LONDON THEATRE REPORT

BY ALISTAIR SMITH

COMMISSIONED BY

THE SOCIETY OF LONDON THEATRE

AND THE NATIONAL THEATRE

LONDON THEATRE REPORT

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0,0 INTRODUC-TION

"THERE WAS NO LIST OF ALL LONDON THEATRES. IT SIMPLY DID NOT EXIST"

London theatre is widely held to be enjoying a golden period. Both artistically and at the box office, it is booming.

Shows like War Horse, Matilda and Billy Elliot are popular hits both at home and abroad; new channels of distribution are being found for theatre via cinema screenings and online broadcasts; inventive companies like Punchdrunk are pushing the boundaries of what theatre is, while also making work that appeals to large audiences; the West End has reported its tenth consecutive year of record box office takings; work originating in our not-for-profit theatres like Shakespeare's Globe is the toast of New York; audiences in London have an unmatched variety of theatre and theatres on offer - from ambitious and experimental new writing in tiny backrooms above pubs to large scale musicals in the commercial West End and superb classical revivals in subsidised venues.

Meanwhile, British theatre talent leaves its mark across the world. Performers like Judi Dench, Daniel Day Lewis and Helen Mirren, who started their careers in theatre, have gone on to become Oscar winners and major international film stars. Directors like Danny Boyle, whose career began with the Joint Stock Theatre Company, recently created the awe-inspiring Opening Ceremony for the London Olympics. Sam Mendes has journeyed from Covent Garden's Donmar Warehouse to James Bond. Both continue to work in London theatre. And, beyond these high profile names, there is a wealth of creative and technical talent, whose expertise is in huge demand across the globe.

And yet, this report has been borne out of frustration. Working in and around theatre there are a lot of things that we instinctively know, that we take for granted.

We may be world-beaters at making theatre in the UK, and in London specifically, but when it comes to collating data to prove the health and vibrancy of the sector, we are lagging some way behind the competition.

I recently gave a talk to a group of young entrepreneurs who were studying on a cross-sector course covering the creative industries. From one week to the next they were looking into areas as diverse film, music, publishing, online entertainment and, yes, theatre. They were universally shocked (even appalled) at the lack of information available about our industry, when compared to these other sectors.

An example. When we started collating this report, there was no available, recognised list of all professional theatres in London. It simply did not exist. That meant in turn that no overall attendance or box office figures existed. Reliable employment estimates for theatre? Forget it.

Historically, the reason for this is the fragmentation of the sector. Despite the fact that artists and creatives move freely from fringe to subsidised theatres to the commercial West End, when it has come to any form of report on London theatre previously, these have tended to focus on one area of the industry. So, while the Society of London Theatre publishes an annual guide to its members' box office and attendances, this only covers a portion of theatres in the capital – certainly a large portion (indeed this report reveals just how large a portion it is), but by no means all of it. Likewise, when Arts Council England talks about theatre (in London or elsewhere), it is talking about the theatre it funds, not all theatre, so you are again presented with a partial view.

In this report, we want to present a complete picture of the size and shape of London theatre, or certainly a picture that is more complete than anything that has gone before. Undoubtedly, it can be improved upon and expanded. But we hope to do this in future years when the results will also provide a baseline against which developments in the sector can be measured.

The report does not set out to measure quality, diversity of repertoire or innovation. It is a commonly held view that the current 'golden period' owes much to the breadth and diversity of working models in both the commercial and not-for-profit sectors and the interplay between them. The report also does not examine who makes up the audiences at London theatres or where they have come from.

However we believe this to be the most comprehensive report that has ever been published on the size, number and location of theatres in London. It is also the first to make a serious attempt to estimate the overall box office and attendance, as well employment levels. It includes 50-seat backroom theatres above pubs, local authority run theatres in outer London, major national institutions like the National Theatre and large commercial receiving houses like the Lyceum or the London Palladium.

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KEY STATISTICS

LONDON HAS 241 PROFESSIONAL THEATRES WITH A SEATING CAPACITY OF MORE THAN 110,000.

IN 2012/13, MORE THAN 22 MILLION PEOPLE ATTENDED LONDON THEATRE PERFORMANCES. WE BELIEVE THIS MAKES LONDON THE BIGGEST THEATRE CITY IN THE WORLD.

IN 2012/13, LONDON THEATRE TOOK £618.5M AT THE BOX OFFICE, MORE THAN WAS TAKEN BY LONDON'S CINEMAS.

LONDON THEATRE IS GROWING – BOTH ADMISSIONS AND BOX OFFICE WERE UP IN 2012/13 ON 2011/12.

THEATRES RANGE IN SIZE FROM THE 30-SEAT LORD STANLEY PUB TO THE 3,600-SEAT HAMMERSMITH APOLLO.

WESTMINSTER ALONE ACCOUNTS FOR MORE THAN A THIRD OF LONDON'S THEATRE CAPACITY.

AT ANY ONE TIME, LONDON'S THEATRES ENGAGE MORE THAN 3,000 PERFORMERS. ON TOP OF THIS, THERE ARE MORE THAN 6,500 FULL TIME NON-PERFORMING STAFF ENGAGED AT ANY ONE TIME.

THE LARGEST THEATRES ARE BY FAR THE BIGGEST EMPLOYERS OF PERFORMERS.

ONLY 1 IN 5 ACTORS ON THE FRINGE ARE BEING PAID NATIONAL MINIMUM WAGE OR ABOVE.

IN 2012/13, THE AVERAGE TICKET PRICE PAID IN LONDON WAS £27.76. THIS WAS DOWN ON 2011/12.

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HOW?

When deciding that we wanted to report on professional London theatre, we first had to answer a number of questions.

The main three were: What is London? What is theatre? And what is professional theatre?

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WHAT IS LONDON?

We took as our definition of London, the administrative area of Greater London, consisting of the city of London and the 32 London boroughs. We take the statutory definition of Inner London and Outer London and class the City of London as an Inner London borough.

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“THIS IS A DEEPLY THORNY ISSUE AND WAS A SUBJECT OF SOME DEBATE AMONG THE PANEL”

WHAT IS THEATRE?

This is a thorny issue and was a subject of some debate among the panel. We have taken theatre in a reasonably broad sense, including dance, opera and musical theatre alongside what many might traditionally regard as ‘straight’ theatre or plays. We have also made a distinction between theatre and a theatre. So, while we might class the Royal Festival Hall as a theatre because it plays host to some of the activities that we class as theatre, not everything that goes on within the Royal Festival Hall could (or should) be regarded as theatre. Music concerts and comedy, for example, have not been classed as theatre. Where a venue regularly (although perhaps only occasionally) hosts theatre, we have classed it as a theatre. However, when we have come to include data about audiences or box office, we have only included figures from full-time theatre venues so that there is no chance of over-estimating London theatre attendance or box office.

Meanwhile, we have classed a theatre as being one theatre auditorium, so the National Theatre counts as three theatres (the Olivier, Cottesloe and Lyttelton).

It should be said that there were various places where we could have drawn the lines around our definition, but the list of theatres included in this report reflected to the panel definition we were all happy with. Fundamentally – and on a basic level – we felt that theatre featured people on stage performing to an audience and (generally) pretending (acting) to be someone they are not. Hence why opera and dance are included, but music concerts and stand-up comedy are not.

By now, I suspect you're wondering why this is all so building-based. In truth, the reasons are mainly practical. When monitoring activity within a given geographical area (London), the easiest way of doing this is to look at the permanent structures within that area hosting the activity. This, it should be noted, is not exhaustive, but it does cover the vast majority of theatre activity in London and, where possible, we have attempted to include available data from non-building based activity in the capital.

0,5 WHAT IS 'PROFESSIONAL' THEATRE?

Another thorny issue. One might be tempted to say that a professional theatre is somewhere that employs performers. However, by doing this one would rule out a large chunk of the fringe sector, which often doesn't 'employ' anyone in any real legal sense. However, fringe theatre is widely regarded as (and considers itself to be) professional and makes up a significant part of the London theatre ecology, so it seemed perverse to exclude it. Amateur theatre, it seemed to us, was not part of this ecology (nor is it seeking to be), so was not deemed to be within the report's remit.

Our definition of a professional theatre, then, was somewhere that self-defined itself as professional and was reviewed as such. This includes fringe venues like the Finborough or the Brockley Jack, but excluded drama school productions and the amateur sector. Again, the lines could have been drawn differently, but this felt the fairest reflection of the sector to our panel.

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"WE KNEW LONDON THEATRE WAS BIG. THIS REPORT QUANTIFIES HOW BIG. WE KNEW LOTS OF PEOPLE WENT TO THE THEATRE IN LONDON EVERY YEAR. THIS REPORT TELLS US HOW MANY."

WHAT DOES THIS REPORT TELL US?

This report reveals many facets of London theatre that we could only guess at before and I would encourage people to draw their own conclusions from the raw data we present over the coming pages.

We knew London theatre was big. This report quantifies how big: 241 theatres with more than 110,000 seats. We knew lots of people went to the theatre in London every year, this report tells us how many (more than 22 million in 2012/13) and where those audiences are focussed. We knew London theatre was a big employer, this report gives us a reliable estimate of how many people are employed at any one time. We knew London theatre took millions at the box office. This report tells us how many millions: £600 million.

But more than that, it also shows how those millions (of people and of pounds) are broken down across the various sub-sectors (commercial, not-for-profit, subsidised and fringe) that make up the industry and its multi-faceted ecology. It also attempts to show – using the data – how those sub-sectors combine to create the overall London theatre ecology.

A few notes of caution, though. While this report paints an undoubtedly (and fairly) rosy picture of London theatre that should be celebrated, it would be foolish to ignore the fact that there are a number of threats to its future prosperity.

Firstly, this report attempts no measure of profits. It would be dangerous to assume that because box office has increased between 2011/12 and 2012/13 that profits have also. Indeed the average ticket price paid appears to be falling.

The commercial and not-for-profit sectors – as this report reveals – are intertwined in a way un-replicated anywhere else in the world. This is London theatre's greatest strength. But, with funding levels falling for the subsidised companies in the face of tightening public purses, it would be rather optimistic to think that this will not have some effect on the overall ecology of theatre in the capital.

Meanwhile, many of the theatres spoken of in this report are historic, often listed buildings. These buildings – as the event at the Apollo Theatre on December 19, 2013 reminded everyone – pose their own very specific challenges. These challenges are only likely to become even greater as time passes.

There is also a very clear imbalance between Inner and Outer London in levels of provision. Theatre activity is heavily focussed on the centre of the capital. While Inner London theatres of course serve the whole of Greater London (and beyond), some areas of the capital have very little local theatre offering.

The employment chapter of this report most certainly

■ ■ ■

"MOST FRINGE ROLES ARE NOT BEING PAID MINIMUM WAGE"

throws up the spectre of low pay or no pay work (if one can call it that) within the London fringe sector. The vast majority of roles within this sector are not being paid national minimum wage, revealing that as well as subsidy from the government, at the bottom end, the London theatre sector as a whole is being subsidised by people giving up their time for no or little pay. Whether this is a desirable state of affairs or not – a shining example of Big Society or exploitation of an industry where workforce supply outstrips demand – is something of a moot point.

0,7

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DAVID BROWNLEE (EXECUTIVE DIRECTOR, UK THEATRE)

PANEL AND PROCESS

While I have authored the report, it has been with the support and hands-on input of a panel featuring a range of key figures from the London theatre industry.

They are:

- National Theatre executive director Nick Starr (who has chaired the group)

- SOLT and UK Theatre chief executive Julian Bird

- Independent producer and SOLT vice president Mark Rubinstein

- Independent producer and former National Theatre deputy executive director Kate Horton

- Independent producer Matthew Byam Shaw

- UK Theatre executive director David Brownlee.

We have met regularly since December 2012 to discuss the report, its terms of engagement and the results, with panel suggesting the direction of travel of my investigation into the sector. Further notes on methodology are explained at the beginning of each chapter.

Alistair Smith, January 2014

1,0 MAPPING LONDON THEATRE

NUMBERS IN SUMMARY

London has 241 professional theatre spaces, with more than 110,000 seats.

These are located largely in Inner London and specifically Westminster and Camden.

In terms of theatre capacity (number of seats), there is a nearly even split (50/50) between the commercial and not-for-profit sectors. The fringe only accounts for 3.6%.

The largest theatre space regularly used for theatre (or in its case opera) is the Coliseum, home to English National Opera, with 2,359 seats. London's smallest regularly used professional theatre is the Lord Stanley pub theatre with 30 seats.

The commercial West End (42 theatres in Westminster and Camden with more than 42,500 seats) represents more than a third of all of London's theatre capacity.

Arts Council England-funded NPOs account for 76 theatre spaces and 28,514 seats. The vast majority of these are in Inner London (62 spaces / 25,026 seats).

APPROX. CAPACITY SPLIT BETWEEN

50/50

COMMERCIAL AND NOT-FOR-PROFIT SECTORS

LARGEST THEATRE: 2,359 SEATS

SMALLEST THEATRE: 30 SEATS

TOTAL SEATS: > 110,000

SEATS IN WESTMINSTER AND CAMDEN: > 42,500

28,514

LONDON SEATS ACCOUNTED FOR BY ARTS COUNCIL - FUNDED NPOs

1,1

METHODOLOGY

Prior to this report, there was no reliable list of all professional theatres operating in Greater London. So, the first aim of the report was to map the London theatre sector.

This was easier said than done – by pulling together the lists of various membership organisations and trade bodies such as the Society of London Theatre, UK Theatre (formerly the Theatrical Management Association), Independent Theatre Council and OffWestEnd.com, you can get a pretty full picture of the sector, but there are still gaps.

The method we employed was to approach every London borough and ask for a list of all theatres operating within the borough. Unfortunately, most London boroughs were also not in possession of a complete list of theatres operating within their borough. Instead, we asked for a complete list of all premises within the borough licensed as a theatre or for the performance of plays.

This included far more premises that were not, never had been and most likely never will be used for theatre, so the panel whittled down this list to the premises within each borough that were used for professional theatre. We have then categorised those theatres by geography, size and type.

We followed the criteria mentioned in the introduction when deciding whether to class a premises as a professional theatre. A full list of all theatre venues included in the report is available in the appendix (many of these theatre venues have multiple theatre spaces).

1,2

OVERALL CAPACITY

London is one of the two great theatre capitals of the world, along with New York. It has a vibrant theatre scene that ranges from big budget large-scale musicals to small avant-garde theatre productions performed in found spaces.

Overall, Greater London boasts 241 professional theatre spaces with a seating capacity of more than 110,000.

A study of this nature has not been carried out for the whole of New York theatre. On figures available (for Broadway), West End theatre attendances outstrip Broadway attendances by 20%.

1,3

"MORE THAN HALF OF LONDON'S THEATRE CAPACITY AND AROUND A THIRD OF ITS THEATRE SPACES ARE FOCUSSED IN JUST TWO BOROUGHS"

GEOGRAPHY OF LONDON THEATRES

Unsurprisingly, given that the city serves a UK and world market for theatre, London's professional theatres are overwhelmingly located in inner London where transport links are best (we have taken the GLA / statutory definition of Inner and Outer London). More than 85% of London theatre's capacity is in Inner London.

And, in fact, theatre capacity is focussed even more sharply than that. More than half (51%) of London's theatre capacity and around a third (32%) of its theatre spaces are focussed in just two boroughs – Westminster and Camden.

Westminster alone accounts for 39% of Greater London's theatre capacity and 22% of its theatre spaces. It has 53 theatre spaces and more than 40,000 seats.

It is the borough with by far the highest capacity for theatre activity in the capital, with more than three times as many seats as the next highest capacity borough (Camden).

Yet, notably, none of the theatres within Westminster are funded by the local council. The vast majority are commercially operated, with a small number of organisations (e.g. ENO, Royal Opera House, Soho Theatre) funded by the Arts Council and a few un-funded not-for-profits, such as the Regent's Park Open Air Theatre.

This focussed area of commercial theatre activity (which extends into Camden) is often referred to as the West End. There is no other similar focussed area of commercial theatre activity in London, or indeed anywhere in the rest of the UK.

Some inner London theatres operate on very different models to the commercial West End, particularly in the focus on work for and with young audiences and communities, artist development, new writing and creative learning.

T1

TABLE ONE

TOP 5 BOROUGHS BY CAPACITY

The five boroughs with the greatest theatre capacity are all in Inner London. Croydon, the Outer London borough with the highest theatre capacity (2,606) would be placed eighth in capacity list.

The Inner London borough with the fewest seats is Wandsworth with 570.
Two boroughs, both in Outer London, have no permanent professional theatres – Ealing and Bexley (Bexley does have an occasional open air theatre, Ealing has a permanent amateur theatre).

Waltham Forest only has one theatre space, the fringe theatre The Olde Rose and Crown, which, while permanent, is not in constant use as a theatre.

Of course there is no direct correlation between the number of theatre seats in a borough and its residents' opportunities to access theatre within the local authority they reside in or further afield. Indeed, a venue with 1,000 seats that presents an average of one performance a week offers no more tickets for sale than a 100 seat venue that usually presents ten performances during that time.

AREA	NUMBER OF SEATS
WESTMINSTER	43.542
CAMDEN	12.366
LAMBETH	9.932
HAMMERSMITH AND FULHAM	5.813
SOUTHWARK	3.997

1,4

THEATRE CAPACITY BY POPULATION

When the varying capacities of London's boroughs (source: ONS 2001 Census) are taken into account, the picture changes slightly.

In Inner London there are around 0.03 theatre seats per resident. In Outer London there are around 0.003 theatre seats per resident.

T2

TOP 5 SEATS PER RESIDENT

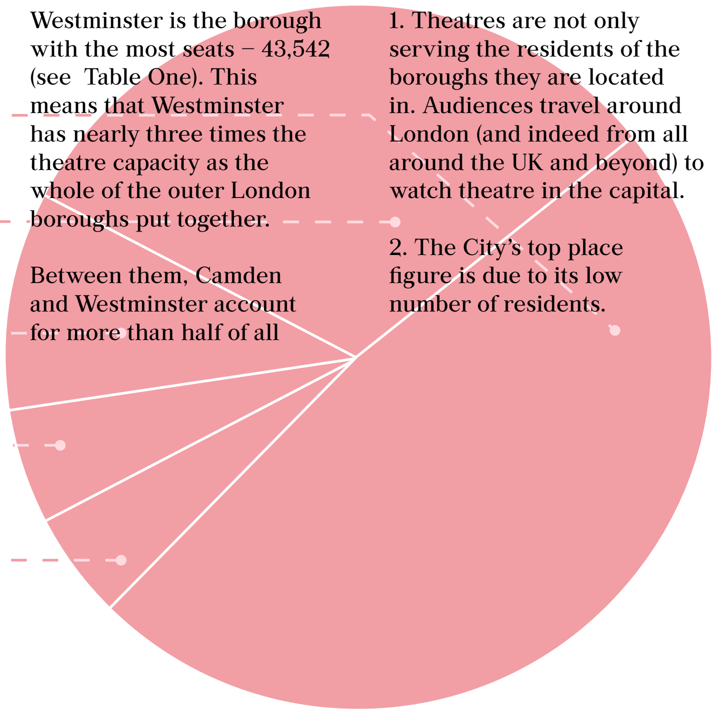
TABLE TWO

AREA	SEATS PER RESIDENT
CITY	0.29
WESTMINSTER	0.19
CAMDEN	0.06
HAMMERSMITH AND FULHAM	0.03
LAMBETH	0.03

Inner London has 191 theatres with 93,449 seats Outer London has 50 theatres with 16,557 seats

Westminster is the borough with the most seats – 43,542 (see Table One). This means that Westminster has nearly three times the theatre capacity as the whole of the outer London boroughs put together.

Between them, Camden and Westminster account for more than half of all the theatre capacity in London – nearly 56,000 seats across 78 theatres.



Notes:
1. Theatres are not only serving the residents of the boroughs they are located in. Audiences travel around London (and indeed from all around the UK and beyond) to watch theatre in the capital.

2. The City's top place figure is due to its low number of residents.

1,5

"THE AVERAGE THEATRE SIZE IS 466 SEATS"

CAPACITY OF LONDON THEATRES

There are a huge range of different sized theatres in Inner London, ranging from the Hammersmith Apollo with 3,600 seats down to the Lord Stanley Pub with only 30.

However, the Apollo is more regularly used for comedy and music than theatre. The largest space regularly used for theatre (or in its case opera and ballet) is the Coliseum, home to English National Opera, with 2,359 seats.

The (mean) average theatre size in London is around 466 seats. The (median) average is around 227 seats.

T3

TABLE THREE

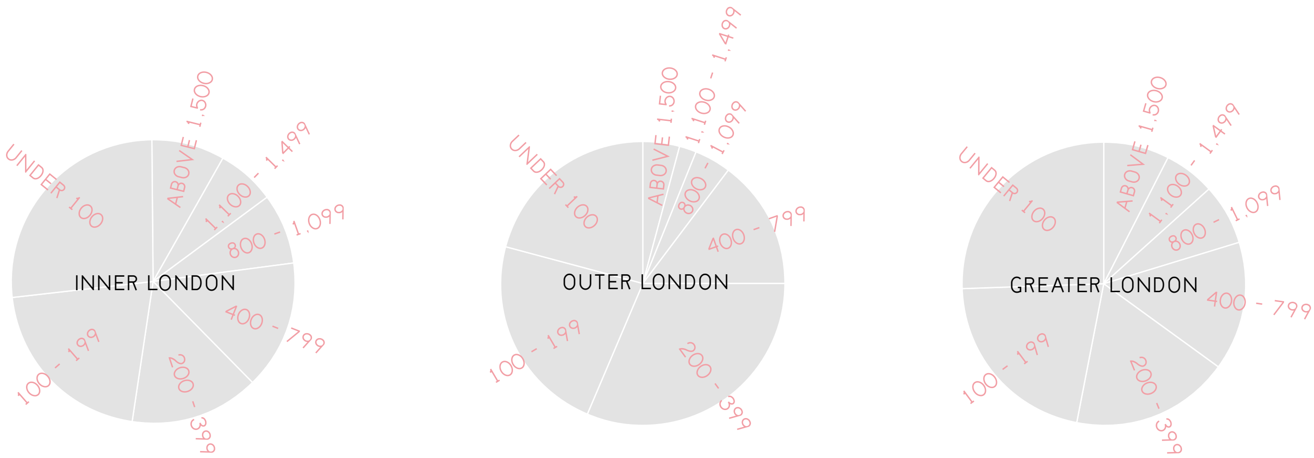
CAPACITY: INNER LONDON

There are fewer large venues than small venues and nearly a third of all Inner London venues have 100 seats or fewer. However theatres with 1,100 and more seats (just 15.2% of the sample) cumulatively account for over 50% of the overall seating capacity of London theatres.

The mean average theatre size in Inner London is 489 seats and the median average is 225 seats.

CAPACITY (SEATS)	THEATRES	SEATS	% THEATRES	% SEATS
ABOVE 1,500	16	32,167	8.4	34.4
1,100 - 1,499	13	15,884	6.8	17.0
800 -1,099	15	13,916	7.9	14.9
400 - 799	28	15,245	14.7	16.3
200 - 399	28	7,838	14.7	8.4
100 - 199	40	5,362	20.9	5.7
UNDER 100	51	3,037	26.7	3.2

T3, T4 AND T5: PERCENTAGE OF THEATRES BY CAPACITY



T4

TABLE FOUR

CAPACITY: OUTER LONDON

In Outer London, the picture is slightly different: there are only three theatres in the whole of Outer London with more than 1,000 seats (compared to 33 in inner London). In fact, of Outer London's 48 theatre spaces, 32 (precisely two thirds) have fewer than 300 seats. A very high proportion of theatres in Outer London have 101- 300 seats (41.7%).

Note:
There are also 2 open air spaces with varying capacity from show to show

CAPACITY (SEATS)	THEATRES	SEATS	% THEATRES	% SEATS
ABOVE 1,500	2	3,459	4.2	20.9
1,100 - 1,499	1	1,150	2.1	6.9
800 -1,099	2	1,740	4.2	10.5
400 - 799	7	3,892	14.6	23.5
200 - 399	15	4,201	31.3	25.3
100 - 199	11	1,476	22.9	8.9
UNDER 100	10	639	20.8	3.8

T5

CAPACITY: GREATER LONDON

TABLE FIVE

CAPACITY (SEATS)	THEATRES	SEATS	% THEATRES	% SEATS
ABOVE 1,500	18	35,626	7.5	32.4
1,100 - 1,499	14	17,034	5.9	15.5
800 -1,099	17	15,656	7.1	14.2
400 - 799	35	19,137	14.6	17.4
200 - 399	43	12,039	18.0	10.9
100 - 199	51	6,838	21.3	6.2
UNDER 100	61	3,676	25.5	3.3

1,6

COMMERCIAL AND COMMERCIALLY OPERATED THEATRES

LONDON THEATRES BY TYPE

We have divided the London theatre scene into three theatre types: commercial, not-for-profit and fringe.

Commercial and Commercially Operated Theatres

The commercial sector (defined as not being a charity) accounts for just over half of all capacity in London theatre (around 56,000 seats) and around a quarter of all theatre spaces (59). The vast majority (all but nearly 4,000 seats) are in Inner London.

There are 42 commercial theatres in the West End (as defined by SOLT membership), plus a small handful outside the West End, such as the Arts Theatre and St James Theatre. These theatres are mostly run in a similar fashion – as venues which producers rent in order to put on theatre shows. A few smaller commercial theatres, such as the Menier Chocolate Factory and St James, produce their own work, as well as acting as venues for rent.

NOT-FOR-PROFIT THEATRES

All of these are located in Inner London.

There are some commercially operated theatres in Outer London. Theatres such as the Churchill Bromley and Beck Theatre in Hayes are managed on behalf of the local authority by a commercial operator – in these cases the Ambassador Theatre Group and HQ Theatres. The New Wimbledon Theatre is owned by a charity, but operated by ATG.

The commercial West End is 42 theatres in Westminster and Camden and more than 42,500 seats – more than a third of all of London's theatre capacity.

SOLT membership (including not-for-profit theatres such as the National) accounts for half of all of London's theatre seating capacity (54,000 seats) and a quarter of all theatre venues (59).

Commercial theatres tend to be larger than non-commercial theatres.

Commercially owned and/or operated theatres are, on average, 950 seats. In the commercial West End, the average theatre size is a little larger – around 1,000 seats.

Not-for-profit

The not-for-profit sector also represents a large proportion of London theatre. In fact, in terms of number of theatres it is the largest with 135 theatres spaces.

However, because on average not-for-profit theatres are smaller than commercial theatres, they make up a little less of the capital's theatre capacity, with a total of 50,058 seats.

On average (mean) a not-for-profit theatre has around 380 seats. The median average is 200 seats. Not-for-profits are spread across both inner and outer London.

The not-for-profit group includes the theatres which receive regular funded from Arts Council England, known as National Portfolio Organisations (NPOs).

Arts Council England-funded NPOs account for 76 theatre spaces and 28,514 seats. The vast majority of these are in Inner London (62 spaces / 25,026 seats). This means that a little over half of all of London's not-for-profit theatres receive regular funding from the Arts Council.

Only 14 theatre spaces, accounting for around 3,500 seats are ACE NPOs in outer London.

Of the not-for-profits that do not receive ACE NPO funding, some are run by local authorities, or at arm's length from local authorities by a trust, some (such as the Cockpit) are part of HE institutions, some are funded by the local authority, but run independently and others are run as charities, but with no regular subsidy at all (such as the Shakespeare's Globe, Old Vic and Regent's Park Open Air).

FRINGE THEATRES

At more than 1,500 seats Shakespeare's Globe is London's largest not-for-profit to operate without regular arts council subsidy. At 50 seats, Blue Elephant Theatre in Camberwell is the smallest.

Fringe theatres

Fringe theatres could have been subsumed into the two other categories, because there are both commercial and not-for-profit entities. However, while there is no strict definition of what a 'fringe' theatre is, they operate differently to theatres in the other two categories. And, whether they are 'for-profit' or 'not-for-profit', they are generally not making much (if any) profit for anyone involved.

In fact, one could make the argument that the defining feature of the fringe sector is that people (in general) aren't getting paid national minimum wage (more on this in the employment chapter).

Fringe theatres are small. They have a (mean) average of 85 seats and a median average of around 65 seats. They are often located above or behind pubs and they are generally unfunded. For the sake of this report, any regularly funded theatres that might fall into this category (such as the Gate) are classified as not-for-profit theatres, as they operate in a more similar way to these theatres than those in the Fringe category. Likewise theatres such as the Blue Elephant in Camberwell, which has an extensive education programme and is funded by its local council, operates more similarly to a not-for-profit than a traditional fringe theatre and is therefore classified in that group.

Following our categorisation, there are 47 fringe theatres in the capital, with cumulatively just under 4,000 seats.

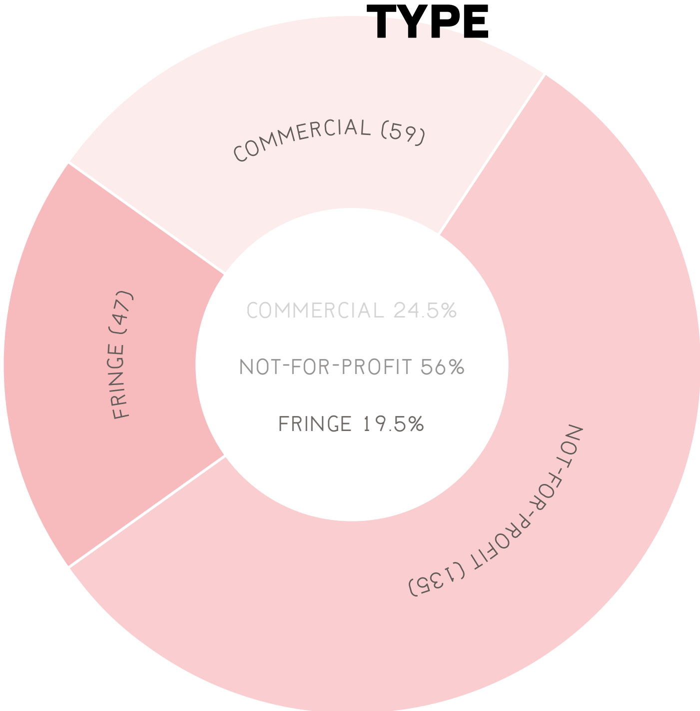
The vast majority of these are focussed in Inner London. Only five are located in Outer London, accounting for around 500 seats.

Within Inner London, the borough with the most fringe theatres is Camden with 10.

T6

TABLE SIX

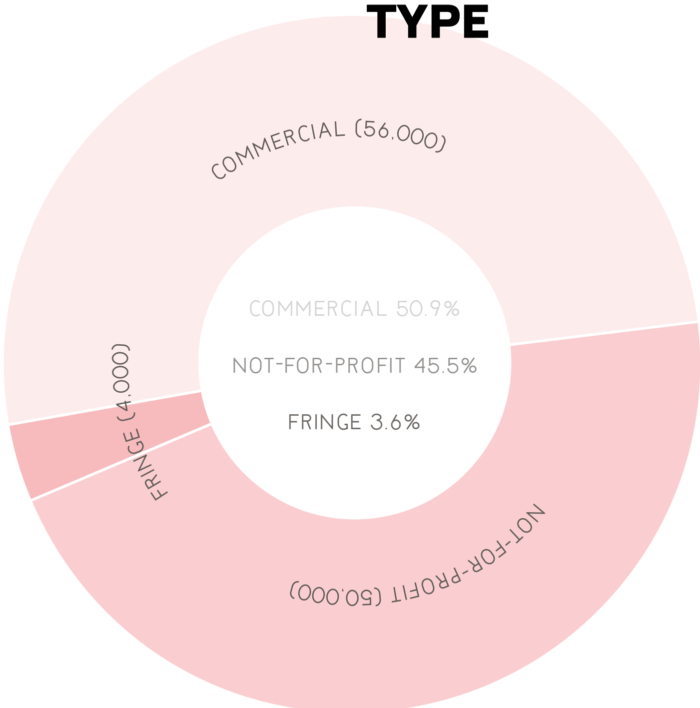
NUMBER OF THEATRES BY TYPE



T7

TABLE SEVEN

SEATING CAPACITY BY TYPE



2,0 EMPLOY-MENT

NUMBERS IN SUMMARY

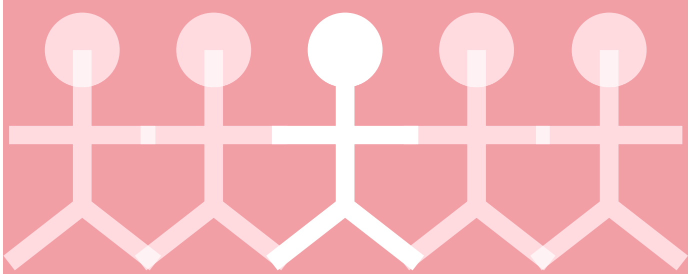
On average, more than 3,000 performers are engaged by London theatres at any one time.

At any one time, more than 6,500 full time staff are engaged by London theatres, with a further 5,000+ part time staff and 5,000+ freelance staff.

As one might expect, the number of performers and staff engaged by a theatre increases exponentially with venue size.

Only 1 in 5 actors on the Fringe are being paid National Minimum Wage or above.

>3.000 PERFORMERS AND >6.500 FULL TIME STAFF ARE ENGAGED BY LONDON THEATRES AT ANY ONE TIME



1 IN 5 FRINGE ACTORS PAID MINIMUM WAGE OR ABOVE

2,1

"THERE ARE CURRENTLY NO RELIABLE FIGURES HELD FOR THE LEVELS OF EMPLOYMENT WITHIN THE LONDON THEATRE INDUSTRY"

METHODOLOGY

There are currently no reliable figures held for the levels of employment within the London theatre industry.

We decided that the best way to establish a base-line of employment levels both on and off-stage was to conduct a snapshot survey. We contacted all the theatres on our list of all professional London theatre (established in Chapter 1) and asked them to return details of how many performers (including musicians) they had engaged in performance and in rehearsal on a given date – Friday July 5, 2013. This date was chosen as a performance date which would not result in an over-estimate of the level of engagement.

We also asked them for details of non-performance staff and whether these were full time, part time or freelance.

We also asked whether the performers and non-performance staff were being paid national minimum wage (or above); being paid, but less than NMW; or not being paid at all/ were volunteers.

When calculating grand totals (for example total number of performers engaged) we have extrapolated figures that we have not been supplied with by the theatres that did not respond.

For example, if a 500-seat venue did not respond and the average number of performers engaged in rehearsal at a 500-seat venue was 5 performers, we have extrapolated that this would be the same for the venues that have not responded, or we were not able to determine engagement levels via cast lists. We have NOT extrapolated when determining the results surrounding payment levels, which is why they are represented as a percentage of respondents, rather than numerical totals.

Note:
The figures in this chapter will be an underestimate for the number of people engaged and working in London theatre. While the results represent as complete a total of people engaged by London theatres as it was possible to ascertain, it does not represent a complete total of people engaged in London theatre. Many roles in the industry are not directly connected to theatre venues – for example writers, set designers, freelance theatre PRs, marketing companies, freelance creative, ticket agencies. These would not have necessarily been picked up by this survey, as if they had been, there would have been a danger of double counting. The figures in this chapter are therefore worth treating as a minimum level, especially when it comes to non-performance staff.

2,2

“AT ANY ONE TIME, LONDON’S PROFESSIONAL THEATRES ARE ENGAGING AN ESTIMATED 3,141 PERFORMERS”

PERFORMERS

London is the biggest centre of theatre employment in the UK and one of the biggest theatrical employers (perhaps the biggest employer – there are no comparable figures) in the world.

At any one time (in the case of our survey July 5) London’s professional theatres are engaging an estimated 3,141 performers.

Of these 3,141 performers (including musicians as well as actors, dancers, opera singers etc), nearly 2,300 were engaged in a current production with a further nearly 850 in rehearsal.

Note:
This is obviously a figure that fluctuates throughout the year and, in fact, one would expect this to be a significant under-estimate when compared to busier times of the theatre calendar, such as Christmas, when theatres are at their busiest and often stage large-scale family shows and pantomimes, which can have larger than average cast sizes. We intend to repeat the survey and, when we do, we intend to undertake the snapshot at a different time of year.

2,3

NON-PERFORMANCE STAFF

Of course, it is not only on stage where London theatres are acting as a major employer. In fact, there are many more people being engaged in off-stage or back-stage work than as performers at any one time.

London’s theatres currently engage an estimated 6,655 full time staff, with a further 5,323 part-time and 5,771 freelance engagements.

Note:
1. If anything, the numbers above are an underestimate, because
a) the performers figure is taken at one of the less busy times of the year
b) the staff figure does not account for theatre support staff not connected to a specific venue, e.g. marketing companies.

2,4

"MORE THAN 90% OF ACTORS ARE ENGAGED IN WORK IN INNER LONDON"

INNER VS. OUTER LONDON

Unsurprisingly, given that the vast majority of the capital's theatre stock is focussed in Inner London (see Chapter 1), employment opportunities are also focussed in the centre of the city.

More than 90% of actors are engaged in work in Inner London (this is roughly in line with attendance and box office figures, see Chapter 3)

This is roughly mirrored in terms of off-stage staff as well: 89% of full time staff are engaged in Inner London; 76% of part-time staff are engaged in Inner London; 85% of freelance staff are engaged in Inner London.

Those last two figures would appear to indicate that there is a higher reliance on part-time and freelance staff in Outer London than in Inner.

Again, unsurprisingly, employment is even further concentrated within Westminster and Camden (where again, the majority of theatres are located).

Westminster sees 45% of all performer engagement, with Camden adding another 12%. This means that a clear majority (57%) of performance jobs in London are focussed on Westminster and Camden, what one would loosely describe as the geographical West End. These figures are broadly mirrored in terms of non-performance staff, with 44% of all of London's full time theatre staff working in Westminster and around 8.5% working in Camden. Again, put together, around half of all of London's full time theatre staff are working in London's geographical West End.

2,5

EMPLOYMENT BY VENUE SIZE

There is a direct and clear correlation between a venue's capacity and the number of performers and staff it engages.

Put simply: larger theatres employ more people and stage shows with bigger casts.

On the whole, Inner London venues also tend to have larger cast sizes than Outer London venues, a trend that is even more exaggerated when it comes to non-performance staff.

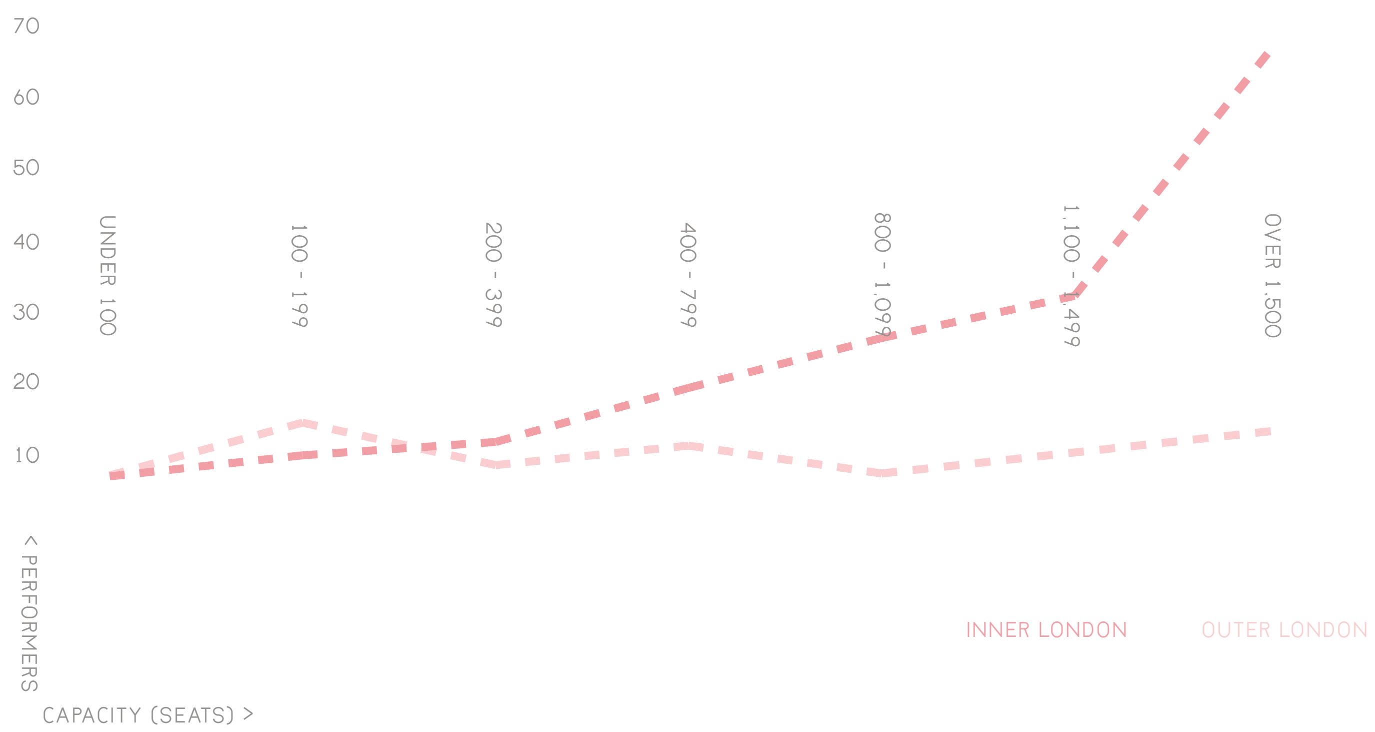
T8

CAPACITY VS. NUMBER OF PERFORMERS

TABLE EIGHT

AVERAGE NUMBER OF PERFORMERS ENGAGED IN A PRODUCTION

CAPACITY (SEATS)	INNER LONDON		OUTER LONDON
ABOVE 1,500	65.7	>	12.0
1,100 - 1,499	31.2	-	N/A
800 -1,099	25.2	>	6.0
400 - 799	18.1	>	10.0
200 - 399	10.4	>	7.2
100 - 199	8.5	<	13.3
UNDER 100	5.5	<	5.7



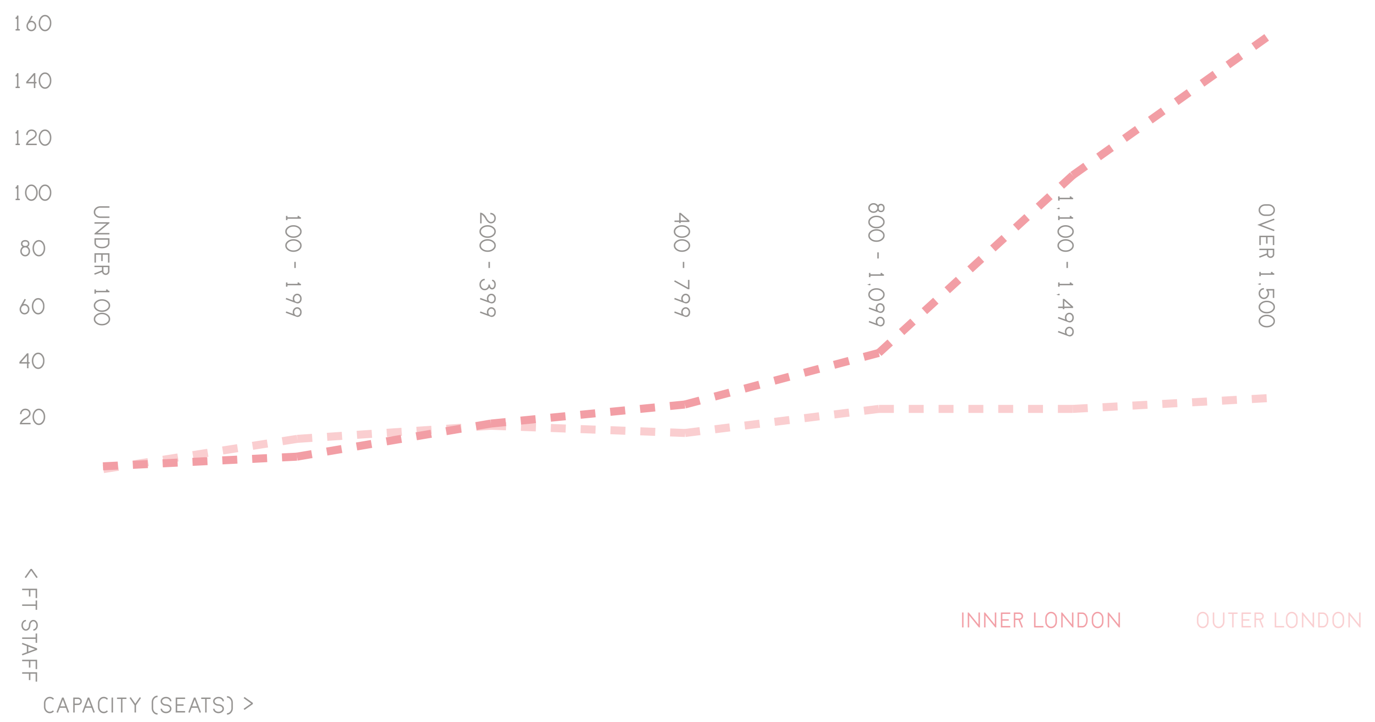
T9

CAPACITY VS. NUMBER OF STAFF

TABLE NINE

AVERAGE NUMBER OF FULL TIME STAFF ENGAGED (PER THEATRE)

CAPACITY (SEATS)	INNER LONDON		OUTER LONDON
ABOVE 1,500	157.0	>	27.0
1,100 - 1,499	107.0	>	23.0
800 -1,099	42.6	>	23.0
400 - 799	23.9	>	14.0
200 - 399	17.0	>	16.7
100 - 199	5.0	<	11.8
UNDER 100	1.5	>	0.5

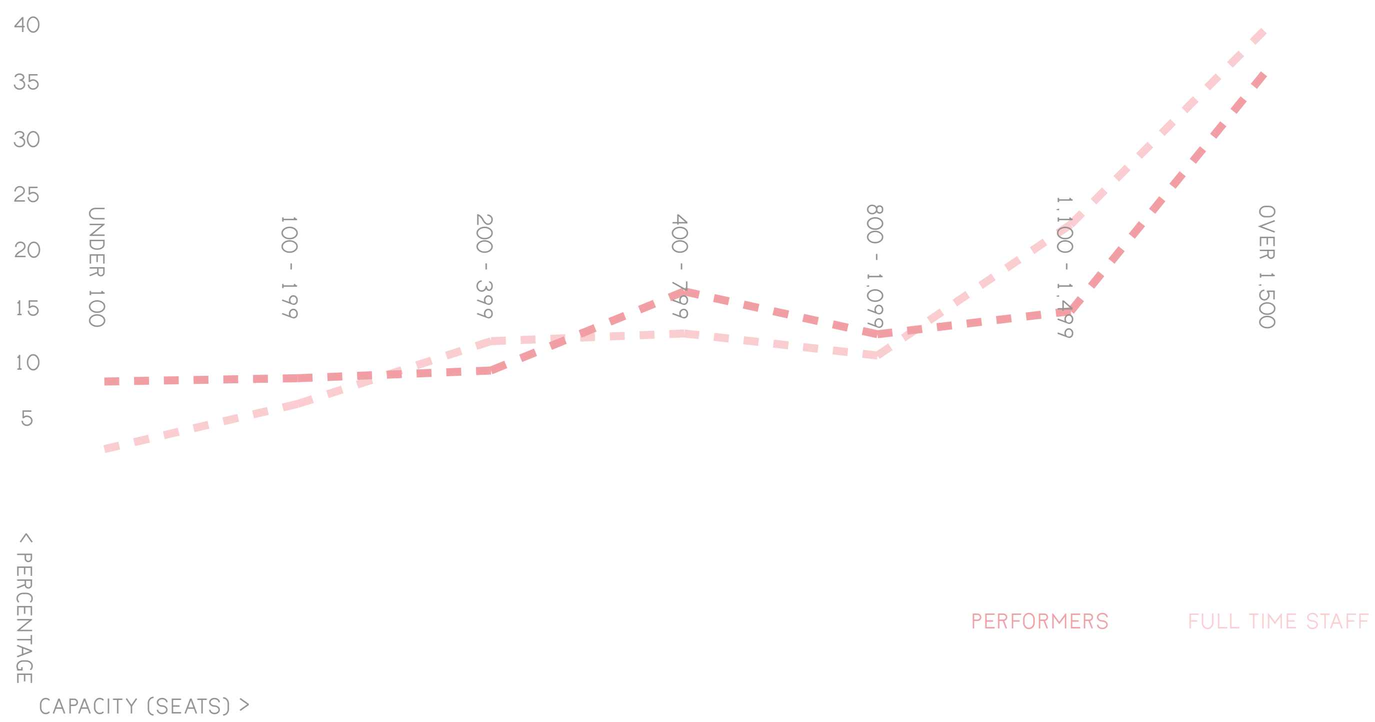


T10

PERCENTAGES BY CAPACITY

TABLE TEN

CAPACITY (SEATS)	% OF TOTAL PERFORMERS	% OF TOTAL FT STAFF
ABOVE 1,500	35.4	39.3
1,100 - 1,499	13.8	21.7
800 -1,099	11.7	9.8
400 - 799	15.6	11.8
200 - 399	8.4	11.1
100 - 199	7.7	5.4
UNDER 100	7.4	1.3



2,6

"THE LARGEST THEATRES ARE THE SINGLE MOST SIGNIFICANT DRIVER OF PERFORMER EMPLOYMENT IN LONDON THEATRE"

THE LARGEST THEATRES

As you can see from Table 8 above, the largest theatres (essentially the largest musical theatre houses, two opera houses and Shakespeare's Globe) are engaging on average many more performers (66) than other size venues. The same is true of full time staff, with the largest venues employing 157 full time staff on average. (Note: this number is a slight over-estimate as for venues which had more than one theatre space, the staff were counted towards the largest theatre)

There is a noticeable drop (performer numbers halve) between theatres with a capacity of over 1,500 (66 performers) and those from 1,100 to 1,499 (31 performers) and this figure then continues to fall as venues get smaller, until small studio spaces are engaging fewer than six performers on average.

This is mirrored in the figures for off-stage staff (see Table 2), with the smallest (sub 100 seat) theatres only engaging on average 1.5 full time members of staff in Inner London and 0.5 members of full time staff in Outer London.

In fact, on July 5 2013, 12 of the very largest London theatres (1,500-seats and above) were cumulatively engaging more than 900 performers – nearly a third of all performers across the whole of London. (see Table 3)

That is just 12 out of more than 240 theatres engaging a third of all performers. This shows just how important these theatres are to employment in London theatre.

It is worth noting that the survey was undertaken when all the West End's major musical houses were in use. When one of these houses is dark – or indeed if multiple venues of this size were to be dark – it would have major impact on employment levels in the sector.

The largest theatres are the single most significant driver of performer employment (in terms of numbers employed) in London theatre.

They are also a significant factor in off-stage employment. Taking the same 12 theatres, they are engaging around a quarter (26%) of all of London's full time theatre staff.

2,7

"THE WEST END ENGAGES MORE THAN 1/3 OF ALL LONDON THEATRE PERFORMERS AT ANY ONE TIME"

COMMERCIAL, NFP, FRINGE

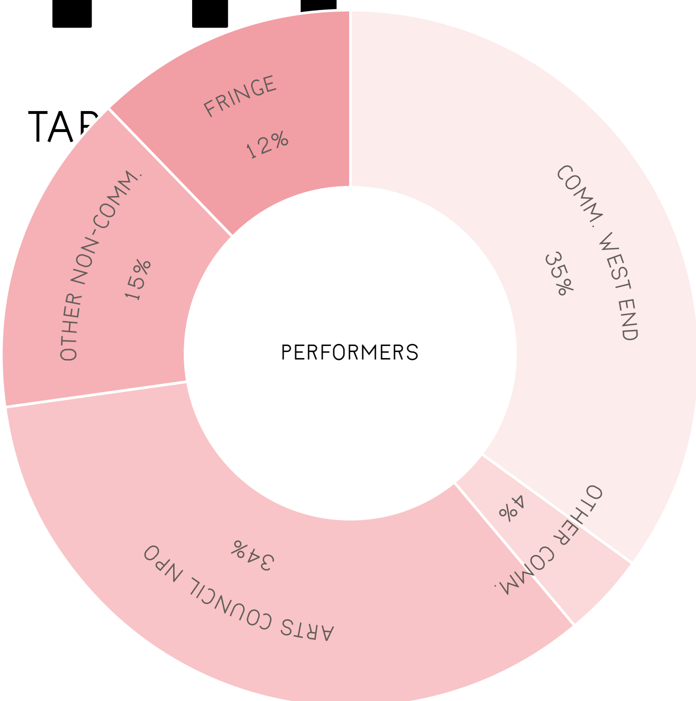
The commercial West End engages around a third (35%) of all performers appearing in London theatres at any one time.

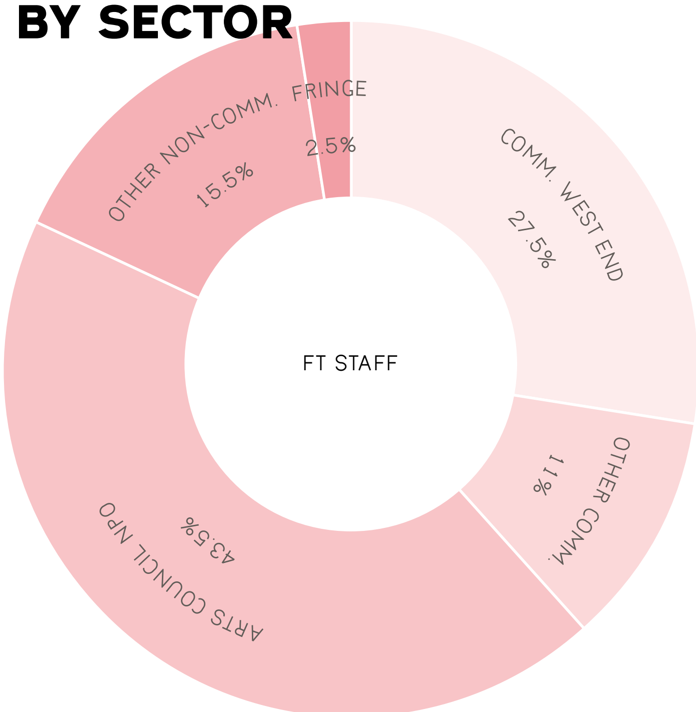
When this is extended to include all members of the Society of London Theatre, including unfunded not-for-profits such as Shakespeare's Globe and Regent's Park Open Air and funded not-for-profits like the National Theatre and Royal Opera House, this figure increases to 59%.

Fringe theatres engage 12% of all London performers. This might seem like a significant amount when it comes to a small-scale sector (which proportionally accounts for far less in box office and audiences – see Chapter 3), but it is worth bearing in mind the figures below, which show that – of our survey respondents – only around 1 in 5 performers on the Fringe are being paid NMW or above. So, in terms of actual paid employment, the impact of the Fringe on the sector as a whole is much smaller.

T11

EMPLOYMENT BY SECTOR





2,8

"THE FRINGE IS WHERE THE VAST MAJORITY OF LOW OR NO PAID WORK IS TAKING PLACE. FROM THE 22 RESPONSES WE RECEIVED, ONLY 20% OF PERFORMERS ARE BEING PAID NATIONAL MINIMUM WAGE"

PAYMENT

While we did not look at precise salaries, we did ask our survey respondents whether the performers and staff being engaged were being paid National Minimum Wage or were volunteering for free or were being paid less than National Minimum Wage (for example profit share or expenses).

The following results are restricted to the responses we received and are not extrapolated across the data set.

Performers
When it comes to performers, in the commercial sector all adult performers are being paid NMW or above.

The non-commercial area is, on the whole paying performers NMW or above (84%). The majority of the 16% who are not being paid NMW are volunteers (often community volunteers / amateurs).

The fringe sector is where the vast majority of low or no paid work is taking place. From the 22 responses we received, only 20% of performers are being paid NMW. Around a third (33.5%) are being paid nothing at all, with nearly half (46%) being paid something, but less than NMW. This would make sense, bearing in mind the large amount of 'expenses only' or 'profit-share' work taking place on the fringe.

If anything, one would expect that these results over-estimate the percentage of performers on the fringe being paid NMW, as respondents would be more likely to reply to the survey if they were paying performers NMW than not.

Full time staff
All full time staff in the commercial sector are being paid NMW or above. A very small number of full time staff in the non-commercial sector (0.3%) are engaged at less than NMW (likely to be apprentices or under-18), there are no full time volunteers. In the fringe sector, 73% of full time staff are being paid National Minimum Wage or above, 26% are volunteers and 1% are being paid, but less than NMW.

Part time staff
Again, all part time staff working in the commercial sector are being paid NMW or above.

In the non-commercial sector, while the majority of part-time staff (62%) are being paid NMW or above, there are a sizeable number of volunteers (38%) according to our survey responses. Meanwhile, in the fringe sector, there is a near 50/50 split between those staff who are paid NMW or above (53%) and those who are engaged on entirely voluntary basis (47%).

This would appear to indicate that you are more likely to be paid national minimum wage or above on the fringe if you are engaged in a non-performance position – whether that is full-time or part-time.

3,0 BOX OFFICE, ATTENDANCE AND AUDIENCES

NUMBERS IN SUMMARY

London theatre takes more £600 million at the box office.

Audiences of more than 22 million visited London theatres in 2012/13.

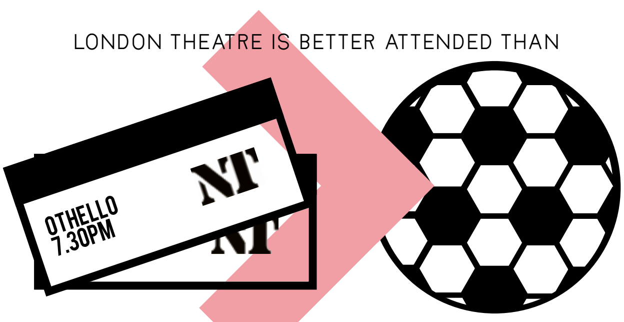
Both box office and attendance at London theatres are increasing – box office was up 1.6% and attendances 5.5% year on year from 2011/12 to 2012/13 (although yield fell).

London theatre is better attended than Premier League football and takes more at the box office than London's cinemas.

Average price paid for a London theatre ticket is £27.76 (in 2012/13)

Nearly a quarter (24%) of holiday visitors who stay in London will go to the theatre.

LONDON THEATRE IS BETTER ATTENDED THAN



PREMIERSHIP FOOTBALL

£££££££
£27.76 IS THE
£££££££
AVERAGE PRICE FOR A
£££££££
LONDON THEATRE TICKET
£££££££

3,1

"SOLT HAS PREVIOUSLY PUBLISHED BOX OFFICE AND ATTENDANCE FOR ITS MEMBERSHIP. HOWEVER, THESE FIGURES DO NOT INCLUDE THE MANY PROFESSIONAL THEATRES ACROSS LONDON NOT IN SOLT MEMBERSHIP"

METHODOLOGY

There are currently no reliable figures held for box office and attendance across the London theatre as a whole.

The Society of London Theatre has, for many years, been publishing these figures for theatres in membership of the society – both commercial and subsidised. However, while this accounts for a large portion of London's theatre-going it does not include the many professional theatres across London who are not full or affiliate members of SOLT. These include high profile venues like the Bush Theatre, as well as theatres in Outer London such as the New Wimbledon and Richmond Theatres, or fringe theatres like the Finborough.

As part of our snapshot employment survey (see Chapter 2) we contacted all the theatres on our list of all professional London theatres (see Chapter 1) and asked them to return details of their total box office and attendance figures for 2011/12 and 2012/13.

In the few cases where we were unable to get the figures direct from the theatre themselves, we did one of three things.

In the case of SOLT members, we were able to refer to SOLT's figures. In some other cases, we were able to extract figures from the organisation's annual reports.

This meant that we had a full set of data for theatres in SOLT membership and a partial set for those not in SOLT membership.

Where we were not able to find out a theatre's total attendance and box office, we again extrapolated our results by venue size and location. So, for example, if we were missing results for an 800 to 1,100-seat theatre in Inner London, we used the average results for an 800 to 1,100-seat theatre in Inner London.

We have only done this with theatres that we know to be full-time professional theatres. For theatres which are only used part-time as professional theatres, we have left blank rather than extrapolating. This was to avoid over-estimating. The figures also omit theatre events that took place in venues not listed in Chapter 1. This means that – in all likelihood – the figures in this chapter are slight under-estimates in terms of the total attendance and box office for London theatre.

3,2

TOTAL BOX OFFICE 2011/12: £609M

TOTAL BOX OFFICE 2012/13: £619M

BOX OFFICE

London theatre has long been known to be a major driver in the London economy – both through direct spend on tickets, but also indirect spend, for example on hotel stays and restaurants.

However, the only reliable box office figures available up to this point have been via SOLT's excellent and thorough annual box office data report.

This showed that in the calendar year of 2013, 14.6 million people attended a SOLT theatre, with box office of £585 million. This was the tenth successive year of record box office.

Note: SOLT box office in the 2012 calendar year was around £530 million, with attendance of 14 million. Our figures cover the 2012/13 financial year.

However, while our results show that the SOLT figures account for much of London's theatre box office, they do not account for all of it.

We found that – in total - an estimated £619 million was spent on tickets at London theatres in 2012/13 – up from an estimated £609 million in 2011/12. While this was an increase it was below the rate of inflation for the period.

While the commercial West End accounts for the majority of London theatre box office, a growing portion comes from outside of London's main commercial theatre district.

In 2011/12, the commercial West End accounted for £400 million, up to £403 million in 2012/13 (an increase of 0.75%). Note: A number of the shows running in commercial theatres originated and/or are produced by not-for-profit organisations. According to the methodology of this report, they are classified as commercial theatre.

However, the portion of London theatre that was NOT the commercial West End increased from 209 million to 215 million (an increase of 3.3%)

Within this, the subsidised sector is also growing in terms of its contribution to London's overall box office.

In 2011/12, Arts Council NPOs accounted for box office returns of £144 million. This increased to £152 million in 2012/13 (an increase of 5.3%)

London's 12 largest theatres (with 1.500 seats or more) accounted for £245m in 2011/12 and £219m in 2012/13. This accounted for 40% and 35% of total box office respectively.

Unsurprisingly (bearing in mind the results of earlier chapters) geographically, the vast majority of box office takings are focussed on inner London: in 2012/13, 96.4% of total box office was taken in Inner London. Only 3.6% of the total box office was taken in outer London. If one compares this to attendances (which we'll return to in more detail later)

92% of all attendance was in Inner London in 2012/13.

In fact, London theatre box office income (and attendance) occurs predominantly in Westminster, Camden and Lambeth.

In 2011/12, these boroughs respectively account for 65%, 12% and 9% of London total theatre box office. Between them, these three boroughs account for 86% of London box office.

In 2012/13 the figures were 61%, 14% and 10%. In total, this represented 85% of total London box office (and 79% of attendance).

T12

TABLE TWELVE

BOX OFFICE BY BOROUGHS

The drop in box office in Westminster in 2012/13 could suggest that this area of London suffered more from the impact of the Olympics in the summer of 2012, than other boroughs.

Fringe theatre accounts for a very small proportion of London's overall box office – only 0.9% in both 2011/12 and 2012/13 (£5m and £6m).

	BOX OFFICE		ATTENDANCE	
	2011/12	2012/13	2011/12	2012/13
WESTMINSTER	£396M	£383M	11M	11M
CAMDEN	£74M	£87M	2M	3M
LAMBETH	£58M	£61M	3M	4M
ALL THREE BOROUGHS	£528M	£531M	17M	18M

T13

TABLE THIRTEEN

BOX OFFICE BY ARTS COUNCIL NPO

	BOX OFFICE		ATTENDANCE	
ARTS COUNCIL NPOs	2011/12	2012/13	2011/12	2012/13
INNER LONDON	£140M	£148M	6M	7M
OUTER LONDON	£4M	£4M	0.4M	0.4M
TOTAL LONDON	£144M	£152M	6M	7M

3,3

TOTAL ATTENDANCE 2011/12: 21M

ATTENDANCE

The only reliable figures for London theatre attendance up until now have been SOLT's annual box office data report.

The most recent report (covering the 2013 calendar year) shows attendances of 14.6 million people. However, this only counts attendances at SOLT member venues.

We discovered that overall London theatre attendance is, in fact, significantly higher. London's non-SOLT theatres account for a larger proportion of cumulative tickets sold than cumulative box office income.

Total attendance across all London's theatres was 21 million in 2011/12, increasing by 5.2% to 22 million in 2012/13.

To put the above in context, the total attendance at all premier league games (across the whole of England) was 13 million. The rest of the Football League (all three professional divisions) accounts for around 16 million.

Cinema admissions in London were 43 million in 2012.

Notes:
1. One can surmise from this that more is spent at the London theatre box office, than is spent at London cinemas. For it to match London's box office, the average price paid for a London cinema ticket would need to be in excess of £14.40. Nationally, the average price is £6.37 and even Leicester

TOTAL ATTENDANCE 2012/13: 22M

Square's cinemas, traditionally London's most expensive, quote a top price of £14.50).

2. The commercial West End accounts for half of this – 53% in 2011/12 and 50% in 2012/13. However, outside the commercial West End attendances are increasing, whereas they are roughly static (in fact very marginally down) in the commercial West End between 2011/12 and 2012/13.

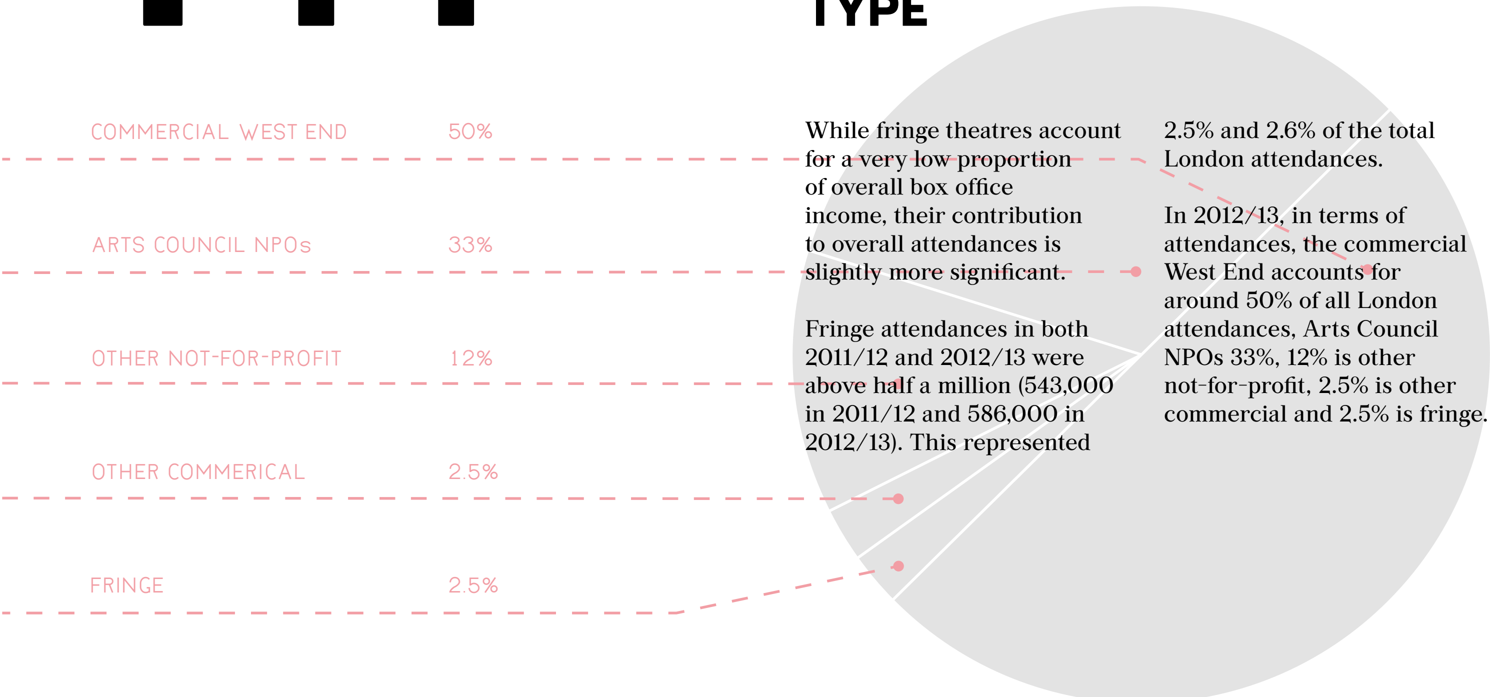
3. London's 12 biggest theatres (those over 1,500 seats) accounted for 7m attendances in 2011/12 and 6m attendances in 2012/13. This represented 31% and 27% of total attendances respectively.

4. Attendances at Arts Council England's London NPOs have increased significantly between 2011/12 and 2012/13, increasing by 19%.

5. Attendances at Arts Council-funded theatres in London accounted for 29% of all attendances in 2011/12 and 33% in 2012/13.

T14

ATTENDANCE BY THEATRE TYPE



While fringe theatres account for a very low proportion of overall box office income, their contribution to overall attendances is slightly more significant.

Fringe attendances in both 2011/12 and 2012/13 were above half a million (543,000 in 2011/12 and 586,000 in 2012/13). This represented 2.5% and 2.6% of the total London attendances.

In 2012/13, in terms of attendances, the commercial West End accounts for around 50% of all London attendances, Arts Council NPOs 33%, 12% is other not-for-profit, 2.5% is other commercial and 2.5% is fringe.

3,4

TICKET PRICE HIGHLIGHTS

TICKET PRICES

The average price paid for a London theatre ticket was £27.76 in 2012/13, down by more than £1 on the year before (3.7% decrease).

There is a very significant difference between the average price paid for a ticket in Inner and Outer London.

On average, tickets in Inner London are more than twice as expensive as those in Outer London.

The average price paid in the commercial West End in 2012/13 was £36.05, slightly up on 2011/12 when it was £35.48.

Conversely, Arts Council NPOs in Inner London saw the average price paid for their tickets fall from £24.44 to £21.24. In Outer London, the average increased from £9 precisely to £10.05.

The price of Fringe theatre tickets was reasonably consistent across Inner and Outer London, with an overall average price paid of £10.08 in 2012/13, up from £9.87 in 2011/12.

In Inner London, there is a reasonably consistent correlation between the size of theatre and the amount paid for a ticket. On average, larger venues charge more for theatre tickets than smaller venues.

T14

TABLE FOURTEEN

TICKET PRICES BY AREA

	BOX OFFICE		ATTENDANCE		AVERAGE TICKET PRICE PAID	
	2011/12	2012/13	2011/12	2012/13	2011/12	2012/13
INNER LONDON	£587M	£596M	19M	21M	£30.21	£28.98
OUTER LONDON	£22M	£23M	2M	2M	£12.88	£13.20
TOTAL LONDON	£609M	£619M	21M	22M	£28.82	£27.76

T15

TABLE FIFTEEN

TICKET PRICES BY CAPACITY

Interestingly, in the table below, the two largest sizes of venue were the only ones to have really significant drops (more than £1) in price paid over the two years.

It is also notable that venues of 800-1,099 seats have a significantly higher average price paid per ticket than those of 1,100 to 1,499. This could be to do with the proportion of 'good seats' in these houses, for which producers can charge top price.

	AVERAGE TICKET PRICE PAID	
CAPACITY (SEATS)	2011/12	2012/13
ABOVE 1,500	£36.88	£35.68
1,100 - 1,499	£30.09	£28.12
800 -1,099	£34.98	£36.41
400 - 799	£24.38	£24.38
200 - 399	£12.23	£12.61
100 - 199	£10.26	£10.11
UNDER 100	£9.16	£9.29

3,5

"24% OF LONDON VISITORS WILL GO TO THE THEATRE"

THEATRE TOURISM

According to the most recent report from Visit Britain, 24% of holiday visitors who stay in London will go to the theatre, resulting in an estimation of just over 2 million international tourists overall enjoying a show in the capital every year.

The most recent SOLT demographic survey estimates that around 3 in 10 West End audience members come from overseas.

3,6

"THE FIVE WEST END BOROUGHS WITH THE HIGHEST PROPORTION OF THEATREGOERS VERY CLOSELY CORRELATE WITH THE WEST END BOROUGHS WITH THE MOST THEATRE PROVISION"

AUDIENCES

We did not carry out primary research in this area, however there is some existing (although slightly out of date) research we thought worth including in the report.

The most recent survey of West End audiences was in 2008 (The West End Theatre Audience: A Research Study for the Society of London Theatre by Ipsos MORI).

The most recent survey of London Fringe audiences was in 2011 (The Fringe & Off West End Audience Report 2011).

The West End report revealed that:

- 68% of respondents were female / 32% male.
- The average age of respondents was 43.
- 72% were under 55, 28% above 55+ years of age.
- 92% of respondents were white.
- Average income was £31,500 (in 2008).
- 45% were visiting the theatre with their partner.
- 38% from London; 43% other UK; 19% overseas.
- The five boroughs in London with highest proportion of respondents were: Wandsworth, Camden, Westminster, Lambeth, Southwark
The five with lowest proportion: Barking; City of London; Newham; Havering; Bexley.
- Around 12% of respondents attended at least once a month.

The fringe / Off West End report revealed that:

- 53% of respondents were female / 47% male.
- 64% were under 50 / 36% 50+ years of age.
- 45% attended at least once a month.

It is worth noting from the above that the five West End boroughs with the highest proportion of West End theatregoers closely correlate with the West End boroughs with the most theatre provision.

A,0 ADDITIONAL INFORMATION

APPENDIX

A,1 FURTHER READING

OFFWESTEND.COM AUDIENCES REPORT	http://www.itrendresearch.com/foweaudiencereport.html
SOLT AUDIENCES REPORT	http://www.solt.co.uk/publications
SOLT BOX OFFICE REPORT	http://www.solt.co.uk/publications
THEATRES TRUST ACT NOW REPORT 2003	http://bit.ly/1Iwh3FL

A,2 FULL LIST OF THEATRE VENUES

EMAIL FOR INCLUSION: ALISTAIRSMITH@ME.COM

Note 1: Many of these venues have multiple theatre spaces, which have been counted in the overall list. So for example, while National Theatre is listed below once, the Olivier, Cottesloe, and Lyttelton are all counted separately in Chapter 1.

Note 2: this list of theatres was compiled in early 2013. New theatres are opening all the time. If your theatre is not included and you would like to be featured in the next version of this report, please email alistairsmith@me.com

INNER LONDON:

HACKNEY

GREENWICH

ISLINGTON

HAMMERSMITH AND FULHAM

KENSINGTON AND CHELSEA

LAMBETH

CAMDEN

TOWER HAMLETS

INNER LONDON:

Hackney
Arcola Theatre
Hackney Empire
Hoxton Hall
Rosemary Branch
Courtyard Theatre
New Britannia Theatre
The Yard
Rose Lipman Building
Shoreditch Town Hall

Greenwich
Greenwich Theatre
Blackheath Halls
Borough Hall
The O2

Islington
King's Head
Sadler's Wells
Little Angel Theatre
Pleasance
Hen and Chickens Theatre
Old Red Lion
Park Theatre
Almeida Theatre

Hammersmith and Fulham
Hammersmith Apollo
Lyric Hammersmith
Bush Theatre
Barons Court Theatre
Teatr Polski
Riverside Studios

Kensington and Chelsea
Holland Park Theatre
Tabernacle
Drayton Arms
Gate Theatre
Cadogan Hall
Royal Court
Chelsea Theatre
Finborough Theatre

Lambeth
National Theatre
Omnibus Arts Centre
Old Vic
London Wonderground
Udderbelly
Southbank Centre
Oval House
Landor
White Bear
Young Vic
Lost Theatre
Waterloo East Theatre

Camden
Tristan Bates Theatre
Ambassadors Theatre
Bloomsbury Theatre
Cambridge Theatre
Camden People's Theatre
Dominion Theatre
Donmar Warehouse
Etcetera Theatre
Hampstead studio
Hampstead Theatre
Lauderdale House
New Diorama
New London
Pentameters
Phoenix Theatre
The Place
The Drill Hall / RADA Studios
Roundhouse
Shaftesbury Theatre
Shaw Theatre
St Martin's Theatre
Teatro Technis
Lord Stanley pub
Lion and Unicorn
Upstairs at the Gatehouse

Tower Hamlets
Toynbee Studios
The Space
Half Moon
Wilton's Music Hall
Albany
Laban Theatre
Broadway Theatre & Studio
Brockley Jack
The London Theatre

City of London
Barbican
Rich Mix

INNER LONDON:

WANDSWORTH

WESTMINSTER

SOUTHWARK

OUTER LONDON:

BARKING

BRENT

CROYDON

REDBRIDGE

NEWHAM

HOUNSLOW

ENFIELD

Wandsworth
Theatre 503
Tara Arts
Battersea Arts Centre

Westminster
The Gielgud Theatre
Noel Coward Theatre
Prince Edward Theatre
Queens Theatre
The St James Theatre
The Harold Pinter Theatre
Criterion Theatre
Adelphi Theatre
Print Room Theatre
Jermyn Street Theatre
Duke of York's Theatre
Royal Opera House
Piccadilly Theatre
London Palladium
Cockpit Theatre
Trafalgar Studios
Apollo Victoria Theatre
Soho Theatre
Aldwych Theatre
Wyndhams Theatre
Regents Park Open
Air Theatre
The Arts Theatre
Duchess Theatre
Garrick Theatre
Novello Theatre
Theatre Royal Drury Lane
The Lyceum Theatre
Prince of Wales Theatre
Theatre Royal Haymarket
Apollo Theatre
Vaudeville Theatre
Lyric Theatre
London Coliseum
Leicester Square Theatre
Victoria Palace Theatre
Palace Theatre
Charring Cross Theatre
Peacock Theatre
Savoy Theatre
Playhouse Theatre
Fortune Theatre
Theatre Delicatessen
Actors Church (Iris Theatre)
Canal Café
Mayfair Theatre at
May Fair Hotel
Her Majesty's Theatre

Southwark
Puppet Theatre Barge
Blue Elephant Theatre
Menier Chocolate Factory
Rose Theatre
The Scoop
Shakespeare's Globe
Southwark Playhouse
Bussey Building
Theatre Peckham
Half Moon Herne Hill
Unicorn Theatre
Union Theatre
Canada Water Library
The last refuge

OUTER LONDON:

Barking
Broadway Theatre

Brent
Tricycle

Croydon
Fairfield Halls
Matthew's Yard

Redbridge
Kenneth More Theatre
Redbridge Drama Centre

Newham
Stratford East
Stratford Circus
Brick Lane Music Hall

Hounslow
Waterman Arts Centre
Isleworth Public Hall
Paul Robeson Theatre
Tabard Theatre
Chiswick House (open air)

Enfield
Chicken Shed Theatre
Dugdale Centre
Millfield Theatre

OUTER LONDON:

WALTHAM FOREST

HAVERING

BROMLEY

BARNET

HILLINGDON

BEXLEY

RICHMOND

KINGSTON

HARINGEY

HARROW

SUTTON

Waltham Forest
Walthamstow Assembly Hall
Leytonstone Library
Rose and Crown

Havering
Queens Theatre, Hornchurch
Brookside Theatre

Bromley
Churchill Bromley

Barnet
Arts Depot

Hillingdon
Compass Theatre
The Beck Theatre

Bexley
Danson House (open air)

Richmond
Langdon Down Centre /
Normansfield Theatre
Richmond Theatre
Orange Tree Theatre

Kingston
Rose Theatre
Colour House Theatre
Lantern Arts Centre
Polka Theatre
New Wimbledon
Theatre & Studio

Haringey
Jacksons Lane Theatre
The Red Hedgehog
Bernie Grant Performing
Arts Centre,
T Chances

Harrow
Harrow Arts Centre

Sutton
Secombe Theatre
Charles Cryer Studio

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