

Theatre for Young Audiences: Opportunities in China

鹅！鹅！鹅！ by Catherine Wheels
and the Art Space For Kids.
Photograph by Henry Qi (2017)



1. Introduction

The British Council in China commissioned BOP Consulting to produce this briefing note mapping theatre for young audiences in China, in order to support UK performing arts practitioners wishing to work with this sector.

This document aims to inform, first by presenting relevant information, for example on main players and market conditions. It then puts forward advice based on analysis of the above, including key considerations and what the opportunities for the UK performing arts sector might look like.

This report uses the term ‘theatre for young audiences’ to include all performances made for children and young people between 6 months and 18 years of age. This is so not to exclude older age groups, as the term ‘children’s theatre’ in China usually refers to audiences between 3 and 12 years old.

1.1 Background

China has a long performing arts tradition that includes unique forms of classical dance, music and opera. However, recent decades have seen both young audiences and adults shifting their interest away from traditional performing art forms and towards Western forms of theatre, including theatre produced specifically for children.

Growing audience demand has also been influenced by demographic changes. As China’s “Post 80s generation” (those born after 1980) have become parents, they have driven increasing recognition of the important role of theatre in the education and entertainment of their young children.¹ Running in parallel to this has been the relaxing of China’s 37 year one-child policy (announced in 2015),² with the aim of increasing the number of children in future generations.

In China’s performing arts sector itself, structural changes taking place from the year 2000 onwards have gradually removed the ‘iron rice bowl’ of continuous unconditional government subsidy. In order to stimulate commercial development, China’s Ministry of Culture and Tourism has reduced public subsidy and restructured state-owned performing arts companies and institutions into market-oriented businesses.³

These increases, both in audience demand and the demand for commercially viable content, are key driving forces in the development of theatre for young people in China at the moment.



2. Market Conditions

2.1 Socio-demographic data

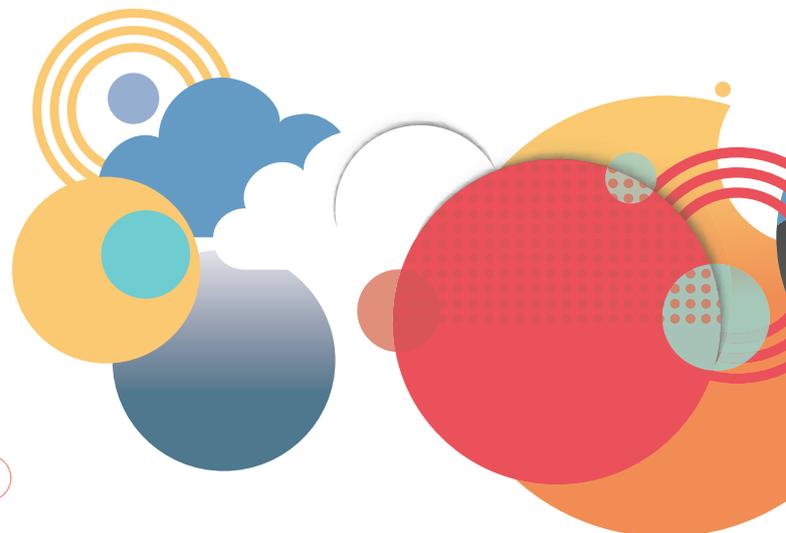
- Around 20% of China's 1.4 billion citizens are under 18 years old, **making nearly 280 million young people in China**,⁴ with more than half in China's cities.⁵
- Urban middle-class and upper middle-class households now spend less than 50% of their income on necessities, and can be assumed to have money to spend on cultural activity. In Between 2002 and 2012, this **urban middle-class had grown from 4% to 68%, and are expected to rise to 75% by 2022.**
- **Nearly half of these potential cultural consumers are found in China's Tier 2 cities**, with the majority of the remainder fairly evenly split between Tier 1 megacities and emerging Tier 3 cities.⁶
- **Among the upper middle-class group, those aged 35 and younger will in the next few years account for 65% of consumption** in this group.⁷ Given that the average age at which women give birth to their first child in China is 26,⁸ we can infer that these younger, wealthier urban middle - class consumers are also likely to be the parents of young children.
- The Chinese government fully implemented its **second-child policy** in 2015, potentially growing future audiences for theatre for young people.
- In summary, not only is China's urban population now significant in number, their wealth is also continuing to grow, particularly among the under 35s – a key group driving attendance at theatre performances aimed at children.

2.2 Sector data

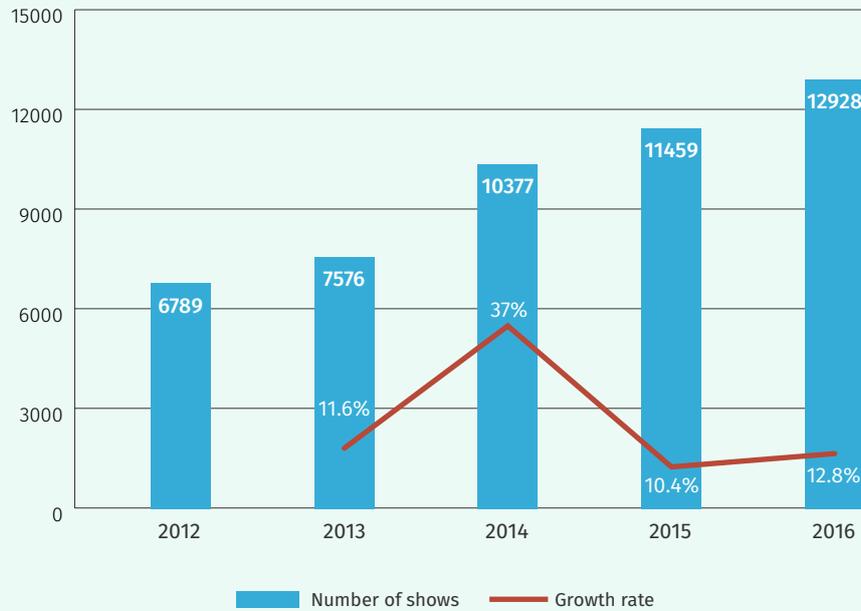
2.2.1 China's domestic market

- **The size of the children's theatre sector in China has steadily increased in past decades.** No data is available on the number of performance spaces, productions or companies directly associated with theatre for young audiences, but the overall number of these performances has risen substantially. Performances doubled in 4 years from 6,789 shows in 2012 to 12,928 shows in 2016, with a growth rate of over 10% visible since 2013.
- **2014 was particularly successful:** This year saw a 37% increase in the number of performances, a 24% growth in box office and a 25% growth in audience numbers.
- **In 2016, audience figures for children's theatre surpassed that of spoken drama**, making children's theatre the biggest theatre sub-sector in China.

Analysts predict that taking into account the socio-demographic factors outlined above, **the children's theatre market will reach 720 million yuan by 2020**, displaying a compound annual growth rate of about 15% over the next 5 years.⁹



1. Number of Children's theatre shows 2012-2016



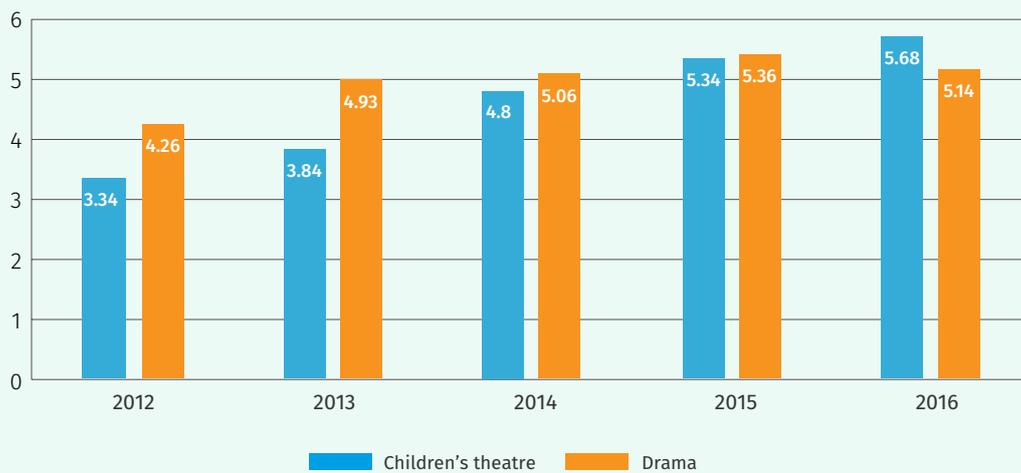
Source: Children's Theatre Market (2017), Daolue Performing Arts Industry Research Centre¹⁰

2. Trend analysis 2014- 2016: number of performances, box office, audience

| | Number of shows | Growth rate | Box office (RMB) | Growth rate | Audience number | Growth rate |
|------|-----------------|-------------|------------------|-------------|-----------------|-------------|
| 2014 | 10,377 | +37% | 326 million | +24% | 4.798 million | +25% |
| 2015 | 11,459 | +10.5% | 361 million | +10.8% | 5.34 million | +6.7% |
| 2016 | 12,926 | +12.8% | 385 million | +6.7% | 5.68 million | +6.3% |

Source: Children's Theatre Market (2017), Daolue Performing Arts Industry Research Centre^{11,12}

3. Audience number of children's theatre and Drama 2012-2016

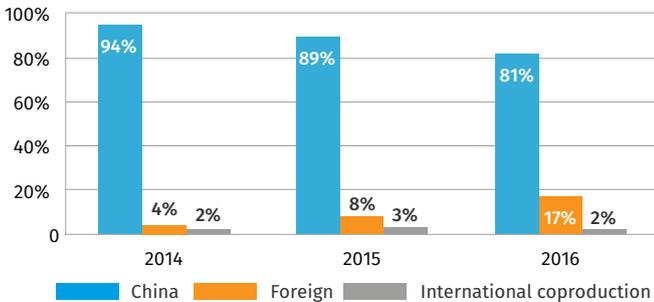


Source: Children's Theatre Market (2017), Daolue Performing Arts Industry Research Centre¹³

2.2.2 International imports and collaboration

Although domestic productions still dominate China's children's theatre market, Chinese audiences have been offered more and more foreign productions and international co-productions.

4. 2014-2016 proportion of domestic production, foreign production, and international co-productions



Source: Children's Theatre Industry Insight Report (2017), Damai¹⁴

Productions imported into and toured around China are growing faster than domestic productions. Certain venues feature again and again as receiving houses for imported productions, for example Shanghai's Art Space for Kids (ASK) and the Shanghai Children's Art Theatre, suggesting that international collaborators are working with a small number of key partners within China that have the skills and interest in importing international work. Growing demand however has sparked interest among more local partners and venues, with international collaboration now increasingly visible beyond the usual players.

Local players importing work such as Meriton's Zhou Xiaoli place value on the increasing levels of interest in foreign content among their audiences, regardless

of the difficulties around importing productions themselves - touring costs, cultural barriers and logistical work make importing a challenge.¹⁵ Another stakeholder suggested that people are slow to take an interest in theatre for young audiences after having seen (predominantly lower quality) domestic productions. Performances from abroad by contrast enjoy a better reputation in terms of artistic and educational quality, and are very well received.¹⁶

As well as importing existing theatre shows, the number of international co-productions is steadily increasing. Venues and companies experienced in importing shows have recently started to get involved in working collaboratively with international organisations and artists to localise or co-produce new children's theatre pieces for the Chinese market.

In 2017, in collaboration with ASK, Scottish theatre company Catherine Wheels presented a localised version of one of their earliest productions, *Martha*. Though not a creative collaboration (and therefore, according to the company's producer Louise Gilmour-Wills, not a 'co-production') the project involved extensive work to localise the play's text to make it more accessible to local audiences. The set also changed a little, and a local music producer, local assistant director, and Chinese performers were brought on board. The show had a successful tour across China in 2017-2018 and received very positive feedback from Chinese audiences.

Other examples demonstrate full co-production. Artistic Director of Sweden's Bananteatern Björn Dahlman works with China's Little Player Theatre (小顽家) as a director on new productions, for example 2017's successful new multimedia show, *My Dad is a Dinosaur* (我的爸爸是恐龙).

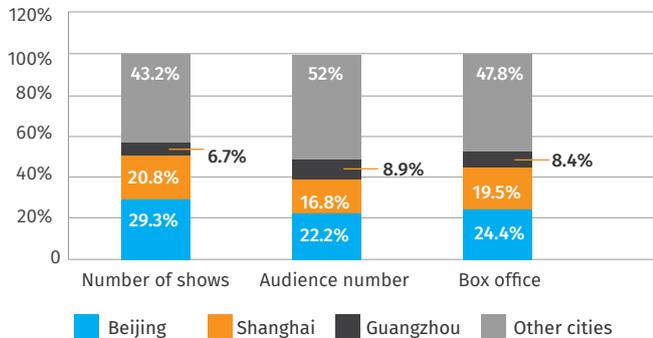


鹅! 鹅! 鹅!
adapted from the performance 'Martha'.

2.3 Regional distribution

Almost half of the total market for young people's theatre is clustered in just 3 of China's 5 first tier cities, namely Beijing, Shanghai and Guangzhou.

5. Regional distribution in 2016 (Beijing, Shanghai, Guangzhou and other cities)



Source: Children's Theatre Market (2017), Daolue Performing Arts Industry Research Centre¹⁷

However, demand for theatre for young audiences in 2nd, 3rd and 4th tier cities is apparently growing, according to a theatre director in Chifeng (a 4th tier city).¹⁸

Trends in household income appear to back this up, with nearly half of China's middle class found in Tier 2 cities (the rest are evenly distributed between Tier 1 and Tier 3 cities).

Forrina Chen, executive producer of ASK, also suggests there is demand outside first tier cities. She was surprised to find 'Mum groups' in cities like Zhengzhou, Chengdu and Chongqing that are just as enthusiastic, if not more so, about the theatre offer she brought there:

"There are so many mums that have similar interests, you just have to find them"¹⁹

2.4 Popular Genres

2.4.1 International classics

Classic, globally-recognised stories such as The Brothers Grimm and Hans Christian Andersen's Fairy Tales are by far the most popular content in China and have been for some time. With generations of readers and no copyright issues, these stories are staged repeatedly by both national theatres and independent producers.²⁰

"...there are at least 100 versions of Snow White produced in China by different companies, but you can't tell the difference."

- Journalist from Beijing Business Today²¹

The chair of Beijing Ugly Duck Theatre Company explains that the repeated selection of these same classic stories is done reluctantly, mostly to minimise risk. Private theatres have very little chance of receiving government funding and are therefore under significant pressure to survive through box office sales alone. They are not sufficiently resourced to undertake effective marketing campaigns for new shows and formats.²² Recognisable, classic stories therefore provide proven box-office draw.

2.4.2 Adaptations tapping into 'IP' value

The concept of 'IP' in China is different to the English legal term 'Intellectual Property.' It is used to refer to any popular cultural content that has accumulated a large fan-base and has a recognised 'brand value'. Content derived from stories, characters or brands with significant 'IP' value are seen to have potential to generate strong commercial returns.

In the TYA sector, productions adapted from famous cartoons (seen as having significant 'IP' value) are one of the most attractive types of programme for family audiences. *Peppa Pig* and *Thomas and Friends* are enjoying huge commercial success as theatre productions.²³

Another recent and notable example is *Qiaohu*, a play for children adapted from a Japanese cartoon series and *its'* animated tiger, popular in China since 2006. With the cartoon's core audience group as a basis, *Qiaohu* 'IP' grew to include products such as picture books, exhibitions, theme parks and stage shows.²⁴ According to a 2017 survey by ticketing agency Damai, the *Qiaohu* theatre production was China's most popular play for young audiences,²⁵ a fact corroborated by our interviewees.

In addition to animation, children's literature is another type of 'IP' with a similar impact on China's theatre sector. Eric Carle's award-winning children's book *The Very Hungry Caterpillar* has a large readership in China. The leading Canadian stage adaptation was toured across China's first, second and third tier cities in 2014 by DCWH, a Hangzhou-based promoter.²⁶



2. Children's theatre adapted from well-known animation *Qiaohu*²⁷

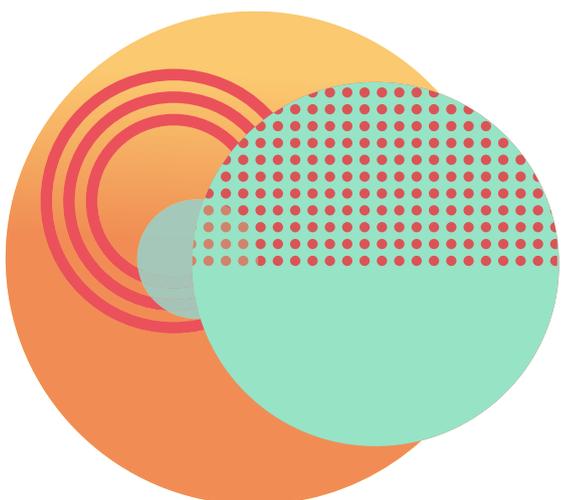
2.4.3 Combined entertainment and education offer

Chinese sector professionals interviewed as part of this research agreed that entertainment was the most important selling point for theatre for young audiences. In terms of format, productions with song and dance elements are seen to be most popular. Recent tours of *The Sound of Music* and an extremely popular local adaptation of *The Lion King* at Disneyland in Shanghai exemplify the market dominance of musical content.

The other main element sought by parents from theatre productions is educational value. *Samajam*, a Canadian music performance that combines percussion instrumentals with ESL learning, has achieved exceptional success. In 2016 the company staged 100 performances in 22 cities across China, selling over 50,000 tickets. The production continues to tour.²⁸

Louise Gilmour-Wills, Programme Director for Catherine Wheels,²⁹ feels that China's venue programmers often work hard to deliver added value for their audiences. It is common for venues to host educational workshops alongside performances. These can be seen in part as a means of promoting ticket sales,³⁰ but they can also be a necessary part of the programme. Parents that see a 40-minute performance as too short to justify the ticket price can enjoy an added education workshop, boosting it into a 1-hour package. According to Björn Dahlman, there is often the expectation that theatre workshops will also provide some form of English teaching.³¹

All the interviewees – from China and other countries – talked about the willingness of China's young audiences to engage with performers. Natasha Gilmore, Artistic Director of UK's Barrowland Ballet, commented that parents seem keen for their children to learn more about the production process behind the performance. Opportunities for young audiences to explore the set after the show, for example, are particularly welcome.³²



3. Key Stakeholders

China's key sector players often hold multiple roles in the theatre industry's value chain at the same time.

There are certain similarities with the UK sector, for example venues that create new productions in-house or production companies that manage venues (in China, sometimes this is with the express purpose of importing international work).

China however has venue operators acting nationwide as programmers, production companies and as promoters. These operators tour their own work or work they import, around their network of venues.

3.1 Subsidised theatres

Most Chinese theatres are still owned and directly managed by state-affiliated arts organisations, with content and programming centrally controlled. Many such theatres will also have their own in-house performance troupe, subsidised to create original productions.

Although this situation has been gradually changing due to Ministry of Culture and Tourism efforts to move the sector away from a subsidy model,³³ state-owned theatres still enjoy significant subsidies standing at an average of 37.6% of venue income. As an average across the sector, ticket sales make up an average of 49.4% of income and commercial (non-performance) uses of the building 13%.³⁴ Larger venues outside first tier cities are particularly in need of financial support, struggling with high running costs and relatively price sensitive audiences.

Poly Theatre Management Group is an important player, managing over 40 large theatres across China. These include Chongqing Grand Theatre, Qingdao Grand Theatre (Shandong) and Shenzhen Poly Theatre (Guangdong).³⁵ Poly are a state-owned enterprise, expected to deliver on a social responsibility agenda. Most Poly Theatres receive more than 10 million CNY subsidy annually in exchange for meeting performance targets set by local government, including around the number of performances, the content of these performances and the number of attendees.³⁶

Theatres in first tier cities such as Shanghai and Beijing have a more balanced income model with less dependence on subsidies.³⁷

Founded in 1956, the **China National Theatre for Children** (CNTC) 中国儿童艺术剧院 is the only national children's performing arts troupe directly managed by China's Ministry of Culture and Tourism. Since 2006, CNTC has increased the number of in-house productions it creates, which include both original Chinese productions and popular foreign classics such as *Cinderella* or *Snow White*.

Shanghai Children's Art Theatre (SHCAT) 上海儿童艺术剧场, founded in 2013, is another important state-owned theatre and is run by the China Welfare Institute. It is now the largest professional children's performing arts theatre in China, with a well-equipped flexible theatre space (capacity 1,088). SHCAT serves audiences under 16 and their families, and has a vision to present content for younger people of equal quality to that offered to adults.³⁸

3.2 Private theatres

More and more private companies and venues are emerging in China in response to growing demand. In contrast to subsidised venues, they have little opportunity to apply for government funding and need to operate more commercially. These private theatres can take on diverse roles, including that of agent or promoter. Some produce their own work and their own theatre education activities. Examples include:

Super Theatre 超剧场: Their first theatre was opened in Beijing in June 2016 by Chinese celebrity actor Deng Chao and film director Yu Baimei. They have a strong interest in presenting international productions. Every year Mr Yu Baimei leads takes his team to see new work at theatre festivals around the world, with the aim of selecting shows to localise for young audiences in China. Looking for new, creative content for children abroad (particularly physical theatre and productions using multimedia) is a response to a lack of high quality productions for young people available in China.

The Art Space for Kids (ASK / 小不点大视界) in Shanghai was established in 2014 and opened its 200 square metre space in 2015. It is a theatre company that aims to present world-class productions to China's young audiences. In 2016, ASK began working with Beijing Tianqiao Art Centre to programme their multi-function space. They currently tour work to 27 Chinese cities and are expanding with 2 further venues this year, located in second tier cities Hangzhou and Nanjing. Tony Reekie, director of the acclaimed children's programme at the Edinburgh International Festival between 1996 and 2015, is currently ASK's artistic director.

Very limited public funding however still means that ASK has difficulty making their business sustainable. In addition to operating venues, ASK also actively pursues related business opportunities in promoting shows, co-production and performing arts education.

3.3 Independent theatre production companies

In addition to theatre venues producing their own work, a growing number of independent production companies in China are creating work especially for young people.

The Beijing Ugly Duck Theatre Company 北京丑小鸭儿童剧团, established in 2006, is a private production company mainly producing theatre for young audiences, often featuring cartoon characters. Their productions have toured more than 100 Chinese cities, clocked up over 5,000 performances and reached more than 5 million people.

Jingying Entertainment 精英娱乐 is a production company specialising in comedy and physical theatre for children. The company has a strong interest in and links to the international theatre market, as well as a core artistic team with international experience. Artistic director Li Dong produced the National Theatre of China's Mandarin language production of *War Horse*. Associate artist Liu Xiaoyi was puppet director on the same production.

In 2017, Jingying Entertainment's recent physical theatre production *Little Soldier Zhang Ga* (adapted from well-known Chinese 'IP') performed at the Shanghai International Arts Festival, Wuzhen Theatre Festival, the Edinburgh Fringe and the South Bank.

3.4 Agencies / Promoters

China has a number of experienced organisations dedicated to importing and curating international children's theatre productions, providing services such as venue liaison and/or rental, publicity and tour management.

Wu Promotion 吴氏策划 mainly provides large scale productions (e.g. by German company Familie Flöz) to large-scale theatre venues in China.

Hermark Culture 闻铭雅尔, founded in 2012, focuses on smaller scale productions aimed at young audiences and families (e.g. by American company Lightwire Theater).³⁹

Tong Production 立里空间 has toured shows from Italy, France, Denmark, Australia, Spain and the UK (e.g. *What the Ladybird Heard*). Tong Production have recently begun initiating co-production projects with the aim of telling Chinese stories to international audiences. Their first co-production *Panda's Home* with Spanish theatre company TPO is now on tour in the US.

In order to lengthen a tour and make importing international productions more cost effective, some venues (such as ASK) also play the role of nationwide promoter for work brought to their own venue. This leverages their experience of both international productions and the Chinese market.

3.5 Festivals

Festivals are an opportunity for China's sector players to select content appropriate for their own venues, showcase interesting new work, and explore future co-production/ collaboration opportunities.

The following Chinese festivals have a particular interest in international productions targeted at young audiences.

China Children's Theatre Festival 中国儿童戏剧节: Founded by state-run China National Theatre for Children, this festival has been running in Beijing since 2011 and showcases both Chinese and international work. In 2016, it attracted an audience of 160,000 and hosted 46 productions from countries including the United States, Romania, Japan, Korea, Spain and Australia.

Shanghai International Children's Theatre Festival 上海国际儿童戏剧节: Beginning in 2004, this is China's longest running theatre festival for young audiences. It is managed by the China Welfare Institute and

hosted mainly at the Malan Flower Theatre in Shanghai. In 2017, the festival presented 2 Chinese and 6 international productions.

In addition to these 2 major festivals, several new festivals have been established in the last few years outside China's first tier cities:

Poly International Children's Arts Festival 保利国际儿童艺术节: Established in 2015, this festival is hosted by Poly Group venues across China. In 2018, it is set to include 38 productions mixing concert, theatre, musical and performances specifically for family audiences.⁴⁰

Maybe International Children's Arts Festival is sponsored by Chongqing Museum of Fine Arts and organised by Chongqing's Yinzi Theatre. The festival opened in May 2017 with a series of events including exhibitions, multimedia animation installations, dance and theatre performances, workshops and lectures.⁴¹

3.6 Shopping malls as cultural spaces

China currently has around 4,000 shopping malls and more than 10,000 are expected to be added by 2025. However, the growth of online retail has resulted in fierce competition for customers.⁴²

Shopping centres are becoming an increasingly important source of arts and culture provision in China, with some Chinese property developers seeing it as a way of increasing footfall and dwell time in retail spaces. Museums, galleries and even small petting zoos are becoming established tools to achieve this, and the performing arts are also a key part of this cultural offer.

The first children's theatre space opened by ASK in Shanghai was a small 120 capacity space in a shopping mall, programming around 300 shows a year.⁴³ Similar theatres targeting family audiences have emerged in shopping centres not just in first tier cities but also in second and third tier cities like Kunshan.⁴⁴

Alternative forms of collaboration between the performing arts sector and commercial complexes are also emerging. Xixi Theatre in Hangzhou has a dedicated event-planning team that organises theatre activities in collaboration with theatre artists and programmes these in shopping malls. During Xixi's family show season, children's theatre artists are increasingly involved in workshop activities hosted in local shopping centres.

3.7 Cross-sector production companies

Market growth has also brought various types of strategic commercial investment into China's theatre companies, and even into individual theatre

productions. Companies that operate across several different industries or performing arts sectors are also branching out into theatre for young audiences, where they perceive there to be an opportunity.

AC Orange and XCB Family 聚橙和小橙堡

Initially established in 2007 as a ticket agency, the company has expanded its active business areas rapidly in the past 5 years. At the moment it works as a ticket agency, producer and promoter, and covers children's theatre, pop music and musical theatre.⁴⁵

AC Orange sub-brand XCB Family focuses specifically on children's entertainment. In 2014, the company began to become involved in original theatrical productions and the licensing of international theatre productions for children. AC Orange implements a business strategy of standardisation and development at scale, supported by funds from the financial market. Among its varied business interests, music concerts are currently seen as the most commercially promising. However, AC Orange sees theatre for young audiences as a way to develop the audiences of the future, growing the company's overall audience base.⁴⁶

Mahua Funage 开心麻花

Funage has been the most popular comedy theatre company in China over the past decade. Its core operation has traditionally been creating comedy productions and touring them around China. Every year, they present over 2000 performances in more than 50 cities.⁴⁷

In 2015 however, Funage began to work in film production and quickly found success. Their first project, *Goodbye Mr. Loser*, achieved record box office returns of 1.42 billion CNY, equivalent to half of Funage's total revenue for that year.⁴⁸ This enabled Funage to raise several rounds of private equity funding, bringing the company's total value to 5 billion CNY. Funage continues to explore financial market opportunities and submitted an application to be listed in China's Growth Enterprise Market (GEM) in 2017.⁴⁹

Between 2015-2017 Funage worked with Little Player Theatre, a TYA production company based in Shanghai, to co-produce a series of shows in Mahua Funage's dedicated venue. Although the collaboration has since come to an end, Mahua Funage continue to see theatre for young audiences as an area with potential.

Compared with other theatre companies, the financial support brought in by Funage's other business areas gives it more space to be experimental in its theatre productions.

4. Gaps and Opportunities

4.1 Emerging smaller venues

There are around 1,000 theatre venues in China, a significant proportion of which are large and newly built. Around a third of China's dedicated theatre venues were built in the last 15 years, and 120 of these have over 1,000 seats.⁵⁰

Large theatre venues are not only more challenging for ticket sales but also limit the range of productions that can be staged.

Many theatre companies produce children's theatre using costumes with large heads, as such costumes enabling audiences to see characters clearly on a large stage and from a distance.⁵² Björn Dahlman, Artistic Director of both Bananteatern (Sweden) and Little Player Theatre (China), feels that these kinds of local productions "*focus more on lights, music and dance, rather than real content and narrative*".⁵³

UK productions designed for larger venues are well placed to take up opportunities to tour Chinese venues, with Selladoor's current touring production *Guess How Much I Love You* successfully performing

at the 920-seat Shanghai Centre Theatre. Companies looking to create a closer relationship with their audiences in a more intimate setting however may find it more challenging to identify an appropriate receiving venue.⁵⁴

More recently however, sector professionals and audiences in China have begun to value smaller spaces. Forrina Chen remembers the positive response from a Wuzhen Theatre festival audience to the British production *Cloudman* in 2014, with audiences impressed by the impact of the action, language and lighting in a small space (capacity 120).

Considering the lack of theatre productions in China's market and the **importance of a closer audience relationship in productions aimed at children and young people**, in 2014 ASK founder Forrina Chen began to introduce the concept of the 'tiny theatre' to China.⁵⁵



3. 'Big head' children's theatre productions⁵¹

Recent years have seen a corresponding **increase in the number of small to medium sized theatre venues constructed in China**. Examples include Xixi Theatre in Hangzhou (400 seats, opened 2015), TPM ‘Seedo’ Theatre in Nanjing (150 seats, opened 2016), and Beijing Tianqiao’s multi-functional space (200 seats, opened 2016). These **leading venues are actively looking for high quality international content to present and creating the infrastructure to do so, leading to opportunities for the UK performing arts sector**.

Caution remains however, as most small-to-mid size theatre venues are private ventures with limited public funding. The high (upfront) cost of programming international productions still makes it challenging to find a sustainable business model, especially when audience capacity is restricted.

4.2 Age categories

Most Chinese theatres use the term ‘children’s theatre’ to describe a genre of performance, without then clearly classifying age groups. The UK practice of suggesting age ranges for theatre productions, with distinctions made between different age groups, is not common in China. Theatres therefore sometimes find children refusing to watch a show all the way through, either because they are too young and have difficulty understanding, or because they find it too childish.⁵⁶

This situation is already starting to change. Ms Zhou Xiaoli, General Manager of children’s theatre company Meriton, noted that it is the venue’s responsibility to present suitable content to the right age group. Little Player Theatre focuses exclusively on 3 to 8 year olds and Shanghai Children’s Art Theatre introduced an age classification system in 2015. Such developments are helping strengthen the sector.

There is general consensus within the sector in China that, due to a very competitive and exam-focused secondary education system, audiences of secondary school age have little free time for entertainment. This has led to few productions for China’s teenagers but Yinzi Theatre’s founder Hu Yin stated that she is keen to explore this area. Based on her experience of watching excellent theatre pieces for teenagers in Denmark and in the UK, she believes theatre productions focusing on 12-15 year olds can be experimental, inspirational and accessible. As she expands Yinzi Theatre’s productions younger children, she is also anticipating that teenagers will become an important audience in future.

4.3 Talent and training

In China, further and higher education in the performing arts mostly prepares theatre makers to work on or in productions aimed at adults, or productions that are very text-heavy. Actors coming into the sector are often more interested in TV and film than in theatre. Additionally, theatre for young audiences is not highly regarded, leading to a dearth of trained performers and creative talent.⁵⁷ **Lack of highly skilled professional talent in theatre for young audiences in China offers international companies direct opportunities and opportunities for collaboration.**

Meriton’s Ms Zhou stated that attracting talent is the most challenging problem her production company faces at the moment. The company is based in a second tier city (Xi’An), but Ms Zhou says the best domestic artists are mainly based in first tier cities.

Louise Gilmour-Wills, Programme Director of Catherine Wheels Theatre Company, encountered a similar problem even in first-tier city Shanghai. While working with ASK on a local production of *Martha*, Catherine Wheels found it difficult to cast the production as so few actors with a sufficient level of skill wanted to audition.

Björn Dahlman also noted a lack of focus on actors’ training and development in China. *“There is perhaps too much focus on the extraneous elements – multimedia, etc – and not enough on actors training and development, which is central to the European theatre for young audiences tradition.”*

ASK’s Forrina Chen agreed that the supply of domestic talent for theatre for young audiences is insufficient. Part of the reason for her insistence on developing co-production projects every year with international partners is as a training opportunity for her own team.

According to Denise Chen, founder of Little Player Theatre, lack of local creatives is a key challenge, but also an opportunity they would like to explore. Little Player Theatre would like to work with the best of international talent to develop high quality co-productions and local versions of international projects. In so doing, they aim to incubate influential ‘IP’ and give themselves a competitive advantage.

4.4 Commercial pressures

Lack of government funding for non-subsidised theatres has had a significant effect on the sector. Accustomed to public funding in Sweden, Björn Dahlman (Little Player Theatre) found the pressure to deliver profit created restrictions, particularly for smaller companies.

Rehearsal periods were short and gave less room for experimentation. Ticket prices were relatively high in order to cover costs. Production companies are therefore incentivised to make theatre that attracts parents (the ticket buyers) rather than children. In return for a high ticket price, audiences demand high production values, (sometimes unsuitably) long performances and design that leads with attractive images for posting on social networks.⁵⁸

The standard model in China's theatre industry is for shows to grow into large-scale productions, but some companies like ASK are different. Although clearly successful, in order to steadily provide quality content ASK struggle with tight finances.

There are a number of different approaches to dealing with commercial pressure. To cover the cost of international travel, Little Player Theatre tries to tour international productions to more cities, sharing costs among more venues. Selecting shows that have fewer crew members and simple sets has become the guiding principle for Meriton.

Little Player Theatre stated that their preferred format of international collaboration is to obtaining copyright licenses and create local version productions, rather than touring original international productions. In this way, Chinese companies have more flexibility to recruit local performers and tour to more venues, which for them makes more commercial sense.

In 2017 for example, Shanghai Children's Art Theatre purchased the rights to produce a Mandarin language version of Spanish production *To The Moon*, and worked hard on translation and adaptation to make it accessible for Chinese audiences. The show was co-produced with Beijing's Inside-Out Theatre, staged successfully in Shanghai and Beijing, then invited to tour around China.

4.5 Theatre education

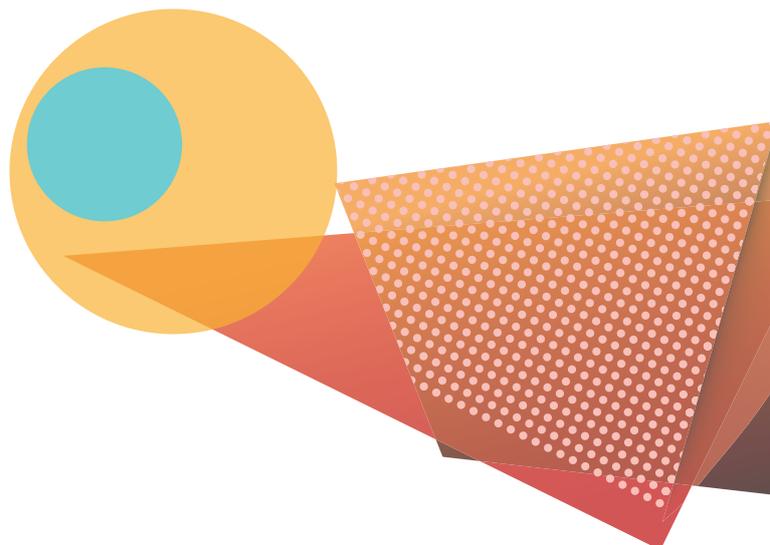
At present, theatre does not feature in the Chinese national curriculum. However, as a result of recent shifts in education policy towards innovation and creativity, theatre is becoming increasingly valued and attractive in educational contexts.⁵⁹

In place of public provision, a number of dedicated private theatre education companies have emerged to fill the gap. Some of these companies have also started to develop education programmes in collaboration with performing artists.

These education programmes exist in the form of highly desirable summer camp activities, after school or weekend theatre classes, workshops alongside performances, or as theatre education services delivered in state-run and private schools.

At this stage, almost all educational theatre activities in China carry the expectation of ESL learning, as evidenced through the number of 'English through drama' courses aimed at children and young people, and the fact that most drama teachers are expected to be English speakers. **English language learning is one of the key selling points of British performing arts and education activities aimed at children and young people.**

However, it is also agreed among many sector professionals that the purpose of theatre education should go well beyond that of English learning. Chinese professionals are particularly impressed by UK practice of building close links between theatre education, schools and the community. Yinzi Theatre among others have started integrating other creative possibilities based on theatre, dance and new media into the educational sector. **UK-China links in this area are greatly desired, and could potentially create long-term social impacts in the country.**⁶⁰



5. Considerations for international producers

Below is a summary of key points to consider for UK performing arts organisations making work for children and young people, when preparing to work in China for the first time. These points are based on interviews with professionals from the theatre sector in China, and those from the UK and other countries with experience of working in China in this area. Sharing knowledge and experience was strongly recommended by all. Interviewees emphasised the value of making contact directly with international companies who have previously worked in China, to learn from their first-hand experience.

5.1 Partnership building

5.1.1 Finding the right partner is crucial

In China, the UK's reputation for producing theatre for young audiences is very positive, and there is great potential for UK organisations to create tours and partnerships in China. However, as ASK founder Forrina Chen points out, it is important to find the right people to work with:

“China has a huge market, opportunities are everywhere, however, you need to find a trusted partner who shares similar values with you, and with whom you can develop a plan step by step.”

The right partner is one for whom providing the best support for you is in their interest, and also within their expectations and capabilities.

If you are looking to tour a big production at large-scale venues, the most suitable way is to collaborate with networks of large venues managed by a dedicated promoter such as the Poly Group or the China Performing Arts Agency, or work through professional agencies who are experienced in booking large scale tours.

For smaller productions it is crucial to find an experienced sector partner who understands your needs and the needs of local audiences. An international theatre festival or a stand-alone, small-capacity venue may also be able to provide you with the support you need to make your performance happen.

Consider first targeting your search for partners among those active in China's first tier cities (Shanghai, Beijing, Guangzhou) and the larger and wealthier second tier cities (eg. Chongqing, Nanjing, Xi'An, Chengdu). These cities are likely to present greater audience demand, provide access to more local talent and equip you with a more advanced performing arts infrastructure.

A simple keyword search on google or baidu (China's primary search-engine) is unlikely to yield much information, since most Chinese organisations, in any sector, tend not to put much attention into websites. For further research on the companies outlined in this report, it is advisable to download and use wechat (weixin) or sina weibo, China's primary communication and social media platforms, predominantly operating on mobile phones. It is on these platforms that you will find the organisations' dedicated information pages.

You may find that it is best for you to work with more than one partner. A partner may have strong reach in their local region, but cannot work with you beyond that area. Some partners may only want to work with a specific production, not a number of different shows. To maximise reach in the country, it is quite common for international companies work with multiple agents and promoters across multiple regions, but with exclusivity clauses linked to individual productions in individual cities written into contracts.⁶¹

5.1.2 Meeting in person is an important first step

Festivals are the most common entry point for international theatre producers and local operators/producers to start the conversation. Zhou Xiaoli from Meriton theatre, for example, visits several international festivals each year to find new work. It is very common for Chinese theatre professionals to see and select shows at the Edinburgh Fringe Festival.

Participating in cultural exchange programmes and dedicated delegation trips are also effective ways

to meet potential partners. ASK founder Forrina Chen notes that joining an international placement programme organised by the British Council in 2013 provided her with the opportunity to meet many theatre producers who went on to become key ASK partners.

An initial visit to China could be equally useful for international producers interested in exploring opportunities. Yinzi Theatre founder Hu Yin strongly recommends that international producers come and visit China in person.

“There are so many companies and organisations who target different audience groups. You have to go and meet them in person, and find the best match in such a diverse market.”⁶²

The British Council’s Connections Through Culture grant can contribute towards the cost of an initial visit to China to meet potential partners.

5.1.3 Important to nurture long-term partnerships

Co-production partnerships can take a longer time to identify and develop. Subsidised venues with their own in-house production team like the China National Theatre for Children may be interested in such partnerships, though there are also increasing numbers of private players actively seeking international partners.

Many Chinese partners take a step-by-step approach to their business interaction with an international company, building from touring projects towards co-productions or art education.

Tong Production began to co-produce projects only after a solid partnership had been built with international artists via touring projects. Liz Ren (Tong Productions) explains that building up trust between both sides is key to a good co-production project. Similarly, though ASK began collaborating with Catherine Wheels on a localised production of *Martha* before any tour took place, the 2 sides had built up a relationship of trust over a number of years, and as a result the joint tour of *White* was able to be successfully arranged at almost the same time.

Partnerships, when they occur, can be very strong, often contractually exclusive and fiercely defended in a sector that is increasingly competitive. One company interviewed for this research said they felt that *“once one company has made arrangements with you, you’re effectively theirs.”⁶³*

5.2 Content and audience

Even if productions are critically acclaimed by your home audience, it is very important to understand that the response may be very different in China. Even for experienced international producers, the differences presented by China’s market, as well as wider cultural and social differences, can be a significant challenge.

Björn Dahlman noted that in China, there is a very different way of telling stories than in Europe. However, he added that *“...you must realise that in many ways the production company will understand their audience, culture and market better than you do, so trust them.”*

5.2.1 Language can be a barrier - and an advantage

As a compulsory second language in China’s national curriculum, English makes British theatre productions for young audiences comparatively more accessible to audiences than performances in other languages.

According to a spokesperson at a private theatre in Beijing, many of their young audience members can fully engage with English language performances and enjoy the atmosphere. However, adjustments are necessary. Some complicated or colloquial words need editing to make a show more accessible to local audiences, and companies should consider making the necessary artistic or linguistic changes. Catherine Wheels, for example, adapted some of the original text and set for *Martha* to better fit the local context, and Barrowland Ballet had one performer say a line in Mandarin, which was very well received.

However, Barrowland Ballet also stated that having little or no text in the performance was actually one of their unique selling points. This enabled them to tour their original performance without the need for surtitles or localisation for the Chinese audience.

5.2.2 Understand the delicate balance between entertainment value and artistic quality

There is a tension in China’s theatre sector between the need for high-impact spectacle (entertainment value) and what may be described as a less immediate or more complex experience (artistic quality). The majority of locally-made theatre in China is still predominantly entertainment-focused. This makes the artistic quality of foreign

productions stand out, a positive consideration for theatre operators when deciding to collaborate with international producers.

Programmers at ASK believe that, amongst other things, an “*exquisite blend of movement, breath, language, lighting and set*” provides children and parents with a memorable theatre experience. Liz Ren from Tong Production stated that she is particularly interested in performances with multiple layers, that “*can make kids laugh but parents cry*”.⁶⁴

However, selecting shows that get the balance between artistic quality and entertainment value right is still a challenge for Chinese programmers, given the need to both grow an audience base and test new approaches. Denise Chen from Little Player Theatre cites a piece of musical theatre from France that recently came to her theatre on tour. It was critically acclaimed in France, and she thought that the musical element would help the show transcend the language and cultural barrier. However, adult audiences stated that both the (French) language text and the performance itself was too ‘artistic’ to understand.

Current consensus is that China’s theatre audiences respond well to highly visual and physical performing arts spectacles. US company Lightwire Theatre and other companies integrating lighting and multimedia into their work are particularly sought after. Additionally, independent Chinese producers are beginning to create similar work, such as Little Player Theatre’s *My Daddy is a Dinosaur*.

British humour in children’s theatre productions is another strong selling point, helping UK performing arts content achieve a balance between entertainment value and artistic quality. Natasha Gilmore feels that the comic elements in their production of *Tiger Tale* were very much appreciated, despite the different cultural context: “*the audience [in China] laughed in the same places [as the audience in the UK].*”

5.3 Commercially viable business models

Lack of government funding for non-subsidised theatres has had a significant effect on the sector in China. The pressure to make a profit may affect the models for collaboration that those in the sector prefer to adopt with international producers.

5.3.1 Tours are scaled to reduce costs

With international travel, accommodation, performance fees, per diems and visa costs, importing an international production puts considerable financial pressure on host venues or companies in China, particularly private players without state funding support. In order to cover costs, enterprises like The Little Player Theatre try to tour international productions to more cities, thereby sharing costs among the venues. In addition to lengthening a tour, Chinese host venues or companies will look to scale down the production itself. Selecting shows that have fewer crew members and simple sets became a guiding principle for Xi’An-based Meriton, for example, as the distances between Chinese cities can create considerable difficulties around transportation.

5.3.2 Many companies licence shows and localise productions

To reduce the cost burden of importing and touring international productions in their entirety, some Chinese theatres and producers instead choose to license international shows and produce localised versions. In this way, they have more flexibility to recruit local performers for longer tours to more venues.

5.4 Business culture in China

Working with partners in a new market with a different language and cultural context may require quite a bit of adjustment and compromise from both sides.

5.4.1 Decision-making processes and negotiations are very different

Since Chinese companies are often structured differently, Björn Dahlman believes it is very important to understand the decision-making process. Different people can make decisions independently, sometimes contradicting or overriding one another. Agreeing a clear communication channel and establishing an understanding of who in the partner organisation is responsible for making what decisions will help avoid misunderstandings.

Interviewees for this research expressed great willingness to coordinate with partners about issues on which opinions differ. All interviewees stressed that the most important thing is to keep communicating, figuring out a solution that both sides can accept.

Catherine Wheels, for example, changed the name of their touring show in China. Despite initial misunderstanding, the fact that the original name was hard for Chinese people to say was discussed and this decision was made.

Sometimes negotiation can be lengthy. Barrowland Ballet found they needed to negotiate separately with every layer in the hierarchy around the safe use of matches on stage, before being able to go ahead and use a small flame on stage.

“Keep communicating and be patient” was a key insight shared by Forrina Chen, essential for developing long-term partnerships with international organisations and artists.

5.4.2 China works at a different speed

Louise Gilmour-Wills of Catherine Wheels stated that *“on a very practical level, we realised China and UK work to very different timescales”*. Things can happen very quickly, which can be both helpful and challenging. In order to respond to a Chinese partner’s request, they ended up asking for longer deadlines. However, speed also meant that problems were dealt with very quickly.

Both expectations and plans can also change fast. Björn Dahlman expressed frustration at this, but also emphasised the need to persevere and adjust one’s own perspectives on how projects are managed.

To keep up with ‘China speed’⁶⁵ it is imperative to actively use the Chinese communication app WeChat. This is a go-to platform for sharing information, documents, contacts and even fees quickly and efficiently, and a useful tool for networking and publicising work.

5.4.3 Every performance needs government approval.

All public performances in China need to apply to the relevant provincial authority and pass through their censorship process to obtain a performance permit. This process includes preparing information about the company (including company members’ passport details and the company’s certificate of incorporation), plus a full script and video of the performance itself, several months before starting to market the show. The application process could take a month or more, so it is therefore important to factor this into a project timeline.

There are rare cases where a performance does not pass its censorship application, most likely if the performance touches on sensitive issues. There are no clear rules around this and decisions may differ in different provinces. The best way to reduce the risk of this happening is to work closely with a Chinese partner that understands government expectations.

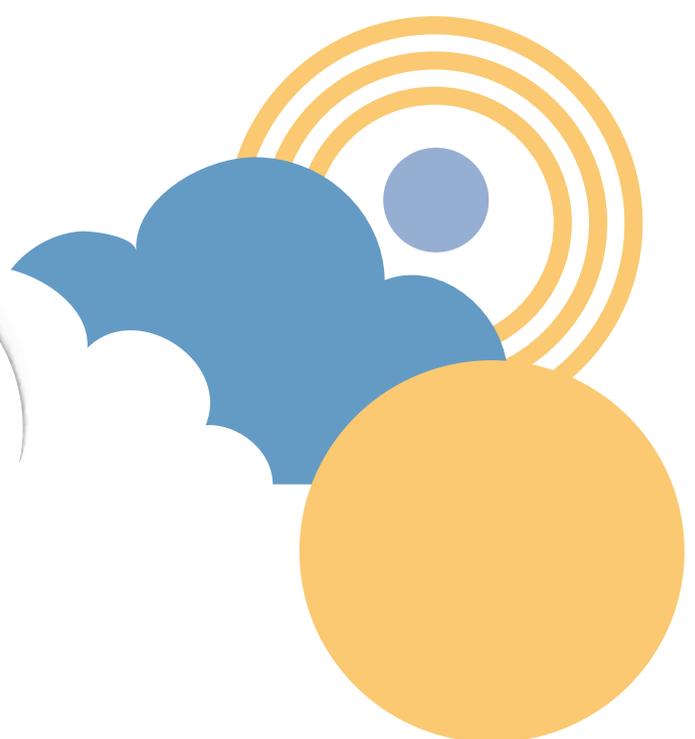
5.5 A developing industry

The development path of China’s theatre sector is not the same as that in the UK. Chinese sector actors are therefore having to learn very quickly how best to work with international partners and how to provide international companies with what they need.

Health and Safety regulations in China are different to those in the UK, and some venues are not purpose-build performing spaces. Working in a relatively new sector means UK companies need to consider balancing their professional requirements with a consideration for the practical issues their local partners may face.

There may well be surprises in terms of what venues in China provide. Barrowland Ballet, for example, noted that sprung-wood dance floors were not as common in China as they anticipated.

Venues are also trying to educate audiences around the use of mobile phones during performances. Gilmore says that behaviour is improving, especially when Chinese partners are strict with audiences around phone use. Outside first tier Chinese cities however, audiences may be unaccustomed to limiting their use of mobile phones during a show.



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