

## **FOR EMBARGOED PUBLICATION (16/3/21) ON UK THEATRE & SOLT WEBSITES**

### **UK Theatre / SOLT: COVID-19: One Year On - Impact on Theatre Sector**

**Data collected:** 4-12 March 2021 (compiled 15 March 2021)

#### **HEADLINES**

#### **ABOUT RESPONDENTS**

##### **Respondent numbers**

- 1762 respondents – 944 of these are valid and have been used in analysis

##### **Business type**

- The majority (78.6%) of respondents were 'freelancers/ self-employed' (n=742). This was followed by 'Non-venue theatre' businesses who made up 20.87% (n=107). The third largest group of respondents were 'Theatre-single venues' (n=75) at 7.94%. The smallest group of respondents were 'Theatre Venue Groups' (n=20) making up 2.12% of respondents. 21% (n=202 /944) were organisations

##### **Membership type**

Of the 944 respondents (N.B respondents can be both UKT & SOLT members)

- 81% were neither UK Theatre or SOLT members (n=760)
- 14% were UK Theatre members (n=130)
- 10% were SOLT members (n=93)

#### **VENUES**

- Almost a third 28% (n=26) said they were or are developing an outdoor performance space (94 responses to this question)
- 93% (n=28/30) of venues say they are going to make a loss or break even if they opened outdoors from 17 May. 61% (n=17/28) will make a loss.
- Only 2% (n=2) said that drive in is their primary revenue space (94 responses to this question)
- Almost half (46% - n=43/94) of respondents said that as a result of COVID-19 they were developing digital revenue streams
- 92% (n=67/73) said they will restart trading / reopen under stage 4 (from June 21)

#### **REOPENING / RESTARTING TRADING**

- Survey reveals hope for the future following Government roadmap announcement - but many dependent on creation of Government-backed theatre insurance scheme and adaptation of Theatre Tax Relief.

##### **Non-venue theatre businesses**

- 53% (n=89/168) were non-venue theatre businesses. Over half, 51% (n=45/89) said they would not restart trading under Step 3 (from 17 May).
- Three quarters (76%) of non-venue theatre businesses will open under stage 4 (from June 21)

### **Venues only**

- 20% (n=17/85) of English venues will open outdoors from 17 May 2021
- 69% (n=59/85) of English venues will open indoors) from 17 May 2021
- 58% (n=49/85) of English venues said they will open their venue from 21 June 2021

### **All organisations (Non-venue theatre businesses & venues – but not freelancers)**

- 60% (n=101/168) of all organisations will open / restart trading under roadmap Step 3 (from 17 May).
- 83% (n=133/160) English organisations said they will open / re-start trading under Roadmap Step 4 (from 21 June 2021)
- 78% (n=21/27) who said they wouldn't restart / reopen were 'non-venue theatre' businesses.
- 17% (n=27/160) said they wouldn't re-start trading under Roadmap Step 4 (from 21 June 2021)

### **FINANCIALS – Venues and Non-venue theatre businesses (excludes freelancers)**

- Over 95% of organisations that responded declared they are worse off due to Covid-19.
- So far, the total loss of those 165 organisations able to provide figures is estimated as nearly £200m.
- Over half (52% n=34/66) SOLT members who responded are currently\* in financial difficulties.
- 41% (n=43/104) of UK Theatre members that responded are currently\* experiencing financial issues.

\* 'currently' = (April 2020-March 2021)

- When looking at financial loss - 54% (n=89/165) non-venue theatre businesses (e.g. producers, clerical, supply chain etc.) answered the question: '*How much money have you lost as a result of COVID-19?*' 16% (n=14/ 89) of non-venue businesses declared losses greater than £1million each. 36% (n=5/14) declaring losses of greater than £5million each. Of these 5 non-venue theatre businesses who declared a loss of greater than £5million – 100% were production companies.

- When looking at financial loss: 10% (n=17/165) were theatre venue groups. For these 17 theatre venue groups, losses ranged between £300,000 and £5m+. 76% (n=13/17) have lost over £2million+ each. 62% (n=8/13) have lost over £5million each.
- When looking at financial loss: 36% (n=59/165) were single venue theatres. 41% (n=24/59) have lost over £1million each, with 5% (n=3/59) single venues declaring losses of greater than £5million.

### **GOVERNMENT SUPPORT SCHEMES – Venues and Non-venue theatre businesses**

- 89% (n=165/185) said that the 3 March 2021 budget announcement, has not changed their ability to employ.
- Overall organisations will use furlough for as long as it's available (Sep 2021).
- 46% (n=32/69) non-venue theatre businesses will continue to furlough staff until September 2021
- 17% (n=12/69) non venue theatre business will stop using furlough from June 2021.
- Venues in London's West End will expect to bring staff back earlier from furlough. 16% (n=11/70) respondents were from London's West End, of these 45% (n=5/11) said they would start bringing staff back from June 2021.
- For all organisation types:
  - 63% JRS (n=128/202) and
  - 57% CRF (n=115/202) and
  - 56% VAT extension (n=114/202)
  - were the most useful interventions of March 3 Budget.
  - This remains the same when further broken down into business type.

### **FREELANCERS (includes financial questions for freelancers)**

- 1/4 (n=180 / 689) of theatre freelancers who responded said they'd gone out of business/ceased trading due to Covid-19
- As a result of COVID-19, **270 roles** in other employment (a role they hadn't done before COVID-19) were taken up by freelancers
- As a result of COVID-19, **456 roles** in other employment (a role they hadn't done before COVID-19) were taken up by freelancers. The vast majority of those are freelancer or part-time roles.

### **END OF HEADLINES**