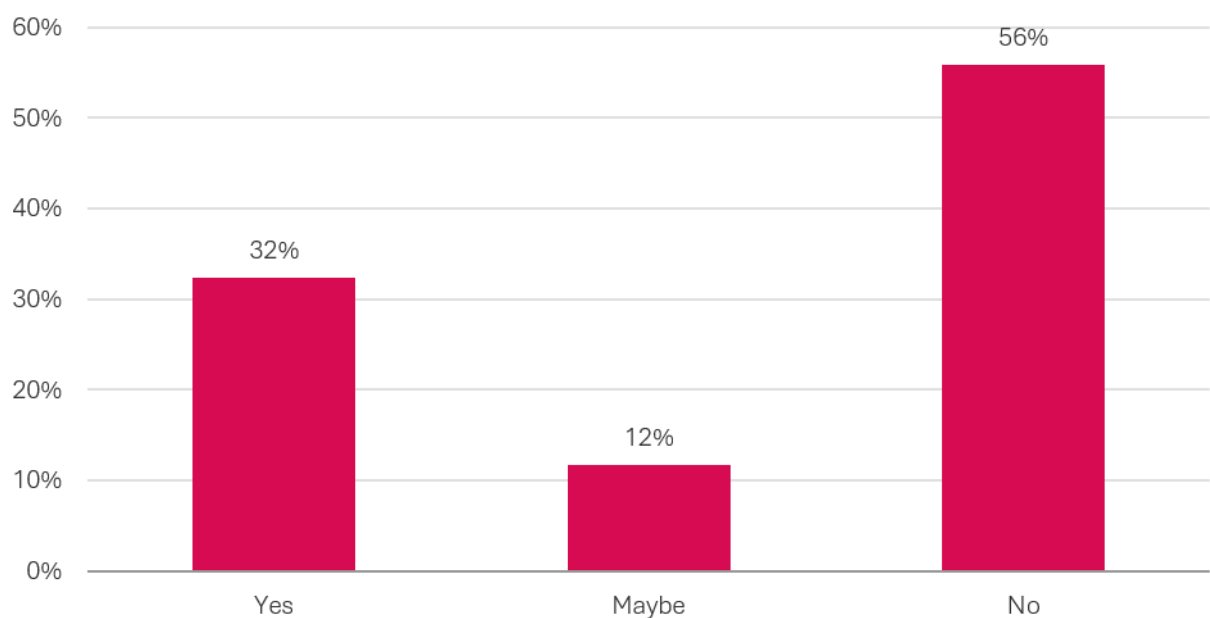
Base – 36 (all respondents)

How far in advance do you tend to book your programme?



Base – 36 (all respondents)

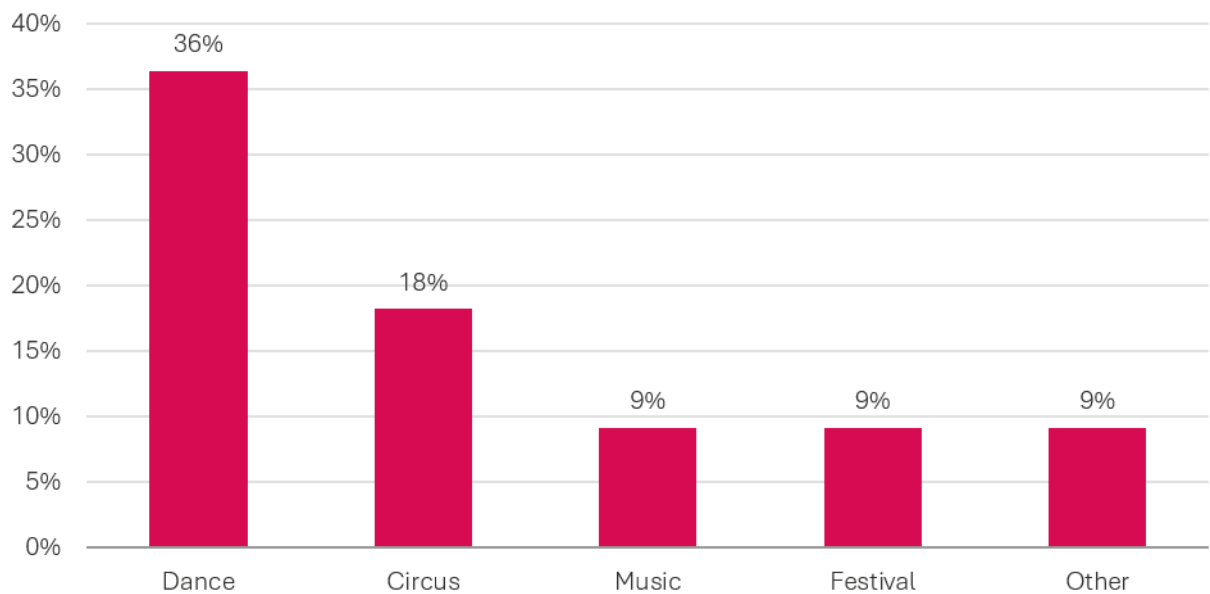
Are there any types of work you don't currently produce or programme that you plan to in the future?



Base – 34 (all respondents)

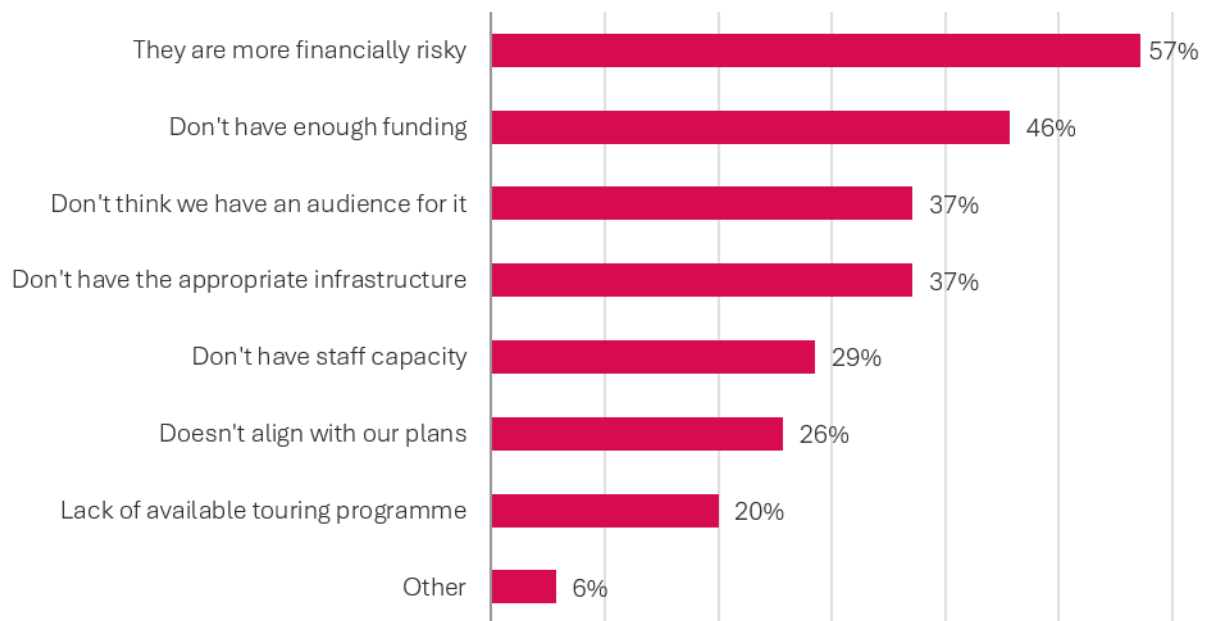
What work (that you don't currently produce or programme) do you plan in the future?

Respondents were asked to answer this question in their own words. The following chart groups responses into categories. Full responses are available in the accompanying spreadsheet.



Base – 34 (all respondents)

Is there anything stopping you from programming these types of work now?



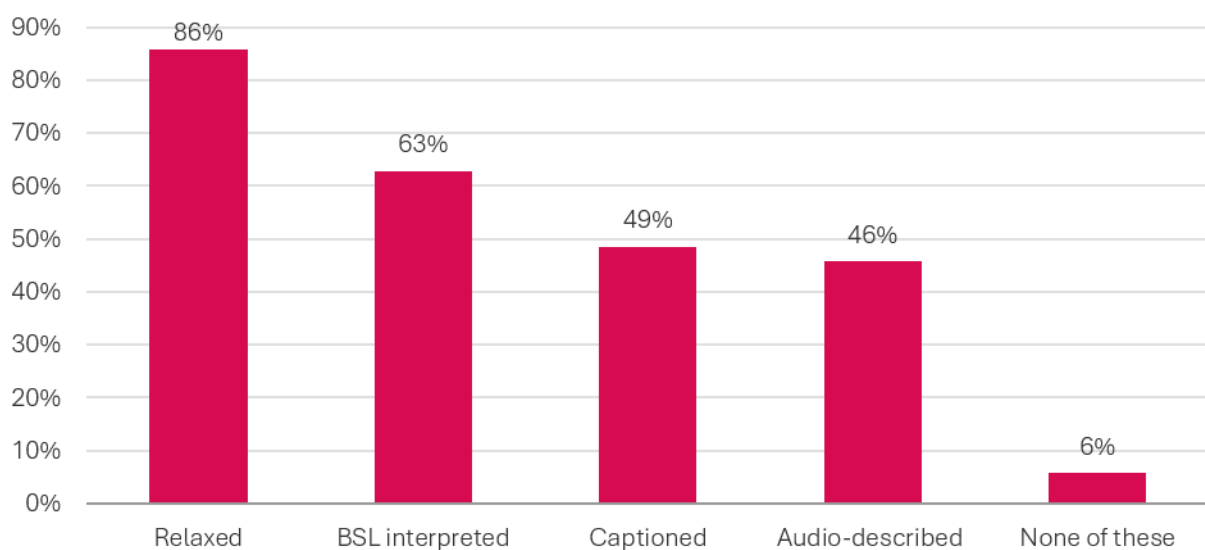
Base – 35 (all respondents)

The two respondents who gave an “other” response said:

‘Lease prevents us from screening film.’

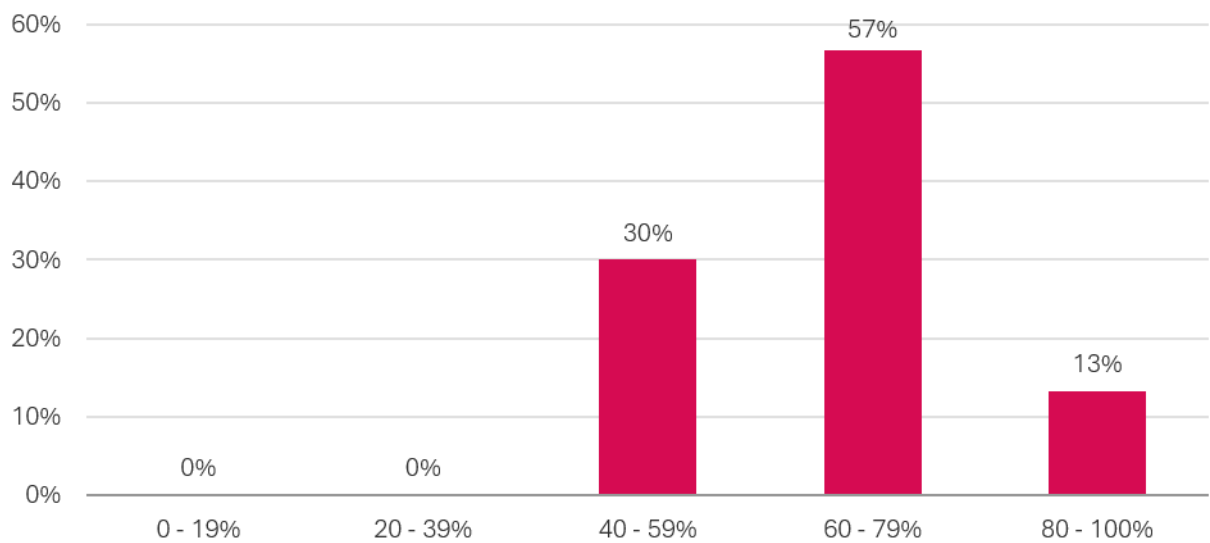
‘Inadequate technical facilities.’

Do you offer any of these access performances?



Base – 35 (all respondents)

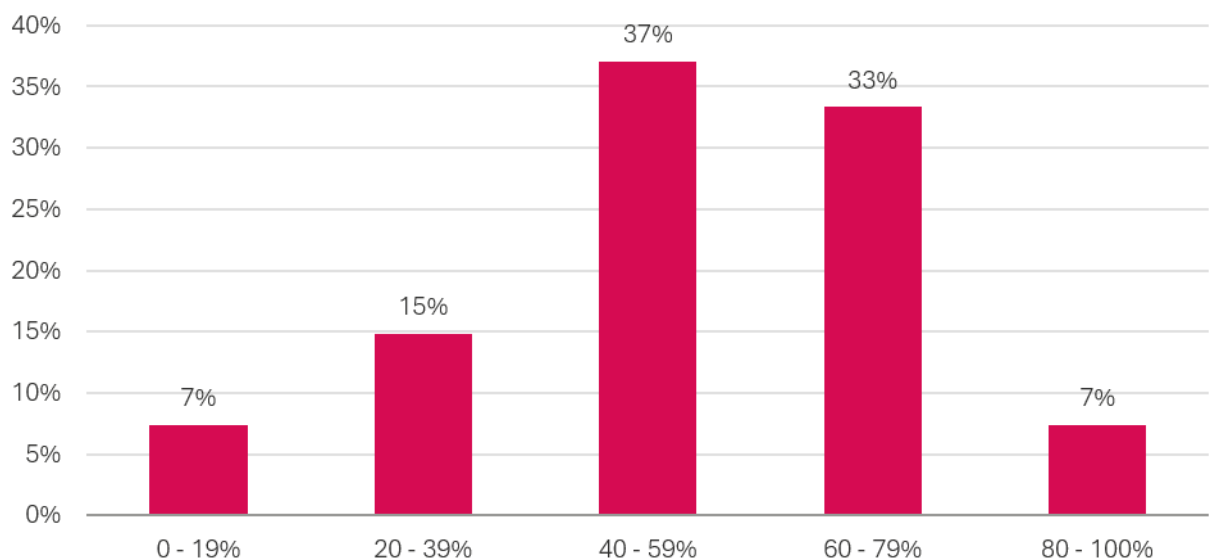
What was the average attendance for all (performance) events at your venue based on your capacity in 2025/26?



Base – 30 (all respondents)

The average percent attendance for all performance events at venues based on capacity in 2025/26 was **62%**.

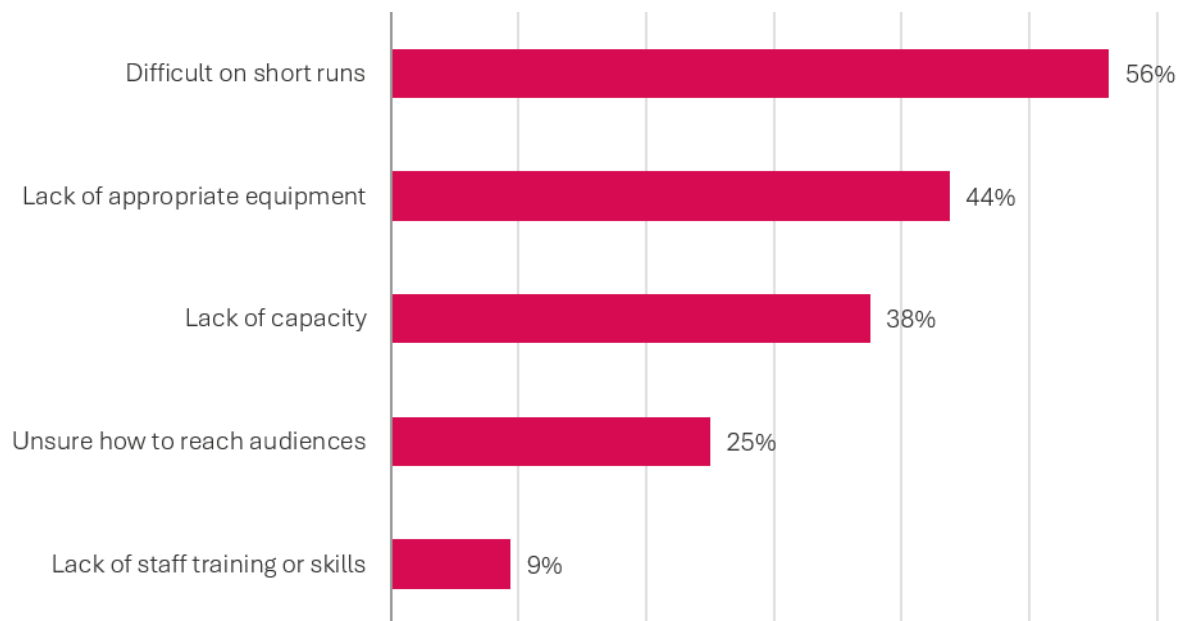
What was the average attendance for theatre at your venue based on your capacity in 2025/26?



Base – 27 (all respondents)

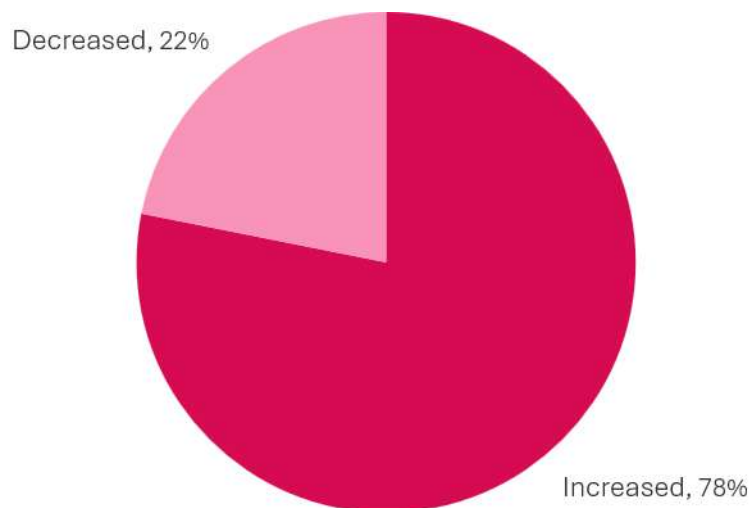
The average percent attendance for theatre at venues based on capacity in 2025/26 was **62%**.

What are your barriers to programming more accessible performances?



Base – 32 (all respondents)

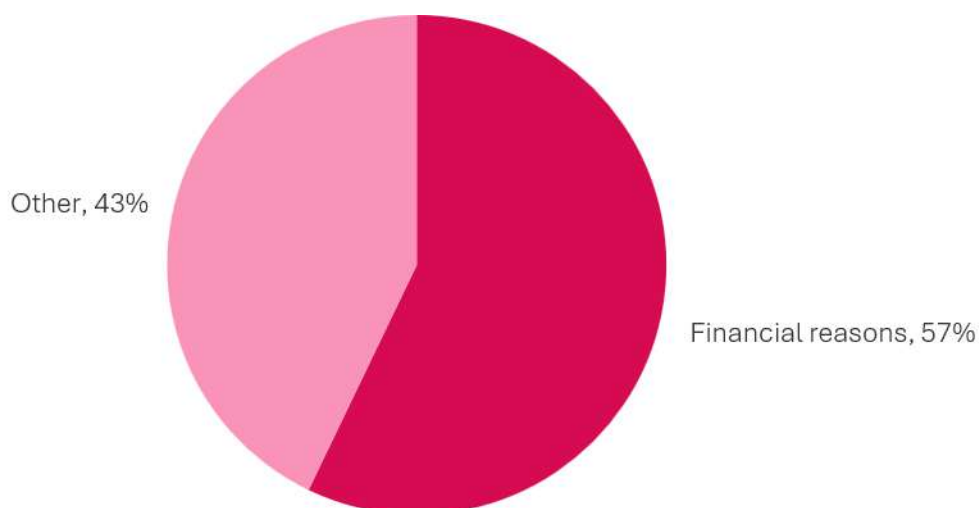
Compared to this time last year, has your non-theatre programming increased or decreased?



Base – 32 (all respondents)

What are some of the reasons, or decisions you have made, to decrease your non-theatre programming?

Respondents were asked to answer this question in their own words. The following chart groups responses into categories.



Base – 7 (respondents who decreased their non-theatre programming)

The following responses were received:

‘Financial - we are more aware of technical costs so have the steer not to over programme.’

‘Less touring options suitable for our sized venue.’

‘We are finding that audiences are not consistent or reliable and booking very late which makes forecasting finances very difficult. Rising costs across the board has meant it's necessary to prioritise income generating events i.e. comedy and music; and dedicate more days hires.’

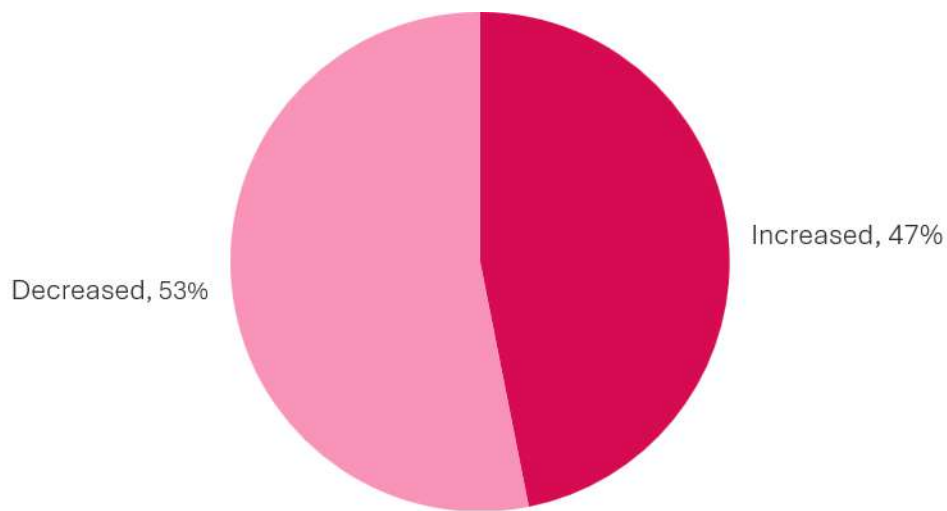
‘For a major maintenance project - we anticipate it returning to previous levels.’

‘Mainly cost, or more particularly inability to pin losses to acceptable levels.’

‘Cost.’

‘Our produced season has increased.’

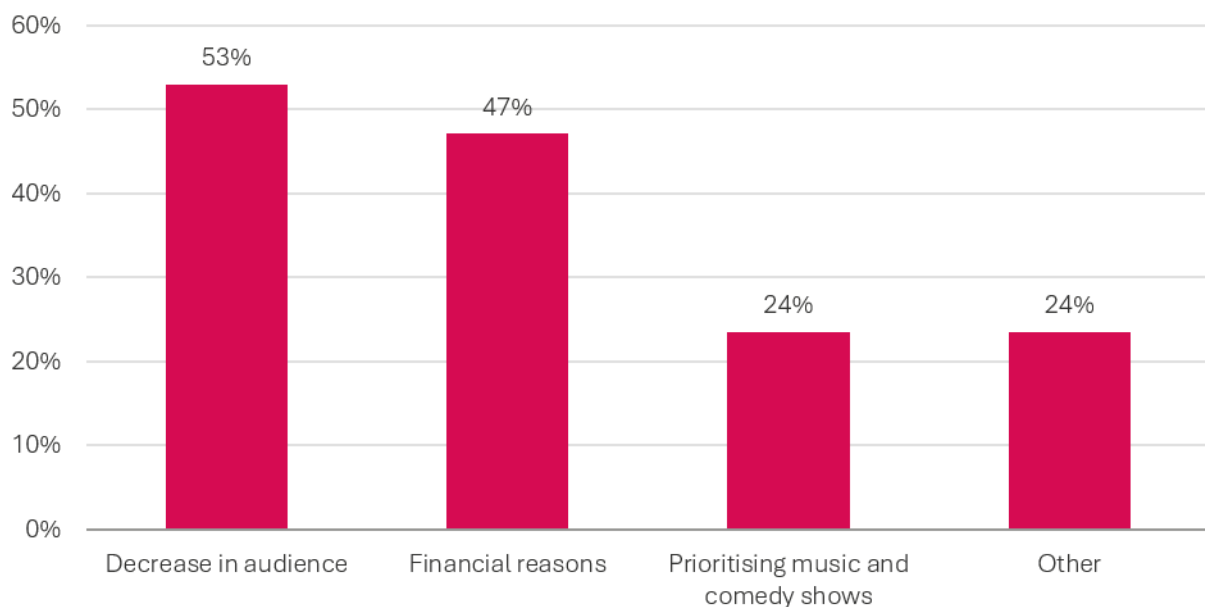
Compared to this time last year, has your theatre programming increased or decreased?



Base – 32 (all respondents)

What are some of the reasons, or decisions you have made, to decrease your theatre programming?

Respondents were asked to answer this question in their own words. The following chart groups responses into categories.



Base – 17 (respondents who decreased their theatre programming)

The following word cloud shows which words were used more or less frequently in open responses to this question.



Typical responses included:

'Difficult to attract audiences - some great challenging themes but we find our audiences want to be entertained. They will watch hard hitting drama on tv but not live. Music and comedy achieve better income.'

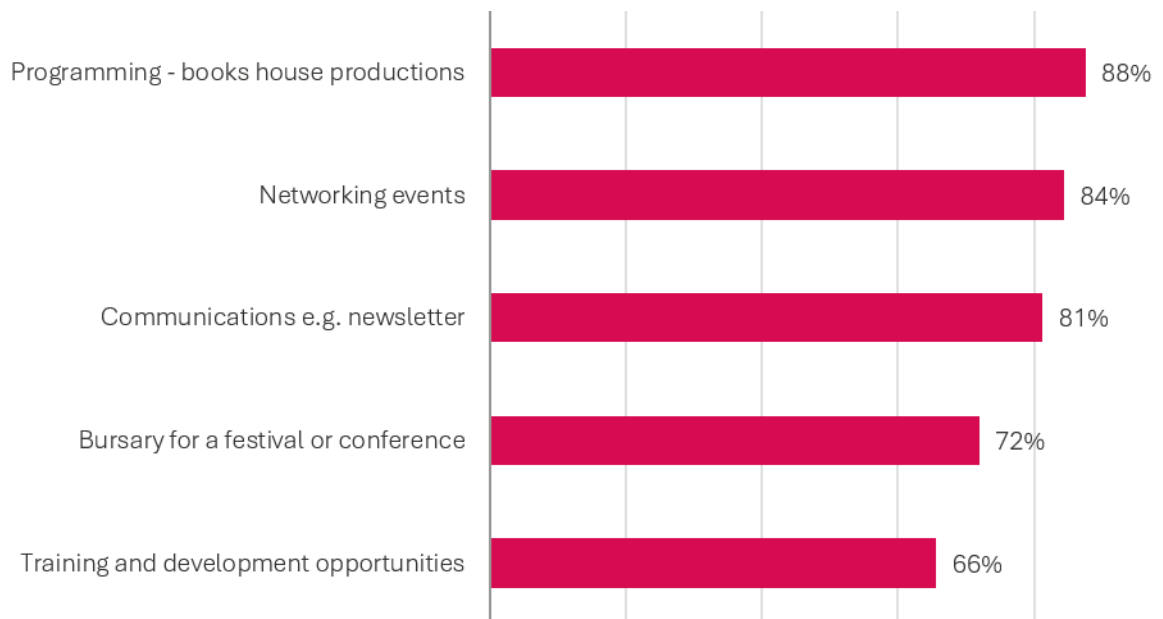
'There doesn't seem to be an appetite for it in the same way. Harder to sell for some reason.'

‘We no longer have the financial resource to pay out guaranteed fees and theatre shows are tech heavy or no longer fit in the playing space we have in our studio space. We have also seen audiences for theatre decreasing seeing that our audience wants more of a light hearted social experience to escape the bleak reality of the world rather than heavy social-political plays.’

Full responses are available in the accompanying spreadsheet.

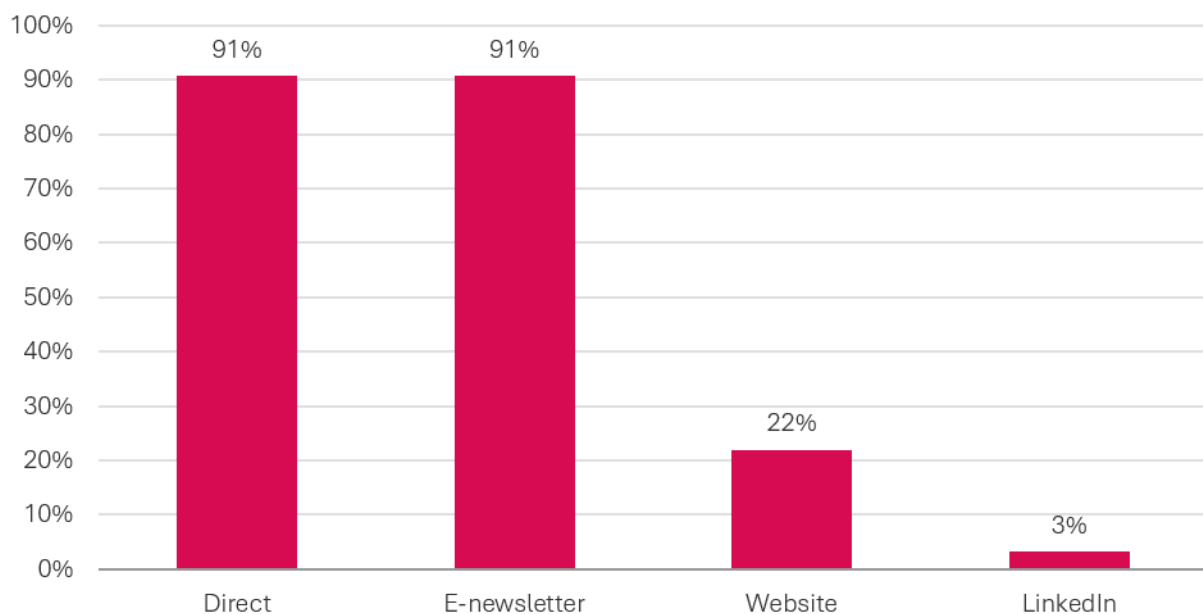
This reflects the wider sector feedback in the **State of Touring report** re the shift in audience preferences.

How does your organisation engage with house?



Base – 32 (all respondents)

Which house channels do you use most effectively to find out about our activity?



Base – 32 (all respondents)

Respondents were asked to answer this question in their own words. The following chart groups responses into categories.

[illegible]

'The programming meet ups for me are the most valuable, and the programming that's sent through.'

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Appendices

Responding organisations

Organisation	Marketeers	Programmers	Leaders
ARK	0	1	0
Arlington Arts Centre	0	0	1
Artsdepot	1	1	1
Bedales School	1	0	0
BIGG Theatre	0	0	1
Cambridge Junction	1	0	0
Chelmsford Theatre	1	1	1
Chichester Festival Theatre	0	1	0
Colchester Arts Centre	1	0	1
Corn Exchange Newbury	2	1	1
Cornerstone Arts Centre	1	1	1
EM Forster Theatre	0	0	1
Farnham Maltings	1	1	1
Half Moon	1	0	0
Hat Factory Arts Centre	0	1	0
Jacksons Lane	0	0	1
JW3	0	1	0
Kenton Theatre	1	1	1
Landmark Arts Centre	0	0	1
Landmark Theatres Ltd	0	1	0
Lighthouse Poole	0	1	1
Marlowe Theatre	1	1	0
New Wolsey Theatre	0	1	0
Norden Farm Centre for the Arts and Curve Venue	1	1	1
Norwich Theatre	0	2	0
Old Fire Station	0	1	0
Oxford Playhouse	0	1	1

Pavilion Dance	0	0	1
Pegasus	0	0	1
Pevensey	0	0	1
Proteus Theatre Company	1	1	1
Quay Theatre Sudbury	0	1	1
Queen's Theatre Hornchurch	0	1	0
Ropetackle Arts Centre	0	1	1
Rushmoor Borough Council - Princes Hall	0	0	1
Sheringham Little Theatre	0	0	1
South Street Arts Centre	1	1	1
Spun Glass Theatre	0	0	1
Stanley Arts	0	1	1
The Albany	1	0	0
The Alex	1	1	1
The Corn Hall	0	1	1
The Garage Trust	0	0	1
The Horton	0	0	1
The Mill Arts Centre	1	1	1
The Nutshell and Discarded Nut CIO	0	0	1
The Old Town Hall	0	1	2
The Phoenix Theatre and Arts Centre	1	1	1
The Place Bedford	0	1	0
The Point and Berry Theatres	1	1	0
The Spring Arts and Heritage Centre	0	1	1
The Stables	1	0	0
The Theatre Chipping Norton	1	0	0
The Workshop	1	0	0
Trinity Theatre	0	1	1
Ventnor Exchange	1	1	1
Visit Staines	1	0	0
Wells Maltings	1	1	1
Worthing Theatres and Museum	0	0	1
Yvonne Arnaud Theatre	1	0	0

[Venue not known]	8	1	0
Total responses	35	36	40
Total number of known orgs represented in survey	26	34	38



The Audience Agency

Company Registered in England and Wales No. 811 7915

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