



SOUND
DIPLOMACY



Economic Impact Assessment of UK Theatre Sector

On Behalf of UK Theatre and The Society of
London Theatre

8th June 2023



TABLE OF CONTENTS

1. Executive Summary	7
1.1. Economic Impact	7
1.2 Audiences Spend Analysis	7
1.3 COVID-19 Impact Assessment	8
1.4 Geospatial Analysis	8
2. Introduction	8
2.1 About the Project	8
2.2 About Society of London Theatre and UK Theatre	9
2.3 About Sound Diplomacy	9
2.4 Research Scope	9

2.4.1 Spatial Scope	9
2.4.2 Asset Definitions	10
3. Economic Impact Assessment	11
3.1 UK Theatres Economic Impact	12
3.1.1 Direct Impact	14
3.1.1.1 Freelancers and Self-Employment in the UK Theatre Ecosystem	15
3.1.1.2 Direct Impact by Country	15
3.1.2. Indirect Impact of the Theatre Ecosystem in the UK	17
3.1.3 Induced Impact	19
3.2 UK Theatres In Comparison	19
3.2.1 Contribution to Local Workforce	19
3.2.2 Theatre GVA per Capita	20
3.3 Country Specific Economic Impact	21
3.3.1 England	21
3.3.2 Northern Ireland	22
3.3.3 Scotland	24
3.3.4 Wales	25
3.4 London Economic Impact	26

3.4.1 Direct Impact	26
3.4.2 Indirect and Induced Impacts	27
3.5. Additional remarks	27
4 Audiences Spend Analysis	28
4.1. UK as a whole	28
4.2. Countries/Regions in the UK	30
5 COVID-19 Impact Assessment	36
6 Geospatial Analysis	39
6.1 Overview of Theatre Assets in the UK	39
6.1.1 Spatial Distribution of the Theatre Assets in the UK	40
6.1.1.1 Cluster analysis for Theatre Assets in the UK	40
6.1.1.2 Country/Region Density (Assets by Country/Region Size) for Theatre Assets in the UK	46
6.2 Overview of Theatre Assets in London	49
6.2.1 Cluster analysis for Theatre Assets in London	49
6.2.2 Borough Density (Assets by Borough Size) for Theatre Assets in London	52
6.2.3 Access to Public Transport Using Five Minute Pedestrian Isochrones For Theatre Venues in London	54
6.2.4 Land Use in London	59

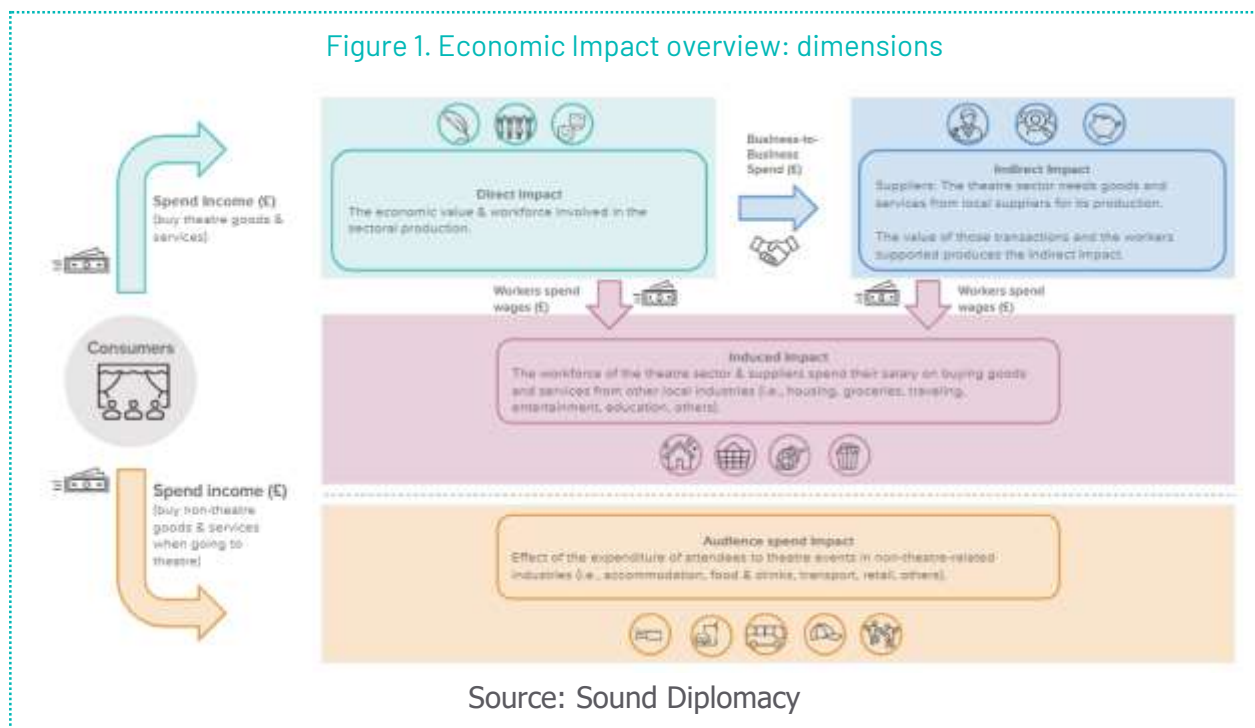
7 References	61
Appendix 1. Detailed Methodology and Sources	62
1.1 Economic Impact Assessment	62
1.1.1 Classifications	63
1.1.2 Data Sources	64
1.1.3 Methodological process and scope	65
1.1.3.1 Direct impact	65
1.1.3.1 Indirect and Induced Impacts	65
1.2. COVID-19 Impact Assessment	66
1.2.1 Data Sources	66
1.3. Consumer Spend Analysis	66
1.3.1 Data Sources	67
1.4 Geospatial Analysis	68
1.4.1 Data Sources	69
Appendix 2. Land Use Classification in London	70
Appendix 3. UK Theatre Organisations Questionnaire (Survey)	72
Welcome page	72
Introduction	72

Economic Details	74
Final Remarks	76
End Page - Thank you	93

1. Executive Summary

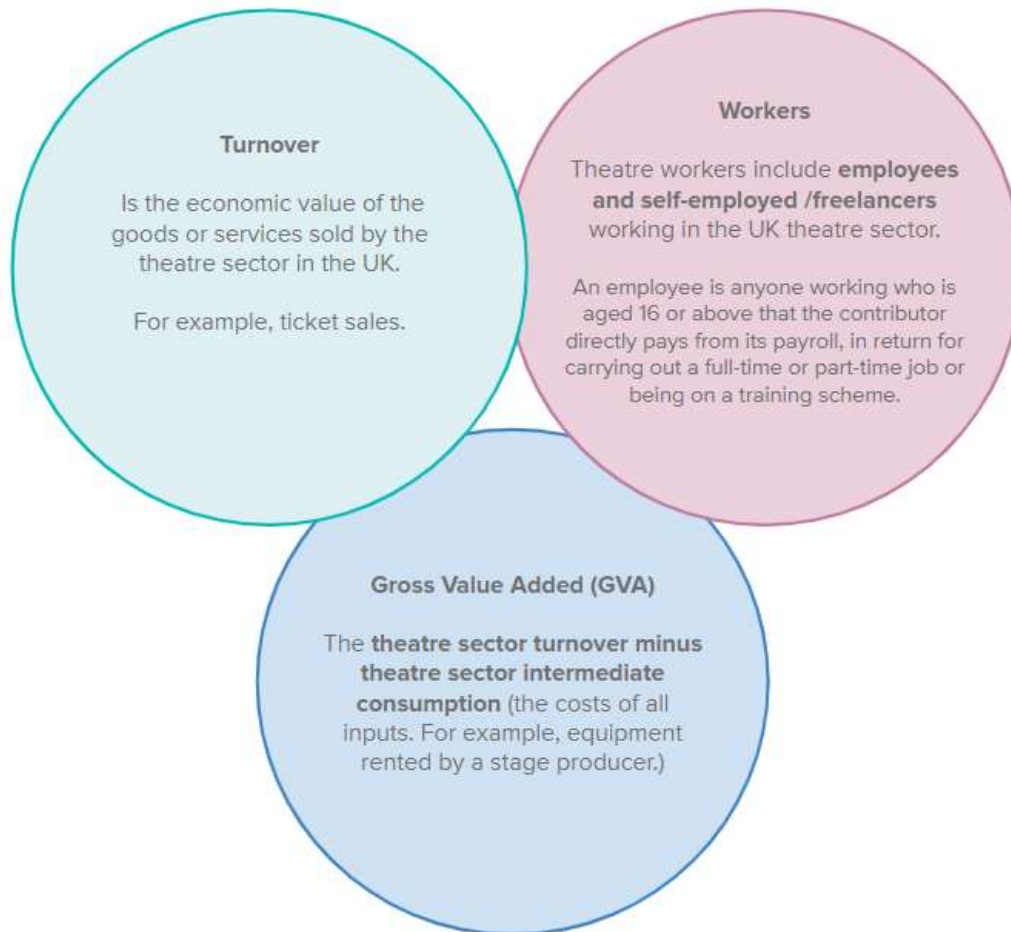
1.1. Methodology overview

- For the purpose of this study, the theatre sector economic impact consisted in the estimation of the impact on 4 dimensions: direct impact, indirect impact and induced Impact in section 3, and audience spend impact in section 4 (see Figure 1).



- The upper section of the infographic shows the effects on the value chain of the sector and its suppliers and it groups the direct, indirect and induced effects.
- The direct, indirect and induced impact are measured against 3 variables: turnover, Gross Added Value (GVA), and workers (see Figure 2).
- The lower part shows the effects of the theatre audience spend in other industries such as accommodation, food & drinks, transportation, etc, whenever they go to see a theatre performance (see Figure 1).

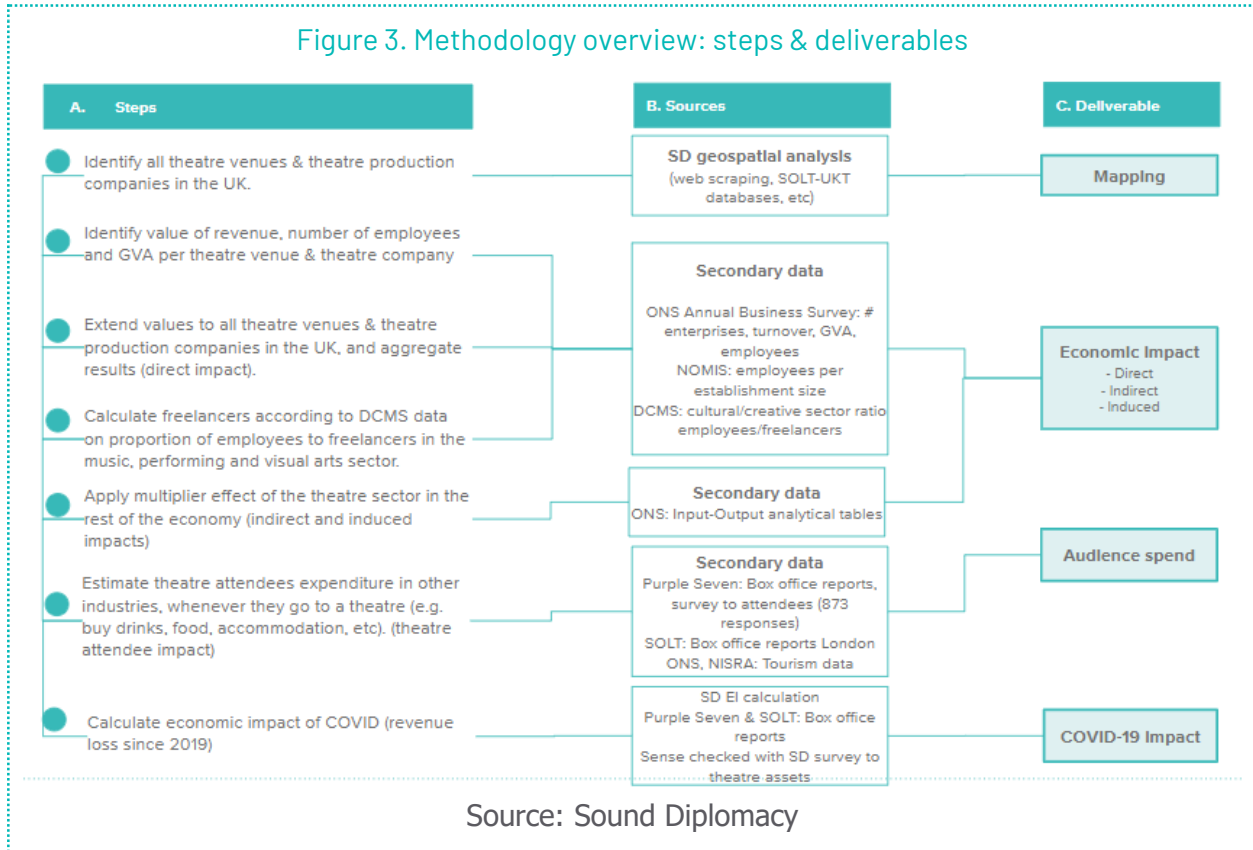
Figure 2. Economic impact overview: variables



Source: Sound Diplomacy

- The methodology implemented consisted of 7 steps and multiple primary and secondary sources, allowing the estimation of the above mentioned impacts (see Figure 3).

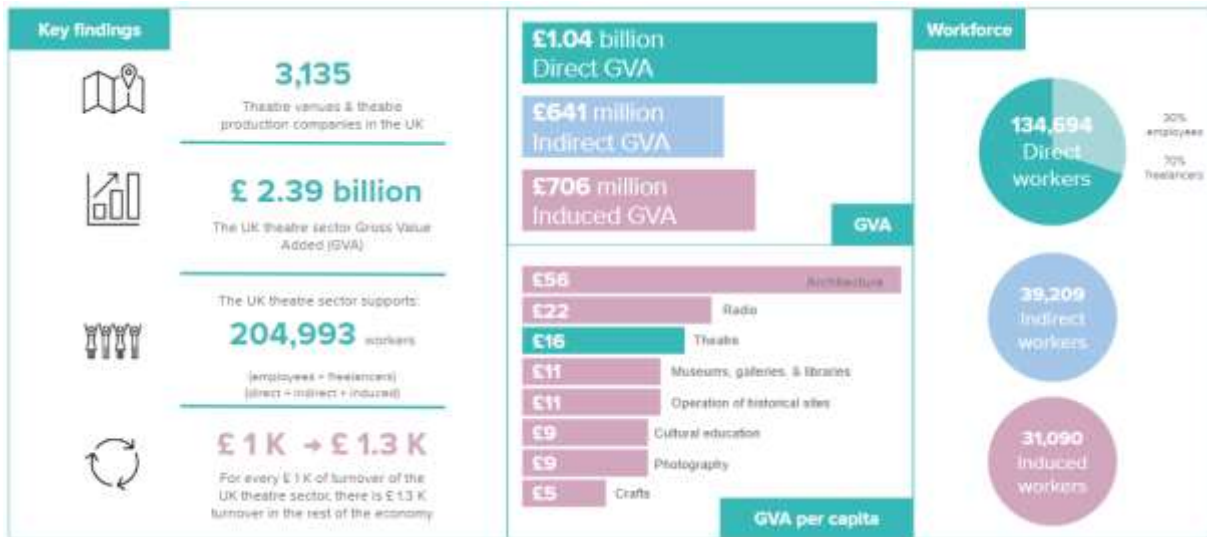
Figure 3. Methodology overview: steps & deliverables



1.2. Economic Impact: Direct, Indirect and Induced

- The UK theatre ecosystem supported a **total number of 204,993 workers** (including employees and freelancers), generated a **total turnover of £4.44 billion**, and a **total Gross Value Added (GVA) of £2.39 billion**, in 2019 (see Figure 4).

Figure 4. Overview of the economic impact of the theatre sector: direct, indirect and induced



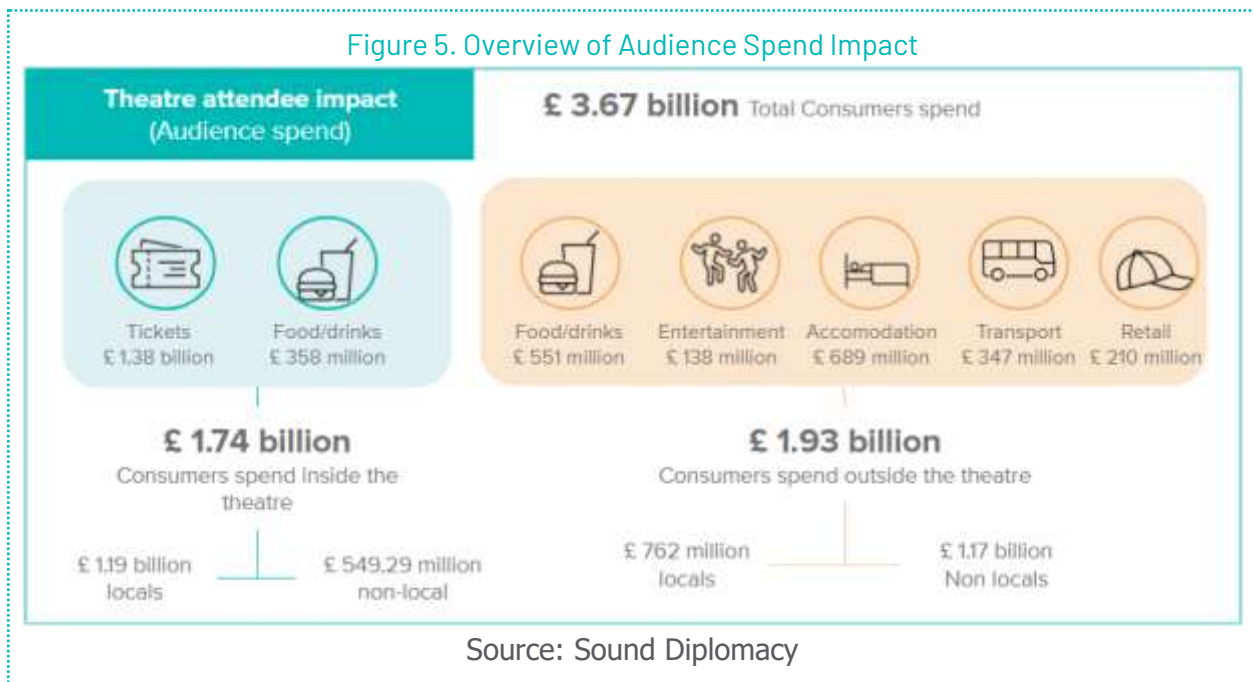
Source: Sound Diplomacy

- **Direct impact:** The economy of the UK directly benefited from the activities of UK theatre venues and production companies, such as selling tickets for performances, licensing of production rights, managed tours, amongst others.
 - Those direct activities of the UK Theatre ecosystem supported a total of **134,694 direct workers** (40,322 employed and 94,372 self-employed/freelancers). The ecosystem directly contributed **£1.04 billion (GVA)**, and generated a **direct turnover of £1.93 billion**.
- **Indirect impact:** The UK theatre ecosystem also indirectly impacted the revenue and workers in the industries or sectors that supply goods and services to the theatre ecosystem of the UK (e.g. advertisement, financial and legal services).
 - There were **39,209 indirect workers** supported by the UK theatre ecosystem, an **indirect turnover of £1.24 billion** and a **GVA of £641 million**.
- **Induced impact:** The people that are directly and indirectly working in the UK theatre ecosystem create an additional impact in the UK economy because they spend their wages in other UK economic sectors.
 - There were **31,090 induced workers supported**, an **induced turnover of £1.27 billion**, and a **GVA of £706 million** in 2019.
- For every **£1,000 of turnover generated by the theatre ecosystem in the United Kingdom, there is a positive effect of £1,909 turnover in the rest of the economy**, both within the theatre sector value chain and in other industries such as tourism:

- **£1,301** are generated within the theatre value chain (e.g. theatre venues, production companies, their suppliers), and
- **£608** are within the tourism-related industries in the UK (accommodation, food, drinks), generated by the spend of **10.9 million non-local theatregoers** (UK residents¹ & international theatre audiences).

1.3 Audiences spend impact

- **The estimated audience spending reached £3.67 billion in 2019:** This is equivalent to a spend of £88.46 per audience member including the ticket price, and the expenditures inside and outside the theatre venue (see Figure 5).



- The spending outside the venue (food, beverages, transportation, accommodation, etc) is valued at £1.93 billion, and £1.74 billion inside the theatre venue.
- **Slightly half of the total spending was generated by the local attendees (53.1%) and the remaining 46.9% by the non-local attendees.** The spending of residents of the region where they went to see a theatre performance (local attendees)

¹ Theatregoers that live in a region in the UK and travel to another region in the UK to attend a theatre performance.

was £1.95 billion, and the spending of non-residents of the region where they went to see a theatre performance (non-local attendees) was £1.72 billion.

1.4 COVID-19 impact assessment

- The **economic losses** of the sector **in 2020 equaled 77% of the turnover (£1.495 billion) in comparison to 2019** as a result of COVID-19. In 2021, the turnover of the UK theatre ecosystem recovered, increasing by **£500.1 million**, a growth of 114.6% (see Figure 6).

Figure 6. Overview of COVID-19 impact on the theatre sector turnover



Source: Sound Diplomacy

- **In 2020**, the UK theatre ecosystem experienced an estimated net total loss of 31% of the workers (41,755). In the following year, the net total loss was estimated at another 1.3% compared to 2019 (1,859 workers).
- **Due to restrictions caused by the COVID-19 pandemic, the total yearly spending made by theatre goes on tickets decreased 78% from 2019 to 2020.**

1.5 Geospatial Analysis

- **There are 3,019 theatre assets mapped in the UK:** There are 1,647 (55%) theatre venues mapped, and 1,372 (45%) theatre production companies (see Figure 7).

Figure 7. Overview of number of theatre assets in the UK and in London



Source: Sound Diplomacy

- **The highest number of assets are located in London with 599 (20%) theatre assets:** This is followed by 503 (17%) in the South East, 267 (9%) both in the East of England and the North West, 243 (8%) in the East Midlands, 242 (8%) in the South West, 216 (7%) in the West Midlands, 215 (7%) in Yorkshire and The Humber. The remaining 467 (15%) are in Scotland with 211 (7%), Wales with 122 (4%), the North East with 90 (3%), Northern Ireland with 42 (1%), and the Isle of Man, and Jersey, with 1.

2. Introduction

2.1 About the Project

Sound Diplomacy was appointed by Society of London Theatre (SOLT) and UK Theatre (UKT) to deliver an Economic Impact Assessment & Consumer Spend Assessment of the United Kingdom Theatre Sector.

The aim of this project was to provide SOLT & UKT with a more detailed understanding of the economic behaviour of UK theatres by highlighting the following:

- Economic impact (direct, indirect, and induced) assessment of the UK theatre sector
- Assessment of consumer spend across the UK theatre sector (e.g. spend in bars, restaurants, accommodation, etc)
- COVID-19 impact assessment
- Fully map and analyse the Theatre Sector in the UK, not limited to SOLT/UKT members but including all identified theatre venues and production companies in the UK.

This project was undertaken between January and May 2022 and was completed through the implementation of the methodology specified in Appendix 1.

2.2 About Society of London Theatre and UK Theatre

Society of London Theatre is an organisation that works with and on behalf of its members to champion theatre and the performing arts in London. SOLT represents approximately 230 London-based producers, theatre owners and managers, including all the major subsidised theatrical organisations in London. They deliver a range of services both to assist their members and to promote theatre going to the widest possible audience.

UK Theatre is the UK's leading theatre and performing arts membership organisation. Its vision is to see a well-connected and supported theatre sector that is recognised as being at the heart of UK life, with thriving organisations, the world's greatest creative and managerial talent, and ever larger and more diverse audiences. UK Theatre has 1,600 members and over 200 venues across the UK.

2.3 About Sound Diplomacy

Sound Diplomacy is a global research and strategy consultancy, committed to building and supporting sustainable ecosystems that bring economic development to people, places and

cities. Providing research and recommendations to businesses and policymakers to help them make informed decisions on the best use of places and how to stimulate economic, social and cultural growth.

2.4 Research Scope

2.4.1 Spatial Scope

The sole focus of this research was the United Kingdom (UK). This was segmented into 12 countries/regions, which were sourced from the Office for National Statistics (ONS).² The 12 countries/regions are the East Midlands, the East of England, London, the North East, the North West, Northern Ireland, Scotland, the South East, the South West, Wales, the West Midlands, and Yorkshire and The Humber. This geographic segmentation formed the basis for the methodology and report analysis.

2.4.2 Asset Definitions

The sole focus of this research was all theatre venues and theatre production companies that are professionally run, and sell or offer their services to the general public³. The asset definitions provided in Table 1 are the core categories considered in the overall assessment.

² ONS (2020) Local Authority District to Region (December 2020). Online [here](#). Accessed 20.03.22

³ The study includes all identified theatre venues and production companies in the UK, therefore it is not limited to UKT or SOLT/UK members.

Table 1. Categories and descriptions of theatre assets

CATEGORY	DESCRIPTION	EXAMPLES
Theatre Venues	<p>Assets where live-theatre performance is the main focus and with dedicated theatre programming.</p> <p>These can be independent or commercial venues, single venues or chains/groups, (non-) local authority owned, (non-) ACE NPO, and/or not-for-profit.</p> <p>The assets can either be producing theatre venues (most of the shows on their stage are produced in-house or in co-productions with other venues) or receiving theatre venues (most of the shows on their stage are from external theatre companies or groups who hire their space).</p>	<p>Performing Arts Theatre Venues, Amateur Theatre Venues</p>
Theatre Production	<p>Producer/production company/non-building based organisations are professional and/or community entities, groups, or individuals that produce theatre shows.</p> <p>These can be independent or subsidiary/attached to a venue owning group, (non-) local authority funded, (non-) ACE NPO, and/or not-for-profit.</p>	<p>Theatre ensembles, Theatre Production companies, Actors, Acting Groups, Agencies, Touring Theatre companies</p>

3. Economic Impact Assessment

The Economic Impact Assessment aims to measure the direct, indirect and induced impact of the theatre ecosystem in the UK (see Table 2). In order to quantify the results, the impact is measured in terms of turnover, GVA, workforce and compensation (see Table 3).

Table 2. Economic Impact Definitions

ECONOMIC IMPACT	DEFINITION
Direct Economic Impact	The direct impact is the economic activity directly connected to the theatre ecosystem, such as actors, directors, stage-set designers, agents, and venues.
Indirect Economic Impact	The indirect impact is the supportive activity of the suppliers of the theatre ecosystem and is related to local businesses that provide goods and services, such as advertising, financial services, and legal affairs.
Induced Economic Impact	Induced impact is created when the workers of the direct and indirect theatre ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life in the local economy, thereby supporting additional Turnover, GVA and workers

Table 3. Variables Definitions

VARIABLE	DEFINITION
The theatre ecosystem turnover	All produced goods and services of the theatre ecosystem in the UK. For example, ticket sales, support services, etc.
Gross value added (GVA)	The theatre ecosystem turnover minus theatre ecosystem intermediate consumption (the costs of all inputs – for example, equipment rented by a stage producer).
Theatre ecosystem workers	Theatre ecosystem workers include employees and self-employed/freelancers working in the UK Theatre ecosystem. An employee is anyone working who is aged 16 or above that the contributor directly pays from its payroll, in return for carrying out a full-time or part-time work or being on a training scheme.

3.1 UK Theatres Economic Impact

Methodology Insights

Methodology: The Economic Impact calculation is based on the Input-Output Model (I-O), which explains how production is determined by the total amount of products and services that all consumers buy (Leontief, 1936). The model shows which sectors need supplies from other industries to generate a chain reaction or a multiplier throughout the economy. Thus, intersectoral impacts are estimated, and the respective sales and purchases are distributed. For the direct impact, data on workforce number of assets and average turnover per employee were used for calculations on turnover, GVA and number of workers.

Sources and data:

- Office for National Statistics (ONS)
 - Annual Business Survey: number of enterprises, total turnover, approximate GVA and total employment
 - UK Input-Output Analytical Tables (IOATs): Used to calculate Type I and Type II multipliers⁴
- Official Labour Market Statistics (NOMIS)
 - UK Business Counts: breakdown of number of establishments/assets by employment size bands
 - Great Britain and UK Level Employment: employment details on full-time/part-time, public/private sector split per industry
- Department for Digital, Culture, Media & Sport (DCMS)
 - Sectors Economic Estimates 2019 - employment: proportion of self-employed/freelancers in the cultural and creative sector for 2019
- Sound Diplomacy:
 - UK theatre asset mapping: assets in the theatre ecosystem in the UK

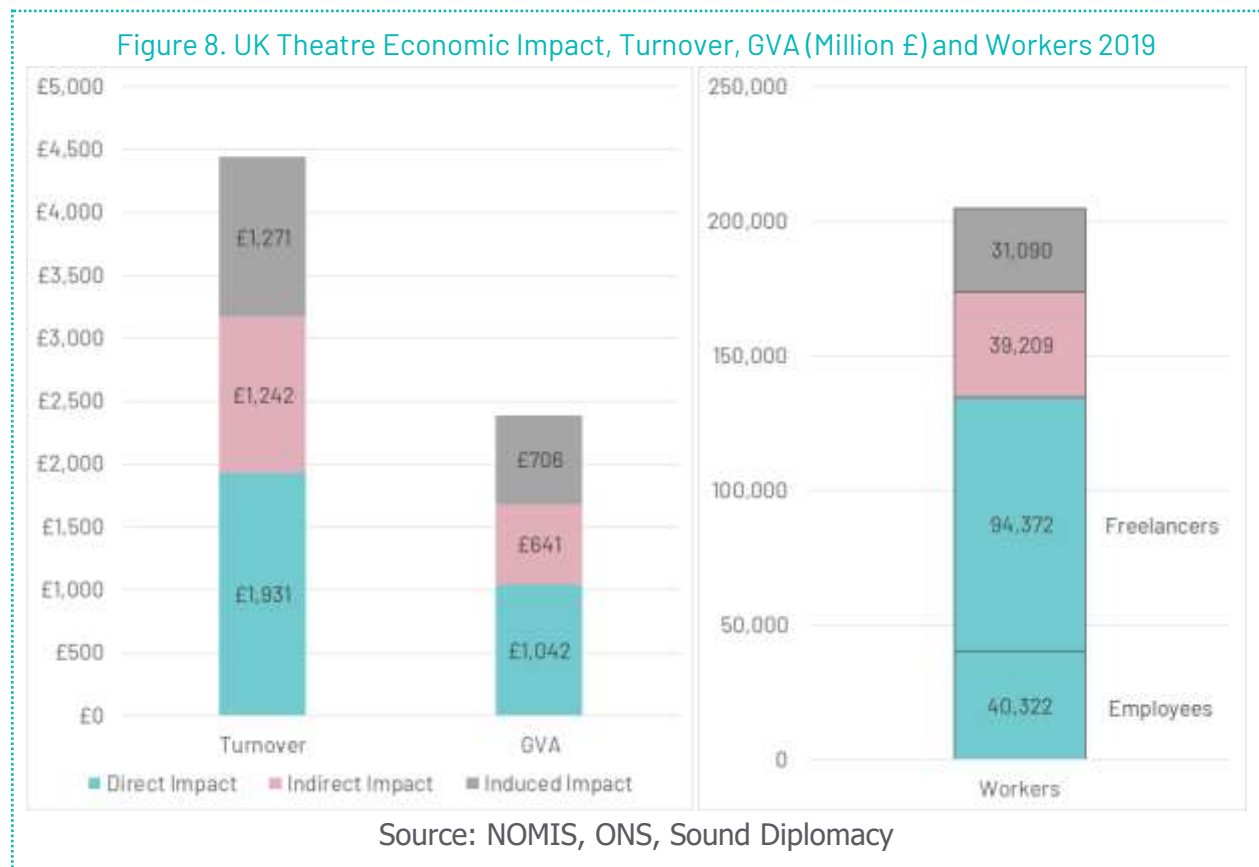
The summary of the economic impact (direct, indirect, and induced) of the UK theatre ecosystem in 2019 is shown in Figure 8 and Table 4. The **total turnover** generated equaled **£4.44 billion**. The **total GVA** was **£2.39 billion**.

For every **£1,000 of turnover generated by the theatre ecosystem in the United Kingdom**, there is an **indirect effect of £643** in the **turnover of other industries that are**

⁴ Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the theatre ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by workers of the direct and indirect theatre ecosystem.

part of the value chain of the theatre sector, and an **induced effect of £658 supported by the expense of the income of direct and indirect workers.**

In total, for every **£1,000 of direct turnover generated**, there is an additional economic turnover effect of **£1,301** through the indirect and induced effects of the UK Theatre Ecosystem.



The UK Theatre Ecosystem supports a **total number of 204,993 workers**. Out of these, **134,694⁵ are direct workers** and the remaining **70,299⁶ refer to** indirect and induced employment.

Table 4. UK Direct, Indirect, Induced, and Total Economic Impact

TYPE OF IMPACT	WORKERS	TURNOVER MILLION £	GROSS VALUE ADDED MILLION £
Direct	134,694 (40,322 Employees, 94,372 Freelancers)	1,931	1,042
Indirect	39,209	1,242	641
Induced	31,090	1,271	706
Total Impact	204,993	4,444	2,388

Source: Sound Diplomacy

The following sections give an overview of the direct, indirect and induced impact of the theatre ecosystem in the UK.

3.1.1 Direct Impact

The direct impact is the economic value created directly by the economic activities of the theatre ecosystems, its assets and workers in the UK. The UK Theatre ecosystem directly contributed **£1.04 billion (GVA)** to the UK economy. The **direct turnover** produced equaled **£1.93 billion**. It was responsible for a total of **134,694 direct workers**, with 40,322 employed and an additional 94,372 self-employed or freelancers.

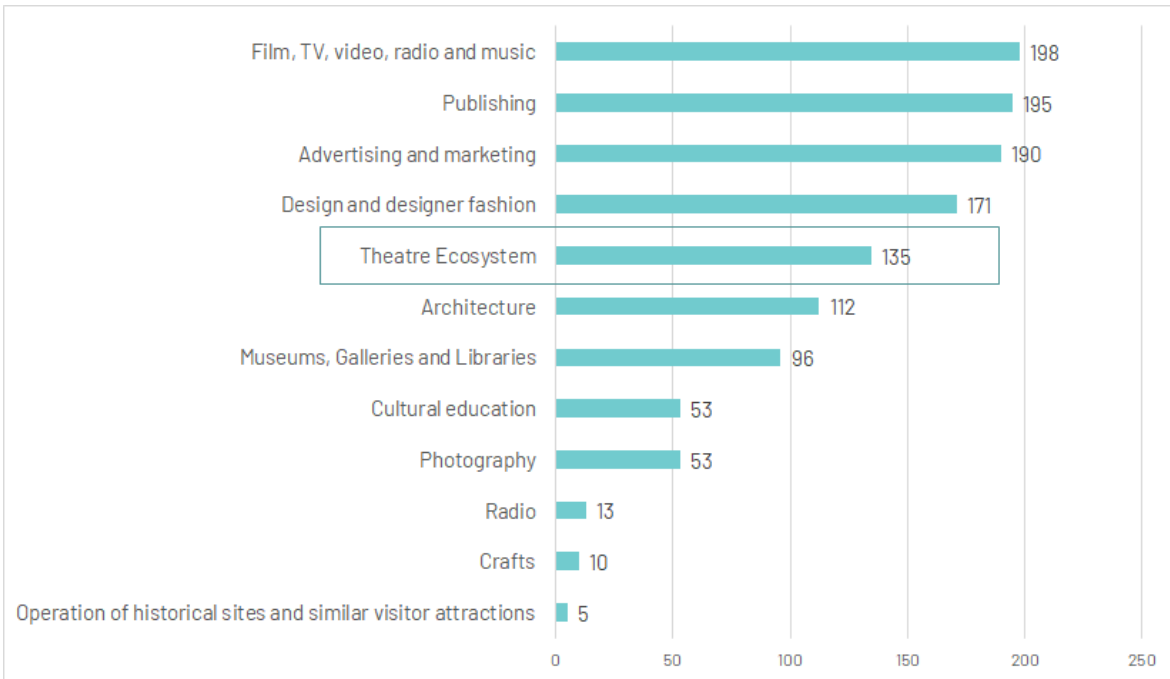
To put into perspective the level of direct workers supported by the theatre ecosystem, Sound Diplomacy has compared the number of workers in the theatre ecosystem, with other cultural

⁵134,694 workers = 94,372 freelancers or self-employed and 40,322 employees

⁶ 70,299 workers = 39,209 indirect workers + 31,090 induced workers

and creative sectors in the UK.⁷ The direct number of workers supported by the **theatre ecosystem in 2019 equaled 134,694**. The contribution to the workforce is larger than of other cultural or creative sectors such as Crafts (6,000), Radio (13,000) Photography (53,000), Cultural education (53,000), Museums, Galleries and Libraries (96,000) and Architecture (112,000) and is below industries such as Design and designer fashion (171,000), Advertising and marketing (190,000) Publishing (195,000), while the combined sector of Film, TV, video, radio and music employs approximately 198,000 workers.⁸

Figure 9. Number of Workers in Creative and Cultural Industries in Thousands, 2019



Source: DCMS (2020), Sound Diplomacy

3.1.1.1 Freelancers and Self-Employment in the UK Theatre Ecosystem

To a large extent, the workforce of the music, performing and visual arts sector (where the Theatre Ecosystem belongs), is made up of freelancers or self-employed workers. According to DCMS (2020), 70.1% of the workforce in the UK in the sector is freelance or self-employed.⁹

⁷ Information based on data from DCMS (2020) on employed and self-employed in creative industries and cultural subsectors.

⁸ All DCMS data is rounded to the nearest thousands.

⁹ DCMS (2020). DCMS Sectors Economic Estimates 2019 - Employment in DCMS sectors.

This proportion is significantly higher than compared to the economy as a whole, where only 16%¹⁰ of the workers are freelancers or self-employed workers.

Using the aforementioned proportion of freelance or self-employed in the music, performing and visual arts sector, it is estimated that, additionally to the 40,322 employed, another 94,371 freelancers or self-employed make up the workforce of the theatre ecosystem, comprising a total of 134,693.

According to survey data collected by Freelancers Make Theatre Work (2020), organisations in the performing arts sector spend 39.4% of their annual turnover on freelancers.¹¹ In combination with that insight, it is estimated that the **income generated by the freelance workers of the Theatre Ecosystem reached £760.8 million in 2019.**

3.1.1.2 Direct Impact by Country

Table 5 breaks down the theatre ecosystem of the UK by country. Considering the Number of assets, the direct workforce, the direct turnover and the direct GVA, England has the highest share in a country comparison. The second biggest theatre ecosystem in the UK is situated in Scotland, followed by Wales and Northern Ireland. The rest of the UK in our data concerns 2 assets, one in Jersey and the Isle of Man.

Table 5. UK Theatre Ecosystem by Country Direct Effects

Country	NUMBER OF ASSETS	NUMBER OF WORKERS	TURNOVER MILLION £	GROSS VALUE ADDED MILLION £
England	2,742	117,473	1,675	904
Northern Ireland	45	531	8	4
Scotland	223	12,467	189	102

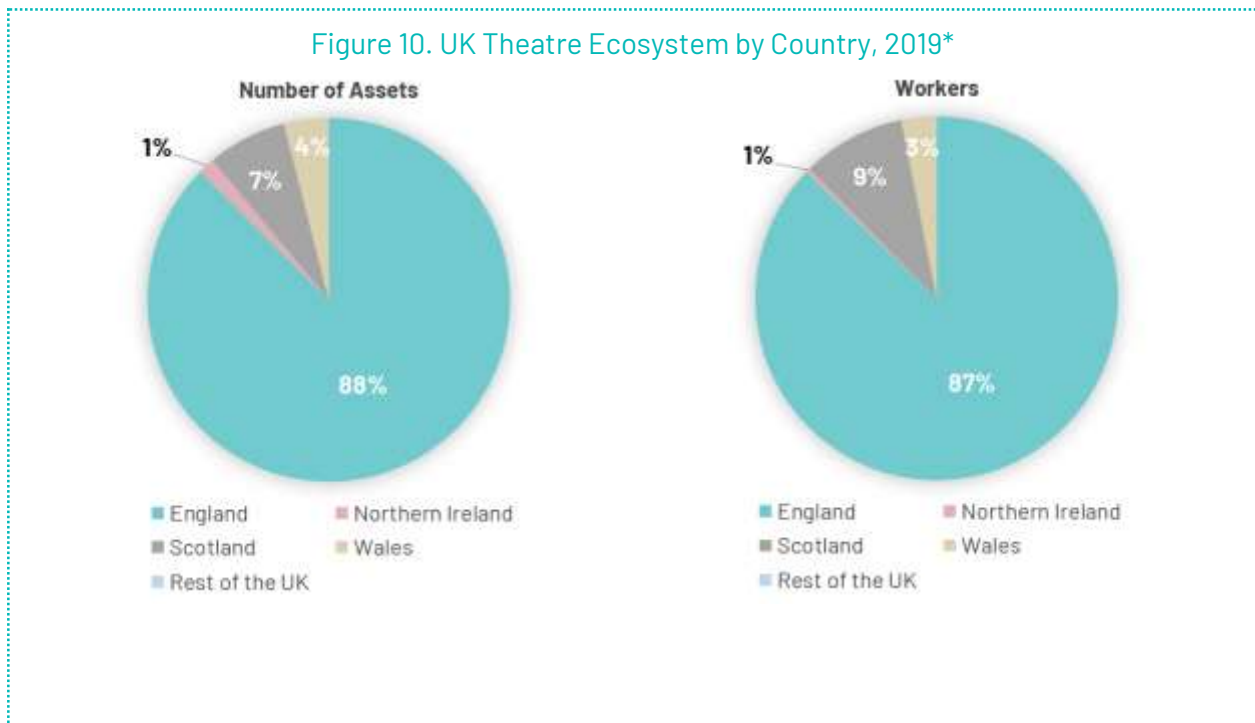
¹⁰ Ibid.

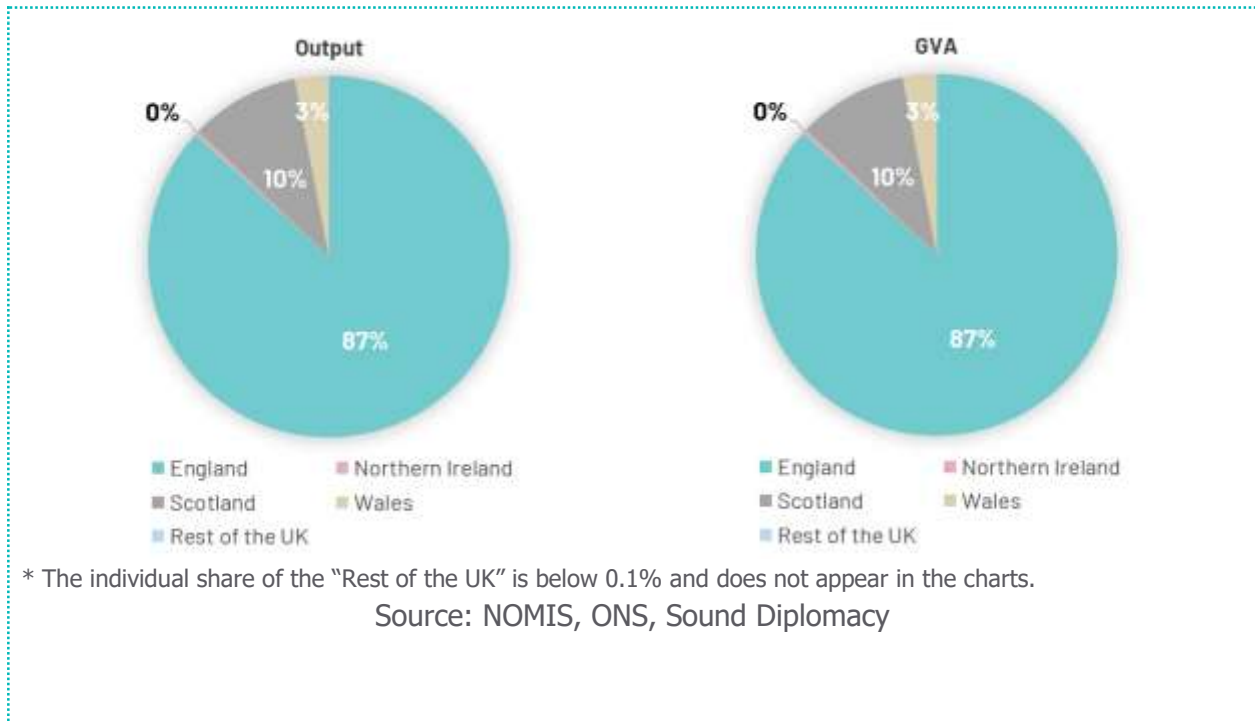
¹¹ Freelancers Make Theatre Work (2020). The report compiles findings from a survey of 96 producing organisations throughout the UK, including the National Theatre, Royal Shakespeare Company, and Sheffield Theatres.

Wales	123	4,079	57	31
Rest of the UK (Jersey & Isle of Man)	2	144	2	1
Total UK theatre ecosystem	3,135	134,694	1,931	1,042

Source: NOMIS, ONS, Sound Diplomacy

Comparing the sizes of the individual country's theatre ecosystem, England has the most substantial theatre ecosystem in the UK. In terms of the number of assets, its share equals 88% (2,742), while Scotland has the second-largest share with 7% (223), followed by Wales with 4% (123), Northern Ireland with 1% (45) and then one establishment in Jersey and the Isle of Man each (see Figure 10). The share of direct workforce closely relates to the share in assets in the UK ecosystem. The number of UK theatre ecosystem workers in England constitutes 87% (117,473), 9% (12,467) Scotland, followed by Wales with 3% (4,079), Northern Ireland with 1% (531), and the Rest of the UK with 0.1% (144).





In terms of turnover and GVA, the distribution by each country is the same. England's contribution in both cases equals 87% (turnover of £1.68 billion and GVA of £904 million), Scotland's share equals 10% (turnover of £189 million and GVA of £102 million). The percentage of Wales reaches 3% (turnover of £57 million and GVA of £31 million), followed by Northern Ireland with 0.4% (turnover of £8 million and GVA of £4 million), and the Rest of the UK with below 0.1% (turnover of £2 million and GVA of £1 million).

3.1.2. Indirect Impact of the Theatre Ecosystem in the UK

The theatre ecosystem not only generates revenue and supports workers within the sector. It also impacts the revenue and workers in the industries or sectors that supply goods and services to it. For this reason, the impact of the sector also considers the indirect effect on the national economy.

The indirect economic impact refers to the workers and turnover generated by local businesses that supply goods and services to the theatre ecosystem of the UK.¹² This process is carried out

¹² The variables measured are Turnover, Employment, and Compensation, from the suppliers of the theatre ecosystem.

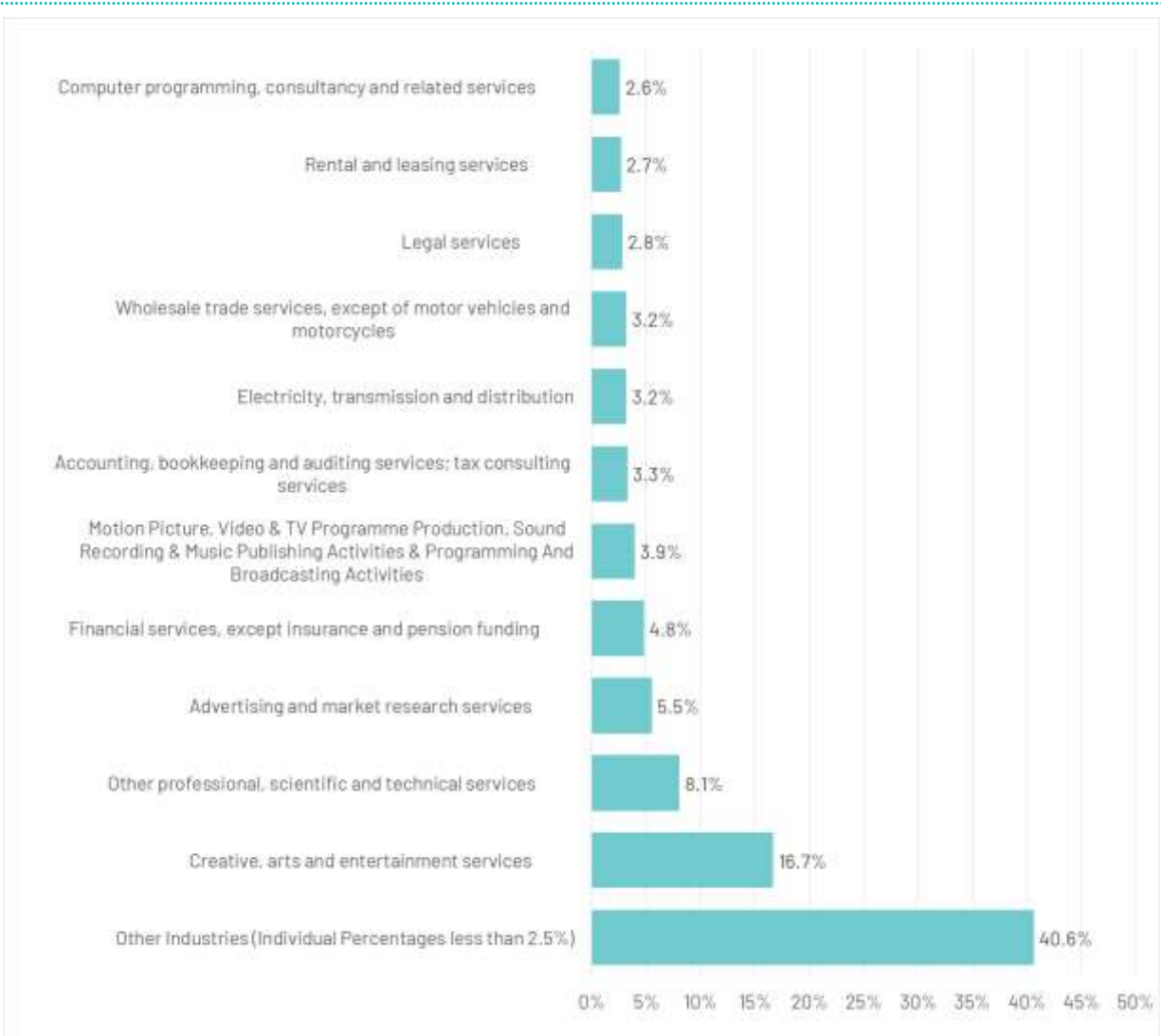
using the Type I Multipliers available in the 2017 United Kingdom Input-Turnover Analytical Tables (IOATs).

The **indirect turnover** of the theatre ecosystem reached **£1.24 billion and a GVA of £641 million**. At the same time, an additional **39,209 workers** were supported by the activities of the UK theatre ecosystem.

To give an idea of the size of the indirect effect of the UK theatre ecosystem on the local economy, it was estimated that **£1,000 of turnover generated by the theatre ecosystem is indirectly supporting £643 of the turnover of other industries in the UK**.

It was estimated that 16.7% (£207 million) of the indirect Turnover Effect of the UK theatre ecosystem impacted the Creative, Arts, and Entertainment Services sector. This shows that the UK theatre ecosystem indirectly supports the Creative Industries that are not necessarily associated with the theatre ecosystem. Figure 11 displays the turnover breakdown of the sectors impacted indirectly by the activities of the theatre ecosystem.

Figure 11. Indirect Impact Turnover Breakdown, 2019



Source: ONS, Sound Diplomacy

Another 8.1% (£100 million) impacted the Other professional, scientific and technical services sector,¹³ 5.5% (£69 million) impacted Advertising and market research services, 4.8% (£60 million) impacted Financial Services and 3.9% (£49 million) impacted Motion Picture, Video & TV Programme Production, Sound Recording & Music Publishing Activities & Programming and Broadcasting Activities. A total of 40.6% (£505 million) go to various other industries, where individual percentages are below 2.5% of the indirect impact.

¹³ This sector includes Specialised design activities, Photographic activities as well service activities generally delivered to commercial clients such as consulting and representation of clients.

The high percentage of indirect turnover from other industries show that generally the theatre ecosystem in the UK has an impact on a wide variety of economic activities usually not associated with the UK theatre ecosystem.

3.1.3 Induced Impact

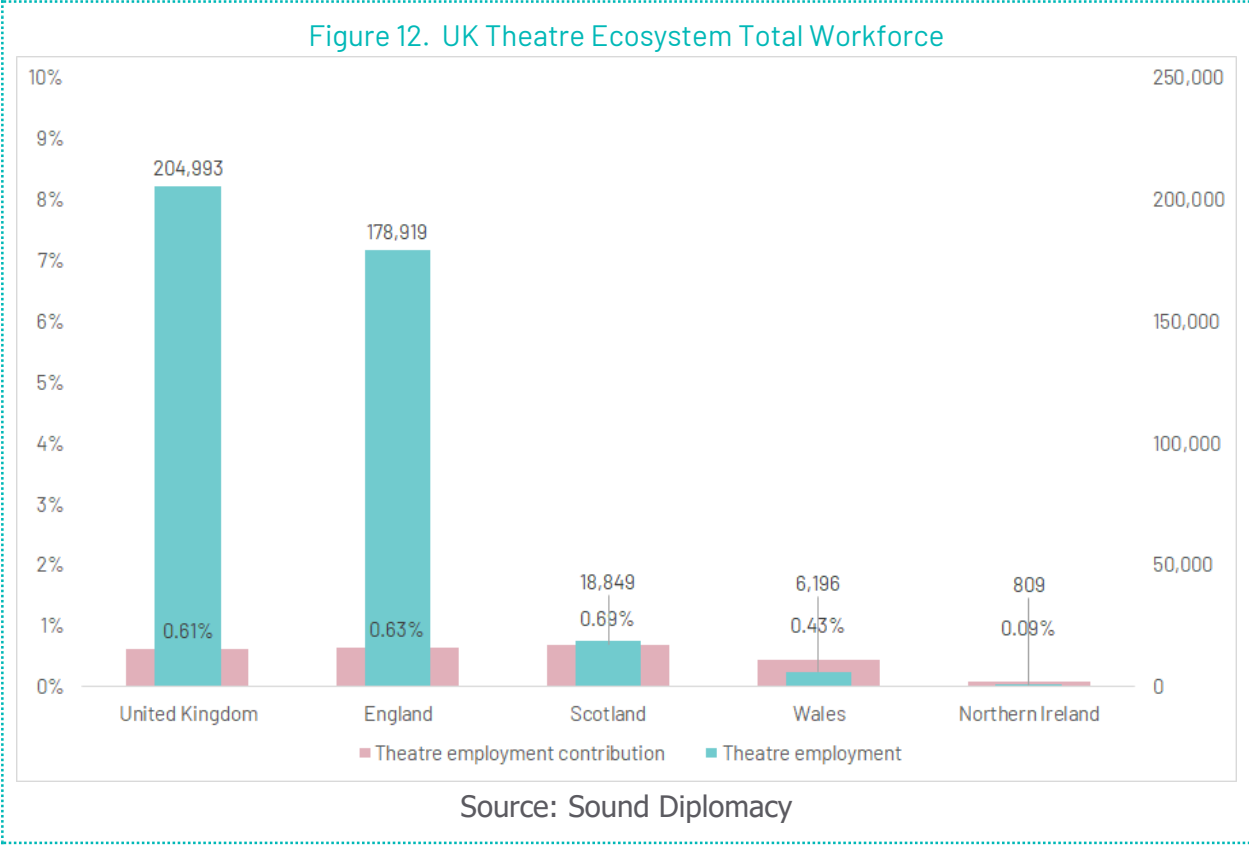
The induced economic impact is the economic value (turnover, GVA and number of workers) derived from the spending of direct and indirect workers on goods and services from other local industries (i.e. groceries, transport, entertainment, education & others) whose wages are supported directly and indirectly by the theatre ecosystem of the UK.

The induced turnover reached **£1.27 billion, a GVA of £706 million** in 2019, and supported **31,090 workers**. The data shows that **£1,000 of the turnover is generating an induced effect of £658 on different industries of the economy**. This includes, for example, the money they spent on services, food, entertainment, transportation, etc.

3.2 UK Theatres In Comparison

3.2.1 Contribution to Local Workforce

To put the theatre ecosystem into perspective, Figure 12 provides an overview over the share of the workforce in the UK as well as the individual breakdown of England, Northern Ireland, Scotland and Wales.

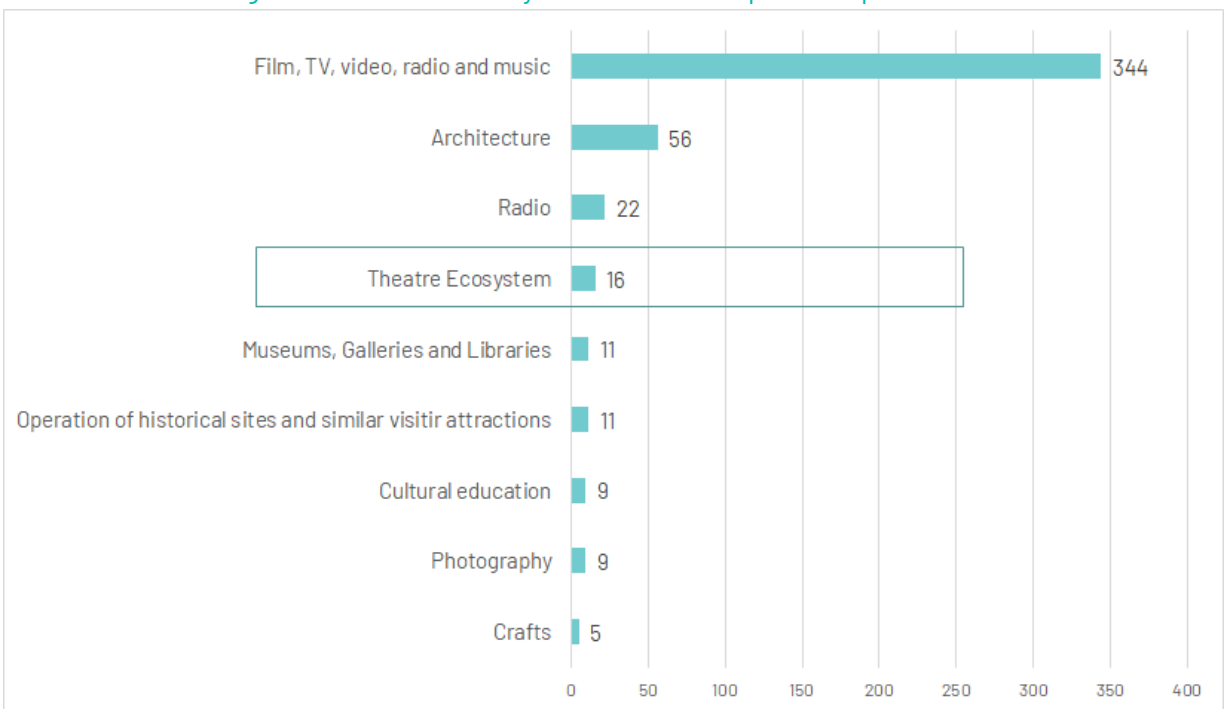


In the case of the UK, the theatre ecosystem supports 0.61% of the local workforce. The contribution of Scotland and England’s theatre ecosystems to the local workforce rank above the UK average. In contrast, Northern Ireland and Wales rank considerably below the UK average.

3.2.2 Theatre GVA per Capita

Another variable that allows for comparing the contribution of theatre ecosystems is the theatre GVA per capita since it represents the economic resources generated in relation to the size of the country’s population. This variable is calculated by dividing the direct GVA of the theatre sector and other DCMS sectors by the total number of residents in the UK 2019.

Figure 13. Theatre Ecosystem GVA Per Capita Comparator in £



Source: DCMS (2020), Sound Diplomacy

The average theatre ecosystem GVA per capita in the UK equals £16. It is therefore higher than in other cultural or creative industries such as Museums, Galleries and Libraries (£11), Cultural education or Photography (both £9). It is below sectors such as Radio (£22) or Architecture (£56) or Film, TV, video, radio and music (£344).

3.3 Country Specific Economic Impact

The following chapter will provide a deeper insight into each of the four countries' theatre ecosystems. It will give data on the direct, indirect and induced employment, compensation, turnover and GVA, break down the ecosystems by segments and provide a greater understanding into the developments of the segments of the theatre ecosystems since 2015.

3.3.1 England

Approximately above 83% of the total theatre venues and production companies and turnover are based in England- in total, **2,742 assets** are part of it. The direct impact amounts to **117,473 workers** and a direct turnover of **£1.68 billion**, which results in approximately **£904 million** direct GVA.

Table 6. England, Direct, Indirect, Induced and Total Economic Impact

TYPE OF IMPACT	WORKERS	TURNOVER MILLION £	GROSS VALUE ADDED MILLION £
Direct	117,473 (35,167 Employees 82,306 Freelancers)	1,675	904
Indirect	34,272	1,077	556
Induced	27,174	1,103	612
Total Impact	178,919	3,856	2,072

Source: Sound Diplomacy

Considering the direct, indirect and induced effects, England's theatre ecosystem generated a total turnover of **£3.86 billion in 2019** which resulted in a **total GVA of 2.07 billion** (see Figure 14). Through indirect and induced effects, the UK Theatre Ecosystem supported **61,446** additional workers, adding up to a total of **178,919**.

Figure 14. England Theatre Economic Impact, Turnover, GVA (Million £), Workers, 2019

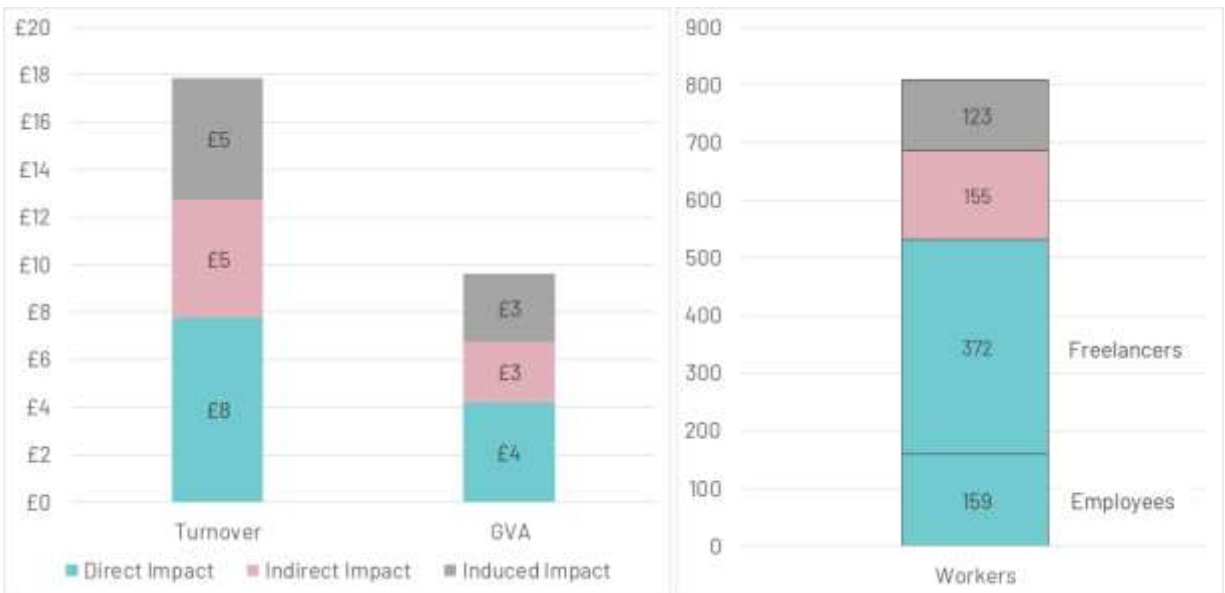


Source: NOMIS, ONS, Sound Diplomacy

3.3.2 Northern Ireland

The theatre ecosystem in Northern Ireland consists of 45 assets, including theatre venues and production companies. These assets are responsible for a **direct workforce of 531 (159 employees and 372 freelancers)**. The **direct turnover** amounts to **£7.8 million** and a direct GVA of **£4.2 million**.

Figure 15. Northern Ireland Theatre Economic Impact, Turnover, GVA (Million £) and Workers, 2019



Source: NOMIS, ONS, Sound Diplomacy

When considering the total effect of the theatre ecosystem in Northern Ireland, the **total turnover** reaches **£17.9 million** with a **total GVA** of **£9.6 million**. An additional 278 workers are supported by the indirect and induced effects of the Theatre Ecosystem in Northern Ireland.

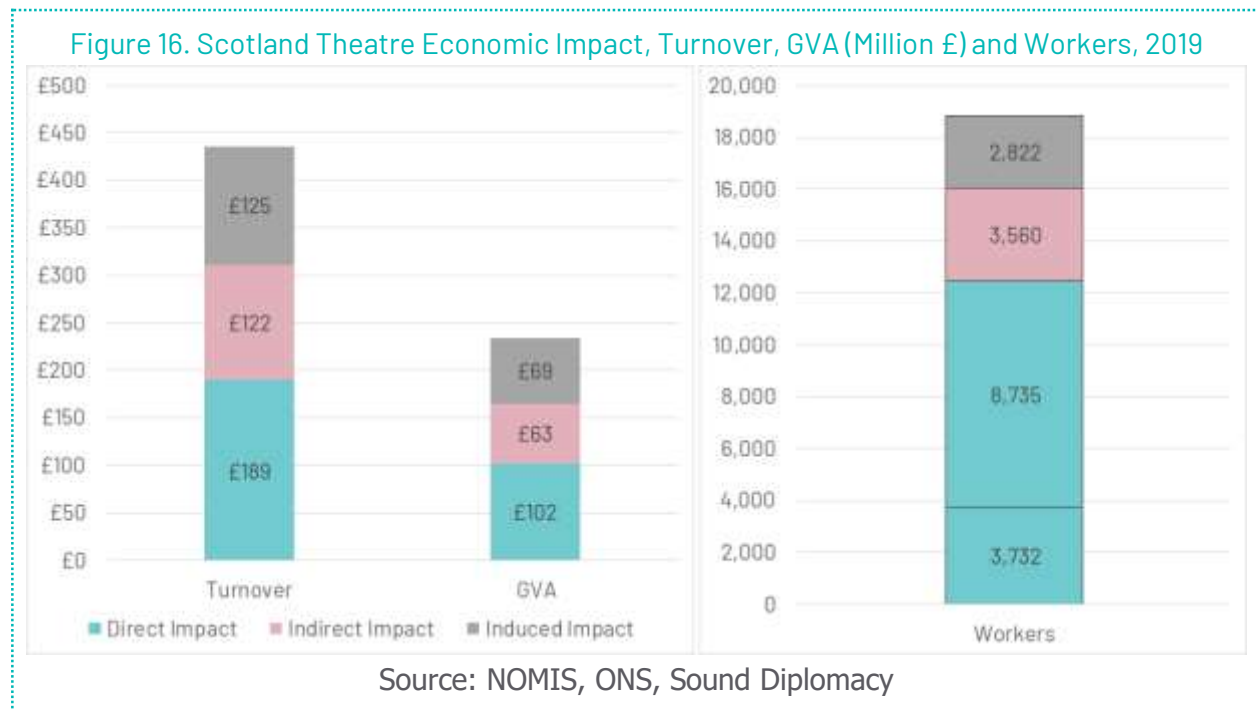
Table 7. Northern Ireland, Direct, Indirect, Induced and Total Economic Impact

TYPE OF IMPACT	WORKERS	TURNOVER MILLION £	GROSS VALUE ADDED MILLION £
Direct	531 (159 Employees 372 Freelancers)	7.8	4.2
Indirect	155	5.0	2.6
Induced	123	5.1	2.8
Total Impact	809	17.9	9.6

Source: Sound Diplomacy

3.3.3 Scotland

The following section is concerned with the theatre ecosystem in Scotland. The second greatest number of assets of the UK total are located here, with 223 assets. Figure 16 gives a graphical representation of the economic impacts (direct, indirect and induced) in Scotland. The direct impacts in 2019 are as follows: the Direct Turnover equaled **£189 million**, which accounted for a GVA of **£102 million**. The number of **direct workers equals 12,467**, with **3,732 employees and 8,735 freelancers**.



In total, **18,849 workers** are supported by the activities related to the theatre ecosystem. The total turnover amounts to **£436 million** and accounts for a total GVA of **£234 million**.

Table 8. Scotland, Direct, Indirect, Induced and Total Economic Impact

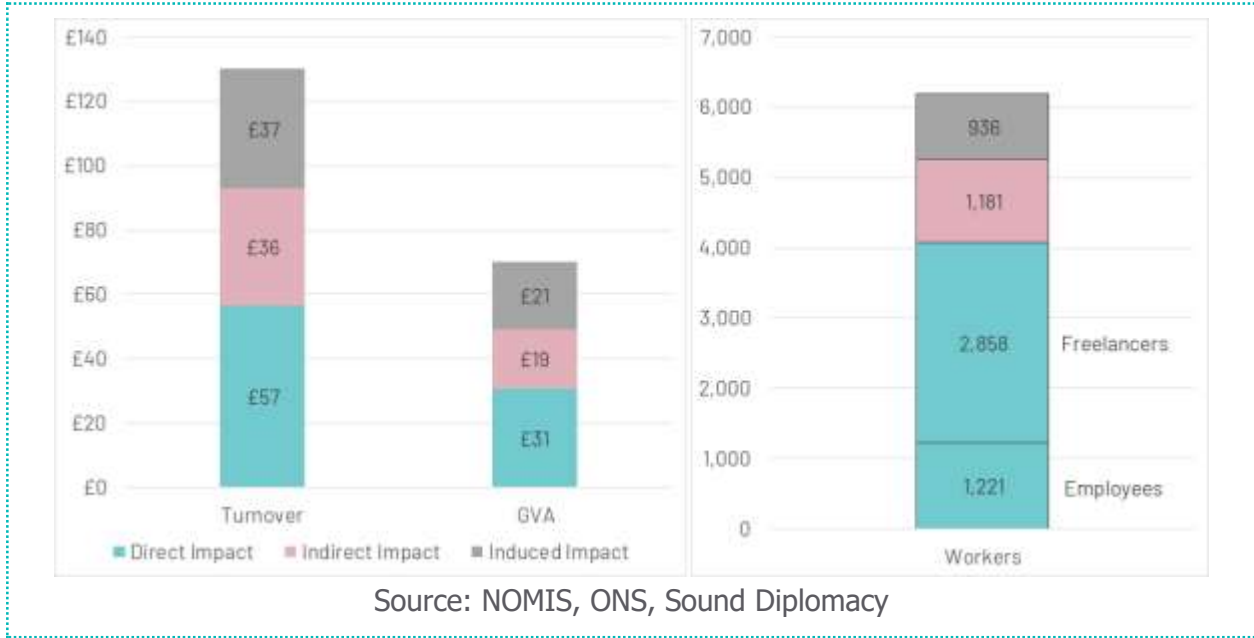
TYPE OF IMPACT	WORKERS	TURNOVER MILLION £	GROSS VALUE ADDED MILLION £
Direct	12,467 (3,732 Employees 8,735 Freelancers)	189	102
Indirect	3,560	122	63
Induced	2,822	125	69
Total Impact	18,849	436	234

Source: Sound Diplomacy

3.3.4 Wales

The theatre ecosystem in Wales consists of 123 assets in total. There are 1,221 employees and another 2,858 freelancers, equalling a total of 4,079 workers. The direct Turnover amounted to **£57 million** in 2019, leading to a direct GVA of **£31 million** (see Figure 17).

Figure 17. Wales Theatre Economic Impact, Turnover, GVA (Million £) and Workers, 2019



When considering the indirect and induced effects of the theatre ecosystem, **2,117 workers** are generated and supported. The total turnover generated equals **£130 million** and a **total GVA of £71 million** (see Table 9).

Table 9. Wales, Direct, Indirect, Induced and Total Economic Impact

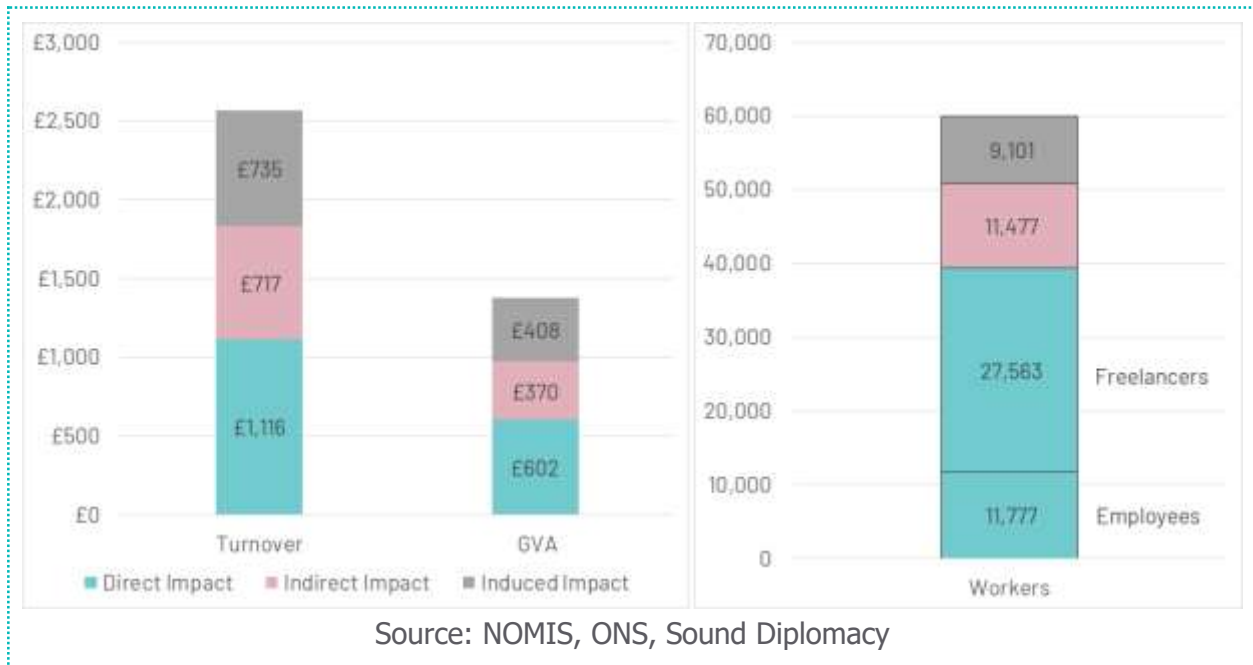
TYPE OF IMPACT	WORKERS	TURNOVER MILLION £	GROSS VALUE ADDED MILLION £
Direct	4,079 (1,221 Employees 2,858 Freelancers)	57	31
Indirect	1,181	36	19
Induced	936	37	21
Total Impact	6,196	130	71

Source: Sound Diplomacy

3.4 London Economic Impact

Figure 18 shows the summary of the economic impact (direct, indirect and induced) of London's theatre ecosystem in 2019. In total, **59,918 workers** were supported by London's theatre ecosystem. There are an estimated 11,777 direct employees and 27,563 direct freelancers. The total turnover generated equaled **£2.57 billion** and the **total GVA** was **£1.38 billion**.

Figure 18. London Theatre Economic Impact, Turnover, GVA (Million £) and Workers, 2019



The following section provides an overview of the direct, indirect and induced effects of London's Theatre ecosystem.

3.4.1 Direct Impact

The **direct turnover** of London's theatre ecosystem equaled **£1.1 billion** and an estimated **GVA of £602 million**. It was responsible for **39,340 workers**. This represents 29% of the direct workforce of the UK theatre ecosystem. Its contribution to the direct turnover is 57.7%.

3.4.2 Indirect and Induced Impacts

As previously mentioned, the theatre ecosystem also indirectly impacted the revenue and workers in the industries or sectors that supply goods and services to the theatre ecosystem of the UK (e.g. advertisement, financial and legal services). London's theatre ecosystem generated an **indirect turnover of £717 million and an indirect GVA of £370 million**. An additional **11,477 indirect workers** were supported by the activities of the theatre ecosystem. The data shows that **£1,000 of turnover is generating an indirect effect of £643** on different industries in the economy.

Those that are directly and indirectly working in the London theatre ecosystem create an additional impact in the economy as they spend their wages in other economic sectors. **The**

induced turnover in 2019 equaled **£735 million** which generated an **induced GVA** of **£408 million**. The number of **induced workers** reached **9,101**. It can be shown that **£1,000** of turnover leads to an additional **£658** of induced turnover.

3.5. Additional remarks

Note 1: In comparing the economic impact of London's theatre ecosystem with the impact of the whole UK, it is worth mentioning that a majority of touring operators are headquartered in London. This leads to turnover, GVA and workers generated by these touring operators to be accounted for in London even though the actual production might take place outside of London.

Note 2: In addition to the value of the **economic** impact (market value of the theatre sector), research carried out by Arts Council England (Davies & Bakhshi, 2022),¹⁴ aimed to identify the non-market value of theatre in the UK. The study found, by surveying attendees to 4 regional theatres in the UK that:

- Regional theatre visitors are willing to pay **£13.10 per household per year in taxes** to ensure that the theatre in the city remains open. This shows that audiences view theatres as relevant cultural sites for the city.
- People that hadn't visited the regional theatres are willing to pay **£5.01 per year in taxes**, to ensure that the theatre in the city remains open. This shows that even though non-visitors are willing to pay less than visitors for the theatre to remain open, they still value theatres positively.

The above demonstrates that in addition to the economic impact (market value), theatres have a complementary positive non-market value. Such assessment is not quantified within the date in this chapter.

¹⁴ The research is part of the ongoing Economic Value of Culture project.

4 Audiences Spend Analysis

Methodology Insights

Methodology: The theatre audience spend consists of the average value of the cost that theatre audiences incur, whenever they go to the theatre in the UK. The costs are associated with the products and service from local businesses products and services such as restaurants, transport, entertainment, accommodation, and retail, in addition to their spending on the theatre tickets and consumption of drinks and beverages inside the theatre venues. The audiences of theatre in each region in the UK can be residents from the region, residents from a different region in the UK, or can be international audiences.

To calculate the value of the spend, the methodology considered as the base values for theatre ticketing spend, the data provided by Purple Seven and SOLT. The average values of spend in additional products and services whenever audiences go to theatre, were provided by a survey implemented by Purple Seven in Q1 2022, and subsequently weighted according to the respondent's residence and number of transactions. Results on the average spending on accommodation was calculated using ONS and NISRA official data on tourism.

It is essential to clarify that the data on foreign audiences (non-local International) is a conservative estimation since the data sources and the survey used do not focus on this group. For this reason, it is considered indispensable to address the aspect in further research to fully understand the impact of international audiences on sectoral development.

Sources and data:

- Purple Seven
 - UK Performing Arts Audience Survey Q1 2022
 - Summary of daily sales, revenue, and booker count by region: total revenue, sales, bookers segmentation and average ticket pricing in the years 2019, 2020, and 2021
- SOLT
 - Box Office Reports 2019: Average ticket price and ticket sales in London during 2019
- VisitBritain/VisitEngland,¹⁵ VisitScotland,¹⁶ and CymruWales¹⁷ analysis from data from the ONS
 - International Passenger Survey, IPS (2019): [Inbound Accommodation Research](#)
 - Great Britain Tourism Survey, GBTS (2019): [GB tourists annual report](#)

¹⁵ VisitBritain/VisitEngland is the national tourism agency, a non-departmental public body funded by the Department for Digital, Culture, Media & Sports (DCMS).

¹⁶ VisitScotland is a national tourism organisation for Scotland. It is an executive non-departmental public body of the Scottish Government.

¹⁷ CymruWales (VisitWales) is the Welsh Government's tourism organisation. Its aim is to promote Welsh tourism and assist the tourism industry.

- Northern Ireland Statistics and Research Agency, NISRA
 - Northern Ireland Tourism (2019): [External overnight trips to Northern Ireland](#)

4.1. UK as a whole

In 2019, the **41.6 million¹⁸ attendance to theatre performances in the UK, generated an estimated spend of £3.67 billion in the UK economy.** This is equivalent to a spend of £88.46 per attendee.

The spending by theatre audiences occurs when they go to a theatre performance, and motivated by such visit, they also incur in other expenditure either inside the venue (e.g. food & drinks in the theatre bar), or outside the theatre (e.g. use the tub to go from their hotel/residence to the theatre venue, visit a restaurant after the theatre performance, buy a magazine in the store close to the theatre venue, accommodation at a hotel,¹⁹ amongst others).

That total spending (£3.67 billion) can be divided into 2 groups:

- Spending of residents of the region where they went to see a theatre performance (local attendees): £1.95 billion
- Spending of non-residents of the region where they went to see a theatre performance (non-local attendees): £1.72 billion

Slightly half of the total spending was generated by the local attendees (53.1%) and the remaining 46.9% by the non-local attendees.

The non-local attendees spending (£1.72 billion)²⁰ can also be segmented into 2 groups:

- Spending of non-local UK residents (non-local UK attendees): £1.35 billion²¹

¹⁸ This value corresponds to the total number of ticket sales in 2019 and does not discriminate between unique bookers. Data on ticket sales and revenue for London Theatres was taken from SOLT Box Office Reports (SOLT, 2020) and the value for the rest of the regions/countries in the UK was taken from Purple Seven (2022, February).

¹⁹ We make the assumption that going to theatre performances is one of the motivations of the overnight theatre audiences, to stay in the area. In addition, we make the assumption that local theatregoers do not incur any accommodation costs.

²⁰ The values are rounded up, for this reason, when adding the values per type of spending, there are slight differences with the total.

²¹ Theatregoers that live in a region in the UK and travel to another region in the UK to attend a theatre performance.

- Spending of international travellers (non-local international attendees): £406.84 million²²

Overall the spending, non-local UK attendees generated 35.8% of the total spending and non-local international attendees prompted the 11.1%.

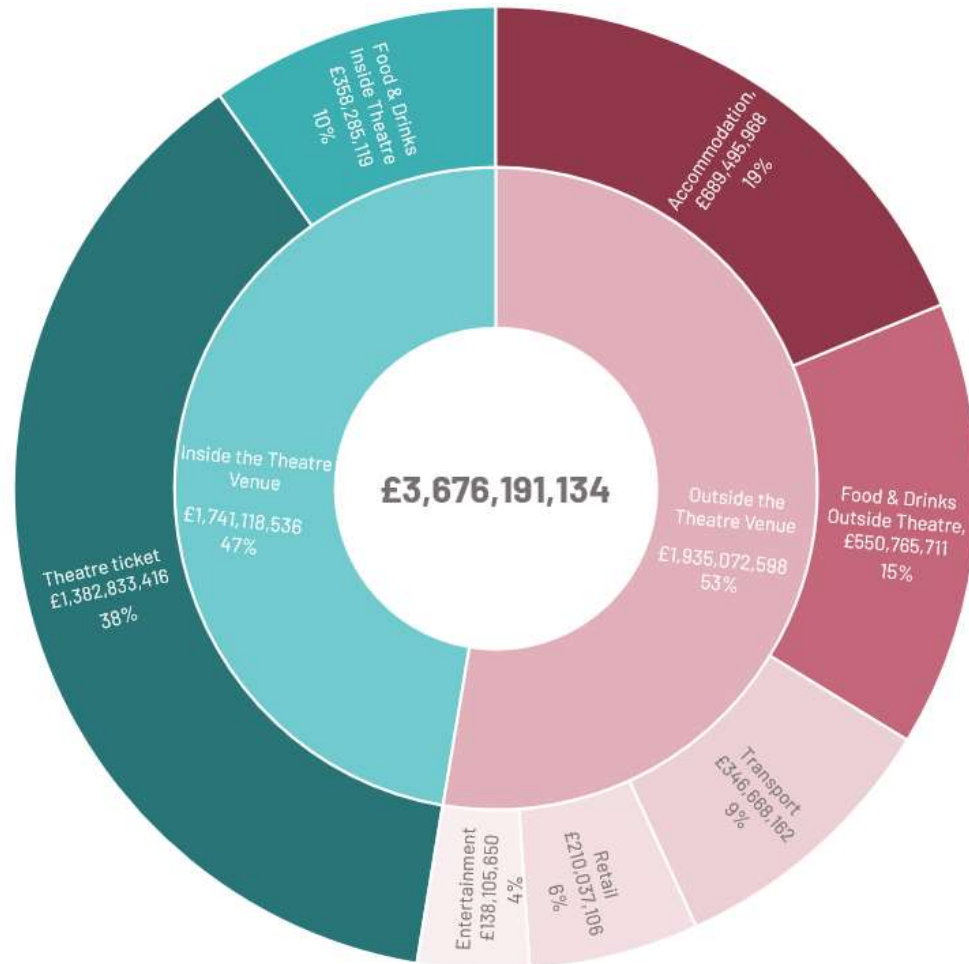
Table 10. Theatre yearly Consumer spend on the overall UK economy, 2019²³

	Spend Category	Average individual 1-day visit spend (£)	Total yearly spend locals (£ million)	Total yearly spend non-locals (£ million)	Total yearly spend (£ million)
Inside the Theatre Venue	Theatre ticket	33.28	953.86	428.9	1,382.8
	Food & Drinks	8.62	237.9	120.3	358.2
Outside the Theatre Venue	Food & Drinks	13.25	341.2	209.5	550.7
	Accommodation	16.59	0	689.4	689.4
	Transport	8.34	221.1	125.5	346.6
	Retail	5.05	128.2	81.7	210.0
	Entertainment	3.32	71.3	66.7	138.1
Total		88.46	1,953.8	1,722.3	3,676.1

Figure 19 shows the distribution of the spending inside and outside the theatre venue, and according to the spend category. The spend inside the theatre (theatre tickets, and Food and Drinks) make up 47% of the total consumer yearly spending.

²² The data from Purple Seven Box Office in 2019 provides the split between local, non-local but (residents) and international bookers of theatre performances. Nonetheless, the proportion is conservative due to the data source accounting such a proportion by the split between online bookers.
²³ The values are rounded up, for this reason, when adding the values per type of spending, there are slight differences with the total.

Figure 19. Theatre yearly Audiences spend on the overall UK economy in 2019, by spend category²⁴



Source: UK Theatre Consumer Spend Analysis. Sound Diplomacy (2022)

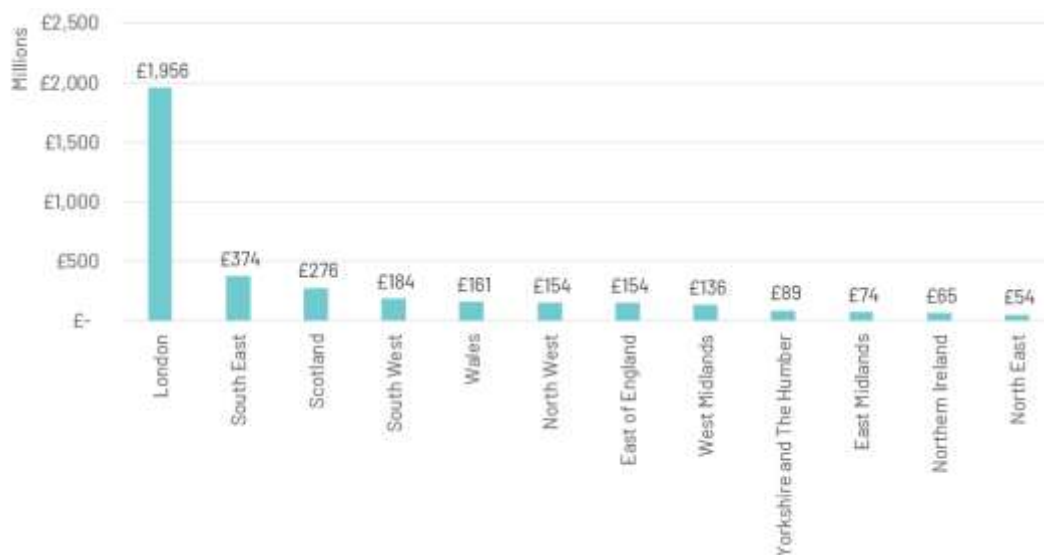
The spending of non-local theatregoers outside of the theatre on Food & Drinks, Transport, Accommodation, Retail and Entertainment supports additional workers in the UK. Based on the results of the consumer spending and the average turnover per worker in the industries, the **spending of the non-local theatregoers support an additional 14,487 workers.**

²⁴ Due to rounding, percentages do not add up to 100%.

4.2. Countries/Regions in the UK

In 2019, £1,956 million was generated in London by theatre goers (53% of the UK total). The South East region and Scotland contributed 10% and 8%, respectively (see Figure 20). Together, the three countries/regions make up 71% of the total spending.

Figure 20. Theatre Audiences total spend in the UK economy in 2019, by country/region (million)

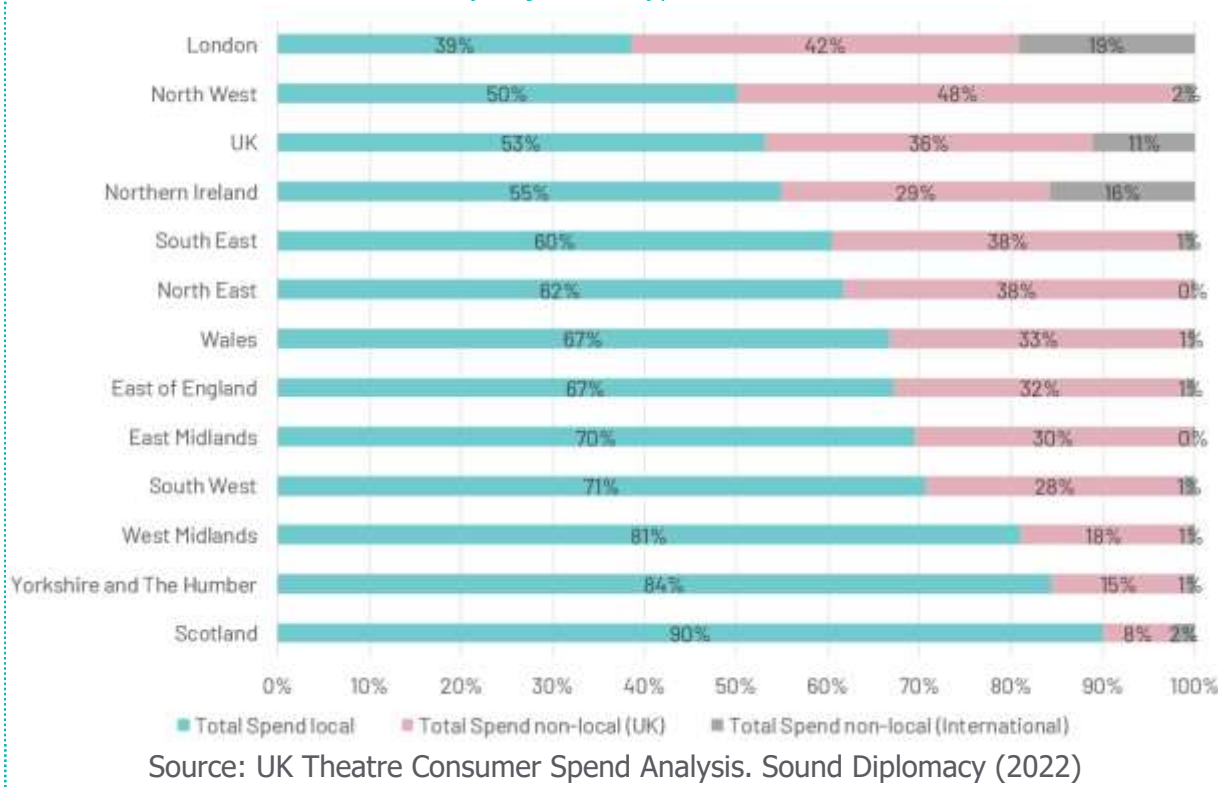


Source: UK Theatre Consumer Spend Analysis. Sound Diplomacy (2022)

In comparison with other countries/regions in the UK, there is a higher concentration of non-local²⁵ attendees spend in London with only 39% corresponding to local spending and the North West with 50%, which means that there are high benefits in the local economy with economic resources that come from other regions and countries. On average in the UK, 53% of the local audiences spend is originated from people that live in the same country/regions where the theatres they visit are located, while 47% is from non-local (see Figure 21).

²⁵ Non-local definition by country/region - international audiences **and** UK-based audiences who attend performances in countries/regions outside of the one they live in

Figure 21. Theatre Audiences distribution of total spend in the UK economy in 2019, by country/region and type of attendee



Finally, we measured the relationship of the total expenditure inside the theatre venue with the expenditure outside of the venue, per country/region. The relationship indicates the value spent outside of the theatre venue, for every £1 spent inside of the venue.

Table 11 shows that **in the UK for every £1 spent in tickets for performances, there is £1.40 spent outside of the venue.** The countries/regions that display the highest effect are East Midlands, where, for every £1 spent in tickets, there is £2.32, North East, with a relationship of £2.11, and Northern Ireland with £1.92.

Table 11. Relationship of ticket spend /spend outside the theatre venue and ATP, per country/region

Country/Region	Average Ticket Price (ATP) (£)	Average spend outside the theatre per person/ticket (£)	Ratio ticket price and spend outside the venue <i>("For every £1 spent on a theatre ticket, £ ... are spent in the local economy")</i>
East Midlands	17.82	41.27	2.32
East of England	20.95	35.72	1.70
London	52.17	66.35	1.27
North East	16.55	34.88	2.11
North West	24.83	39.65	1.60
Northern Ireland	17.58	33.76	1.92
Scotland	21.74	31.37	1.44
South East	24.44	39.10	1.60
South West	24.18	30.15	1.25
Wales	20.02	34.74	1.74
West Midlands	22.71	41.95	1.85
Yorkshire and The Humber	23.71	23.86	1.01
UK	33.28	46.57	1.40

5 COVID-19 Impact Assessment

Methodology Insights

Methodology: The overall impact of COVID-19 in the theatre ecosystem is understood as the generation or loss of revenue and workforce during 2020, when the national and local governments in the UK implemented multiple measures to contain the virus. The impact is twofold: change in the

revenue and change in workforce. To calculate the impact of COVID-19, the methodology considered as the base values for revenue and workforce in 2019, the ones calculated in the Direct Economic Impact (see chapter 3). Subsequently, the values of the variables for 2020, were obtained by extrapolating the change in revenue by ticketing sales provided by Purple Seven and SOLT. For the impact in the workforce, the impact is calculated by extrapolating the responses from the theatre venues and companies that answered to the UK Theatre survey administered by Sound Diplomacy in Q1 2022.

Sources and data:

- Purple Seven
 - Summary of daily sales, revenue, and booker count by region: total revenue from ticket sales in the years 2019, 2020, and 2021
- Sound Diplomacy:
 - UK theatre economic impact assessment (see chapter 3)
 - UK theatre Survey implemented during Q1 2022

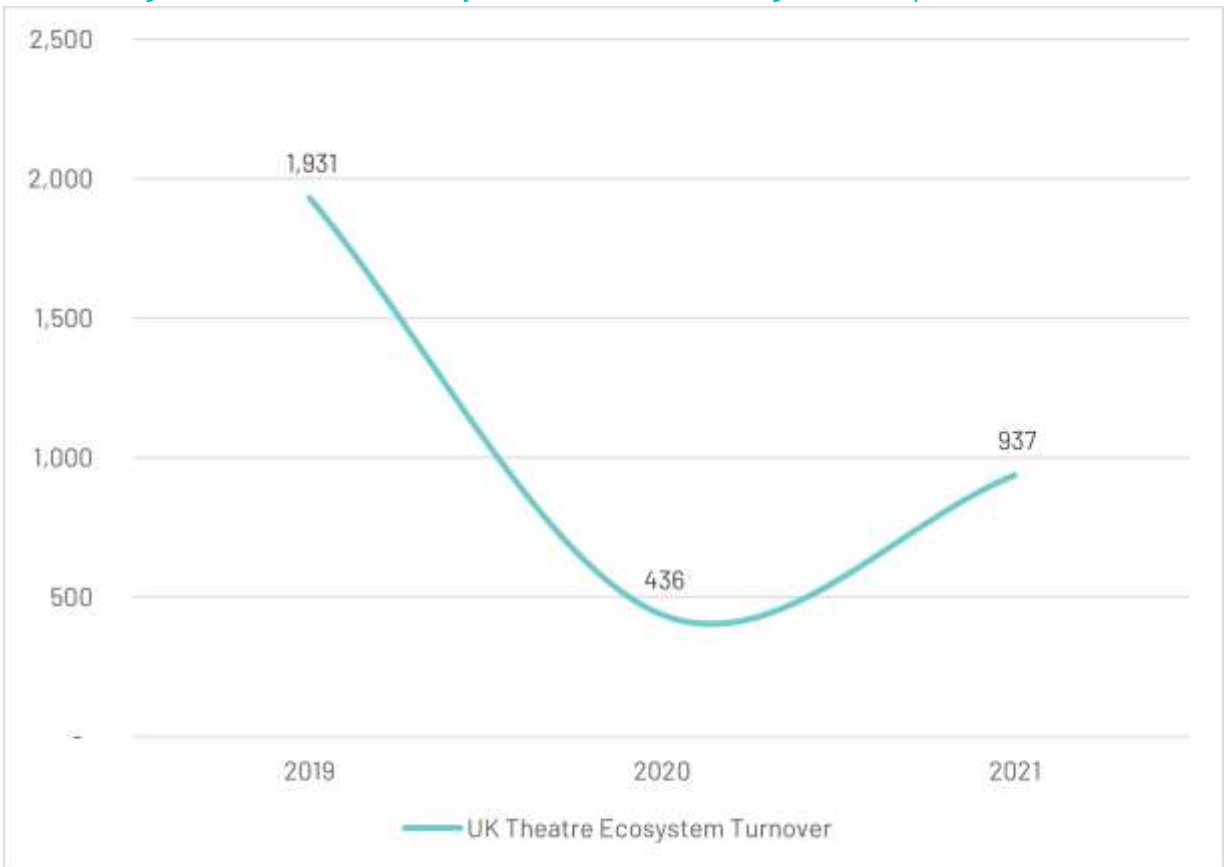
5.1 COVID-19 Impact on the Supply Side

Figure 22 shows the UK theatre ecosystem turnover since 2019, with estimations of the turnover for the years 2020 and 2021.²⁶

For 2020, the estimated turnover equals **£436 million**, which constitutes a **decrease in turnover of 77% for a total loss of £1.49 billion**. In the following year, the turnover of the UK theatre ecosystem recovered. The estimated turnover for 2021 is **£936.5 million**; a growth of 114.6% between 2020 to 2021 and an increase of £500.1 million.

²⁶ The estimates of the effect of COVID 19 were made under the assumption that the losses in the sector are proportional to the decrease in ticket sales during 2020 and 2021.

Figure 22. UK Theatre Ecosystem Turnover including COVID-Impact in Million £



Source: NOMIS, ONS, Sound Diplomacy

In 2020, an estimated total of 45,796 of the UK theatre workforce ended their working engagement because they were made redundant, end of contract, or left on their own accord. This equals 34% of the workforce. 64% of the workforce needed to be put on furlough for at least one month of the year, while 5% experienced a permanent contractual decrease in working hours, and 0% experienced a permanent contractual increase in working hours. Nonetheless, despite the overall decrease in workforce in the sector, it is estimated that approximately new 4,040 workers were added to the UK theatre workforce in 2020.

In 2021 it is estimated that another 18,588 people (20%) ended their working engagement in the UK theatre ecosystem. 43% of the workforce were put on furlough for at least one month and 3% experienced a permanent contractual decrease in working hours. At the same time, 1%

of the workforce experienced a permanent increase in working hours and approximately 16,729 people were newly employed.

According to Purple Seven (2022, April), the sector is expected to recover its pre-pandemic level in the next 12 months (between April 2022 and April 2023). overall UK data shows that 54% of the surveyed consumers expect that their attendance to performances in the following 12 months will most likely return to pre-pandemic levels, and 19% believe that it will increase compared to pre-pandemic levels. The above means that 73% are optimistic about their future attendance, and thus demonstrates a positive recovery of the sector in the short-term.

5.2 COVID-19 Impact on the Consumer Spend

COVID-19 measures implemented throughout the UK in 2020 and 2021 made a significant impact on consumer spending derived from theatre attendance. Figure 23 shows that the total yearly spend decreased by 78% from 2019 to 2020. During the same period, the average spend per attendee decreased by 2.2%.

Nonetheless, 2021 showed a recovery, with a yearly total spend increase of 108%, but still a decrease of 2.5% in the average spend per attendee.²⁷ However, the total spend in 2021 still remained 54% lower than pre-COVID spend in 2019.

²⁷ The individual average spend per attendee during the years 2019, 2020 and 2021 only considers the change in the average ticket price (ATP). The average spend in the rest of the categories is assumed to remain the same.

Figure 23. Theatre Consumer spend on the overall UK economy in 2019, 2020 and 2021, by Total spend and Spend per inhabitant



Source: UK Theatre Consumer Spend Analysis. Sound Diplomacy (2022)

6 Geospatial Analysis

Methodology Insights

Methodology: The mapping database was produced using SOLT & UK Theatre private databases of their members, as well as publicly available sources on the web. The data was cleaned-up and deduplicated to ensure there were unique theatre assets considered in the mapping exercise.

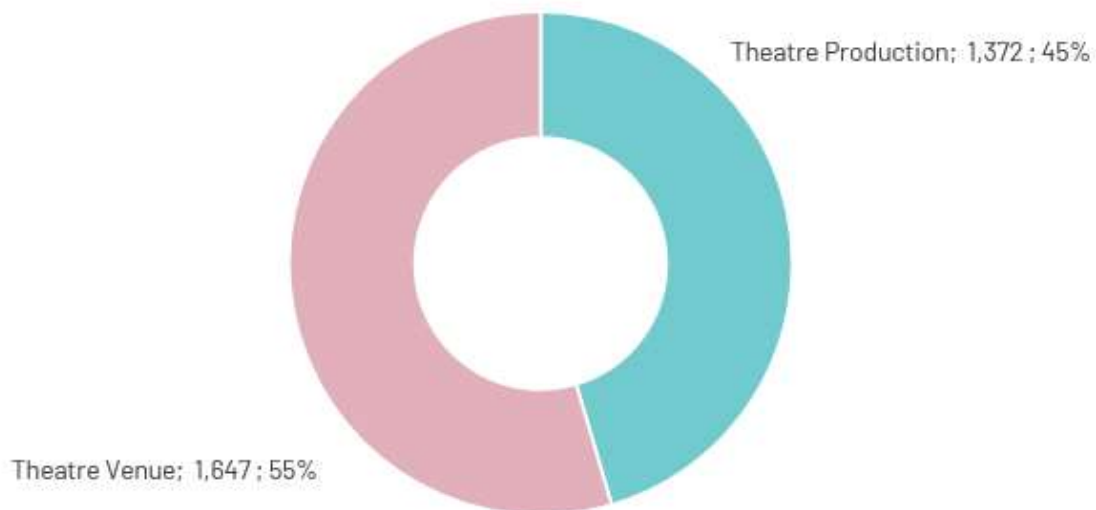
Sources and data:

- SOLT member database
- UKT member database
- Google Maps
- Facebook
- Yell.com
- LondonTheatre.co.uk
- Theatres Trust
- ArthurLloyd.co.uk

6.1 Overview of Theatre Assets in the UK

The geographical area includes 13 regions across which 3,019 assets have been mapped. Of these, 1,647 (55%) are theatre venues, and 1,372 (45%) are theatre production companies (see Figure 24).

Figure 24. Distribution of theatre assets in the UK



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

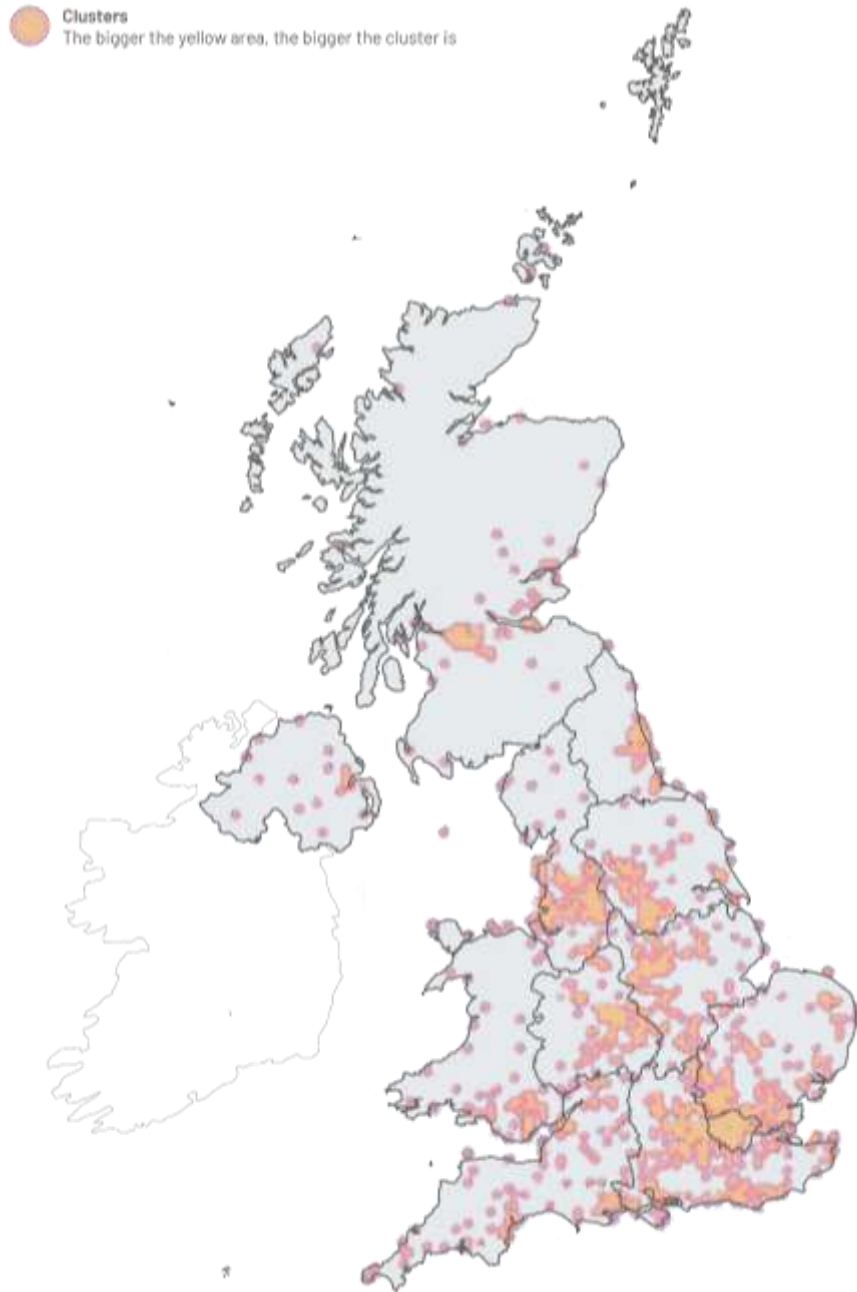
6.1.1 Spatial Distribution of the Theatre Assets in the UK

The spatial distribution of theatre assets, a result of our geolocation exercise, is shown in the [interactive map](#). This emerges from analysing clusters, the number of asset heatmaps, and country/region density heatmaps.

6.1.1.1 Cluster analysis for Theatre Assets in the UK

Map 1 displays the clusters of assets in the UK. The bigger the yellow area, the greater the concentration of assets in that specific geographic location. From this, we identified that there are several asset clusters.

Map 1. Spatial Distribution of Theatre Assets in the UK



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

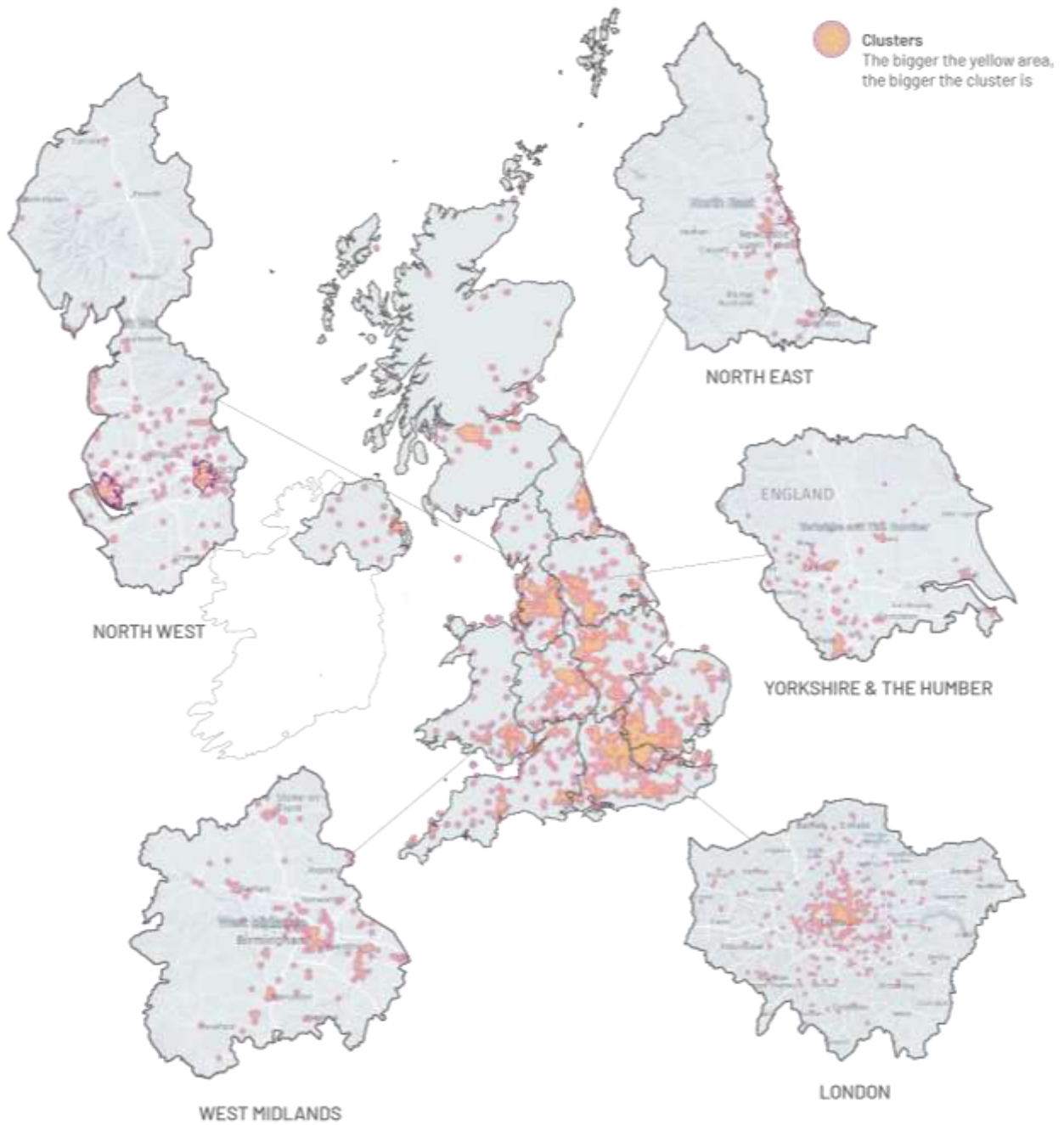
In each country/region, clusters are located in some of the major cities/capitals (see Table 12).

Table 12. Cities where major Theatre asset clusters are located, per Country/Region

Country/Region	Location of the Theatre asset clusters (city)
South East	Brighton and Hove, and Oxford
North West	Liverpool, and Manchester
East of England	Cambridge, Norwich, and St. Albans
West Midlands	Birmingham, and Coventry
South West	Bristol, and Plymouth
Yorkshire and The Humber	Sheffield, and Leeds
East Midlands	Leicester, Derby, Northampton, and Nottingham
North East	Newcastle upon Tyne
Northern Ireland	Belfast
Wales	Cardiff
Scotland	Glasgow, and Edinburgh
London	<i>Further details are provided in a subsequent chapter</i>

Some of the most visible clusters are in London, the West Midlands, Yorkshire and The Humber, the North West, and the North East (see magnified highlights in Map 2).

Map 2. Spatial Distribution of core clusters of Theatre Assets in the UK

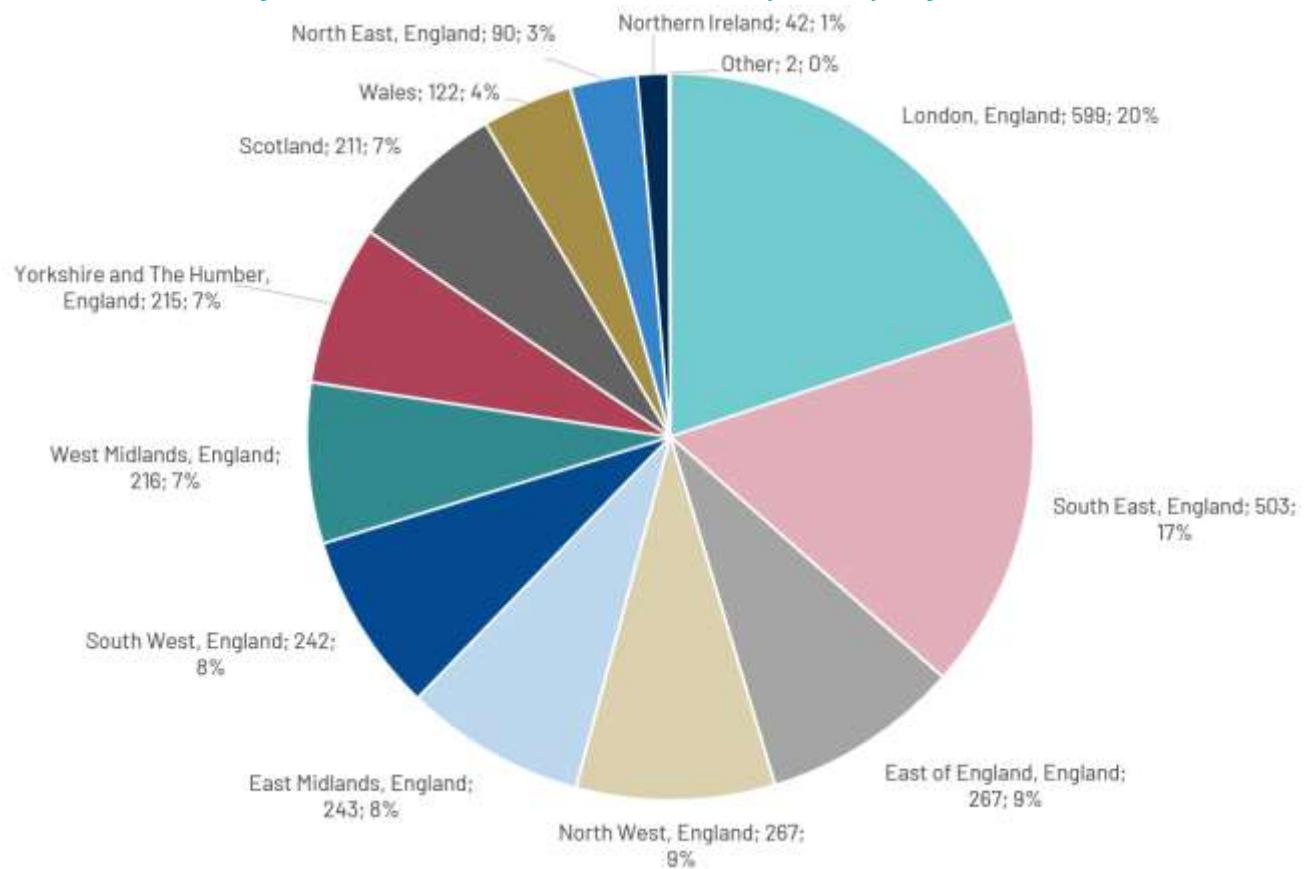


Source: Theatre Asset Mapping for the UK, Sound Diplomacy

Figure 25 shows that the highest number of theatre assets are located in London with 599 (20%), followed by 503 (17%) in the South East, 267 (9%) in the East of England, 267 (9%) in the North West, 243 (8%) in the East Midlands, 242 (8%) in the South West, 216 (7%) in the West Midlands, 215 (7%) in Yorkshire and The Humber. The remaining 467 (15%) are in Scotland with 211 (7%), Wales with 122 (4%), the North East with 90 (3%), Northern Ireland with 42 (1%), and the Isle of Man, and Jersey, with 1.

The above shows that England hosts the majority with 2,642 (90.8%) of all theatre assets in the UK. This is significantly higher than the other UK countries, as Scotland is home to 211 (7%), Wales has 122 (4%), and Northern Ireland has 42 (1%).

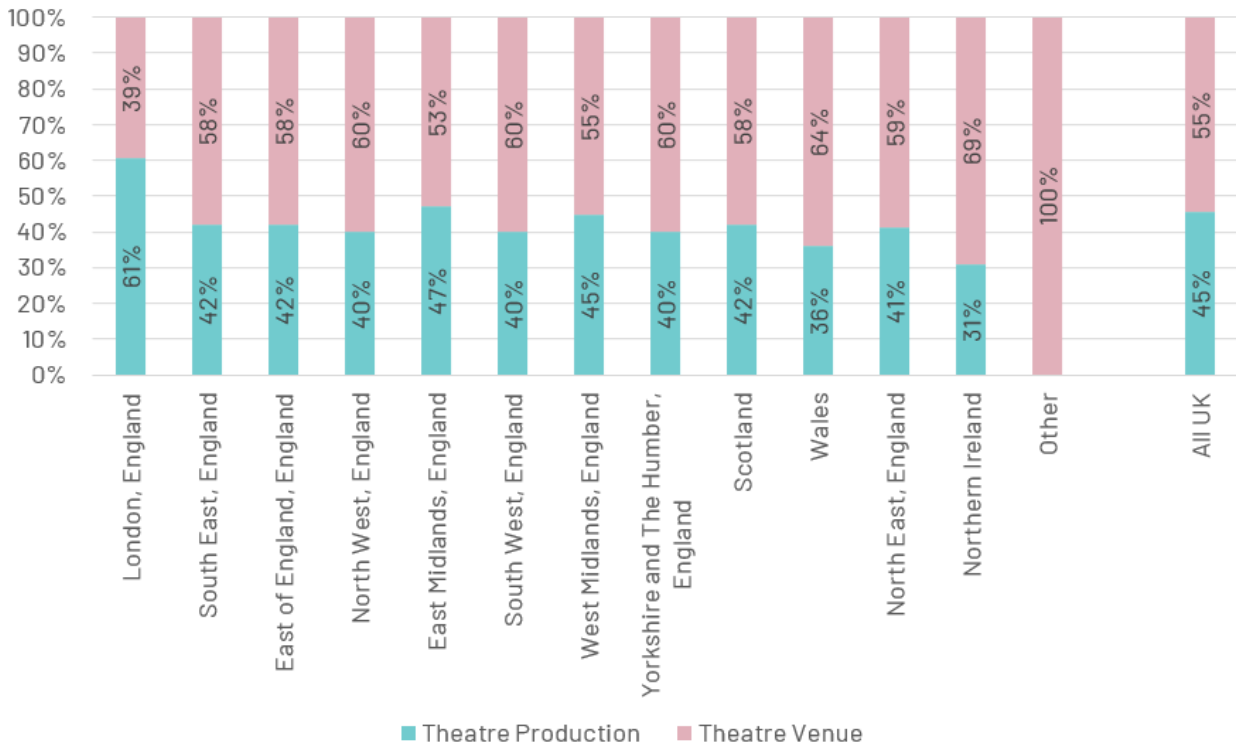
Figure 25. Distribution of Theatre Assets by country/region in the UK



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

The distribution of theatre assets by category and country/region shows that for all of the UK, the percentage of theatre venues within all the theatre assets is 55%. In all the countries/regions, except London, there is a higher proportion of theatre venues than theatre production companies, whilst London comprises 39% of theatre venues (see Figure 26).

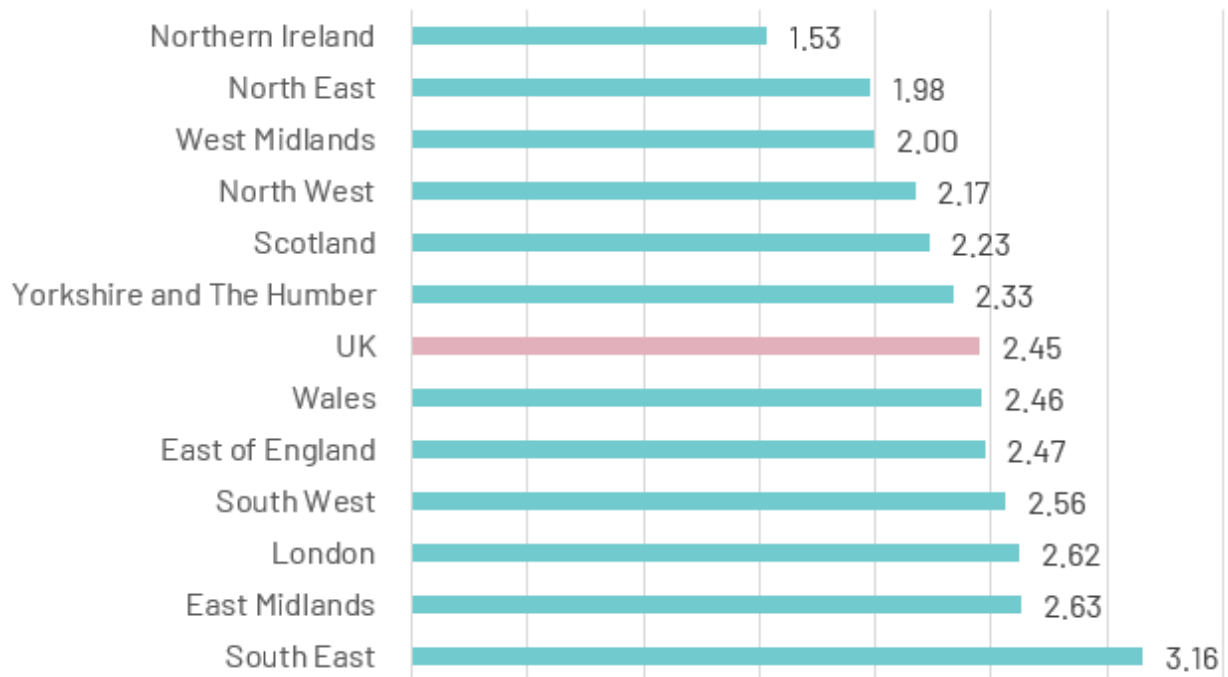
Figure 26. Distribution of Theatre Assets by category and country/region in the UK



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

On average, there are 2.45 venues per 100,000 inhabitants in the UK. However, this differs in the South East, which has the greatest number of venues (3.16), followed by the East Midlands with 2.63, London with 2.62, the East of England with 2.56, and Wales with 2.46. In contrast, the following countries/regions sit below the UK average: Yorkshire and The Humber (2.33), Scotland (2.23), the North West (2.17), the West Midlands (2.00), the North East (1.98), and Northern Ireland (1.53) (see Figure 27).

Figure 27. Average number of theatre venues per 100,000 inhabitants, by Country/Region



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

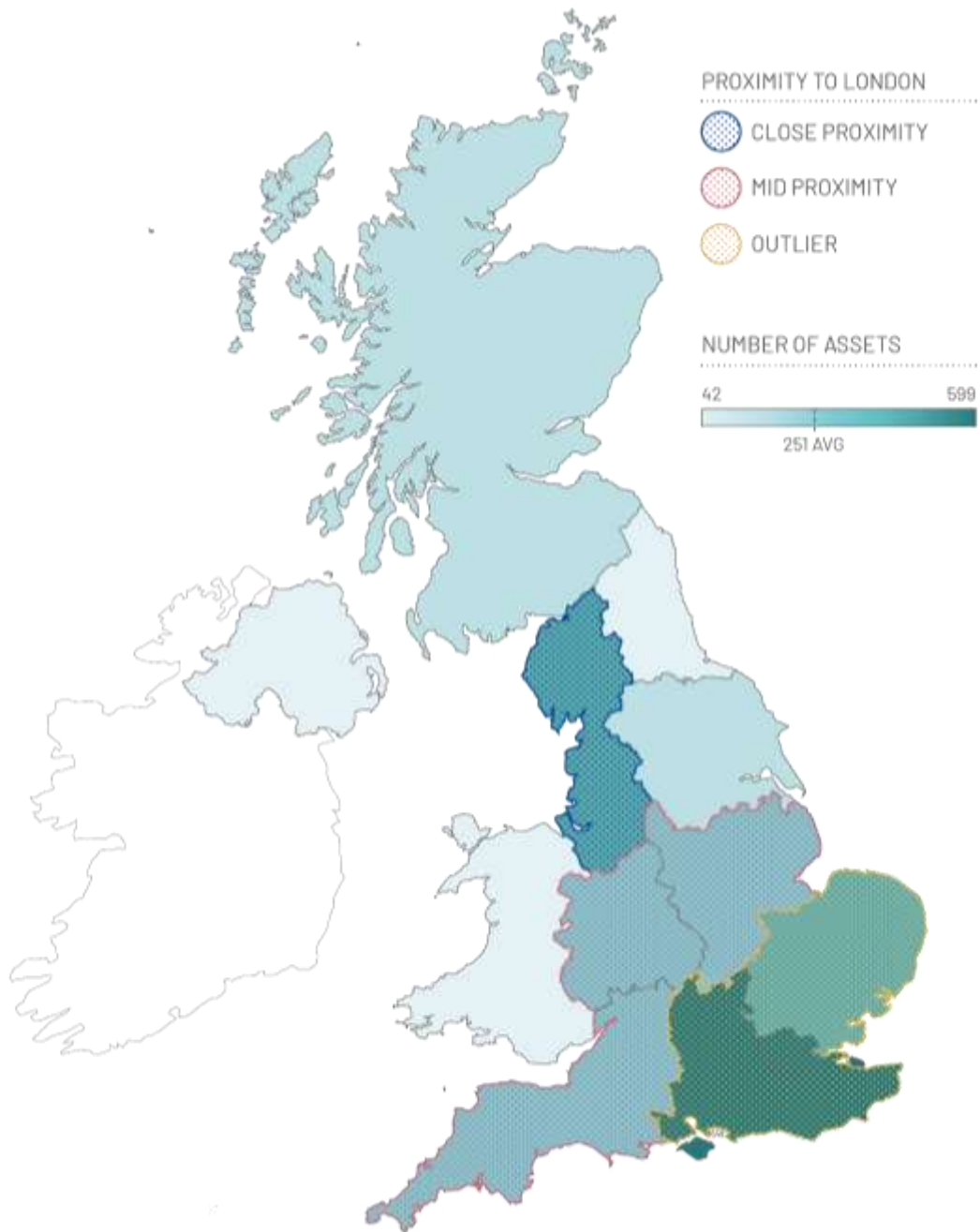
6.1.1.2 Country/Region Density (Assets by Country/Region Size) for Theatre Assets in the UK

As previously mentioned, when we evaluate the number of assets per country/region, it is evident that the highest number are located in London, and the South East, East, and North West of England, collectively containing more than half (1,636 - 54%) of the UK's assets.

Data shows that the greater the proximity²⁸ to London, the greater the concentration of assets, (seen in the darker colours - London, South East, and East of England). Nonetheless, the North West region is one outlier to the rule, as, despite its distance from London, it has one of the highest concentrations of theatre assets (see Map 3).

²⁸ Proximity refers to the distance between countries/regions. Whenever they share borders, the greater the proximity.

Map 3. Number of Assets Heat Map by Country/Region in the UK

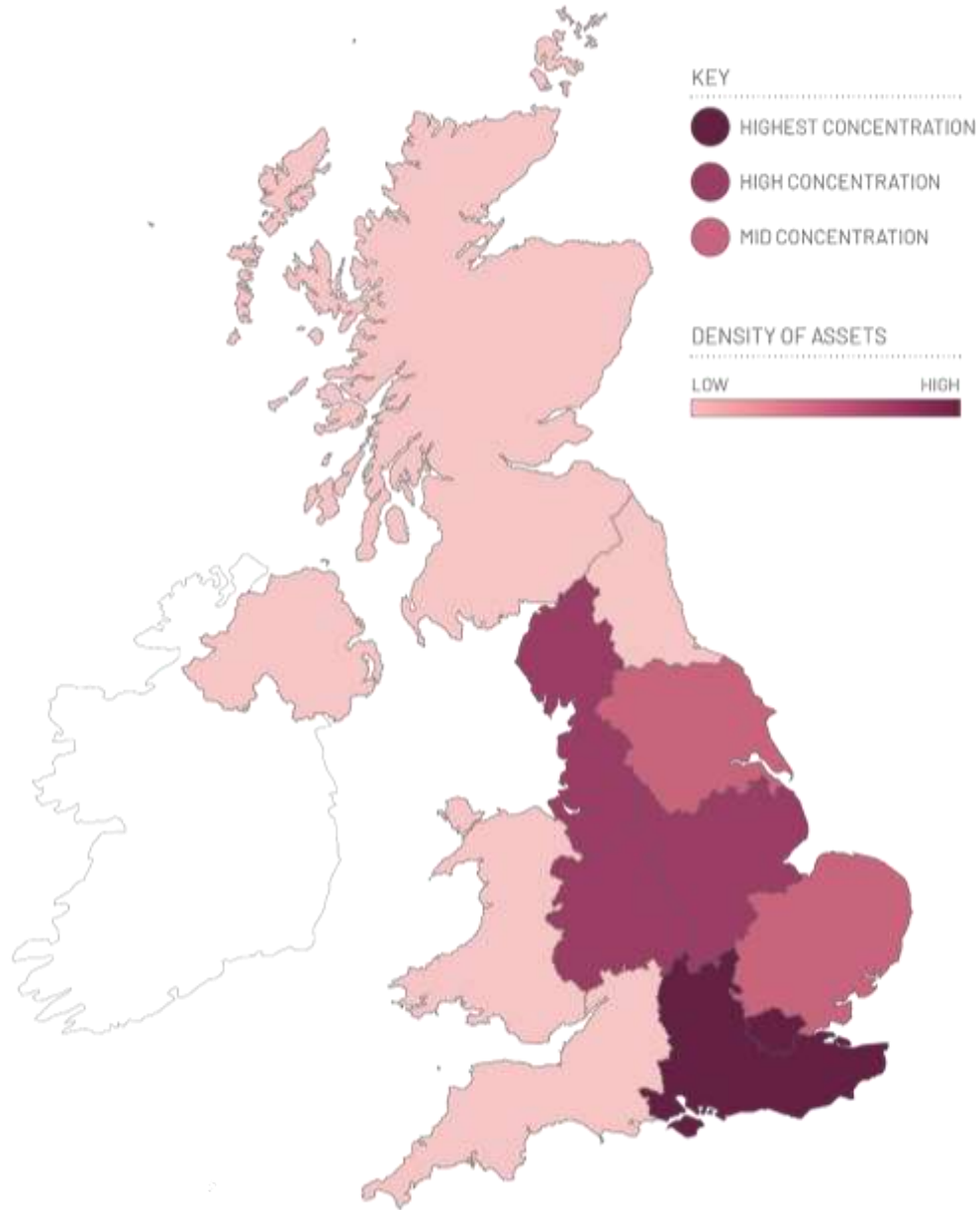


Source: Theatre Asset Mapping for the UK, Sound Diplomacy

As a complementary analysis, the density of assets per square kilometre was evaluated (see Map 4). The darker the colour, the greater the density of theatre assets per country/region. There is an average of 1 theatre asset per every 81.12 square kilometres in the UK.²⁹ For the highest concentrated region (London), there is 1 theatre asset per every 2.65 square kilometres. The lowest concentration of theatre assets is in Scotland with 1 asset per every 373.57 square kilometres.

²⁹ Assets per square metres in relation to Land area in square metres per the Office of National Statistics (ONS): <https://geoportal.statistics.gov.uk/datasets/d6cc711f662940c59f1c7284448b52f6/about>

Map 4. District Density (Assets in relation to Country/Region size) in the UK

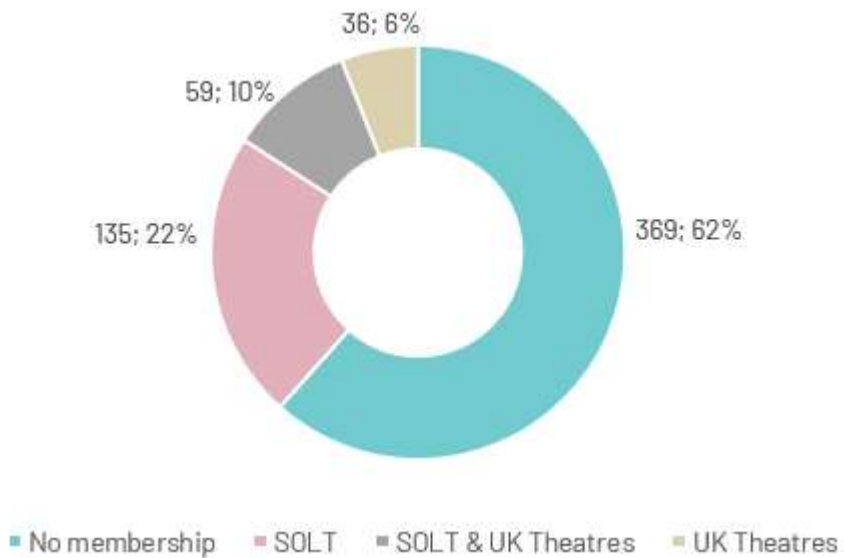


Source: Theatre Asset Mapping for the UK, Sound Diplomacy

6.2 Overview of Theatre Assets in London

There are 599 theatre assets mapped in London, of which 363 (61%) are theatre production companies, and 236 (39%) are theatre venues. Of those assets, 369 (62%) are not members of either SOLT or UKT. Similar trends are seen in both the mapped theatre venues and the theatre production companies (see Figure 28).

Figure 28. Distribution of Theatre Assets by association to SOLT and/or UKT, in London

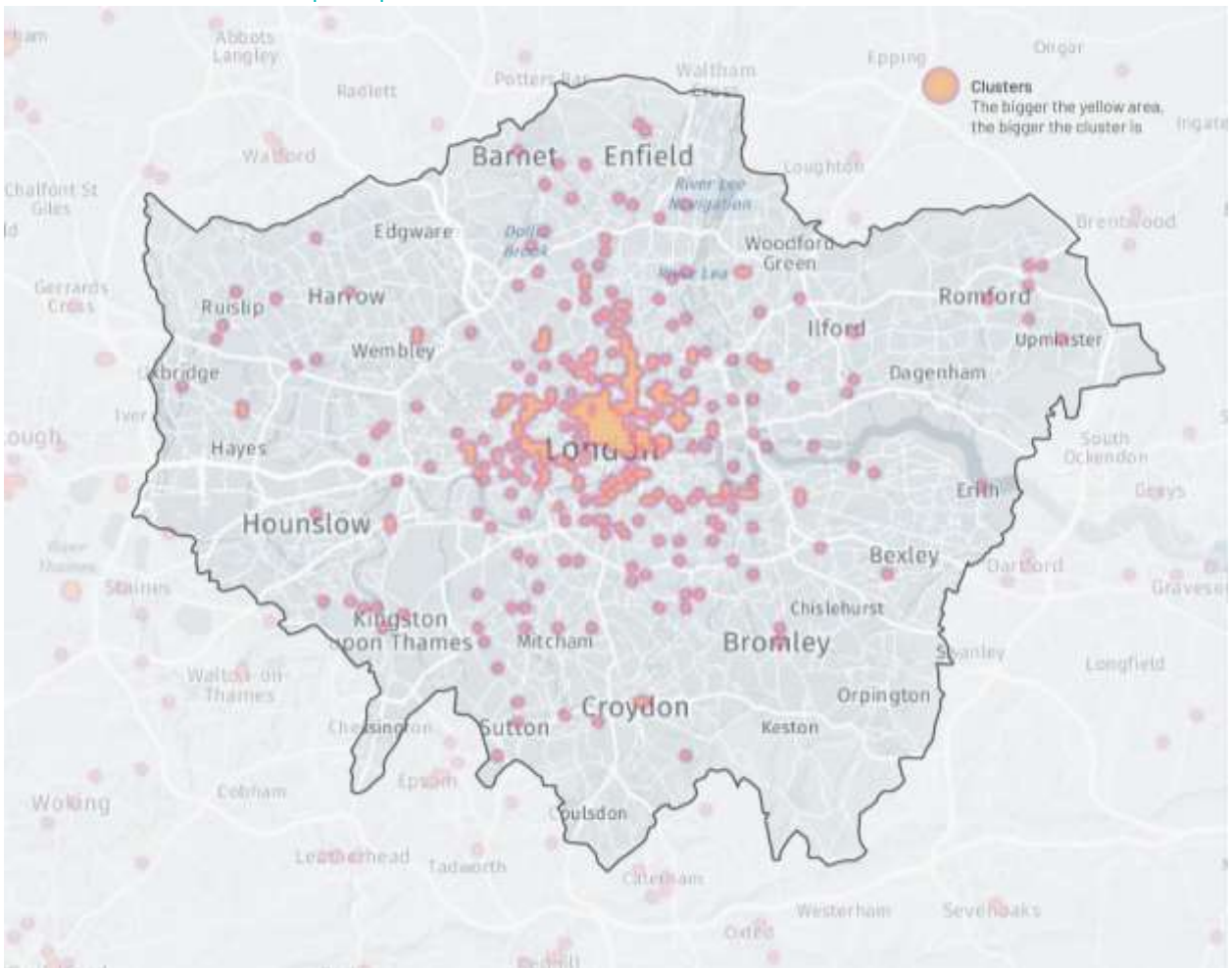


Source: Theatre Asset Mapping for the UK, Sound Diplomacy

6.2.1 Cluster analysis for Theatre Assets in London

Map 5 shows clusters of theatre assets in London. There is a core cluster in the boroughs of Westminster and Camden, in which London's West End is located, close to the River Thames. The remaining assets are located close to this cluster. The concentration of assets reduces as you move further from the West End.

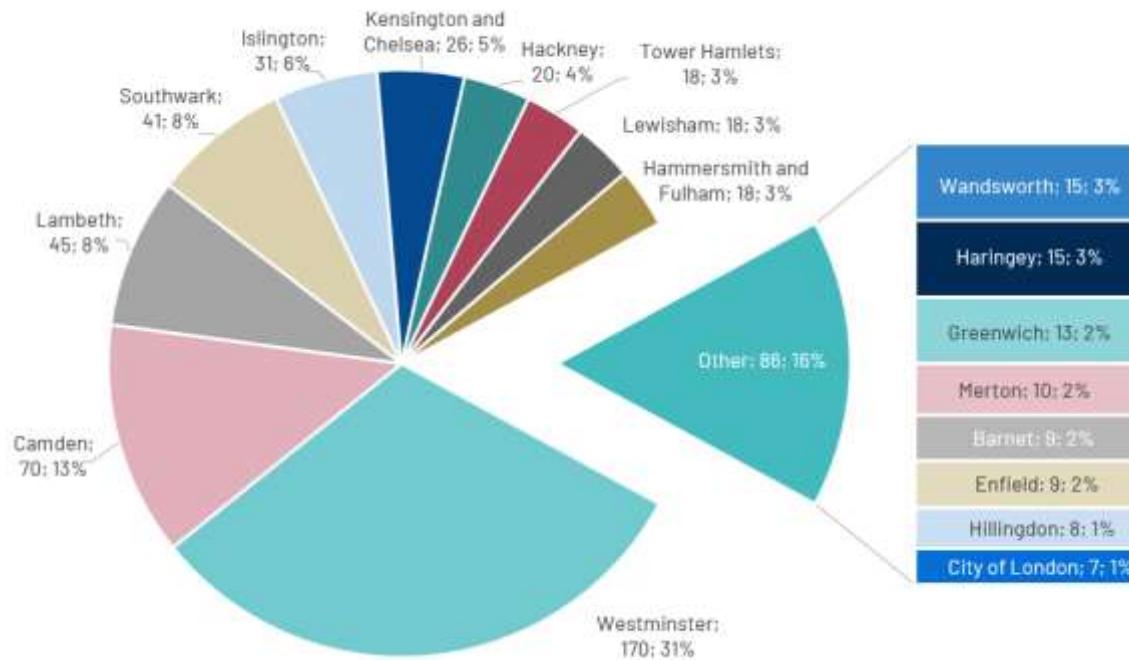
Map 5. Spatial Distribution of Theatre Assets in London



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

Figure 29 shows that the boroughs with the greatest number of theatre assets are Westminster with 170 (31%) and Camden with 70 (13%). The boroughs that follow are Lambeth with 45 (8%), Southwark with 41 (8%), Islington with 31 (6%), Kensington and Chelsea with 26 (5%), Hackney with 20 (4%), and Tower Hamlets, Lewisham and Hammersmith and Fulham each with 18 (3%). The remaining 86 (16%) are located in the boroughs of Wandsworth and Haringey with 15 (3%) assets each, Greenwich with 13 (2%), Merton with 10 (2%), Barnet and Enfield with 9 (2%) each, Hillingdon with 8 (1%), and the City of London with 7 (1%).

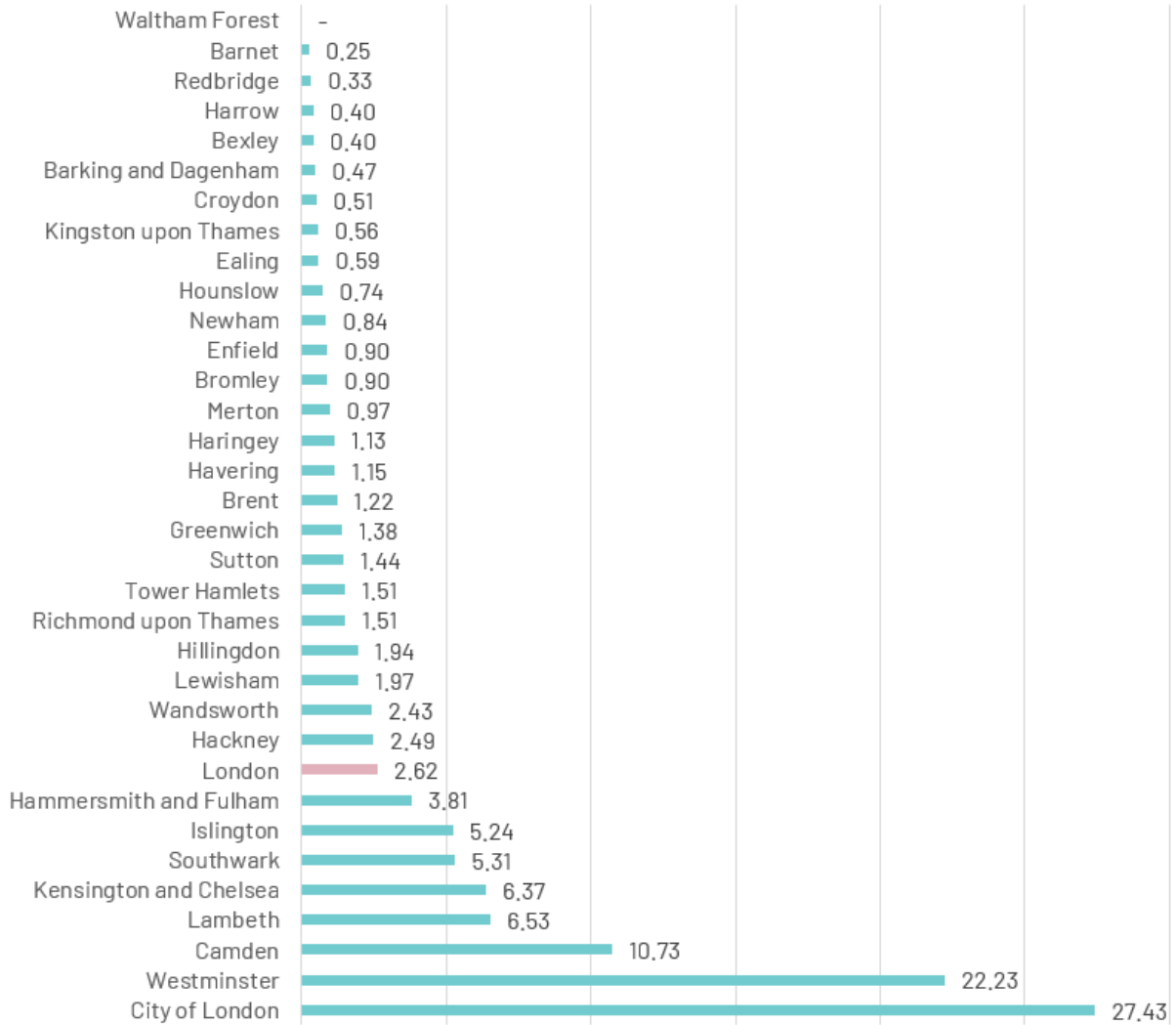
Figure 29. Distribution of Theatre Assets by Borough in London



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

The average number of theatre venues per 100,000 inhabitants in London is 2.62. The City of London exceeds this with 27.43 which is an anomalous result, given its low number of residents compared to other London boroughs, followed by 22.23 in Westminster, and 10.73 in Camden. Other boroughs with a higher than city-average are Lambeth (6.53), Kensington and Chelsea (6.37), Southwark (5.31), Islington (5.24), and Hammersmith and Fulham (3.81). The remaining 25 boroughs are below the London average (see Figure 30).

Figure 30. Average number of theatre venues per 100,000 inhabitants, per borough



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

6.2.2 Borough Density (Assets by Borough Size) for Theatre Assets in London

The above is reaffirmed when evaluating the number of assets per borough in London. The boroughs with the highest number of assets are Westminster, Camden, Lambeth, and Southwark, which collectively contain more than half (326 assets - 54%) of London's theatre assets. The four boroughs combined have more theatre assets than any region in the UK, with the exception of the South East (503 assets). Moreover, these four boroughs represent 14% of all theatre assets in England and 12% in the UK. This means that there is a significant concentration of theatre assets in a contained area in London.

As previously noted, the boroughs in closest proximity to London’s West End have higher concentrations of assets. Nonetheless, the City of London, despite its close proximity to the West End, displays a low concentration of theatre assets, and Hillingdon and Havering, have a slightly higher concentration of assets than their neighbouring boroughs, even though they are further away from the West End (see Map 6).

Map 6. Number of Theatre Assets Heat Map by Borough in London



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

6.2.3 Access to Public Transport Using Five Minute Pedestrian Isochrones For Theatre Venues in London

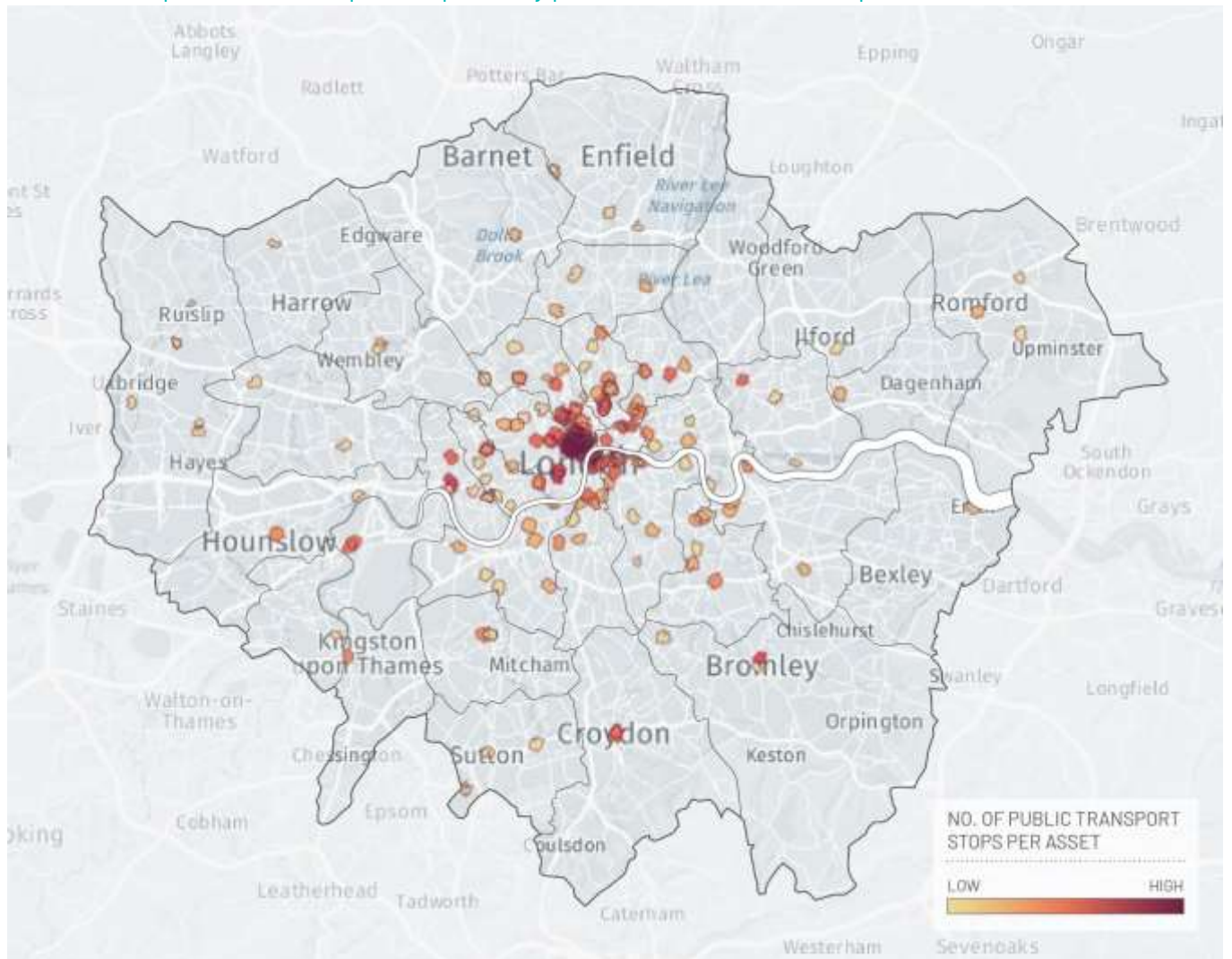
For theatre venues, access to public transport is a significant factor in their ability to attract and maintain audiences, as well as being a key part of the venue's licensing terms, with proximity to the night tube and night buses often considered essential when applying for premises licences. Map 8 shows the number of public transport stops surrounding the theatre venues located within a five-minute walk.³⁰ The darker the red of the area, the greater number of public transport stops each asset has available within this radius.³¹ The areas that are close to or in the West End have the highest level of accessibility using public transportation.

The availability of sufficient public transport enables theatre attendees to egress more efficiently from the venue area, limiting crowd congestion and potential nuisance once the show ends.

³⁰ Office for National Statistics, ONS. (2022). National Public Transport Access Nodes (NaPTAN). Retrieved online [here](#). Accessed 20.03.22.

³¹ The lines determine the five-minute walking radius of each asset, therefore there are several overlapping lines in the densest areas. If in the interactive map the radius is yellow, it means that the asset has no bus stops within a five-minute walk.

Map 8. Public Transport Stop Density per Asset in London: 5 min pedestrian isochrone



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

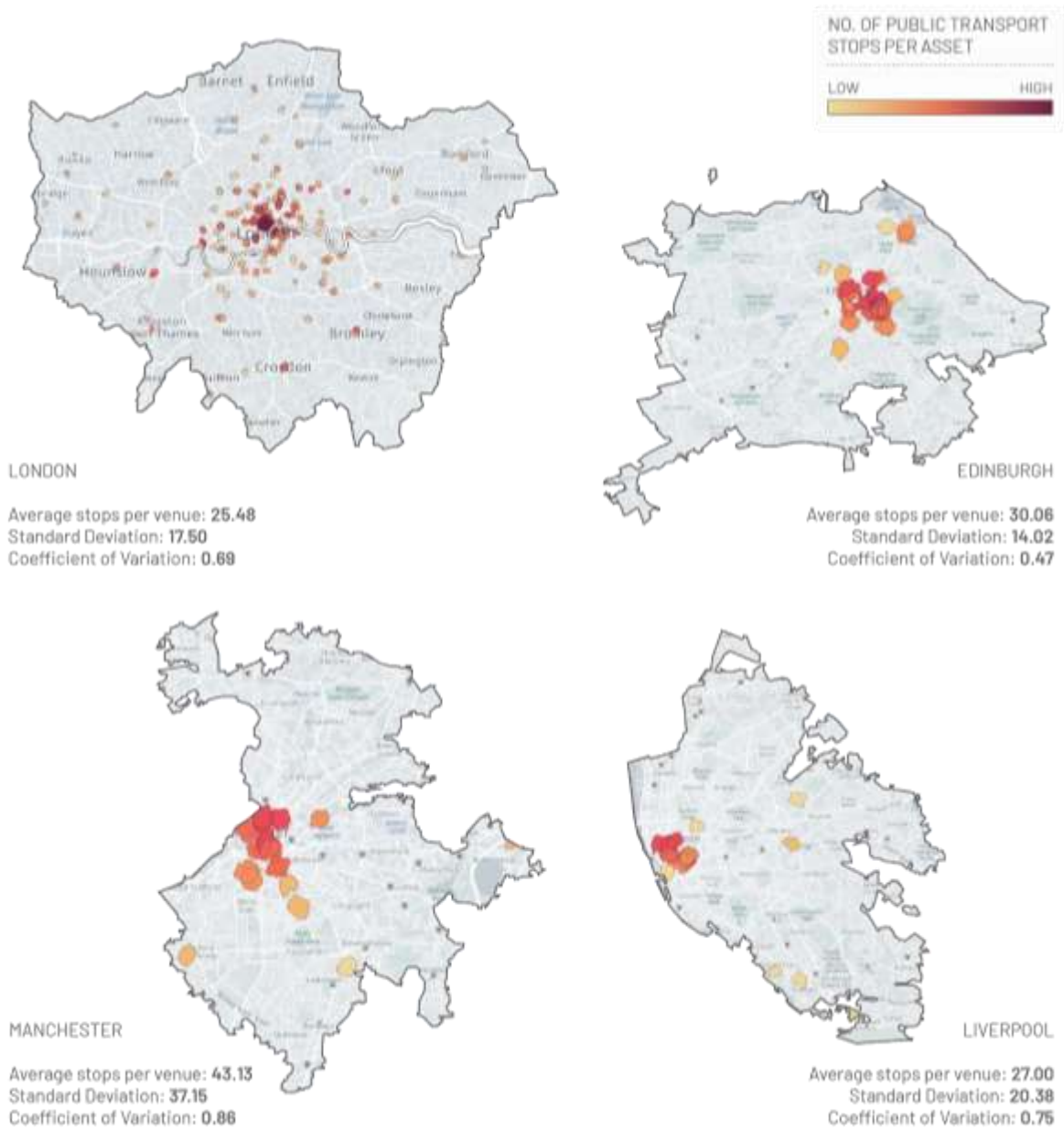
London has, on average, 25.48 public transport stops within a five-minute radius per theatre venue, lower than 3 major cities in the UK.³² For example, Liverpool has an average of 27 stops per theatre venue, Edinburgh 30.06, and Manchester 43 (see Map 9).

³² The 3 cities were selected due to good data accessibility in terms of city delimitations (GIS Shapefiles) in correlation with the public transport GIS data. Multiple cities had a discrepancy between both official Shapefiles, limiting any type of assessment.

To compare the 4 cities, the coefficient of variation³³ has been used. The higher the coefficient, the greater the dispersal of stops and in turn, unequal access to venues within the city. This shows that Manchester and Liverpool's theatre venues don't share the same level of access to public transport (dispersed), whilst in London and Edinburgh, the coefficient is lower, showing that in comparison, theatre venues, regardless of their location, have more equal access to public transportation.

³³ Coefficient of variation is the ratio between the average and the standard deviation.

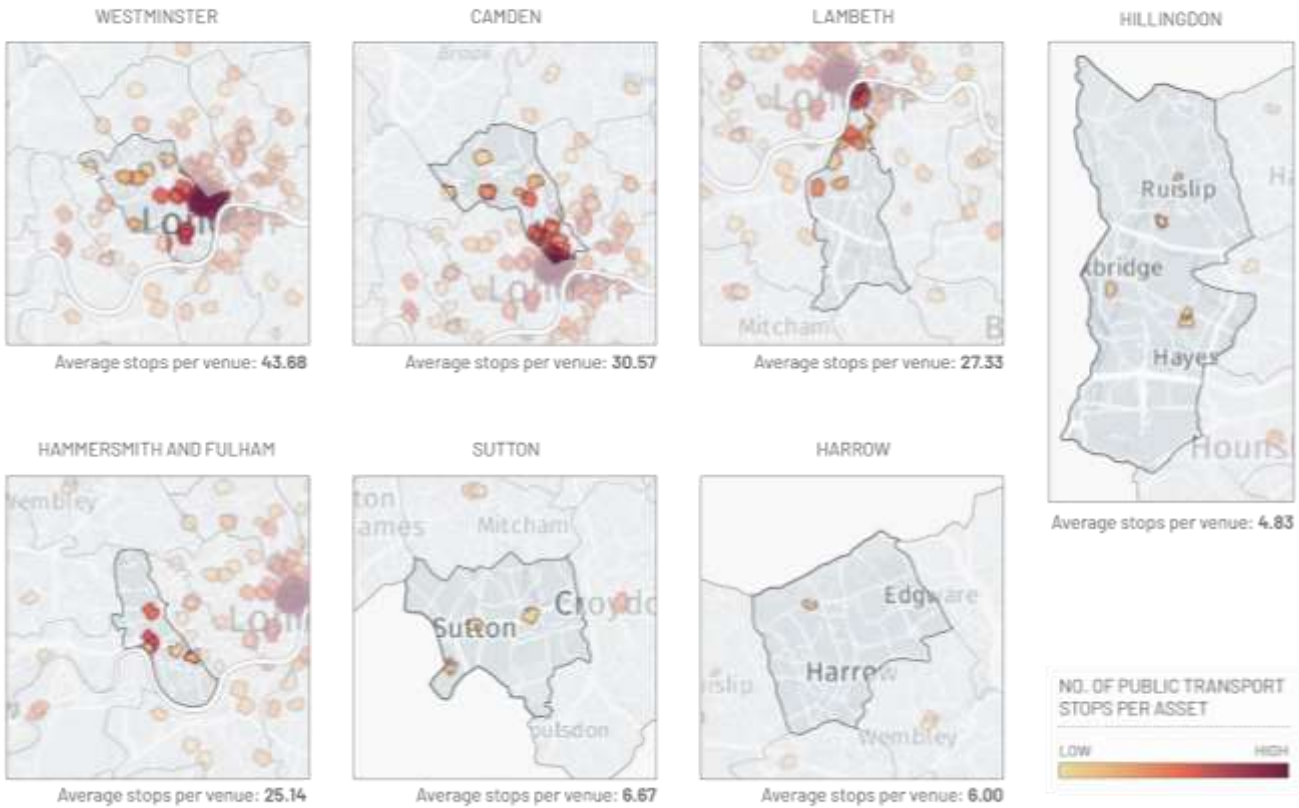
Map 9. Public Transport Stop Density per Asset in London, Edinburgh, Liverpool, and Manchester: 5 min pedestrian isochrone



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

Map 10 shows the number of public transport stops within a five-minute walk of theatres, per borough in London. Some of the boroughs with the highest number of assets also have the highest number of public transport stops per venue. Overall, there is a positive correlation of 0.71 between the number of theatre venues and the number of public transport stops per venue. Some of the boroughs with the highest number of public transport stops per venue are Westminster, Camden, Lambeth, and Hammersmith and Fulham. In contrast, the boroughs with the lowest number are Sutton, Harrow, and Hillingdon.

Map 10. Public Transport Stop Density per Asset in London, per Borough: 5 min pedestrian isochrone



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

The number of stops is not a unique consideration in terms of access to transport for the venues. The drop-off access and blue badge parking also play a crucial role in ensuring theatre

venues' accessibility. This is particularly important whenever public transport doesn't serve the attendees with disabilities, or the staff and performers that travel late at night (SOLT, 2022).³⁴

Nonetheless, Transport for London (TfL) states that 95% of bus stops in London are accessible by wheelchair users, and the DLR and Tram network are step-free.³⁵ In addition, even though London's underground and buses generally run between 5am and midnight from Monday to Saturday (with reduced timetables on Sunday), the main bus lines run 24 hours a day (identified with the letter N). Likewise, there are some night tube trains on Fridays and Saturdays, 3 of which will return in 2022 following closures due to the COVID-19 pandemic.³⁶ By 2050, this will be complemented by a night-time running of the rail network and out-of-hours freight deliveries and servicing to ensure London has a transport system to support a 24/7 city (Mayor of London, n.d.).³⁷

6.2.4 Land Use in London

The zoning of a city in Land Use categories is important to consider in a geographical analysis because zoning is the means of how the local and national authorities regulate and control their land to ensure complementary uses and stimulate (or slow) the development of certain areas. The Greater London Authority (GLA) classifies the purposes for which land in a determined space can be used across several categories. Such categorisation is defined by the National Land Use Database (NLUD) V. 4.4 Classification.³⁸ The GLA provides an official map of categories (see Appendix 2).³⁹

When assessing the location of the theatre venues according to the land use categories, it is observed that 94 (40%) are located in the Retail Distribution Places category. There are 44 (19%) in the category of Amenity, Amusement & Show Places, 27 (11%) in Various Land Use (Roads, Railroads, Electricity Supply Places, and Non-Medical Care Places), 20 (9%) in Offices, 13 (6%) in Social Meeting Places, and 12 (5%) in Residences. The remaining 26 (10%) are in other land use categories such as Education Places, Commercial Sites, and Places of Worship, amongst others (see Figure 31).

³⁴ Society of London Theatre, SOLT. (2022). Securing the Future of London's Theatres: Call for Action. Retrieved online [here](#). Accessed 31.03.22

³⁵ Transport for London (TfL). (n.d.). Accessible travel in London: Your guide to help and support available to you. Retrieved online [here](#). Accessed 31.03.22

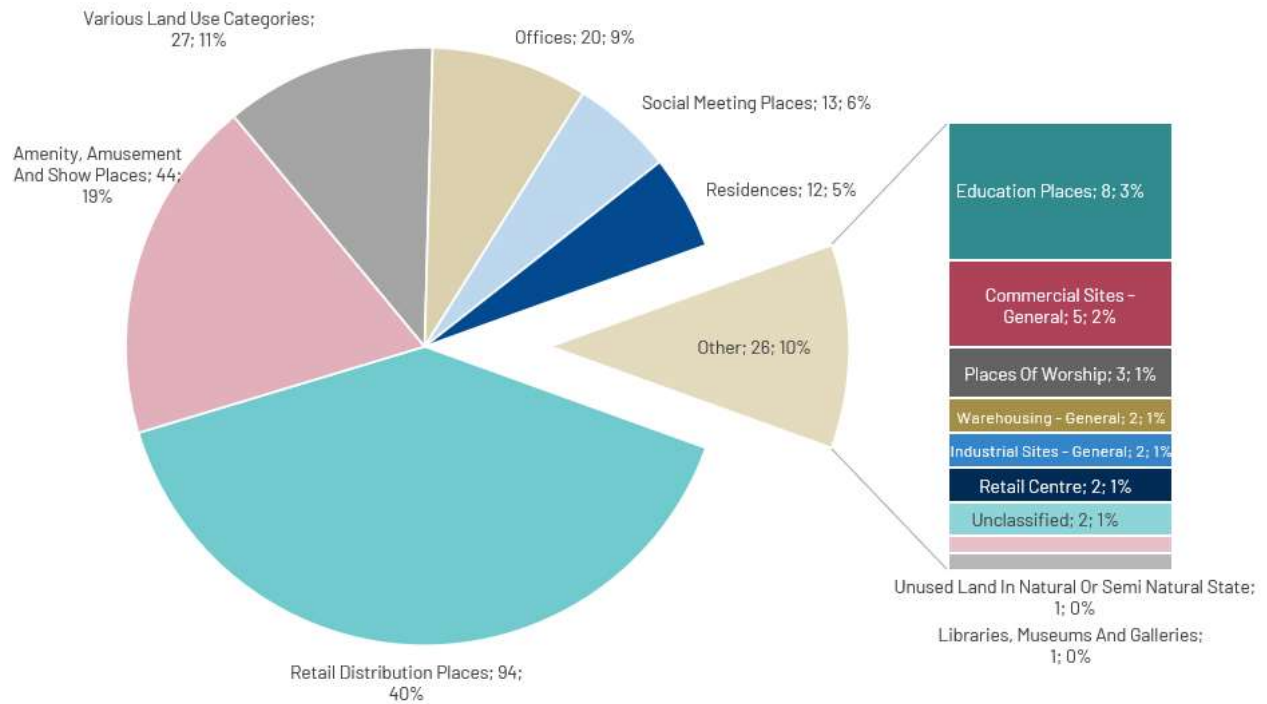
³⁶ Transport for London (TfL). (n.d.). Plan a Journey. Retrieved online [here](#). Accessed 31.03.22

³⁷ Mayor of London. (n.d.). London Infrastructure Plan 2050. Retrieved online [here](#). Accessed 31.03.22

³⁸ Refer to Office of the Deputy Prime Minister (2006). *National Land Use Database: Land Use and Land Cover Classification*. Version 4.4. Retrieved online [here](#). Accessed 20.03.22

³⁹ Refer to Greater London Authority Maps. Retrieved online [here](#). Accessed 20.03.22

Figure 31. Theatre Venues per category of Land Use in London



Source: Theatre Asset Mapping for the UK, Sound Diplomacy

The above shows that theatre venues in London have a presence in areas that are not specifically compliant with the holistic needs of theatre venues, such as the category of Amenity, Amusement, and Show Places (on which only 19% of venues are built). This may be due to theatres not being engaged in plans for wider area public realm and transport schemes early enough (SOLT, 2022).⁴⁰

⁴⁰ Society of London Theatre, SOLT. (2022). Securing the Future of London's Theatres: Call for Action. Retrieved online [here](#). Accessed 31.03.22

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Appendix 1. Detailed Methodology and Sources

1.1 Economic Impact Assessment

The economic impact analysis is performed through macroeconomic research, which is based mainly on official secondary sources and statistics, and complemented by primary research conducted by Sound Diplomacy. It provides a reliable measure of the economic importance of the theatre ecosystem in the economy of the UK and its individual countries on three different scales: direct, indirect, and induced impact. The results contained in this report correspond to data from 2019 and previous years.

The reasoning for this timeframe is two-fold: On the one hand, 2019 represents data from a year of regular operation of theatres before the start of the pandemic, on the other hand one of the crucial data sources, ONS’s Annual Business Survey, is published with a three year delay with the most recent publication providing information for 2019.⁴¹

Table 13. Economic Impact Definitions

ECONOMIC IMPACT	DEFINITION
Direct Economic Impact	The direct impact is the economic activity directly connected to the theatre ecosystem, such as actors, directors, stage-set designers, agents, and venues.
Indirect Economic Impact	The indirect impact is the supportive activity of the suppliers of the theatre ecosystem and is related to local businesses that provide goods and services, such as advertising, financial services, and legal affairs.
Induced Economic Impact	Induced impact is created when the workers of the direct and indirect theatre ecosystem spend their wages on food, transportation, entertainment, etc. in their daily life.

⁴¹ The release date of the most recent Annual Business Survey is the 24th June, 2021.

The variables evaluated as part of the Economic Impact Assessment are: theatre ecosystem turnover, workforce, gross value added (GVA) and workers' compensation or wages.

Table 14. Variables Definitions

VARIABLE	DEFINITION
The theatre ecosystem turnover	All produced goods and services of the theatre ecosystem in the UK. For example, ticket sales, support services, etc.
Gross value added (GVA)	The theatre ecosystem turnover minus theatre ecosystem intermediate consumption (the costs of all inputs – for example, equipment rented by a stage producer).
Theatre ecosystem workers	Theatre ecosystem workers include employees and self-employed/freelancers working in the UK Theatre ecosystem. An employee is anyone working who is aged 16 or above that the contributor directly pays from its payroll, in return for carrying out a full-time or part-time job or being on a training scheme.

1.1.1 Classifications

In order to define and gauge the theatrical ecosystem according to the official data available, we used the following standard classification:

The UK Standard Industrial Classification of Economic Activities (UK SIC) is a classification standard used in the UK to provide the framework for collecting and presenting a large range of statistical data according to economic activity, such as the economic turnover of businesses per five-digit code as well as workforce data in the same classification. It was used to calculate the economic activity in the UK that is attainable to the theatre ecosystem definition.

The SIC Codes used to describe the theatre ecosystem are in Table 15 below⁴².

Table 15. SIC Codes in Scope

DESCRIPTION	SIC CODE
<p>Theatre Production: This segment includes activities of groups or companies as well as activities from individual artists concerning live theatrical presentations and other stage productions. It further includes directors, producers, set designers and agents among others, as well as activities of producers or entrepreneurs of arts live events, with or without facilities.</p>	<p>74.90 - Other professional, scientific and technical activities 90.01 - Performing arts 90.02 - Support activities to performing arts</p>
<p>Theatre Venues: This segment includes the operation of concert and theatre halls and other arts facilities</p>	<p>90.04 - Operation of arts facilities</p>

1.1.2 Data Sources

The following main data sources have been used to conduct the economic impact analysis in the UK.

Table 16. Data Sources

SOURCE	DETAILS
<p>Annual Business Survey (ONS)</p>	<p>This source provides data on the number of enterprises, total turnover, approximate GVA and total employment of industries based on the UK SIC classification.</p>
<p>UK Business Counts - local units by industry and employment size band (NOMIS)</p>	<p>This data source provides a detailed breakdown of the number of establishments or assets by employment size bands used to calculate the required amount of employees, per establishment, per industry.</p>

⁴² SIC Code 90.03 - Artistic Creation is not included in the analysis. It encompasses activities of sculptors, painters, cartoonists, independent journalists and restorers of work of art and is therefore not included in the analysis of the theatre ecosystem.

<p>UK Input-Output Analytical Tables, 2017 (IOATs) (ONS)</p>	<p>The IOATs describe how products (and primary input) are used to produce further products and satisfy final use. They can be used to calculate the Type I and Type II multipliers.</p> <p>Type I multipliers account for the direct and indirect impacts based on the economic dynamics of the theatre ecosystem supply chain. Type II multipliers account for both indirect and induced impacts based on the purchases made by workers of the theatre ecosystem.</p>
<p>GB and UK Level Employment (NOMIS)</p>	<p>This source provides employment data with details on full-time/part-time employment and a public/private sector split per industry.</p>
<p>Sound Diplomacy primary data</p>	<p>This data, collected through the mapping of the theatre ecosystem, allowed us to identify the assets and agents of the theatre ecosystem, which complements the information coming from the other official sources.</p>
<p>DCMS Sectors Economic Estimates 2019: Workforce</p>	<p>Economic estimates of the number of workers in the DCMS sectors for 2019. This source provides information on the proportion of self-employed or freelancers in the cultural and creative sector for 2019 and allows estimating such a proportion for the theatre ecosystem.</p>

1.1.3 Methodological process and scope

The economic impact analysis is carried out through macroeconomic research, based on statistics and official secondary sources, and is complemented by primary research carried out by Sound Diplomacy in the mapping.

The methodological basis of the research is the Input-Output Model (I-O). According to Leontief (1936), the I-O Model explains how production is determined by the total amount of products and services that all consumers buy. In this sense, the sectors need supplies from other industries to generate a chain reaction or a multiplier throughout the economy. Thus, intersectoral impacts are estimated, and the respective sales and purchases are distributed.

The process used to calculate the direct, indirect, and induced impacts is detailed below.

1.1.3.1 Direct impact

1. To avoid problems of misclassifications and omissions of businesses that belong to the Theatre Ecosystem, we used the mapping data to identify and quantify the number of assets and or businesses sorted to the correspondent theatre sector SIC (see Table 15)
2. Using the ONS data, it is possible to calculate the average number of employees per establishment and the average turnover per employee for each selected SIC Code. For subnational analysis purposes, we used data in the specific countries that make up this study to account for regional differences, e.g. England to Scotland. Based on this information, we calculate direct workforce.
3. Combining the results from step 3 and the estimated number of assets from step one, we can calculate the direct turnover and workforce. The number of freelancers was calculated using the percentage between employed persons and freelancers in the “music, performing and visual arts” sector according to DCMS data.
4. The Direct GVA and Direct Compensation are based on information from the Input-Output Tables by the ONS, which allow us to calculate the fractions of the direct turnover that make up the GVA and Compensation.

1.1.3.1 Indirect and Induced Impacts

The indirect and induced impact on turnover, gross value added, and employment is calculated based on the value of the above referenced variables (direct GVA, direct compensation, and direct workers), and multiplied by the coefficients of the table of multipliers of the indirect and induced impacts obtained through the official Input Output matrix.

1.2. COVID-19 Impact Assessment

The overall impact of COVID-19 in the theatre ecosystem is understood as the generation or loss of revenue and workforce during 2020, when the national and local governments in the UK implemented multiple measures to contain the virus.

The impact on revenue is calculated with the following formula:

$$COVID19 \text{ impact on Revenue} = \sum_{i=Theatre \text{ asset } 1}^{N=Theatre \text{ asset } N} (Revenue_{i+1} - Revenue_i) / Revenue_i$$

The impact on workforce is calculated with the following formula:

$$COVID19 \text{ impact on Workforce} = \sum_{i=Theatre \text{ asset } 1}^N Workers_i * \sum_{i=Type \text{ of impact } k}^K Type \text{ of impact}_k$$

Where:

- (i) = theatre assets in the UK economy
- *Type of impact (k)*= percentage of staff made redundant, or left on own accord, ended their contract, was put on furlough, had a permanent decrease in working hours, had a permanent increase in working hours, or was newly employed, in contrast with the number of workers during 2019

1.2.1 Data Sources

The analysis was made using two main sources of information. The first, refers to the economic impact assessment produced by using the previously mentioned methodology. The second, is the data provided by Purple Seven *Summary of daily sales, revenue, and booker count by region*.⁴³ The latter informed the total revenue from ticket sales in the years 2019, 2020, and 2021.

1.3. Audience Spend Impact

Generally, when an individual goes to the theatre, that visit generates **positive economic impacts** on the local economy by increasing the income of economic stakeholders in the area. The impact refers to the economic effect that attendees to theatre performances in the UK are generating on the local economy, by **consuming products and services** from local businesses such as restaurants, transport, entertainment, accommodation, and retail, in addition to their spending on the theatre tickets and consumption of drinks and beverages inside the theatre venues.

The overall consumption of theatre attendees in a given year is calculated using the following formula:

$$Total \text{ Consumer Spend} = \sum_{i=\pounds 0}^{N=above \pounds 100} Average \text{ spend per category } k_i * Total \text{ Theatre Attendees}$$

⁴³ Ibidem.

Where:

- (j) = spend range: (£0, between £1 and £10, between £11 and £20, between £21 and £30, between £31 and £40, between £41 and £50, between £51 and £60, between £61 and £70, between £71 and £80, between £81 and £90, between £91 and £100, above £100).
- *Expenditure Category (k)* = Theatre tickets, Food & Drinks (inside Theatre), Food & Drinks (outside Theatre), Transport, Accommodation, Retail, and Entertainment
- *Average spend per category* = daily average spend per attendee in the Expenditure category (k).
- *Total Theatre attendees* = total number of theatre attendees in a given year⁴⁴

Theatre attendees are categorised according to 2 criteria: the country/region of their residence, and the country/region where they went to a theatre play. Based on the combination of the criteria, they are segmented:

- *Local*: UK resident who lives in the same country/region where the theatre venue they visited is located
- *Non-local (UK)*: UK resident who lives in a different UK country/region than the one where the theatre venue they visited is located
- *Non-local (International)*: Non-resident of the UK who visited a UK theatre venue

1.3.1 Data Sources

The analysis was produced using public secondary data, data provided by SOLT, data provided by Purple Seven, and ONS and NISRA tourism data:

- *UK Performing Arts Audience Survey*⁴⁵
- *Summary of daily sales, revenue, and booker count by region*⁴⁶
- *SOLT Box Office Reports*⁴⁷
- *International Passenger Survey, IPS (2019): Inbound Accommodation Research*⁴⁸
- *Great Britain Tourism Survey, GBTS (2019): GB tourists annual report*⁴⁹
- *Northern Ireland Tourism (2019): External overnight trips to Northern Ireland*⁵⁰

⁴⁴ The calculation was made for 2019, 2020, and 2021, however, the base analysis is done using 2019 (pre-COVID-19).

⁴⁵ Purple Seven. (2022, April). UK Performing Arts Audience Survey: Results. March 7 - April 4, 2022.

⁴⁶ Purple Seven (2022, February)

⁴⁷ SOLT (2020). Ticket Sales and Revenue: 2019

⁴⁸ VisitBritain/VisitEngland analysis from data from the ONS.

⁴⁹ VisitEngland, VisitScotland, and CymruWales.

⁵⁰ Northern Ireland Statistics and Research Agency, NISRA.

The *UK Performing Arts Audience Survey* consists of a randomised digital survey administered by Purple Seven to UK theatre consumers (including UK residents and non-residents). The survey was implemented for a period of 4 weeks (March 7 until April 4, 2022), and provided a statistically significant sample of 879 theatre attendees. The gathered results included:

- The individual average spend per country/region, in GBP (£), for a 1-time visit to a theatre performance, in the following consumption categories:
 - Food and beverages inside the theatre venue (e.g. theatre bars and restaurants)
 - Food and beverages outside the theatre venue (e.g. other restaurants, bars)
 - Entertainment (e.g. museums, galleries, attractions)
 - Transport to the theatre event (e.g. car petrol, bus tickets, train tickets, taxis, etc)
 - Retail (e.g. shopping)
- The composition of theatre-goers in the UK according to their place of residence (country/region) and place of attendance at plays (country/region).

The *Summary of daily sales, revenue, and booker count by region* informed the following:

- Average ticket price per country/region
- The total number of theatre attendees in the years 2019, 2020, and 2021
- The composition of attendees according to their residence: region or country within the UK or residents outside the UK.

The *SOLT Box Office Reports - 2019* informed the following:

- Average ticket price for London
- The total number of theatre attendees in London during 2019

The *International Passenger Survey, IPS (2019): Inbound Accommodation Research* informed the following for outbound (international) visitors to the UK in 2019:

- Type of accommodation (e.g. free guest, hotel, other)
- Average spending per visitor and type of accommodation
- Average nights per visitor per type of accommodation
- Based on the above, Sound Diplomacy inferred the average spending fee per visitor in accommodation (for international visitors)

The *Great Britain Tourism Survey, GBTS (2019): GB tourists annual report* informed the following for Great Britain resident travels within the Great Britain:

- Type of accommodation (e.g. free guest, hotel, other)
- Average spending per visitor and type of accommodation

- Average nights per visitor per type of accommodation
- Based on the above, Sound Diplomacy inferred the average spending fee per visitor in accommodation (for UK visitors)

The *Northern Ireland Tourism (2019): External overnight trips to Northern Ireland* informed the following for UK residents travels to Northern Ireland:

- Type of accommodation (e.g. free guest, hotel, other)
- Average spending per visitor
- Based on the above, Sound Diplomacy inferred the average spending fee per visitor in accommodation

1.4 Geospatial Analysis

Between January and February 2022, Sound Diplomacy compiled a database of all open theatre venues and theatre production companies in the UK. All assets in the database that have coordinates⁵¹ are included and mapped in this [Interactive Map](#) developed specifically for the Society of London Theatre and UK Theatre.⁵² On this interactive tool, users can see a heat map of assets (by district, within the UK) and click on individual assets to view more information. Each asset category is colour-coded and can be singled out or aggregated for a wider view.

The interactive map can be filtered by Category, Country & Region, Major cities (London, Edinburgh, Liverpool & Manchester), London Boroughs, and London Land Use, by clicking on the relevant filter in the menu on the right. To filter Countries & Regions, Boroughs, or Land Use categories that do not appear on that menu (grouped as "other"), click on "search in 13 categories"⁵³ and type the name that you want to filter. It is also possible to filter several categories simultaneously.

The interactive map contains three types of heat maps and each of them can be activated in the menu:

- **Cluster Heat Map:** This is a visual aid that shows the clusters or groups of assets across the map.

⁵¹ Out of 3,135 theatre assets, 3,019 had geographical coordinates.

⁵² If you have issues opening the Map in Carto, eliminate all the cookies from your browsers. Alternatively, try copying the link and opening it in a different tab or browser.

⁵³ The number of categories will vary depending on the filters you have applied to the map.

- **No. of Assets Heat Map:** This shows the concentration of assets by country/region. The darker the blue, the higher the concentration of assets in the country/region.
- **Assets Density Heat Map:** This shows the concentration of assets per square metre of each country/region. This allows us to compare the density in the country/region regardless of its size. The darker the red, the higher the concentration of assets in the country/region based on its size.

Specifically for **London**, the interactive map contains four additional types of maps:

- **No. of Assets Heat Map London:** This shows the concentration of assets by borough in London, the darker the blue, the higher the concentration of assets in the borough.
- **Assets Density Heat Map London:** This shows the concentration of assets per square metre of each borough in London. This allows us to compare the density in the borough regardless of its size. The darker the red, the higher the concentration of assets in the borough, based on its size.
- **London Land Use:** This shows the segmentation of the area within the boroughs according to the local government designation of land use.
- **Public Transport Stops per Asset Map:** Using isochrones,⁵⁴ this map identifies the number of public transport (bus, rail, metro, underground, etc) stops that are located within a five-minute walk from the asset.

1.4.1 Data Sources

The database was produced using SOLT and UKT private databases of their members, as well as publicly available sources on the web. This included Google Maps, Facebook, Yell.com, LondonTheatre.co.uk, Theatres Trust, and ArthurLloyd.co.uk. The data was cross-referenced with the survey results.

⁵⁴ Isochrones: the area accessible from a point within a certain time threshold.

Appendix 2. Land Use Classification in London

The Land Use Classification in London was defined based on the Office of the Deputy Prime Minister (2006)⁵⁵ and on Greater London's Authority (GLA) official map of categories.⁵⁶

Table 17. Land Use Classifications in London

LAND USE CLASSIFICATION	DESCRIPTION
Retail Distribution Places	Includes premises for the retail sale and display of goods to visiting members of the public such as shops, boutiques, department stores, retail warehouses and markets, supermarkets. Also includes shops where the primary use is the sale of food and drink for consumption off the premises such as sandwich bars, hot-food take-aways, amongst others.
Amenity, amusement and show places	Includes places for amusement and entertainment such as cinemas, theatres, concert halls and arenas, broadcast studios, dance halls, bingo halls, night-clubs, gaming and gambling clubs and premises. In addition, it includes amusement arcades, fun fairs, circuses, visitor centres and interpretation centres.
Libraries, Museums & Galleries	Includes buildings, places or institutions devoted to the acquisition, conservation, study, exhibition and educational interpretation of objects with scientific, historical or artistic value such as libraries, museums & galleries.
Offices	Includes offices of central and local government, company offices, other general offices, offices for research and development and testing of products or processes, offices hosting scientific facilities and laboratories. It includes business meeting places and centres, art studios, music recording and film studios.
Social Meeting Places	Includes community meeting places such as community centre, public hall, church hall, youth club.
Residences	Includes dwellings, hotels, boarding & guest houses, residential institutions.

⁵⁵ Office of the Deputy Prime Minister (2006). National Land Use Database: Land Use and Land Cover Classification. Version 4.4. Retrieved online [here](#). Accessed 20.03.22

⁵⁶ Refer to Greater London Authority Maps. Retrieved online [here](#). Accessed 20.03.22

Education Places	Includes educational establishments such as schools, colleges, higher and further education centres, universities and other specialised learning places.
Commercial Sites - General	Includes wholesale distribution places for bulk dealing of raw materials, industrial supplies and machinery and livestock, or wholesale distribution places for food and drink, petroleum and other non-food products.
Places of Worship	Includes churches, mosques and synagogues.
Warehousing - General	Includes storage places and facilities for onward distribution (not sale) of equipment, bulk materials and goods such as warehouses, repositories, open storage land.
Industrial Sites - General	Includes spaces for manufacturing like factories and refineries.
Unused Land In Natural or Semi Natural State	Includes land or water bodies for which no specific primary use can be determined
Various Land Use Categories	Includes other categories such as agriculture & fisheries, forestry, defence, amongst others
Unclassified	Spaces with no classification

Appendix 3. UK Theatre Organisations Questionnaire (Survey)

Welcome page

Sound Diplomacy has been engaged by the Society of London Theatre and UK Theatre to deliver an Economic Impact Assessment, and Consumer Spend Assessment of the UK Theatre Sector.

This work will help us make the case for theatre at all levels of national and local government in the most powerful, impactful way. It will be invaluable for future conversations and advocacy with local authorities and the UK Government when demonstrating the value of the sector to the UK economy and justifying decisions and interventions to enhance and protect this vital sector.

This survey should be completed by theatres across the UK, ideally by a representative that has access to financial and planning details of the theatre that he/she/they are responding on behalf of.

The survey will take approximately 20 minutes to finish. All answers will remain private and confidential. Non aggregated data will be shared with Sound Diplomacy and The Society of London Theatre and UK Theatre only. The deadline for completing the survey is April 11th, 2022.

It is possible to save your answers in case you do not have enough time to answer all the questions during one session. To save your answers and come back later to the questionnaire, please click 'Save and continue' in the upper right of your screen.

Thank you in advance for your time.

Introduction

Information submitted will be kept confidential & used for research purposes only. Please note that the information collected will be analysed both anonymously and in an aggregated manner and no individual details will be shared with other parties. Sharing this information will allow us to make a more accurate assessment of the impact of COVID-19 overall on the theatre sector in the UK.

If you own or represent more than one theatre (venue or production company) operating in the UK, please take the survey for one of them and refresh the page once you reach the final "Thank you" page to complete it for a different one. Alternatively, you can reach out to us at jett@sounddiplomacy.com to find a solution that works for you.

1.A. Name of organisation you are responding on behalf of?*

QType: Text open-field _____

1.B. How would you mainly classify the organisation you are replying on behalf of:*

QType: single-choice

- A venue/venue owner
- Producer/production company/non-building based organisation

1.B.1. Which of the following best describes your organisation:*

QType: single-choice

Logic: Visible if Q1.B = "A venue/venue owner"

- Commercial Venue (Independent)
- Commercial Venue (Chain or Group)
- Local Authority Owned Venue & ACE NPO
- Local Authority Owned Venue
- Independent Not-for-Profit & ACE NPO Venue
- Independent Not-for-Profit Venue

1.B.1.1. Which of the below options best describes the type of the venue you are replying on behalf of:

QType: single-choice

Logic: Visible if Q1.B = "A venue/venue owner"

- Producing theatre venue (eg. most of the shows on your stage are produced in-house, or in co-productions with other venues)
- Receiving theatre venue (eg. most of the shows on your stage are from external theatre companies or groups who hire your space)

1.B.2. Which of the following best describes your organisation:*

QType: single-choice

Logic: Visible if Q1.B = "Producer/production company/non-building based organisation"

- Commercial Producer/Production company (Independent)

- Commercial Producer/Production company (subsidiary or attached to a venue owning group)
- Local Authority Funded & ACE NPO Producer/Production company
- Local Authority Funded Producer/Production company
- Independent Not-for-Profit & ACE NPO Producer/Production company
- Independent Not-for-Profit Producer/Production company

1.C. Specify the location of the organisation that you are replying on behalf of:*

Please provide the Post code.

Text open-field Q _____

1.D. Specify the primary region of activity of the organisation you represent:

- North East
- North West
- Yorkshire and the Humber
- East Midlands
- West Midlands
- East of England
- London
- South East
- South West
- Wales
- Scotland
- Northern Ireland
- England wide (eg. venue group or touring)
- UK wide (eg. venue group or touring)
- International (eg. international touring or licensing is your primary business activity)

Economic Details

Information submitted will be kept confidential & used for research purposes only. Please note that the information collected will be analysed both anonymously and in an aggregated manner and no individual details will be shared with other parties. Sharing this information will allow us to make a more accurate assessment of the impact of COVID-19 overall on the theatre sector in the UK.

2.A.1 Please specify the following information per calendar year. Please provide the overall details of your venue

Logic: Visible if Q1.B = "A venue/venue owner"

Qtype: Text box grid (numeric)

Column

- 2019
- 2020
- 2021

Rows

- Total number of tickets sold
- Annual turnover (gross)

2.A.2 Please specify the following information per calendar year. Please provide the overall details of your organisation for all combined information across all productions that you/your organisation is the lead producer & production company)

Logic: Visible if Q1.B = "Producer/production company/non-building based organisation" OR if Q1.B.1 = "Producing theatre venue (eg. most of the shows on your stage are produced in-house, or in co-productions with other venues)"

Qtype: Text box grid (numeric)

Column

- 2019
- 2020
- 2021

Rows

- Annual capitalisation / recapitalisation on productions
- Annual turnover (gross)

2.D. On average, compared to 2019, how much of these years' total workforce was...:* Please type the percentage and specify per calendar year. In case there were no effects in some categories, please type 0%.

Qtype: Textbox grid, percentage

Columns:

- 2020
- 2021

Rows:

- Made redundant
- Left on own accord

- End of contract
- On furlough (at least 1 month)
- Permanent/contractual decrease in working hours
- Permanent/contractual increase in working hours
- Newly employed

2.E. Please specify in percentage (%), what were the sources of revenue:* *Please specify per calendar year. Ensure that per year, it adds up to 100%. In case you have no income from a specific source, please type 0%.*

Qtype: Textbox grid, percent

Columns:

- 2019
- 2020
- 2021

Rows:

- Ticket revenue
- Intellectual Property/Licensing (e.g. the sale or licensing of production rights)
- Fully managed tours of UK Productions
- Co-productions of UK Productions
- General management (of a product not owned by your organisation) and/or Other consultancy
- Selling additional goods and services (e.g. the sale of food and drinks, merchandise, etc.)
- Other

2.F. Please specify how much of your revenue in the following sources comes from sales outside the UK:* *Please specify the percentage, per calendar year.*

For example, if your total annual revenue in 2019 for 'International licensing' (both national and international) was equivalent to £100,000 and from that, £50,000 came from international licensing, please specify 50% in the row 'International licensing of UK Productions'.

Please specify the name of your key international markets in the 'Comments' box.

Qtype: Textbox grid, percent

Columns:

- 2019
- 2020

- 2021

Rows:

- International licensing of UK Productions
- Fully managed tours of UK Productions
- International co-productions of UK Productions
- General management (of a product not owned by your organisation) and/or Other consultancy

Comments: _____

Final Remarks

Information submitted will be kept confidential & used for research purposes only. Please note that the information collected will be analysed both anonymously and in an aggregated manner and no individual details will be shared with other parties. Sharing this information will allow us to make a more accurate assessment of the impact of COVID-19 overall on the theatre sector in the UK.

3.A. Is there anything we didn't ask you, but you would like to share with us?

Qtype: Textbox, limited to 400 characters

End Page - Thank you

On behalf of everyone involved in this study, thank you very much for your valuable answers. If you would like to respond to this questionnaire on behalf of more than one theatre (venue or production company) operating in the UK, please click the following [link](#) to complete it for a different one. Alternatively, you can reach out to us at jett@sounddiplomacy.com to find a solution that works for you.