



Performing arts

Performing arts in China at a glance

The performing arts sector in China is entering a **new phase of maturity and diversification**. After decades of infrastructure building and global engagement, the focus has shifted to **audience development** and **domestic content creation**.

Post-pandemic recovery has been swift and striking: 2024 marked **a record-breaking year for box office sales**, driven by large-scale concerts and festivals, experimental venues, and youth-oriented formats. Traditional performance formats like opera and dance now sit beside immersive theatre, hybrid events, and IP-driven musicals tailored to Chinese tastes.

Audiences are younger, more female, and more experience-focused than ever before. In major cities, theatre is not just art—it's leisure, entertainment, and lifestyle. Producers respond with data-led programming, local adaptations, and flexible business models.

- **£8.16 billion:** China's performing arts market size in 2024, up 39% from 2019
- **250%+:** Growth in small theatre attendance since 2019
- **72%:** Ticket holders aged 18–34; women make up two-thirds of total audience

Opportunities for UK partners

China's performing arts scene in 2025 is **energetic, multilayered, and accelerating**—but also commercially competitive and in search of wider industry maturity. By combining respect for China's rich cultural traditions with awareness of its rapid modernisation, international partners can find meaningful ways to contribute to and learn from this dynamic scene.

For small and medium UK performing arts professionals and organisations, the Chinese market offers both a potential audience of unprecedented scale and partners who are eager to exchange knowledge and repertoire. Whether it's a UK theatre group doing a Mandarin-subtitled run in China, a joint workshop between British and Chinese dancers, or a digital collaboration in the immersive space, the possibilities are expanding.

- **Opportunities to explore beyond touring.** Straight imports of UK shows to China now can face audience and budget barriers, given rising domestic productions. Co-creation, adaptation, and licensing are the future.
- **Opportunities to explore experimental spaces and scales:** Often more than flagship stages, China offers diverse and strong entry points through new, experimental, intimate venues, grassroots festivals, and immersive formats to reach its audiences.
- **Cultural fluency and localisation is key:** Offer content that aligns with local narratives or a universal appeal, rather than one-way exports.
- **Relationship building precedes results:** long-term collaborations thrive where trust, shared authorship, and curiosity are prioritised. China is a place where you can do business for a long-term view.

Market development timeline

1990s

Reform and Early Adaptation

Chinese theatre contacts with the West tentatively resumed after opening up. Most institutions are government-run but pilot programmes began to allow private investment and market competition.

- 1989** American director Arthur Miller was invited to Beijing to direct the Chinese *Death of a Salesman*.
- 1992** Guangdong Modern Dance Company was founded as China's first professional modern dance company.
- 1998** Disney's *Beauty and the Beast* was staged in Mandarin in Beijing, one of the first Western musicals presented in Chinese.
- 1998** Shanghai Grand Theatre opened, China's first modern performing arts centre.
- 1999** Shanghai launched the China Shanghai International Arts Festival as a state-level showcase of domestic and international performances.

2000s

Infrastructure Expansion and Global Engagement

The government invested heavily in cultural infrastructure. Private and foreign investment in the performing arts was explicitly encouraged. Chinese performing arts stepped up their global presence while foreign productions entered China in greater numbers - *The Phantom of the Opera*, *Cats*, *Lion King* etc.

- 2001** UNESCO recognised Kunqu Opera as a Masterpiece of Oral and Intangible Heritage.
- 2002** *Les Misérables* (English) was the first West End musical to tour China, breaking box office records.
- 2003** Poly Theatre Management Co was founded.
- 2004** *The Peony Pavilion* (youth edition) premiered and toured Mainland China, Hong Kong, Macao, Greece, the UK and the US.
- 2007** Beijing's National Centre for the Performing Arts (NCPA) opened as Asia's largest theatre complex, featuring multiple halls for opera, music and drama.
- 2008** Beijing Fringe Festival was founded.
- 2009** Online ticketing platform damai.cn was founded.
- 2010** Guangzhou Opera House opened (Zaha Hadid).

2010s

Diversification, Localisation, Festivals and Immersive Theatres

With the infrastructure in place, China's performing arts turned its attention to programming and audience development. This decade saw a musical theatre boom with a growing popularity of spoken drama led by renowned directors like Meng Jinghui. The UK-China golden era. The private sector became increasingly active with the rise of theatre festivals and international collaboration. By 2019, China's performing arts had truly diversified – encompassing traditional opera, modern drama, dance, musicals, experimental works, and large-scale spectacles – setting the stage for further growth (unaware of the coming disruption).

- 2011** *Mamma Mia!* First Mandarin production with a local cast at the Shanghai Grand Theatre, paving the way for many more Chinese adaptations of Western musicals.
- 2013** Wuzhen Theatre Festival was founded for avant-garde and international drama in Wuzhen, China.
- 2015** Multi-year partnership between Ambassadors Theatre Group and Poly Theatre Management.
- 2015** *The Phantom of the Opera* premiered in Shanghai, China.
- 2015** *War Horse* toured China in Beijing, Shanghai, and Guangzhou with National Theatre.
- 2016** The British immersive production *Sleep No More* by Punchdrunk opened in Shanghai in partnership with SMG Live, generating \$75M over 8 years and still running today.
- 2019** Domestic production *The Eternal Wave* premiered and toured China.

2020s

Digital Integration, Domestic Production, and Resume of International Connections

In response to the prolonged lockdown, Chinese performing arts organisations quickly innovated to stay connected with audiences online from Zoom calls to livestreaming. From the point Covid restrictions were lifted in 2023, the performing arts sector roared back to life with record-breaking box offices for large concerts and music festivals as well as a rising number of smaller alternative venues.

- 2020** Poly Cloud Theatre was launched to enable live streaming on WeChat and Weibo.
- 2021** Aranya Theatre Festival was founded.
- 2024** Temper Theatre's own production *HOME* toured six Chinese cities - Suzhou, Nanyang, Zhengzhou, Jiaxing, Shenzhen and Chengdu.

Market overview

Market size

China's performing arts industry reached **£8.16 billion (¥ 79.62 billion)** in 2024¹⁶, a **7.61% increase** compared to 2023 and a **39% above pre-pandemic levels**¹⁷.

The rebound has been fuelled by rising cultural consumption, policy support, the rise of domestic productions, and the return of international shows - making the sector a growing driver for both local tourism and broader cultural economy.

According to the China Association of Performing Arts, **the main artistic categories** in China's performing arts often include:

- drama theatre
- dance
- musical
- children's theatre
- music concert
- traditional opera
- folk vocal (including comedy)
- acrobatics

In 2023, China's performing arts box office was driven by folk vocal (including comedy), drama theatre, and children's theatre, each category exceeding £2 billion.

Musicals had the highest average spend per person, at around £34 (¥333.93) and dance followed at around £31 (¥308.67).

Audience demographics: Chinese performing arts audiences are rapidly growing and becoming more sophisticated. According to 2023 data, the audiences are:

- **Female-majority:** 67% of all attendees¹⁸
- **Young:** 72% of ticket holders are aged 18-34 (2023); 40% of the musical audience is below age 25.

Leading performing arts categories by box office in 2023

Types	Box office (billion ¥)	Attendees (million)	Average spend (¥)	Leading cities by box office
Folk vocal (inc. comedy)	29.88	1430.46	208.89	-
Drama theatre	28.52	1156.21	246.67	Beijing (30.8%); Shanghai (21.4%); Hangzhou (7.1%); Shenzhen (5.2%); Chengdu (4.0%)
Music concert	21.82	788.57	267.75	-
Children's theatre	20.55	894.93	229.68	Beijing (25.0%); Shanghai (18.8%); Shenzhen (5.6%); Chengdu (4.9%); Hangzhou (4.7%)
Dance	16.42	531.96	308.67	Beijing (27.9%); Shanghai (17.6%); Chengdu (6.7%); Hangzhou (5.5%); Nanjing (5.2%)
Musical	13.22	395.89	333.93	Shanghai (46.7%); Beijing (24.5%); Shenzhen (5.6%); Guangzhou (4.6%); Chengdu (3.9%)
Traditional opera	2.01	139.69	144.05	-
Acrobatics	1.6	110.08	145.35	-

Market segment

Performing arts venues in China (stadiums, theatres, live houses, and alternative spaces) can be broadly categorised as three major types below.

1. Professional theatre (500+ seats):

- Box office revenue (2023): ¥8.62 billion (↑ 14.21%)
- Audience: 30.6 million (↑ 34.5%)
- This was driven by an increase in venue availability alongside the growth of new domestic productions and the return of international performers.

2. Alternative theatre (< 500 seats, smaller productions in alternative spaces and smaller theatres):

- Box office revenue (2023): ¥ 4.8 billion (↑ 463%)
- Audience: 24 million (↑ 250%)
- These micro-venues have played a major role in incubating original works, nurturing creative teams, diversifying performance formats and growing audiences.

3. Large-scale concert and festivals (5,000+ attendees including theatre and music):

- Box office revenue (2023): ¥ 17.8 billion (↑ 348.98%)
- Audience: 27.89 million (↑ 239.17%)
- Mass live events have surged in popularity, especially among youth, with music festivals leading the growth.

Venues operating models in China often include:

- **Hosting theatres:** Most Chinese theatres fall into this category - primarily serve as rental spaces without in-house productions, relying on rentals and ticket sales. They operate commercially or with local government support. For example, Guangzhou Opera House operates as a self-financing cultural institution.
- **Resident + hosting theatres:** Less common, these venues maintain an in-house ensemble and repertoire alongside providing stages for external productions. The National Centre for the Performing Arts in Beijing is the most influential institution in this category.

Major industry players in China's performing arts sector include:

- **CPAA Theatres Group (China Performing Arts Agency Theatres Group)¹⁹:** a subsidiary of China Arts and Entertainment Group (CAEG) under the Ministry of Culture and Tourism, with 20 directly owned and managed theatres and 70 affiliated theatres in China. A key decision-maker for domestic and international programming as well as cultural diplomacy.
- **Beijing Poly Theatre Management Co., Ltd.²⁰:** China's largest theatre commercial network with 81 theatres across 23 provinces under direct management with integrated ticketing, touring and logistics supply chain. It's fully owned by China Poly Group Corporation, a state-owned business group.
- **AC Orange²¹:** the largest private performance enterprise in China and the first Chinese corporation investing in Broadway musicals. It specialises in musicals, IP licensing and localised Western musical productions (e.g. *Cats*, *Romeo & Juliet*).



Key trends and opportunities

This section distils insights from in-depth conversations with Chinese and UK performing arts professionals. These interviews reveal not a single ‘China model’ but a complex ecology defined by regions, scales, and institutional orientations. While conditions differ between Beijing, Shanghai, Guangzhou and beyond, several shared trends are emerging. These seven interlinked trends highlight how China’s performing arts landscape is evolving, and where UK stakeholders can engage meaningfully—through co-creation, adaptability, and long-term relationship-building.

1. From government-subsidised to mixed market operations

China’s performing arts sector is evolving from a state-dominated to a mixed model. While national and municipal troupes (major ensembles, opera groups, orchestras, dance troupes) still receive public funding, a large portion of performances are now market-driven—led by private companies or commercial arms of state-owned enterprises.

With commercial production on the rise, companies now compete to license international shows and develop original domestic IP. Big tech firms like Alibaba have entered the sector via ticketing and live event promotion, and sponsorship is increasingly common.

This differs from the UK model, where arms-length bodies like Arts Council England give grants to many arts organisations, and ticket sales and philanthropic fundraising fill the gap.

Opportunities: Collaborate across both public and private sectors: public troupes offer legitimacy and national reach, while commercial partners can bring agility, audience insights, and distribution muscle.

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The theatre festival has always been supported by businesses and patrons along with some support from many international cultural associations. We need to be financially more considerate these couple of years - but the upside is that we now have experience, and audiences have changed - they’ve become more open! They used to only want to see big productions, but now they’re more willing to watch smaller, more experimental ones that they once rejected. This widens the range of performance we invite from abroad, allowing us to choose more contemporary pieces beyond traditional storytelling.

—Li Huayi (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival



2. Small stages can have big impact

Despite commercial pressures, pockets of artistic risk-taking thrive in smaller theatres, curated festivals, and immersive spaces. Cities like Shanghai and Chengdu are hubs for format innovation, conceptual work, and genre hybrids. Private venues and patrons continue to invest despite running at a loss, motivated by a belief in theatre's transformative role. Projects like *Sleep No More* Shanghai and interactive horror shows demonstrate demand for experimental formats, especially among younger, urban audiences.

Opportunities: Innovation and experimental content can find its moment in China's performing arts if choosing the right stage. Use festivals (e.g. Aranya Theatre Festival) and smaller venues to pilot risk-taking work. Start small, adapt format, and partner with Chinese venues producers (e.g. Shanghai Dramatic Arts Centre, Tempest Projects) who specialise in curating and presenting contemporary content.

3. Highly audience centric content creation

Creative decisions are increasingly shaped by audience data, emotional preferences and social media engagement patterns. Female audiences aged 18-34 are the dominant demographic especially in urban areas. Shows are often programmed and marketed with this group in mind.

As theatre increasingly becomes a leisure choice, not just a cultural one. Audiences expect not just performance, but a curated night out - photo ops, merchandise, digital interactions, and post-show engagement. Each touchpoint contributes to audience satisfaction and the perceived value of the event. This trend is closely tied to the competitiveness among self-sustaining businesses mentioned above.

Opportunities: Work with partners with domestic audience insights to design how UK works can be meaningfully presented to Chinese audiences. Experienced and trusted China partners can help ground artistic integrity in China's market realities with local marketing and activation.



It's important to choose the right scale of stages. Some big stages can be risky for contemporary dance if there's little central subsidy that supports that risk.

—Joan Clevillé, Artistic Director, Scottish Dance Theatre



You need to find the appropriate scale that matches the scale you are interested in.

—Michelle Rocha, Head of Touring, Factory International



Now it's all about the (female) audience...The production itself might be straightforward but the holistic experience from online promotion to small gestures like signed photos or post-show stage door meet is part of the service that needs to be thoughtfully designed.

—Shihui Weng, Director and Founder, Tempest Projects

4. Theatre as leisure: framing art through everyday emotion

In China's fast-paced urban life, theatre is increasingly consumed as leisure—a break from work, a social activity, or an emotional outlet. While artistic ambition still matters, productions that speak to everyday experiences—love, anxiety, aspiration, family—tend to resonate more deeply than abstract or political themes. This framing doesn't diminish artistic value, but reflects an emphasis towards relatability and emotional immediacy in fast-paced everyday life.

Opportunities: Emphasise universal emotions over culturally unfamiliar content. Visually rich, emotionally accessible formats are more likely to resonate. Consider how a work might be framed around relatable human experiences, rather than relying on cultural or political references that may not translate easily.

5. The shift from export to collaboration

Audience expectations and production economics are making straight touring less favourable. There is a growing appetite for co-production, localisation, and licensed reinterpretation. Shows rooted on Chinese IP or created with local teams currently have far greater traction due to higher audience resonance, with domestic IPs like *Dream of the Red Chamber* or *The Eternal Wave* sell out instantly. The model of concept touring, where UK companies license a format or structure, and local teams deliver, offers a lower-cost and lower-carbon model. But it requires flexibility, trust and legal clarity.

Opportunities: Collaborate early and deeply. Co-creation opens space for smaller UK studios and companies to develop long-term partnerships and connect with China's growing, youthful theatre audiences—many of whom are now seeking contemporary, emotionally resonant work beyond classic imports.

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Going to the theatre today can be more an offline entertainment than a cultural activity. Audiences are looking for instant gratification and having a good time.

—Shihui Weng, Director and Founder, Tempest Projects

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What resonates most are stories grounded in everyday life and shared emotions.

—Li Huayi, (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival

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It's increasingly difficult to bring UK productions over exactly as-is. The future lies in co-creation

—Shihui Weng, Director and Founder, Tempest Projects

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It's hard and rare to adapt the whole foreign play directly into the Chinese context, because many contemporary scripts are deeply rooted in the social realities of their own countries. The key challenge is: how can we translate those social reflections into something meaningful within the Chinese context?

—Li Huayi, (she/her), Curator and producer for multiple theatre festivals in China; Director of International Programme of the Aranya Theatre Festival

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A lot of presenters want to use local casts. Sometimes it can be more efficient and sustainable to sell the concept, not the full production.

—Michelle Rocha, Head of Touring, Factory International



6. Build relationships first before proposals

In China (and potentially everywhere else), who you know often matters more than what you pitch. Successful collaboration relies on strong personal relationships, trusted intermediaries, and clear communication across cultural and organisational norms. Many UK–China projects succeed not through matchmaking but through slow trust-building and shared risk-taking. Misunderstandings around terminology, roles, and expectations are common. Intermediaries like bilingual producers and cultural consultants play a vital role in bridging gaps and maintaining momentum.

Opportunities: Invest in the relationship as an integral part of the creative exchange. Start with low-risk, exploratory work. Clarify shared goals early, and work with cross-cultural producers who understand both contexts.

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You need that one person who can make the decision or who has the international perspective.

—Michelle Rocha, Head of Touring, Factory International

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Never assume the basics... what we call a stage manager in the UK can mean something different in China.

—Michelle Rocha, Head of Touring, Factory International

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It's not easy to listen actively, to negotiate when there are different needs in the room. But when that works, it is really powerful.

—Joan Clevillé, Artistic Director, Scottish Dance Theatre

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I needed Sabrina [at Shanghai International Dance Center] to make the right connections. But I also needed Nelson, our international producer, to connect me to her.

—Joan Clevillé, Artistic Director, Scottish Dance Theatre

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The greatest cost in collaboration is communication.

—Shihui Weng, Director and Founder, Tempest Projects



7. Technology awaits the artists

China has advanced infrastructure for immersive technologies such as motion tracking, but the integration into performing arts is still limited. Few institutions have dedicated capacity for digital experimentation, and artist-led innovation in this space is still emerging. However, China's tech-savvy populace and government interest in the digital creative economy mean this sector could expand quickly.

Opportunities: UK organisations experienced in digital performance, hybrid formats, or creative technology development are well-placed to share expertise. Joint R&D projects, research residencies, or tech-art incubators in partnership with Chinese creatives and tech platforms could open new collaborative ground.

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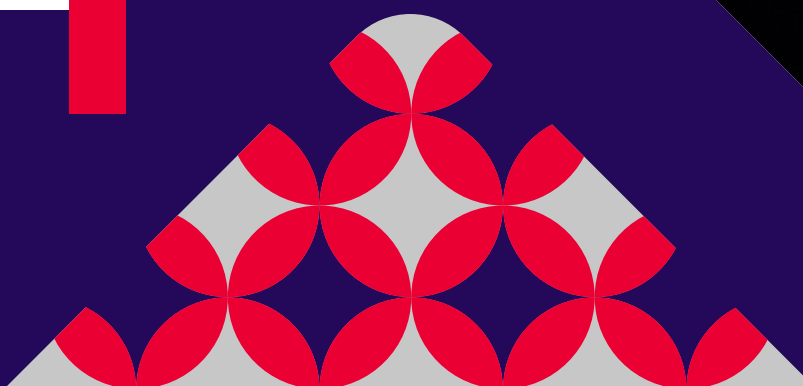
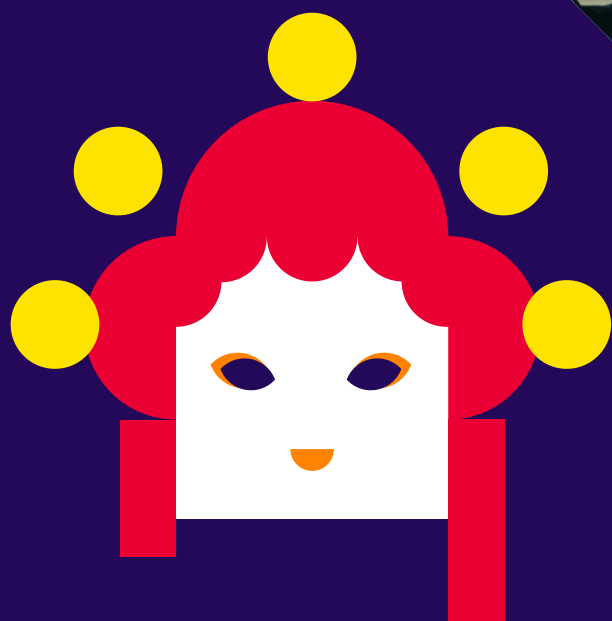
The technology is there — the challenge is that there aren't enough artists leading the way in exploring its creative potential.

—Shihui Weng, Director and Founder, Tempest Projects



Case studies

In this section we showcase a mini typology of UK-China collaborations in performing arts in the past few years. From touring to long-term co-production and R&D alliances, they demonstrate the scope, scale and creativity possible when UK and Chinese partners build relationships rooted in mutuality. These models are not mutually exclusive, many successful collaborations combine elements of several.



The China Tour of *HOME* by Temper Theatre, 2024

Partners: Temper Theatre × AC Orange
(supported by British Council and Arts Council England)

In June 2024, UK's Temper Theatre's own production *HOME* toured six Chinese cities - Suzhou, Nanyang, Zhengzhou, Jiaxing, Shenzhen and Chengdu - with 12 shows to over 3000 audiences and 60 workshop participants in 8 post-show discussions²². The director Finn Morrell was the Assistant Director for Rich Rusk on *Shan Hai Jing*²³, a co-production with Shanghai Dramatic Arts Centre in 2019. Built on pre-existing relationships, the tour blended performance and dialogue, offering Chinese audiences access to contemporary UK theatre and engaging in shared reflection. (images © Temper Theatre)



Three co-productions by Gecko Theatre × Shanghai Dramatic Arts Centre, 2016, 2019, 2025

Since 2016, Gecko Theatre has co-produced three shows with Shanghai Dramatic Arts Centre: *The Dreamer* (2016), *Shan Hai Jing* (2019), and *Metamorphosis* (2025). All were directed by Rich Rusk from Gecko Theatre and delivered with Chinese casts and creative teams. Each work interpreted classic texts (Shakespeare and Tangxianzu²⁴, Chinese mythology, Kafka) through bilingual rehearsal and shared authorship. This long-term partnership is a model of sustained cultural exchange and co-creation. (images © Shanghai Dramatic Arts Centre)



UK Spotlight at Aranya Theatre Festival's international programme, 2025, supported by British Council

The Aranya Theatre Festival is a leading experimental performing arts festival annually held in Qinhuangdao. It has become a gateway for international shows to enter China. The festival presented 29 plays in 2025, including 16 international works from 13 countries and regions²⁵. UK shows *L'Addition*, *The End* and *Puddles and Amazons* were selected.

L'Addition²⁶, directed by UK artist and writer Tim Etchells and performed by the performance duo Bert & Nasi, was an English version of the French production commissioned by Festival d'Avignon in 2023. The English version was part of the Edinburgh Fringe as a Here & Now showcase, where Aranya's programme curators discovered the show and decided to bring it to China.

The End²⁷ is another show by Bert & Nasi, commissioned by The Place and Warwick Arts Centre. Developed with support from the Banff Centre for Arts and Creativity. Supported by Arts Council England.



Puddles and Amazons²⁸ was part of the Made in Scotland Showcase 2024 at Edinburgh Fringe, which has been one of the most important platforms where Chinese producers go to invite shows back home. UK producers could connect with Chinese producers in international festivals in the UK as well as approach international festivals in China like Aranya to showcase works in China. This can potentially lead to collaborative curation for both countries, amplifying mutual global visibility and frosting cultural dialogues. (images © Aranya Theatre Festival)

The co-production of *Sanxingdui* musical, 2024

Partners: Chinese production team × Thom Southerland (director) × Morgan Large (designer)

The musical *Sanxingdui*, co-produced with UK director Thom Southerland and designer Morgan Large, recreated the ancient Shu Kingdom using cutting-edge stagecraft and traditional Chinese music. Alongside impressive results, the process surfaced opportunities to find best practices in co-producing culturally specific stories. The Chinese crew helping the international team understand nuanced historical elements, such as traditional Chinese rituals, underscored the value of early alignment and local consultations to maintain cultural authenticity. When forming an international co-production team for a Chinese story, it's important to prioritise Chinese leads in culturally or historically sensitive roles (e.g. choreography, stage design) while leveraging UK expertise in technical areas (e.g. lighting, design). (images © Guangzhou Opera House)



Sleep No More Shanghai by Punchdrunk, 2016 - ongoing

Partners: SMG Live

Co-produced by the UK's Punchdrunk and China's SMG Live, *Sleep No More Shanghai* has generated over ¥550 million since 2016, with 60% of attendees from outside Shanghai. Its immersive format redefined China's theatre landscape, blending Macbeth's narrative with site-specific staging in a 1930s hotel. The success illustrates the potential of IP adaptation models led by local teams. (images © SMG Live)



IIIE UK-Shanghai Consortium²⁹, 2023 - ongoing

Led by Goldsmiths, University of London, IIIE is a cross-sector consortium connecting UK and Shanghai-based creatives, researchers and funders to explore immersive and mixed-reality theatre through curated networking and investor showcases. The project supports early-stage development of concepts/IP surfaced by project partners in the creative tech space. (images © The Immersive Futures Lab)

