



ADVISORY  
BOARD  
for the ARTS

*Transforming Arts Organizations Worldwide*

## Touring Operations

September 29, 2021



# Top Issues/Challenges—Management and Operations

COSTS		LOGISTICS			OPERATIONS		ARTISTIC
<p><b>Non-Labour Cost</b></p> <p>Costs increasing faster than ticket prices, including</p> <ul style="list-style-type: none"> <li>• fuel</li> <li>• freight</li> <li>• travel</li> <li>• accommodation</li> <li>• set building</li> </ul>	<p><b>Labour Cost</b></p> <p>Repertoire requires 24 hour schedule and night crew</p> <p>Tight labour markets for key roles</p> <p>Per-diems for staff, crew, cast and chorus across entire engagement</p>	<p><b>Time Constraints</b></p> <p>Time in second theatre to rehearse performances</p> <p>Limited time to tech complicated productions or conduct orchestral rehearsal</p> <p>Turnaround demands in three different theatres</p>	<p><b>Lack of Standardization</b></p> <p>Each venue has different dimensions, flying systems, load-in, etc.</p> <p><b>Aging Facilities</b></p> <p>Theatres are old, ill-equipped to accommodate rotation of large-scale productions</p> <p>Cramped backstage, inadequate dressing space</p>	<p><b>Covid</b></p> <p>Managing continuing restrictions</p> <p>Maintaining health of company-members</p>	<p><b>Venue Power Imbalance</b></p> <p>At the mercy of venue availability/interest</p> <p>Cannot enforce early contracting or negotiate sufficient get-in times</p> <p>Getting worse due to venue need to book commercial work/longer runs</p>	<p><b>Sustainability</b></p> <p>Environmental cost/impact of transporting huge sets and large numbers of people</p> <p>Discarded sets</p>	<p><b>Attraction/Retention</b></p> <p>Length of tours can impact ability to attract and retain some artists, as long tours interfere with other work (especially mainland Europe)</p>

# Top Issues/Challenges—Income and Growth

## REVENUE

### Funding Decline

Arts Council of England funding declining in real terms

### Dwindling Sponsorship

Difficulty attracting sponsorship for touring operations

### Audience Decline

Failing to reach diverse audiences in visited venues (age; ethnicity)

Infrequent visits make audience-building harder

### Price Erosion

Increasing sensitivity to ticket price

### Brexit

International touring opportunities more scarce following Brexit

## MARKETING

### Low Brand Recognition

Venues, not companies, are responsible for marketing/box office

Audience more likely to attach to venue than to company

Worse in infrequent tour locations

### Marketing ROI

Sub-scale, low-ROI city-by-city marketing

Time concentration performances give little time for marketing and sales during the week of performance for message to reach interested attendees

### Lack of Audience Data

Rely on buyers opting in to provide data (as low as 10%)

# Ideas for Joint Activity

## MARKETING

### Sales Syndicate

Create consortium of touring companies for joint sales

### Audience Development

Partner with other touring organizations to expand audience in tour cities

## ANALYSIS

### Audience Data Analysis

Analyze audience data from touring cities collectively to develop joint insights

### Financial Modeling

Create a sophisticated model jointly to fully understand costs of touring repertoire

## VENUES

### Venue Collaboration

Get better deals on data-sharing and work-in, etc., including required website promotion

## POLICY

### Net Zero Action Plans

Create a plan for sustainability that is consistent across touring companies and doesn't reinvent the wheel

### Covid Policy Development

Create policy for touring organizations together to avoid reinventing the wheel

## PRODUCTION

### Production Sharing

Touring scenery is built specifically to break down and be packed into the containers in a compact fashion. A downside is that, unless a rented production is constructed to similar parameters, it can be a challenge to tour it, especially in the repertoire model. Creating a log of available touring productions, or a rental/co-production network, might help expand our repertoires while avoiding undue refurb costs.

# Description of Sample Touring Operations

# Description of Sample Touring Operations

---

**Arizona Opera** produces 5 operas per season and all productions rehearse and tech in Phoenix. Each opera plays 3 performances (FSS) in Phoenix, AZ and two performances (SS) in Tucson, AZ. The cities are approximately 113 miles apart. Each production starts and does production in Phoenix, AZ.

The season is divided into the McDougall RED Series, which performs at Center Stage at Herberger Theater Center (764 Seats) in Phoenix and the Holsclaw Theatre (603 seats) in Tucson. Our Mainstage Series performs at Phoenix Symphony Hall (2241 Seats) in Phoenix and The Music Hall (2202 Seats) in Tucson. Stagehands are IATSE Local 336 in Phoenix and Local 415 in Tucson. All Performing artists including orchestra and production personnel are the same in both cities.

**English National Ballet** tours large scale ballet (about 65 dancers and 60 musicians). It's usual (pre-covid) pattern of touring in a September-July season is:

- Autumn: 1-2 weeks at Sadler's Wells; 1 week each at Mayflower Southampton, Bristol Hippodrome, Palace Manchester, Empire Liverpool and Milton Keynes Theatre
- Christmas and New Year: 2 or 3 productions over 6 weeks at London Coliseum
- Spring: Two weeks at Sadler's Wells plus international touring
- Summer: Two weeks at either Royal Albert Hall, Royal Festival Hall or Coliseum, plus international touring

At the Coliseum we rent the venue. Outside of London and at Sadler's wells we are booked and take a split. We aim to work in joint venture at RAH. Internationally we are paid a fee.

Coliseum and RAH makes a profit. All other UK touring is heavily subsidized. International touring aims to make a profit, but we will accept break even for high profile tours.

# Description of Sample Touring Operations

---

**The Glyndebourne Tour** was founded over 50 years ago to take live opera of the highest quality, from the Glyndebourne Festival, to the broadest possible audience in venues around the UK, at very affordable ticket prices. Furthermore, it provides the opportunity for artist development with chorus members, understudies, assistant conductors and directors from the Festival taking lead roles on the Tour. Until this year we have toured 3 full-scale productions to 6 venues every Autumn (including Glyndebourne). From Autumn 2021, we will Tour 2 full scale productions, a concert (Messiah this year) and a "Fringe" programme in each city to which we are touring.

Whilst our Festival is 100% privately funded, we do receive funding from Arts Council England for the Tour and our Learning & Engagement programme. This funds approximately one third of the direct costs, with the Festival underwriting the balance, including all fixed costs—staff, building, utilities, etc.

In addition to our full-scale productions, **Irish National Opera** presents in Dublin (and sometimes in other cities that have an opera house). We tour 2-3 productions a year to regional theatres and arts centres throughout Ireland. There are a large number of regional theatres and arts centres in Ireland of varying sizes and technical capabilities. Most of these arts centres receive national, regional and sometimes municipal public funding.

We take touring productions generally to 8-12 different venues and present one performance at each venue (only exception is in the Dublin area, where we present 2-3 performances). The majority of the venues pay us a fee (a guarantee) for the performance, and the venue is entitled to the box office. In a few cases, we agree on a box-office split with the venue. The income generated by fees/box office covers approximately 15%-20% of the actual costs of mounting the production and touring it. The rest of the cost is covered by INO's Arts Council grant (public funding).

To date we have employed three productions methods: 1) New production, created for the tour; 2) Co-production with another company; Revival of one of our own productions (mainly contemporary work).

Most regional venues in Ireland do not have an orchestra pit. As a result, we tour with small ensembles (7-15 people) and, therefore, tend to tour baroque and contemporary repertoire and/or reduced orchestration.

# Description of Sample Touring Operations

---

**Opera North** is a full time company with a permanent orchestra and chorus. We mount three seasons of work each year.

- Autumn (Sept to Nov.): Normally three productions produced and performed on stage followed by a three or four week tour with all three productions playing in repertoire.
- Winter (Jan to March): A Similar season as above.
- Spring (April to June): Mixed programming.

For example in 2022 we will give 8 performances of PARSIFAL in a “concert staging” devised for concert halls, alongside we will perform a short stagione season of a musical (A Little Night Music) giving 15 performances in Leeds only.

**Scottish Ballet** is the national dance company, chartered and funded to serve Scotland (nationally and internationally). The company's annual touring usually includes three programmes to four key Scottish theatres (Edinburgh, Glasgow, Aberdeen, Inverness), along with small-scale tours to more remote locations when circumstances allow. SB's winter tour also includes two or more England venues. The company endeavours to have a presence in London and the USA biennially, while undertaking other international invitations as the schedule allows.

The Scottish Government promotes soft diplomacy through the National Performing Companies and supports international touring to this end. The financial model for SB's UK touring is based on a % split of Box Office revenue, and for international, fee for service.



# Description of Sample Touring Operations

---

**Scottish Opera** has been committed to touring across Scotland for well over 30 years. We open our mainstage productions in Glasgow (in our home theatre, the Theatre Royal) and then tour to Edinburgh, Inverness and Aberdeen. We have also appeared frequently in Belfast and less often in London – though the Hackney Empire (in London) remains a strategic destination for the work of the company. Additionally, we have a pool of approximately 110 smaller venues around Scotland which we attempt to tour our smaller scale work with 35+ performances per annum – so a repeat cycle of approximately every 3 years. Additionally, over the covid period we have managed to deliver 200+ Pop Up performances across Scotland utilising two adapted curtain sided 45’ trailers – enabling our audiences to be covid safe, outdoors but for live opera to be a reality.

**Virginia Opera** is the official company of the Commonwealth of Virginia. We perform in three locations: Fairfax, Richmond and Norfolk over the course of three weekends per production. Our performances at the Fairfax location is at George Mason University. The VO receives a fee for our engagements there, and marketing becomes the responsibility of the GMU.

Productions are not altered in scope of set or cast, regardless of location. We engage the Virginia Symphony Orchestra for three of the four productions and the Richmond Symphony for the fourth. Currently, all rehearsals take place exclusively in Norfolk.

**Welsh National Opera** performs to the UK touring repertoire model. We undertake two main tours each season, in Autumn/Winter and Spring. Productions open in Cardiff and are phased in, with between 3 to 5 performances of each opera, depending on its box office appeal. We then go on tour.

Each tour comprises three operas played in rotating repertoire over consecutive five days, Tuesday to Saturday. Two of the titles therefore receive two performances each, and the third receives a single performances. We visit six cities on the Autumn/Winter tour and seven in Spring. In summer, we usually mount a larger scale special production in Cardiff, that may also play in England in one or two venues.