British Theatre Before & After Covid

Report

British Theatre Consortium

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https://www.britishtheatreconsortium.co.uk

Contents

Introduction

Background

1. From around 1970 until the late 1990s, the Arts Council collected figures on repertoire from its clients. During the 1970s and 1980s, new work hovered between **12%** and **20%** of the subsidised theatre repertoire. By the end of the 1990s, the Arts Council had ceased to collate this data.

2. In 2000, the Boyden Report led to a **71%** uplift in grants to regional theatre over five years. ACE then commissioned the British Theatre Consortium to report on the impact of the uplift on new writing, titled *Writ Large* and published in 2009. Based on a survey of 89 Regularly Funded Organisations (of which **65** replied) the study demonstrated that the proportion of new writing in the repertoire had increased to **47%**.

3. Following *Writ Large* ACE funded BTC to conduct a follow-up report. UK Theatre [UKT, then the Theatrical Management Association] and the Society of London Theatres [SOLT] agreed to allow BTC access to their data, enabling by far the most comprehensive study of British theatre repertoire that had ever been conducted.

4. BTC studied the repertoire in 2013 and 2014. The basic methodology was to go through the shows presented, excluding non-theatre events, and then tagging each show in a number of non-exclusive categories, including form (Drama, Opera, Musical, Pantomime, Dance etc) era (classical, modern, postwar, new), whether new work was new writing (tagged for gender of writer) or devised.

5. The categories were then aggregated and answers to a large number of questions asked of the collated data. The headline findings of the 2013 report was that new work had overtaken revivals in terms of productions (**55%**), performances (**56%**), attendances (**53%**) and box office take. Other findings included that despite their decline revivals did better than new plays at the box office; **a quarter** of new plays were adaptations; **31%** of new plays were written by women.

6. The 2014 study demonstrated that 2013 had not been a blip. New work continued to dominate the repertoire (new writing attended by over five million people). Devised theatre increased, as did attendances for Pantomimes. The proportion of new plays written by women remained at **31%** of all plays produced.

7. In 2019 BTC and ACE resolved to launch a new study to extend the period of analysis and add an element of longitudinal study to the 2013 and 2014 reports. ACE funded BTC for this work. The lockdown of March 2020 interrupted plans.

This Report

8. In March 2023, BTC met informally with UKT/SOLT and ACE and a series of conversations began which culminated in a decision on 20 October to go ahead with a report on the years either side of lockdown (2019 and 2023) to find out the effect of Covid on British theatre repertoire.

9. Agreements were being negotiated with UKT theatres for their data to be onboarded to UKT's Evidence Centre, to which we were able to add repertoire coding. After that, anonymised, aggregate sales data was shared with us for analysis. By early 2024, BTC had recruited seven drama-qualified researchers and Research Lead, academic, and theatre commentator Dr Catherine Love-Smith. Throughout, we have worked closely with Jonathan Davies, Baker Richards Consulting Ltd.

10. This report is based on 2019 and 2023 data from all **65** SOLT theatres and **74** UKT theatres, almost exactly half the total UKT membership. **15** of the SOLT theatres (which includes the commercial West End) are Arts Council-funded National Portfolio Organisations [NPOs] (**23%** of the total), and **44** of the UKT theatres are NPOs (**59%** of the total). Our dataset includes all but **16** of the **67** UKT NPOs (**76%** of the total). We are thus able to paint a detailed and convincing picture of the subsidised theatre both in London and elsewhere. It should be noted that some theatres lost their NPO status during 2023, but for the purpose of this comparative exercise we have retained those theatres in the 2023 list.

11. The range of UKT theatres in our dataset is wide, including most of the major repertory theatres, Chichester, and the RSC, and a significant range of London non-West End theatres including the Almeida, Hampstead, the Kiln, the Old Vic, the Rose, Sadlers Wells, the Soho, and the Unicorn.

12. Although we have over half of UKT's regional and national commercial theatres, including the **10** theatres in the Trafalgar Group, it does not include data from ATG Entertainment's 20 commercial theatres outside London. As a result, coverage of the regional commercial sector is less complete than that of the London commercial and subsidised sectors.

Comparisons between the two years and with 2013 and 2014

13. The particular focus of our research has been to look at the state of theatre in 2019 – the year immediately preceding the Covid pandemic lockdowns and the national shutdown of all theatres – and to compare that with the state of the theatre in 2023, well over a year after the United Kingdom had emerged from all lockdowns and theatres had reopened.

14. Since 2020, there has been considerable discussion about the effects of the Covid lockdowns on theatre. There were concerns that audiences would take a long time to return; that their expectations would be different; that programming might need to adapt to shortfalls in attendance; and that ticket prices would rise considerably. Whether these outcomes actually happened has been the focus of our analysis of the data.

15. Accordingly, the interim report directly compares the same group of theatres in the calendar years 2019 and 2023, either side of the Covid lockdown.

16. In addition, we were interested to compare repertoire in both 2019 and 2023 with our studies of 2013 and 2014. We are cautious about comparing the figures in this report with those of the earlier reports, which were based on a larger dataset. However, while several of the 2013/2014 theatres have not contributed data to this report, data from most of the 2019-2023 theatres were part of the 2013 and 2014 data harvest. Therefore, we have been able to make some significant conclusions about

how the shape of British theatre repertoire changed between 2013-4 and the end of the decade, as well as either side of lockdown.

17. All three of our reports (2013, 2014 and this one) are based on very large datasets; indeed, apart from those of 2013 and 2014, this is by far the most comprehensive and detailed picture of UK theatre repertoire ever produced. It is our hope and ambition that, in future years, we can increase the post-Covid database to match the scale and scope that we achieved in 2013 and 2014.

A note on methodology

- Researchers attached to the British Theatre Consortium Report Team performed extensive research and coding of publicly available data (playwrights, show titles, genre, form, etc.).

- This coding of repertoire was looked-up against datasets of aggregate sales figures, owned by SOLT & UK Theatre.

- The outputs of this look-up (connecting detailed coding of repertoire with performance counts, box office figures, ets.) were shared with the lead researcher, Dan Rebellato, under NDA to prevent disclosure of sensitive or identifying information.

- The figures shared were in the aggregate, sorted by BTC repertoire coding, not identifying specific venues or productions; additional controls were applied to ensure figures shared with BTC could not identify sensitive business data associated with small clusters of venues.

A note on terminology

- **Core theatre**: Much of what happens in theatres is not theatre (e.g. in-conversation events, stand-up comedy, concerts) or is theatre-related but not theatre as such (e.g. workshops), or is theatre but of a restricted kind (e.g. staged readings). As explained in the opening sections, unless otherwise indicated, our figures relate only to live professional theatre which has had more than one performance, which we occasionally refer to as core theatre.

- **Theatre form**: within the core theatre set, we have identified seven distinct theatre forms: Drama, Musical, Physical theatre, ballet/dance, Opera, Pantomime, Christmas shows. While we are interested in the place of Dance and ballet in the overall theatre picture, we have not tagged ballet/dance beyond the initial identification, so it is excluded from parts of the report.

- **Theatre activity**: this comprises four indicators that we frequently refer to: numbers of **productions**, numbers of **performances**, numbers of **attendances**, and **box office** income. These collectively we refer to as theatre activity.

List of figures

COVID-19

Beginnings

1. In mid-December 2019, in the city of Wuhan, China, several patients exhibit novel pneumonia-like symptoms. At the end of the month, the World Health Organisation is notified of a new disease of unknown cause. In mid-January, China reports that someone has died from the disease for the first time. The disease is designated 2019 Novel Coronavirus (2019-nCoV) but is soon known as Covid-19.

2. Thailand's authorities report the first confirmed case outside China on 13 January. By the end of the month, person-to-person infections have been reported in the United States.

3. In March, Covid-19 cases are being reported in every country. In late January, China instigates strict quarantine in areas affected by Covid. On 9 March, Italy is the first European nation to announce a lockdown, restricting all but essential travel. By the end of March, most countries in western Europe have introduced similar measures.

4. At the end of January 2020, there were just under 200 global deaths from Covid. At the end of February, that number was just under 3,000. At the end of March, the number had risen to just over 400,000.[1]

United Kingdom

5. On 30 January, the first two confirmed cases of Covid-19 are reported in the United Kingdom. By the end of February there are two dozen people confirmed with Covid-19 in the UK, including at least one case in each of the four nations.

6. On 5 March, the United Kingdom experiences the first confirmed death from Covid-19 and on 12 March new guidance advises people with a continuous cough or fever to self-isolate for seven days.

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[1] Edouard Mathieu, et al., 'Coronavirus (COVID-19) Deaths,' *OurWorldinData.org* (2024). https://ourworldindata.org/covid-deaths. Visited 14 September 2025.

7. On 11 March, the Chancellor of the Exchequer, Rishi Sunak, announces £30bn in measures to protect the economy against the effects of Covid-19, though this will soon be overtaken by events. Between mid-February and mid-March, the FTSE 100 drops by around 30%.[2]

8. On 13 March, BBC Radio 1 cancels the Big Weekend music festival, due to be held at the end of May. On the same day the Premier League announces the suspension of the football season.

9. On 16 March, the number of confirmed cases of Covid-19 infections in the UK is over 1,500 and the number of deaths is 55.

British Theatre & Covid[3]

10. On 12 March, Broadway's theatres announce an immediate shutdown of all productions. On 15 March, the Old Vic ends their run of *Endgame* two weeks early, becoming the first British theatre to cancel performances due to Covid; it is quickly followed by the Arcola suspending all performances.[4]

11. On 16 March, the Scottish Government advises that events gathering more than 500 people should be cancelled. An hour later, in a live address to the nation Prime Minister Boris Johnson urges people to avoid going out to places like theatres, though does not instruct theatres to close. Nonetheless, after consultation between the Department of Culture, Media & Sport [DCMS], SOLT, and UK Theatre all theatres announce their immediate closure. This is initially until 26 April, but there will be rolling

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[2] 'FTSE 100,' *London Stock Exchange* (29 August 2025). https://www.londonstockexchange.com/indices/ftse-100. Visited 14 September 2025

[3] This timeline is drawn from various sources but particularly useful were Alistair Smith, 'Timeline: Theatre and Covid-19,' *The Stage* (11 March 2021). https://www.thestage.co.uk/features/timeline-theatre-and-covid-19 Visited 10 September 2025 and Emma De Souza and Kayley Donnelly, *How we supported our members during the pandemic March 2020-April 2022*, London: Society of London Theatre & UK Theatre, 2022.

[4] Harriet Brewis, and Jonathan Prynn, 'Old Vic becomes first London theatre to cancel performances as Endgame closes early amid coronavirus outbreak,' *The Standard* (16 March 2020). https://www.standard.co.uk/culture/theatre/old-vic-endgame-coronavirus-daniel-radcliffe-a4387811.html. Visited 16 September 2025.

monthly closure announcements until September. On 20 March, the Government formally requires all theatres to close.

12. In the first month of closure, it is reported that tickets sales have fallen by 93% and theatres' income by 91%.[5] A report published in June projects a loss of £77bn in turnover across the Creative Industries and 409,000 job losses.[6]

13. On 20 March, the Chancellor of the Exchequer rolls out the 'furlough scheme' to prevent catastrophic job losses. This does not include freelancers, who are thought to make up 70% of the theatre workforce.[7] On 24 March, Arts Council England announces a £160mn emergency fund.

14. On 26 March, the UK officially goes into lockdown.

15. On 25 June, the Government publishes its roadmap to recovery for the performing arts starting with livestreamed productions in empty theatres, then outdoor performances, followed by socially-distanced indoor performances, and ending in a full return to pre-pandemic theatregoing. No dates or money are attached to this roadmap.

16. On 3 July, the Scottish Government announces the Performing Arts Venue Relief Fund with £12.5mn to support struggling organisations. Two days later, the UK Government announces a £1.57bn Culture Recovery Fund. This does not provide support for freelancers; on 6 July, the Theatre Artists Fund is established by SOLT and UK Theatre, led by Sam Mendes, which will award almost £10mn in emergency relief to freelancers. On 5 October, a £53mn Welsh Cultural Recovery Fund is announced.

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[5] 'Devastating Impact of The Pandemic on Theatres.' *Stage Systems* (7 September 2021). https://www.stagesystems.co.uk/pandemic-impact-on-uk-theatres/. Visited 15 September 2025.

[6] *The Projected Economic Impact of Covid-19 on the UK Creative Industries*, Oxford: Oxford Economics, 16 July 2020. https://oeservices.oxfordeconomics.com/publication/download/337983 Visited 16 September 2025.

[7] See *COVID-19: Routes to recovery*, Freelancers Make Theatre Work, 2020. https://freelancersmaketheatrework.com/wp-content/uploads/2020/07/Routes-To-Recovery.pdf Visited 16 September 2025.

17. On 23 July, the DCMS Select Committee releases a report calling for clearer schedules for the roadmap, and financial support for cultural organisations and freelancers.[8]

18. Theatre unions including Equity, BECTU and the Writers' Guild of Great Britain draw up guidelines and secure agreements on procedures for their overwhelmingly freelance members during lockdown. These guidelines are accepted by UK Theatre and the Independent Theatre Council, though some theatres (including the National Theatre, RSC, and Royal Court) decline to accept them.

19. Theatre performances indoors are due to resume on 1 August, but the Government cancels the plan with one day's notice. On 15 August, theatres are permitted to reopen for socially-distanced indoor performances. Few theatres are able to take up this opportunity immediately, though by late October many theatres have begun to reopen.

20. On 14 October, a new system of three 'tiers' of lockdown, designed to be more flexible and responsive to local outbreaks, is introduced.

21. On 31 October, Prime Minister Boris Johnson announces a second national lockdown to come into force on 5 November. Many theatres have only just reopened and are forced to close again.

22. On 2 December, the second lockdown comes to an end, but a new Tier 4 is announced, requiring people to stay indoors and to avoid social mixing. This initially covers London and the South East but soon much of the country comes into this tier as the 'Delta Variant' is seen to be spreading widely.

23. On 6 January 2021, two days after schools reopen, England enters a third national lockdown.

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[8] Digital, Culture, Media and Sport Committee, *Impact of COVID-19 on DCMS sectors: First Report*. HC 291, London: House of Commons, 2020. https://committees.parliament.uk/publications/2022/documents/19516/default/ Visited 16 January 2023.

24. On 22 February, the Government announces the 'Roadmap out of Lockdown', four steps towards full reopening. Most theatre activity seems to fall under Step 3 or (for larger theatres) Step 4, tentatively scheduled for 17 May and 21 June respectively.

25. On 16 March, one year on from the first lockdown, a survey of 186 theatres conducted by SOLT and UK Theatre report combined losses of almost £200mn. More than 95% of theatre organisations report being worse off because of Covid. One in four freelancers have stopped working and many have left the industry altogether.[9]

26. Step 4 is delayed until 19 July, causing significant problems for theatres who have planned productions and sold tickets for shows to open on 21 June.[10] Nonetheless, on 19 July theatres in England reopen.

27. On 27 July, theatres in Northern Ireland reopen for the first time since March 2020.

28. In the October Budget, the Chancellor of the Exchequer announces increased support for theatres through additional Theatre Tax Relief and more money for the DCMS and local authorities.

29. In December 2021, with the 'Omicron Variant' spreading rapidly, 'Plan B' is introduced, making face masks mandatory in indoor venues and requiring the NHS Covid Pass app for entry to some larger venues. These restrictions are relaxed on 19 January 2022. From this point, theatres are operating under pre-Covid legal conditions.

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[9] Matt Hemley, 'A year on: survey reveals theatre losses of £200m and a quarter of freelancers have ceased trading,' *The Stage* (16 March 2021). https://www.thestage.co.uk/news/a-year-on-survey-reveals-theatre-losses-of-200m-and-a-quarter-of-freelancers-have-ceased-trading Visited 16 September 2025.

[10] Sophie Thomas, 'Step Four of Covid roadmap delayed: What does this mean for theatres?' *London Theatre* (15 June 2021). https://www.londontheatre.co.uk/theatre-news/news/step-four-of-covid-roadmap-delayed-what-does-this-mean-for-theatres Visited 14 September 2025.

After-effects

30. Anecdotally, it is widely suggested that British theatre has been significantly transformed by Covid. Some of the reported changes – the downsizing of the workforce, the rise of 'event theatre' to attract audiences – are beyond the scope of this report. We will be able to examine and test some of the common claims made:[11]

    a. It is sometimes said that it has taken a long time to get audiences back. Some report that audience numbers have not returned to pre-Covid levels. Theatres have had to programme more cautiously, perhaps in a more commercially-minded way.

    b. It has been suggested that audiences book later for shows, waiting for reviews and word of mouth before committing to buying a ticket. Perhaps as a response, theatres have made increasing use of familiar intellectual property (adaptations of well-known films and books, for example).

    c. Some report that, because Covid normalised working from home, there have been shifts in the geographical distribution of the population and in the shape of the working week. For example, Fridays and Saturdays, once the fastest sellers, have become much slower to fill.

    d. When the theatres closed, several theatres sought to continue making work that could be streamed. This

[11] See, for example, Alistair Smith, 'Covid continues to shape theatre five years on,' *The Stage* (26 March 2025). https://www.thestage.co.uk/opinion/covid-continues-to-shape-theatre-five-years-on Visited: 3 July 2025; Georgia Luckhurst, 'Five years on from lockdown: theatre figures on Coronavirus' lasting impact,' *The Stage* (19 March 2025). https://www.thestage.co.uk/news/five-years-on-from-lockdown-theatre-figures-on-coronavirus-lasting-impact Visited 3 July 2025; Balme, Christopher, James Rowson, and Thomas Eder. 'Theatre after Covid: Innovation or Path Dependence?', *Urania Interdisciplinary Academic Journal* 4, no. 1 (2024): 7-25; Stephen Langston, 'The pandemic nearly killed theatre – the creative way it fought back could leave it stronger." *The Conversation* (21 February 2022). https://theconversation.com/the-pandemic-nearly-killed-theatre-the-creative-way-it-fought-back-could-leave-it-stronger-176185 Visited 16 September 2025.

generated much excitement about the continuing potential of streaming as a theatrical medium after Covid.

e. Ticket prices are thought to be considerably higher since Covid.

31. In many cases it is difficult to disentangle the effects of Covid with other changes in the environment of theatre production. Rises in fuel prices connected with the ongoing War in Ukraine have undoubtedly raised the costs of theatre production. The inflationary rises and cost of living crisis associated with Brexit, Liz Truss's September 2022 mini-budget, supply chain disruptions and more have made theatre more expensive and limited many people's ability to pay for theatre tickets. These will all have had determining effects on theatre production and theatregoing.

32. However, we have considerable data that allows us to shed some light on changes in theatre repertoire and attendance between 2019 – the last full year before Covid – and 2023 – the first full year without Covid restrictions.

Headlines

Covid impacted UK theatre severely, but the industry survived. After its longest closure since the seventeenth century, theatre needed to win back audiences who found alternative leisure habits during the pandemic. There were great successes – notably in musical theatre. There were more adaptations, less Drama and fewer new plays. Overall, after lockdown, theatre was more metropolitan, more commercial and more conscious of box-office risk than before.

Ten Key Findings

- **Between 2019 and 2023, the number of productions and performances declined but attendances rose.**
- **Musicals increased and Drama declined.**
- **New Work declined in the 2010s but formed a larger part of the repertoire after Covid than before. By 2023, the majority of theatre productions consisted of new work once again.**
- **New Musicals increased considerably after lockdown**
- **There were fewer New Plays but those there were had longer runs in fuller theatres**
- **Revivals declined. Shakespeare dominated classical revivals, with a surprise winner in both years.**
- **The share of adaptations in the repertoire increased. After Covid, adaptations did better business in larger theatres.**
- **The share of plays by women increased substantially.**
- **The capital's already overwhelming share of national theatre activity increased.**
- **Contrary to popular perception, real-terms ticket prices fell between 2019 and 2023.**

In Detail

1. Overall between **2019** and **2023**, the numbers of professional, live theatre **productions** dropped sharply (by **14.5%**) and **performances** marginally (by **3.6%**), but **attendances** increased noticeably (**6.8%**). Either side of lockdown commercial theatres increased their lead over NPOs (subsidised theatres) in **performances**, **attendances** and **box office**. The number of shows running for more than five years increased substantially, from **19** to **34**.

2. Musicals increasingly dominated the theatre repertoire. Along with Pantomime, Musicals were the only form whose performance increased on all measures. In **2019**, Musicals accounted for a **third** of all performances, **half** of all attendances, and almost **three-fifths** of all box office income. In **2023**, those proportions rose to **two-fifths** of all performances, **over half** of all attendances, and approaching **two-thirds** of all box office income.

   By contrast, Drama saw a significant decline as a proportion of productions from **57%** to **51%**.

3. New Work rose as a proportion of theatre on all measures after Covid. From **2019** to **2023**, new work rose to **just over half** of **productions** and half of **performances**, while **attendances** increased from **7.3 million** to just over **11 million visits**.

   As a proportion of all Drama productions (i.e. not including Musicals), New Work rose from just over **60%** to **65.1%**.

   However, this followed a steep decline in New Work in the 2010s. For example, in **2014** new work was **62%** of all theatre productions but in **2019** it was **49%**. New work has been recovering strongly, but it is yet to return to the levels of performance it achieved in **2013** and **2014**.

4. The biggest story for New Work was the increase in New Musicals. In **2019**, **37%** of Musicals were new, rising to just over **50%** in **2023**. After lockdown, new Musicals accounted for **56%** of all **box office** takings for new work (up from **41%**).

5. New Plays declined in terms of numbers of productions, but those plays that did get produced had **longer runs** and made more at the **box office**. Original New Plays for Adults also declined in

numbers of productions but increased on all other measures. In **2019**, original New Plays for Adults achieved **77%** of box office potential, more than any other theatre form, including Musicals, old or new.

Devised work increased as a proportion of all theatre **productions**, **performances**, **attendances** and **box office**, continuing the pattern of increase activity noted in our **2013** and **2014** reports.

6. Between **2019** and **2023**, Revivals declined in terms of **productions**, **performances**, **attendances** and **box office.** Despite this, Revivals outperform New Work in both **attendances** and **box office,** and, in **2023**, still accounted for **a third** of all Drama and **half** of Musicals.

   After lockdown, the proportion of Postwar Revivals increased, while Modern and Classical Revivals declined. In **2023**, **89%** of all Classical Revivals were **Shakespeare**, with *Macbeth* leading the pack both before and after the Covid pandemic. After a global pandemic, tragedy overtook history as the most popular Shakespearean genre for producers.

7. Adaptations (old and new) rose on all measures between **2019** and **2023**, generating **more than half** of all theatre box office in the latter year. In **2023**, Adaptations had **longer runs**, were performed in **larger auditoriums**, filled **more seats**, and did **better box office**.

   Absolute numbers of *new* adaptations declined between the two years but **almost doubled** their attendances and real-terms box office.

   Productions of translations fell sharply between **2019** and **2023**, declining by **59%**. Nonetheless, the smaller number of translations proved popular, filling more of their seats than any of the main theatre forms in **2023**.

8. The number of New Plays written by women increased from **31%** of theatre repertoire in **2013** and **2014** to **39.4%** in **2019** and **41.7%** in **2023**. Plays by women played in **bigger auditoriums** than plays by men in **2019**, but not in **2023**. In **2019** New Plays by women were around **two-fifths** of new play **performances**, **attendances** and **box office**, but those measures dropped to **below a third** in **2023**.

   For women playwrights overall, including authors of revived plays, the number of productions increased from **32.2%** to **35.1%** between the two years. Men still dominate the writing of Adaptations and Musicals.

9. In terms of total theatre activity, London's dominant share increased in all measures between **2019** and **2023**. After lockdown lifted, London represented **22.6%** of all Drama productions, but **60%** of all Drama performances, **69%** of all attendances and **80.1%** of all income.

   However, between **2019** and **2023** the regions and nations outside London improved their performance against potential, both in attendance and box office, slightly more than London.

   In **2019**, the theatre form that filled the largest proportion of its seats anywhere was Pantomime in the North West; in **2023** it was Christmas shows in the West Midlands**.**

10. Contrary to a widespread belief, once above-average inflation is taken into account, average **theatre ticket prices** *fell* between **2019** and **2023**. Further, strikingly, the biggest reductions in ticket prices were for the forms with the highest prices, Opera and Musical theatre. So, far from pushing up ticket prices, Musical theatre has been significantly responsible for keeping them down.

    Average seat prices in the subsidised theatre were **substantially lower** than those in the commercial sector.

    Finally, against common perceptions, it appears that in the main audiences are **not booking tickets later** than they used to. The earliest bookers are for Musicals and the latest for Drama.

1. Overview

All activity

1. Looking at *all* reported shows and other events in the theatres for which we have data, we can say that:

    - In **2019**, there were **8,216** separate shows, together giving **61,806** performances, **27,449,709** attendances, generating **£1,103,949,593,24** at the box office.

    - At the same theatres in **2023,** there were **7,399** separate shows, together giving **54,643** performances, **29,122,292** attendances, generating **£1,332,213,868.47** at the box office.

2. Immediately we can see that there were **9.9%** fewer shows and **11.6%** fewer performances in **2023** compared to **2019**, but **6.1%** more attendances.

3. Calculating box office income needs a slight adjustment to the raw figures; the Bank of England suggests that annual inflation averaged **5.2%** in this period and that cumulative inflation between these two years was **22.6%**. Thus we can say that total box office income fell in real terms by around **1.6%.**

4. The whole sector as represented in our data achieved **68.4%** of its potential box office (i.e. income if every seat were sold) in **2019** and **66.7%** of potential box office in **2023**, a slight decline.

5. However, the sector saw a slight increase in attendances as a proportion of capacity (i.e. attendance if every seat were filled), from **69.5%** in **2019** to **70.6%** in **2023**.[12]

Theatre Events

[12] The difference between the figures for performance against potential for audiences and for box office broadly suggests that theatres are filling their cheaper seats more effectively than the more expensive ones – and that this was even more the case in **2023** than it was in **2019**.

6. However, not all events that take place in our theatres are theatre. There are book tours, poetry readings, concerts, talks, and more. There are also events that are connected to theatre but not fully public or live theatre as such, including platform events, post-show discussions, learning workshops, stand-up comedy, theatre streaming and more. We also took the decision to exclude wholly amateur theatre from our figures: amateur theatre is an important part of Britain's theatre culture but is an inconsistent presence in the theatres in our data which would create anomalies and confusions. Community performances led by professional theatremakers *are* included.

7. If we strip out all of these events, leaving only live public theatre, we find that:

   - In **2019**, there were **2,055** separate shows, together giving **43,160** performances, attended **24,826,571** times, generating **£1,051,367,380.51** at the box office.

   - In **2023,** there were **1,736** separate shows, together giving **41,434** performances, attended **26,414,544** times, generating **£1,263,723,253.95** at the box office.

8. The numbers of public, live theatre shows dropped slightly more (**15.5%**) and performances slightly less (**4%**) than the numbers for overall activity. Attendances, however, increased more (**6.4%**).

9. Adjusting for inflation, we find that in real terms gross box office income between **2019** and **2023** dropped by around **2%**.

Core Theatre

10. Finally, there are some theatre events that we have decided to exclude: specifically legitimate public theatre but that only had one performance. The majority of these are staged readings, scratch nights, showcases and so on. These tend to be one-off events and can skew the overall pattern. We want to focus our analysis on a **Core Theatre** set, consisting of only full productions

of live theatre.[13] When we remove shows with only a single performance, we find that:

a. in **2019** there were **1,671** shows, together giving **42,628** performances, attended **24,669,373** times, bringing in **£1,047,590,054.61** at the box office.

b. In **2023** there were **1,429** shows, together giving **41,089** performances, attended **26,349,451** times, bringing in **£1,262,488,992.95** at the box office.

11. Looking only at Core Theatre, then, numbers of public, live theatre shows dropped sharply (**-14.5%**) and performances marginally (**-3.6%**), but attendances increased noticeably (**6.8%**).

12. Adjusting for inflation, we find that in real terms gross box office income of Core Theatre between **2019** and **2023** dropped by around **1.7%**.

13. Core theatre achieved **69.7%** of box office potential in **2019** and **72.4%** of box office potential in **2023**, a rise of **2.7%pts**.

14. Core theatre achieved **72.8%** of total audience capacity in **2019** and **76.2%** of capacity in **2023**, a rise of **3.4%pts**.[14]

15. We might say, then, that there are three types of activities that happen in our theatres: **events** (non-theatre), **theatre** (all kinds of theatre), and **core** (full productions of live theatre). As we can see from *Fig. 1*, which shows the distribution of these in our theatres in **2023**, 'events' make up the great majority (**76.5%**) of production activity in our reporting theatres, but these non-theatre events make up a far smaller (**24.2%**) proportion of performances, even less (**9.3%**) of attendances, and even less (**5.1%**) of box office.

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[13] Core theatre made up 20.3% of all productions in our theatre in 2019 and 19.3% in 2023. This is broadly consistent with our findings almost a decade ago that core theatre made up 20% of all theatre events. David Brownlee, David Edgar, and Dan Rebellato, *British Theatre Repertoire 2014*, London: British Theatre Consortium, UK Theatre, & Society of London Theatre, 2016, p. 5.

[14] See Note 12.

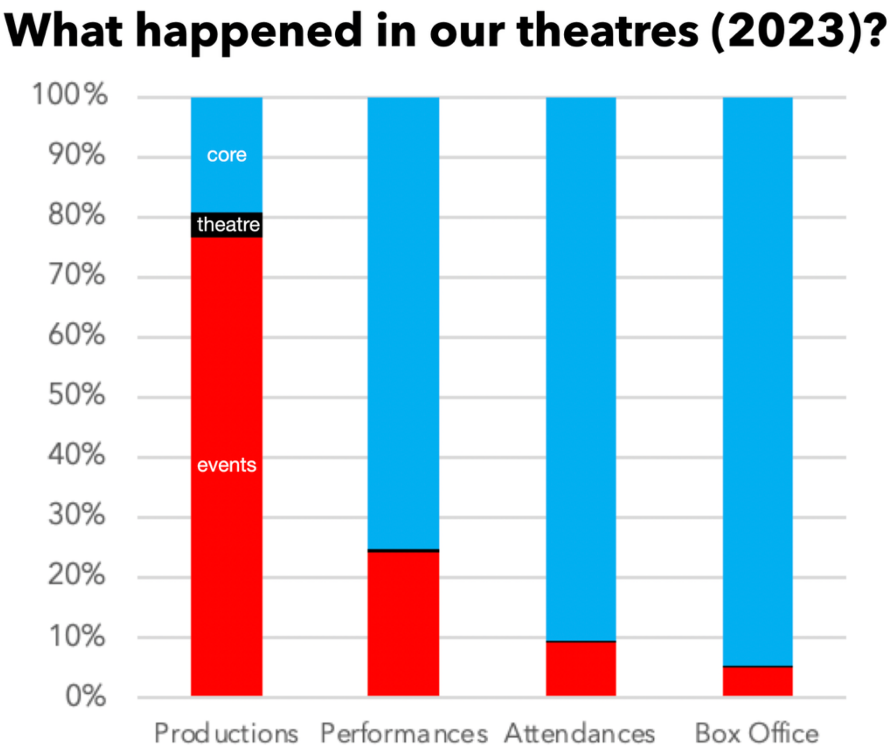


Fig. 1

16. To narrow down to core theatre removes around **18%** of theatre shows but still represents over **99%** of theatre performances, attendances and box office. From now on, unless explicitly stated, we will be working with this core theatre set.

Summary

17. Our data captures, in **2023**, **1,429** theatre shows, over **41,000** theatre performances, **26.3**mn attendances, and a combined box office income of **£1.3bn**.

18. Between **2019** and **2023**, numbers of productions were down substantially, real-terms box office very slightly down, but attendances were noticeably higher.

19. Theatre as a whole filled more of its seats and achieved more of its total potential box office in **2023** than it had in **2019**.

2. Commercial vs. Subsidised

1. Both subsidy and commerce are found throughout the ecosystem of British theatre and it is impossible entirely to separate the commercial and the subsidised sectors. Shows from the subsidised sector frequently make their way into the commercial sector; shows whose creation has been supported by public money will tour to venues without subsidy; commercial producers will commission or enhance work at subsidised venues; even venues that are in receipt of significant public money rely on box office income and follow some commercial imperatives; throughout the industry, individuals will typically move between the sectors, sustaining a career across the mixed-economy of our theatre. Subsidy and commerce are mutually sustaining in British theatre.[15]

NPOs vs. Commercial

2. Nonetheless, a useful way of dividing the sectors is to separate commercial venues from Arts Council England's National Portfolio Organisations [NPOs]. NPOs are not the only subsidised theatres but they form a substantial portion of the subsidised sector and we may think are indicative of that slice of British theatre's cultural

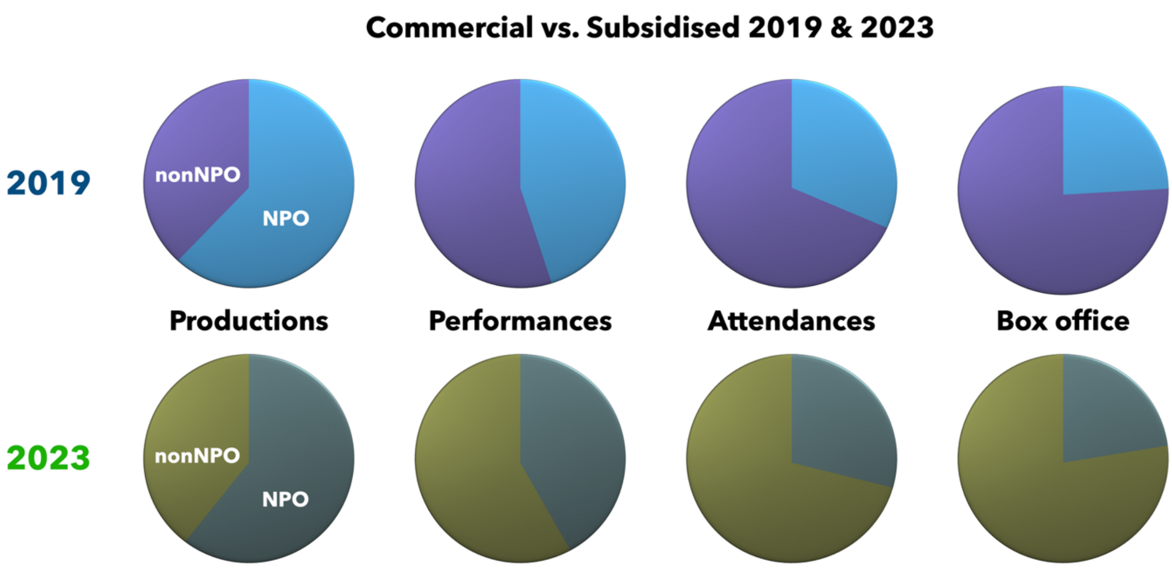


Fig. 2

[15] There is a third sector of theatre, which comprises independent charities who do not receive subsidy yet are also not-for-profit theatres. This is a small, albeit important, sector but we have not been able to separate them out from the commercial sector. We hope to make this distinction in future research, but for now note that though we use the phrase 'commercial' it would be better defined as 'non-subsidised'.

economy.[16] For that reason, references to the subsidised sector from hereon means NPOs. We can look at the distribution of the overall picture between these two sectors. *Fig. 2*[17] shows the distribution of theatre activity in our reporting venues.

3. As both charts show, NPO theatres are where a substantial proportion (just over three-fifths) of all productions take place, but a smaller proportion of performances (just over two fifths). The commercial sector accounts for just under three-quarters of all attendances and just over three-quarters of all box office revenue. (We discuss what happened to these proportions either side of lockdown below.)

4. This is not surprising. The commercial sector is generally where long runs reside in our theatre. In **2019, 72.9%** of runs with 50 performances or more were in the commercial sector and in **2023** that figure rose to **75.6%**. The subsidised sector is also where the smaller theatres are: in our **2019** figures, **69%** of productions taking place in theatres with fewer than 200 seats were in the subsidised sector, rising to **73%** in **2023**.

Ticket Prices

5. In addition, tickets are on average more expensive in the commercial sector. As *Fig. 3* shows, in **2019** average commercial-sector tickets were over **£14** more expensive than average subsidised-sector tickets, and in **2023** over **£15** more expensive.

6. However, digging a little deeper, it's notable that, between the two years, subsidised-sector tickets increased in price by a little

[16] Arts Council England's three main forms of funding for Theatre and Dance are Regular Funding (which, for Theatre and Dance, largely means NPO status), Project Grants, and Strategic Grants. In 2023-4, the Council gave £223mn to Theatre and Dance, £165mn (73.8%) of which of which was through Regular Funding. See https://www.artscouncil.org.uk/research-and-data/our-data/national-investment-dashboard Accessed: 23 October 2025.

[17] This is admittedly an Englandcentric chart, comparing NPOs with everything else; this does mean bundling organisations that are funded by Creative Scotland or the Wales and Northern Ireland funding bodies in with commercial. It has proved challenging to find strict equivalents in all nations; however, the quantities of non-commercial work outside England in our data are fairly small, so these figures should be understood to slightly – though not enormously – overstate the non-NPO figures.

over **14%** and commercial-sector tickets by a little over **11%**, and that therefore the differential has slightly dropped; in **2019**, commercial-sector tickets were **44%** more expensive than in the subsidised-sector but in **2023** that number had reduced to **40%**. It seems plausible that long runs may have contributed to the commercial sector's ability to resist raising prices to offset the rising cost of living, since the running costs are lower for a long-running show, while subsidised theatres with their higher turnover of productions have to lay out for start-up costs repeatedly.

Fig. 3

Production numbers

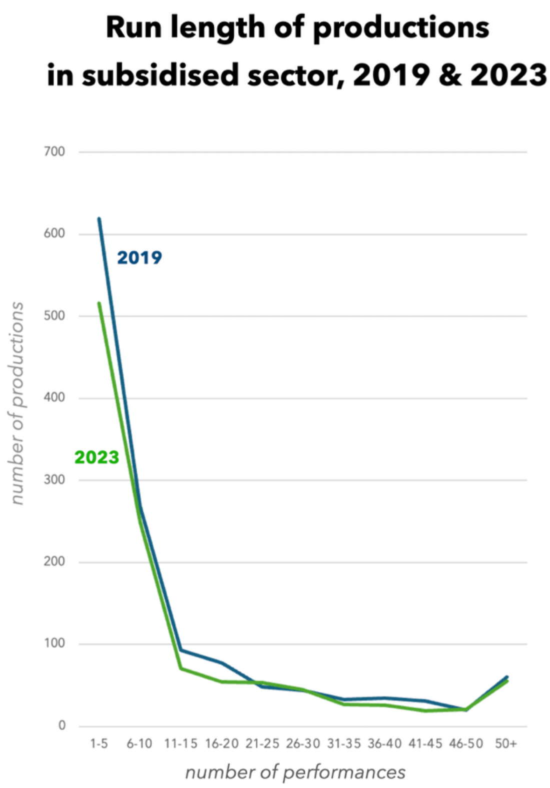
7. However, the drop of **14.5%** in numbers of productions that we previously noted is not evenly distributed across the two sectors.

The raw numbers of productions dropped by **10.6%** in the commercial sector and by **16.3%** in the subsidised sector.

8. The drop in the number of productions in the commercial sector will be partly explained by a growth in long-running shows. In **2019**, **19** shows in our data had been running for five or more years. By **2023**, that number had almost doubled to **34**. These shows will usually be in commercial venues and therefore reduce the number of productions in those theatres.

9. The decline in numbers of productions in subsidised theatres needs more investigation. Can this also be explained by longer runs? It is true that in the subsidised sector the average run length rose from just over **16** performances in **2019** to just over **17** in **2023**. However, *Fig. 4* breaks down all subsidised-sector production by their length of run. If the decline in productions were due to longer runs, we would expect to see **2023**'s green line rise above **2019**'s blue line in the right side of the graph. Instead, the green line remains below the blue line for all lengths of run except marginally in productions with 21-25 and 26-30 performances. This must mean that the subsidised sector was

Fig. 4

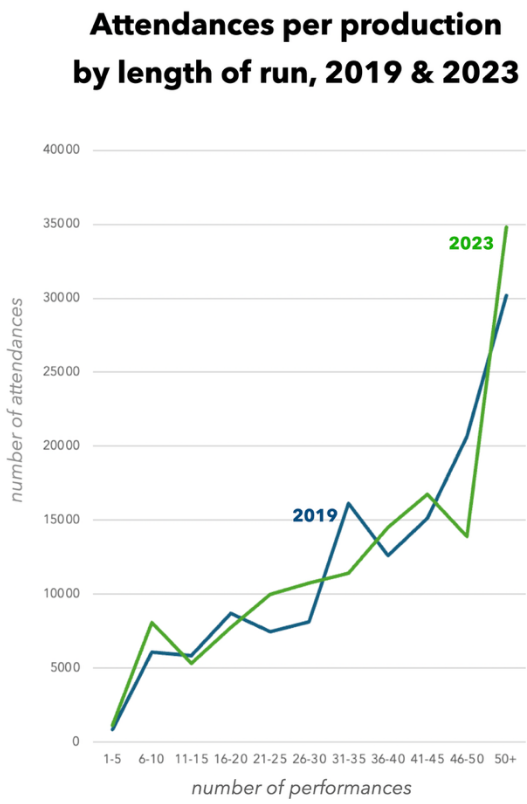


simply programming fewer productions in **2023** than they had been doing in **2019**.[18]

10. However, if we look at the number of attendances *per production*, the picture looks very different. The average number of attendances per performance in the subsidised sector rose from **404** in **2019** to **443** in **2023**, a rise of 9.5%. That, together with the slightly increased average run length, explains a rise in total audience per performance across the run of each production of **17.2%**.

11. And that increase of audience is seen right across the range of run lengths. *Fig. 5* breaks down attendances across the run of a production. What becomes clear is that theatres were able to attract more people per production right across the board from short to long runs.

Fig. 5



[18] This does not categorically mean venues are originating fewer productions; our data tells us how many separate productions run in a venue, which will include touring productions originating elsewhere. However, since the increased costs after 2021 will have affected a venue's ability to take a touring production less directly than the viability of a new production, we consider it likely that the data shows us fewer numbers of original productions.

12. What this picture suggests is that subsidised theatres, faced with increased costs, have sought to reduce their start-up costs by programming fewer productions, but, perhaps by focusing more on advertising and different kinds of programming, have successfully offset that by attracting larger audiences to the range of their work.

Summary

13. The commercial theatre took a greater share of theatre activity on all measures in **2023** compared to **2019**.

14. In the subsidised sector, numbers of productions dropped more sharply than in the commercial sector. In the commercial theatres this was partly offset by longer runs, but this was not the case in the subsidised sector. However, more people came per performance in the subsidised sector in **2023** than they had in **2019**.

15. The difference in ticket prices between the two sectors slightly reduced in **2023**, compared to **2019**.

3. The Repertoire

1. We have divided the theatre repertoire into seven theatre forms: Drama, Musical Theatre, Physical Theatre, Dance/Ballet, Opera, Pantomime, and Christmas shows.[19] This allows us to see how these relatively distinct forms of theatre fare in our theatres.

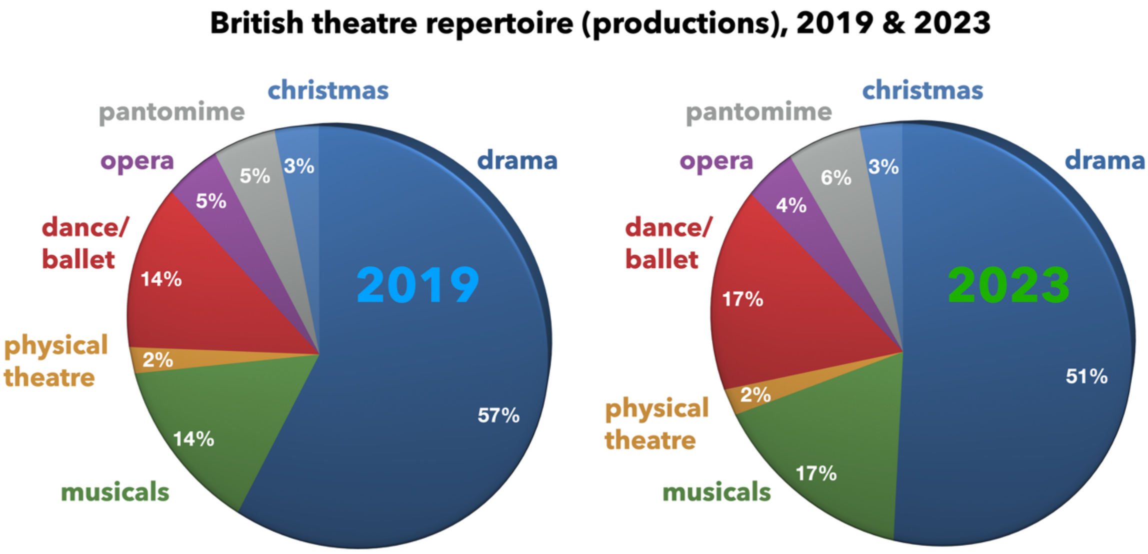


Fig. 6

Theatre forms

2. Looking at simple numbers of productions in each form (*Fig. 6*), we see that the picture across the two years is fairly similar, but with some important differences.

   a. The two forms of theatre with the highest numbers across our four measures are Drama and the Musical which together make up around **70%** of all productions in both years.

   b. Christmas shows, Pantomimes, Opera, and Physical theatre each contribute 5% or less of total productions and the proportions have not changed substantially.

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[19] Although they are both categories of shows performed during the festive season, we have divided Pantomimes (folk tales, TV stars, Dames, 'he's behind you', etc.) from Christmas shows (Wizards, Wonderlands, Witches and Wardrobes, etc.). Separating them out indicates how well these two forms of festive entertainment do with audiences (Pantomime doing particularly well since lockdown). Taken together it is clear how important these shows are to theatre activity.

c. Dance/ballet and Musical theatre both saw the same increase between the two years from **14%** to **17%** of all productions. Combined they accounted for just **over a quarter** of all productions in **2019** to **over a third** of all productions in **2023**.
d. Drama accounts for **more than half** of the productions in both years, but it saw a decline as a proportion of productions from **57%** to **51%**.

3. *Fig. 7* shows how performances, attendances and box office are distributed between theatre forms and the picture changes again.

    a. Musicals dominate the repertoire increasingly as we move through these indicators and between the two years.

        1. In **2019**, the Musical accounted for **a third** of all performances, **half** of all attendances, and almost **three-fifths** of all box office income.
        2. In **2023**, the Musical accounted for **two-fifths** of all performances, **over half** of all attendances, and approaching **two-thirds** of all box office income.

    b. Of performances, Drama makes up **a little over half** in **2019** and **a little under half** in **2023**, dropping around **7%pts** of its share. Its share of attendances went from **34%** to **29%** and its share of box office from **27%** to **24%**. These

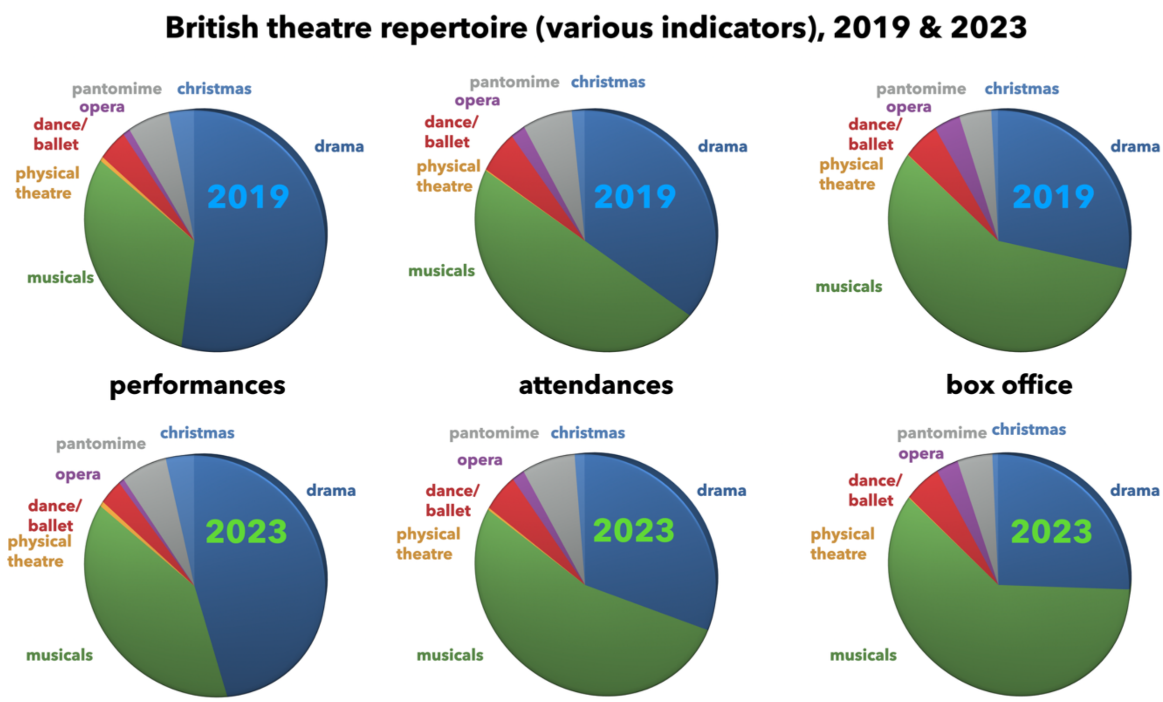


Fig. 7

figures are still greater than the combined share of all other theatre forms excluding Musicals.

c. Pantomimes punch a little above their weight in attendances and slightly below their weight in box office (being typically priced to be affordable to families).

4. When we look at the raw numbers of productions in each theatre form across the two years, the change in the repertoire becomes more starkly clear. As *Fig. 8* shows, some theatre forms have approximately the same numbers of productions. For example, in our theatres there were **241** Musical theatre productions in **2019** and **243** in **2023**; there were **80** Pantomimes in **2019** and **81** in **2023**. Dance/ballet increased its raw numbers by **6.6%**.

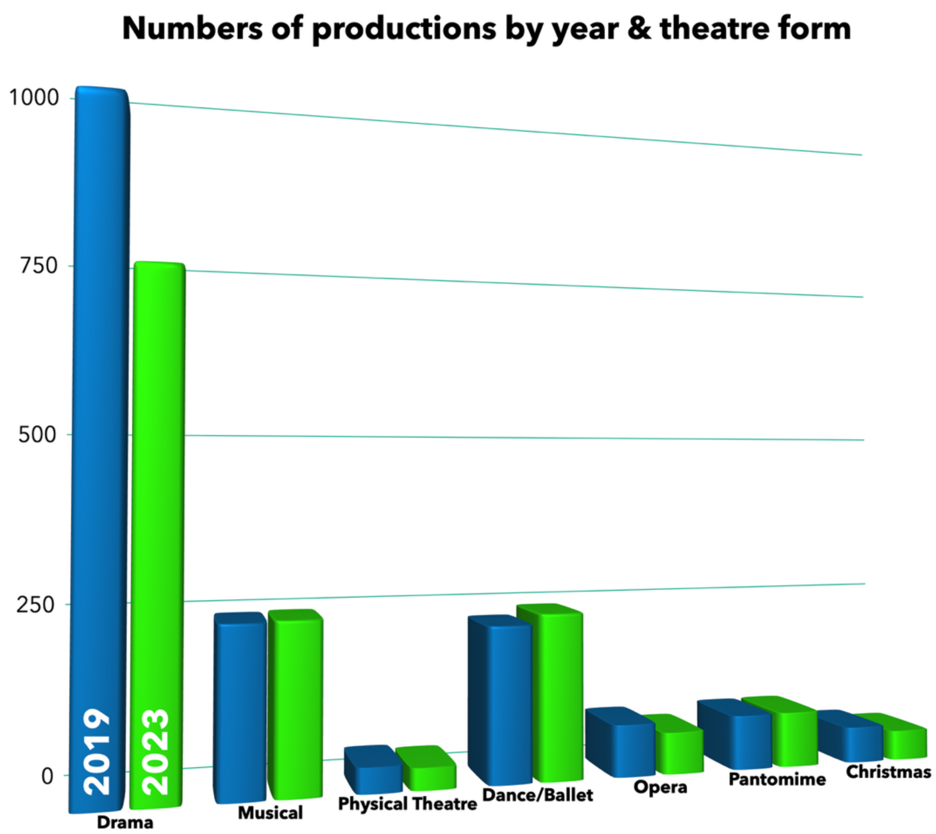


Fig. 8

5. But since overall numbers of productions dropped by **14.5%** between the years, these modest increases in raw numbers of Musicals, Pantomimes, and Dance/ballet productions result in substantial gains in these forms' share of the overall repertoire in **2023**.

6. Productions of other theatre forms have fallen in number: Physical theatre by **13.5%**, Opera by **19.7%**, and Christmas shows by **17%**. As *Fig 8* shows these numbers are relatively small and so a small number of programming decisions will have an outsized effect on headline figures (the **13.5%** drop in Physical theatre is actually a reduction of **37** to **32** shows).

7. The most striking decline is in productions of Drama, which has fallen from **957** productions in **2019** to **727** in **2023**, a decline of **24%**.

8. If we look at changes in all activity, we see a broad picture of the change in activity using all four measures. *Fig. 9* shows the percentage change in activity, red indicating a decline, green an increase.

Comparison of amount of theatre activity 2019 & 2023

Fig. 9

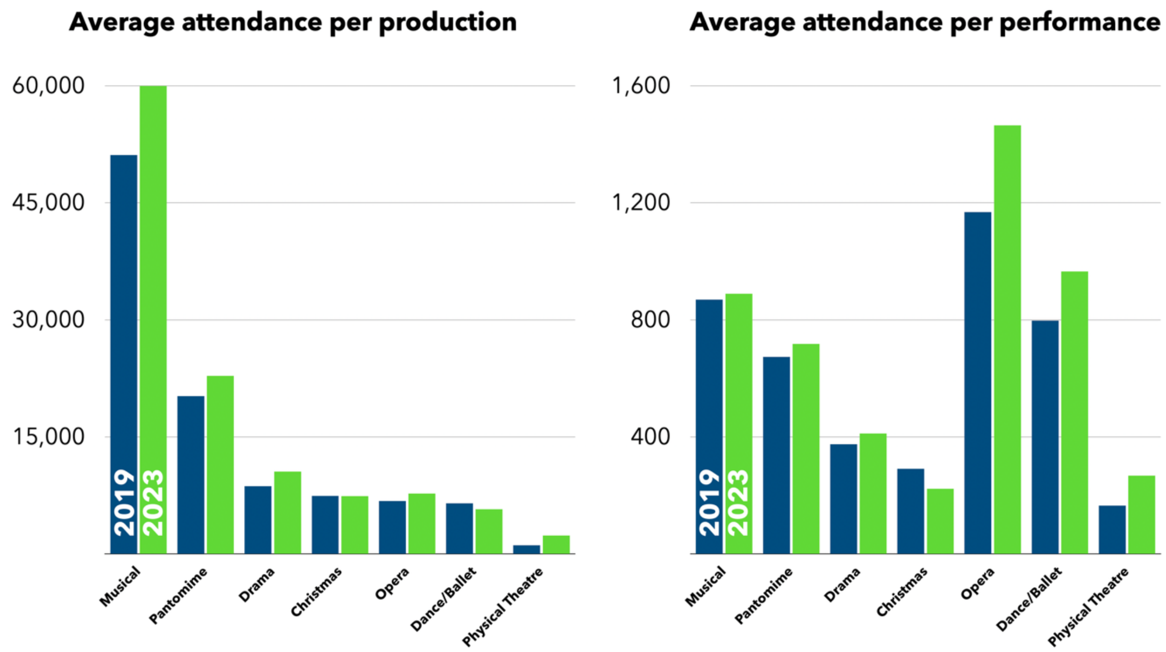
	Productions	Performances	Attendances	Box Office[1]
Drama	-24.0%	-16.0%	-7.8%	-12.6%
Musical	0.8%	15.6%	18.3%	3.6%
Physical Theatre	-13.5%	14.6%	86.1%	69.1%
Dance/Ballet	6.6%	-22.1%	-5.7%	-0.7%
Opera	-19.7%	-27.0%	-8.4%	-17.5%
Pantomime	1.3%	7.0%	14.2%	7.5%
Christmas	-17.0%	8.0%	-17.4%	-17.4%

a. The only theatre forms that increased their activity across the board are Musicals and Pantomime.
b. Drama and Opera, meanwhile, saw a decline in activity across the board.
c. Christmas shows and Dance/ballet saw a decline in three out of four measures, while Physical theatre increased in three out of four measures.
d. Indeed seasonal shows show a split picture: Pantomime is up on every indicator, while Christmas shows are mostly down.

[20] The box office figures are adjusted to inflation, so, although raw income was higher for all theatre forms, most saw a real-terms decline.

9. If we look at average attendances per theatre form, both for the production overall and for individual performances (*Fig. 10*), it is clear that Musicals and Pantomimes in both years attract the largest audiences across a whole run and – with the exception of Opera and Dance/ballet – for individual performances. (Opera and Dance/ballet attract large audiences per performance but smaller audiences overall presumably because they are typically staged in larger houses for shorter runs.)

Fig. 10



10. This is evidence of theatres moving towards shows with more reliable box office, at a time when costs were rising and audiences still needed to be persuaded to return to the theatre.

11. That said, the picture is complicated. Although Drama productions dropped by nearly a quarter between the two years, the number of performances declined by only 16% and attendances by less than 8%, meaning that Drama productions in 2023, though fewer in number than in 2019, on average had longer runs and were better attended. Drama remains far and away the most widely produced category on our stages.

Performance against potential

12. We can also look at the performance of the various theatre forms against potential on two measures: attendances vs. capacity, and income vs box office potential.[21] *Fig. 11* shows what proportion of seats were filled by each form.

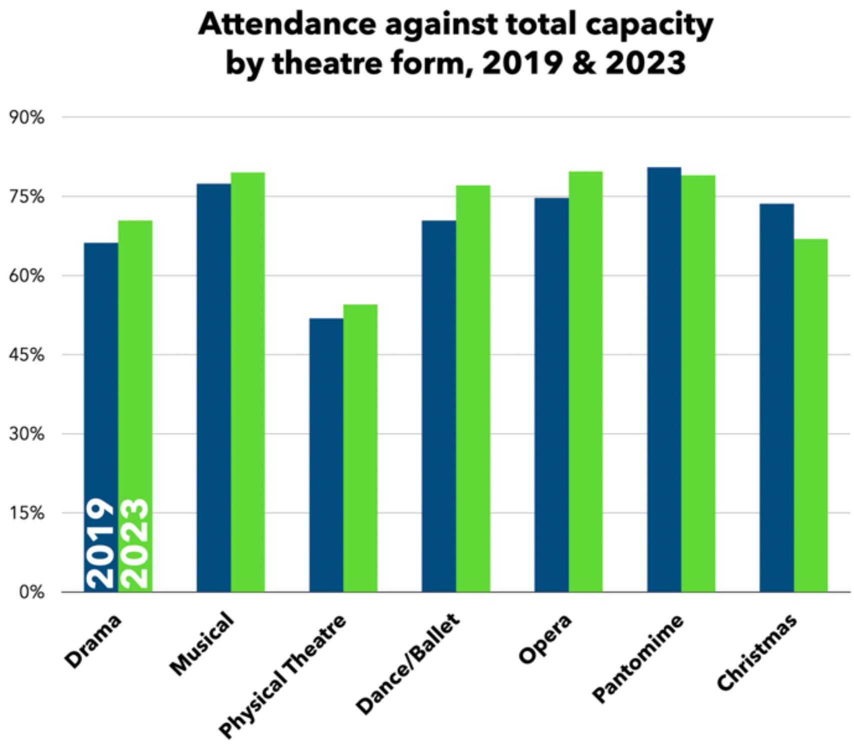


Fig. 11

a. All theatre forms increased their average attendance except the two seasonal forms, Pantomime, which slightly declined (**-1.5%pts**) and Christmas shows, which declined more substantially (**-6.7%pts**).

b. There is some small movement in the performance of various forms that are more easily seen by showing the forms in order of average attendance compared to capacity.

Average attendance as proportion of capacity

2019	2023
Pantomime **80.5%**	Opera **79.7%**
Musical **77.4%**	Musical **79.5%**
Opera **74.7%**	Pantomime **79%**

[21] See p. 25, §4 & §5, for an explanation of this distinction

Christmas **73.6%**	Dance/Ballet **77.1%**
Dance/Ballet **70.4%**	Drama **70.4%**
Drama **66.2%**	Christmas **66.9%**
Physical Theatre **51.9%**	Physical Theatre **54.5%**

Fig. 12

c. The 'most improved' theatre forms are Dance/Ballet (**+6.7%pts**), Opera (**+5%pts**) and Drama (**4.3%pts**), all of which rise up the rankings. Physical theatre had **2.7%pts** higher average attendances per capacity, and for the Musical it was **2.1%pts**.

d. In theatre overall, average attendance compared to capacity rose from **72.8%** in **2019** to **76.2%** in **2023**. Dance/Ballet was below that average in 2019, but above it in 2023; Christmas shows, conversely, performed above that average in 2019 and below it in 2023.

13. We can ask the same question of box office performance. *Fig. 13* shows income against total potential box office in each theatre

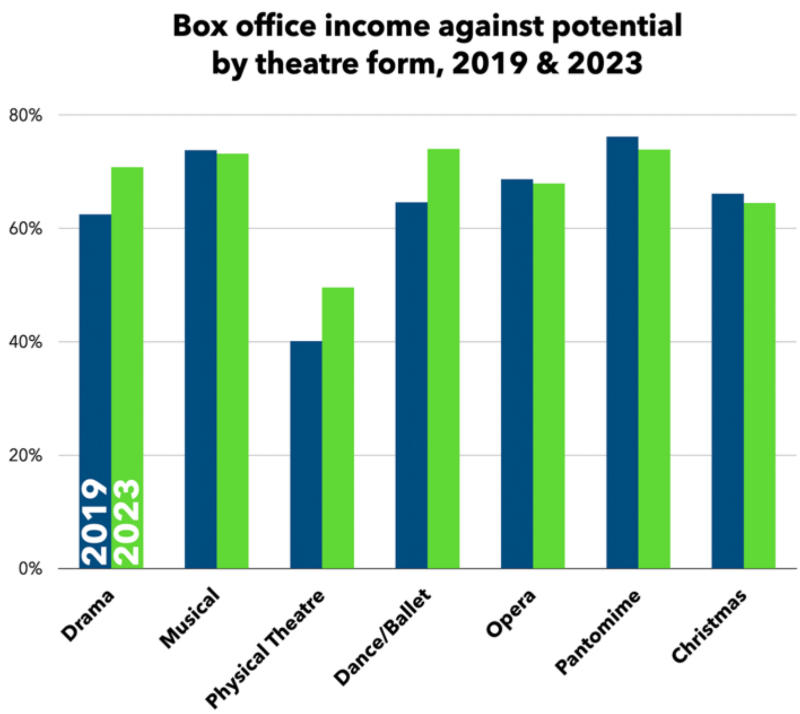


Fig. 13

form.

a. Drama (by **8.2%pts**), and Dance and Physical Theatre (both by **9.5%pts**) increased their box office performance against potential. Opera and the Musical showed very small declines (less than **1%pt**) and Christmas shows and

Pantomime showed slightly larger falls (**1.4** and **2.6%pts**, respectively).

b. These changes in performance between the two years can be seen more concretely in *Fig. 14*. In theatre overall, average income against potential box office rose from **69.7%** in **2019** to **72.4%** in **2023**. Only Dance/Ballet moved from being below that average in 2019 to being above it in 2023. All other forms retained their relative position either above or below the average.

Average box office as proportion of potential

2019	**2023**
Pantomime **76.2%**	Dance/Ballet **74%**
Musical **73.8%**	Pantomime **73.9%**
Opera **68.7%**	Musical **73.2%**
Christmas **66.1%**	Drama **70.8%**
Dance/Ballet **64.2%**	Opera **67.9%**
Drama **62.5%**	Christmas **64.5%**
Physical Theatre **40.1%**	Physical Theatre **49.6%**

Fig. 14

c. The general rise in attendance against capacity is another sign of strong, audience-responsive programming. The slight falls in attendance against capacity of Pantomime, and the slight falls in box office against potential of Pantomimes and Musicals should be seen alongside their absolute rise in activity across all measures; nonetheless, this data perhaps begins to suggest a ceiling to the potential of these forms to attract audiences.

d. In every form and in both years, with one exception, attendance against capacity was higher than box office against potential. There could be many reasons for this – discounting of tickets to attract audiences, theatregoers opting for cheaper seats, and more. The one exception is Drama in **2023**, whose box office performance against potential (**70.8%**) is slightly higher than its attendance against capacity (**70.4%**). We can't say for certain why this is, but it seems possible that theatregoers are more likely to pay face value for tickets to Drama productions than for other forms.

Length of run

14. These shifting patterns of production and performance have had a striking effect on the length of runs. Although the raw numbers of productions and performances have decreased, numbers of performances have decreased less than numbers of productions. This must mean the number of performances per production (the length of its run) has increased and indeed that is the case. The average run of a theatre show in **2019** was **25.5** performances; the average run of a theatre show in **2023** was **28.8**.

15. *Fig. 15* breaks this down further by theatre form to show where the growth is concentrated.

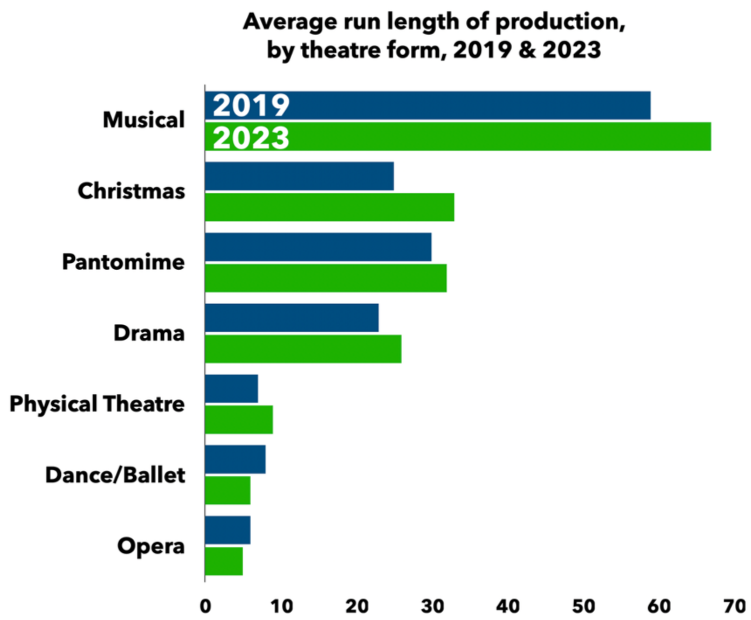


Fig. 15

a. The most striking rises in length of run are for

- Christmas shows (**30%**, from **25** to **33** performances)
- Musicals (**15%**, from **59** to **67**)
- Drama (**11%**, from **23** to **26**)

In fact, Physical theatre saw the biggest rise, of **32%**, though the numbers being so small (from **7** to **9** performances), it is difficult to say whether this is statistically significant.

b. Dance/Ballet and Opera saw reductions in their run lengths, but these are also small numbers, so their significance is doubtful.

Auditorium size

16. What size auditoriums did theatre play to across our two years? We divide auditoriums into three categories:

- **Small**: 1-199 seats
- **Medium**: 200-499 seats
- **Large**: 500+ seats

17. In *Fig. 16*, we can see what proportion of production played in each size of auditorium.

a. Between **2019** and **2023**, there is a shift towards productions playing in larger auditoriums marked by a **-6%pt** drop in productions in small auditoriums and a **5%pt** rise in productions in large auditoriums.[22]

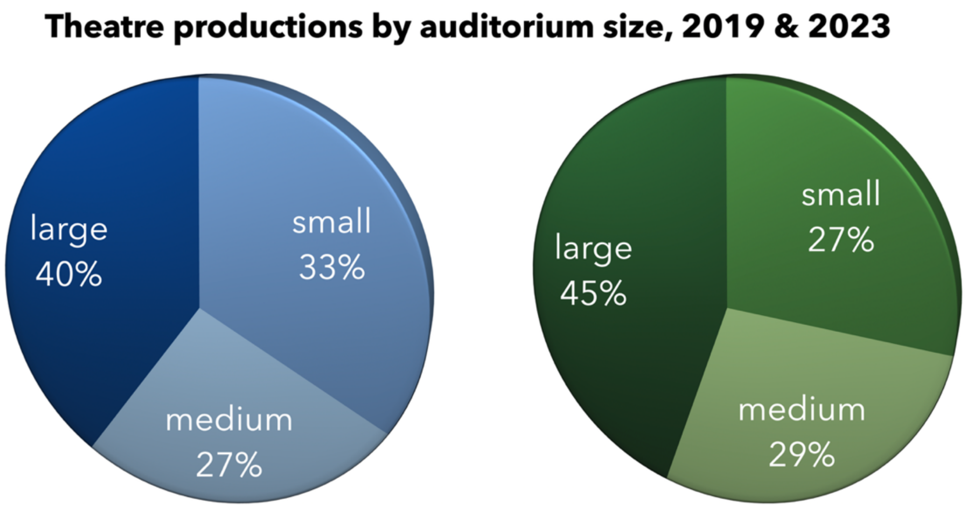


Fig. 16

b. There were no major theatres in our data that opened between 2019 and 2023, so there are two likely (compatible) explanations:

[22] Eagle-eyed readers will observe that the figures in the 2023 chart add up to 101%, which is simply a product of rounding up all three numbers (26.7%, 28.6%, and 44.7%). Similar harmless effects of rounding affect *Fig. 17, Fig. 18,* and *Fig. 30.*

1. Did theatres programme less work in smaller venues? Indeed they did. Against the benchmark reduction of **14.5%** overall in productions, productions in large theatres only reduced by **5%**; productions in medium theatres reduced by **8.4%**; but work in small theatres dropped by **31.4%**. It can be a challenge to make a show in a small venue break even and these figures strongly suggest that theatres, in a cost-of-living crisis, were less inclined to take that risk.

2. Were flexible theatre spaces configured to seat more people? Partly. Between 2019 and 2023, the average capacity for theatres shifted:

    - **Small theatres**: **124** to **113** seats
    - **Medium theatres**: **371** to **259** seats
    - **Large theatres**: **1,112** to **1,130** seats

   Small and medium theatres slightly reduced their average seat numbers, while large theatres increased theirs. Because of the distribution of productions to size of theatres and the tendency for long running shows to be concentrated in larger theatres, this meant that overall capacity in theatre (i.e. the total number of seats available to be filled across the year) rose from **33.9mn** in **2019** to **34.6mn** in **2023**, a rise of **2%**.

18. Theatres managed to fill these seats more effectively. Against a benchmark of theatre as a whole filling **72.8%** of its seats in **2019** and **76.2%** in **2023**:

    - **Small theatres** went from filling **84.7%** of seats to filling **91.9%**
    - **Medium theatres** went from filling **69.7%** of seats to **72.6%**
    - **Large theatres** went from filling **72.9%** of seats to **76.4%**

This is further evidence to suggest that theatres were programming in a more audience-conscious way, successfully attracting more attendances.

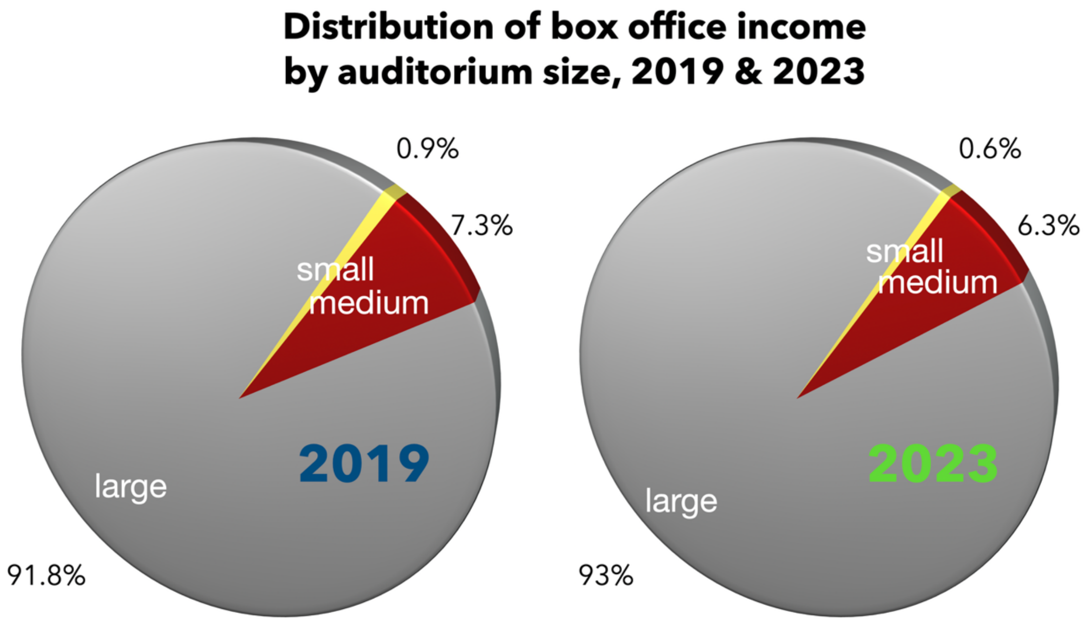


Fig. 17

19. Box office figures confirm this shift towards larger theatres (see *Fig. 17*). For obvious reasons, large theatres dominate overall box office income, but this was even greater in **2023** than in **2019**, the share of box office coming to large theatres rising from **91.8%** to **93%**. Small theatres, conversely, saw their share of national box office reducing. By **2023**, of every £10 spend in British theatre only **6p** was being spent in a small theatre.

20. We can also look at the size of theatres in which each theatre form is programmed. *Fig. 18* breaks this down.
    a. In **2023**, Every form apart from Pantomime saw more of its work being programmed in large theatres than in **2019**. The proportion of Opera and Christmas shows in large theatres went up more than **5%pts**; Musicals just under **4%pts**; Drama and Dance/Ballet's productions in large theatres rose by **2.1%pts** and **2.5%pts**, respectively. In fact, Physical theatre saw the largest rise (**11.7%pts**) of its productions in large theatres but the numbers are small and in this case is produced by the difference between **10** and **13** productions.

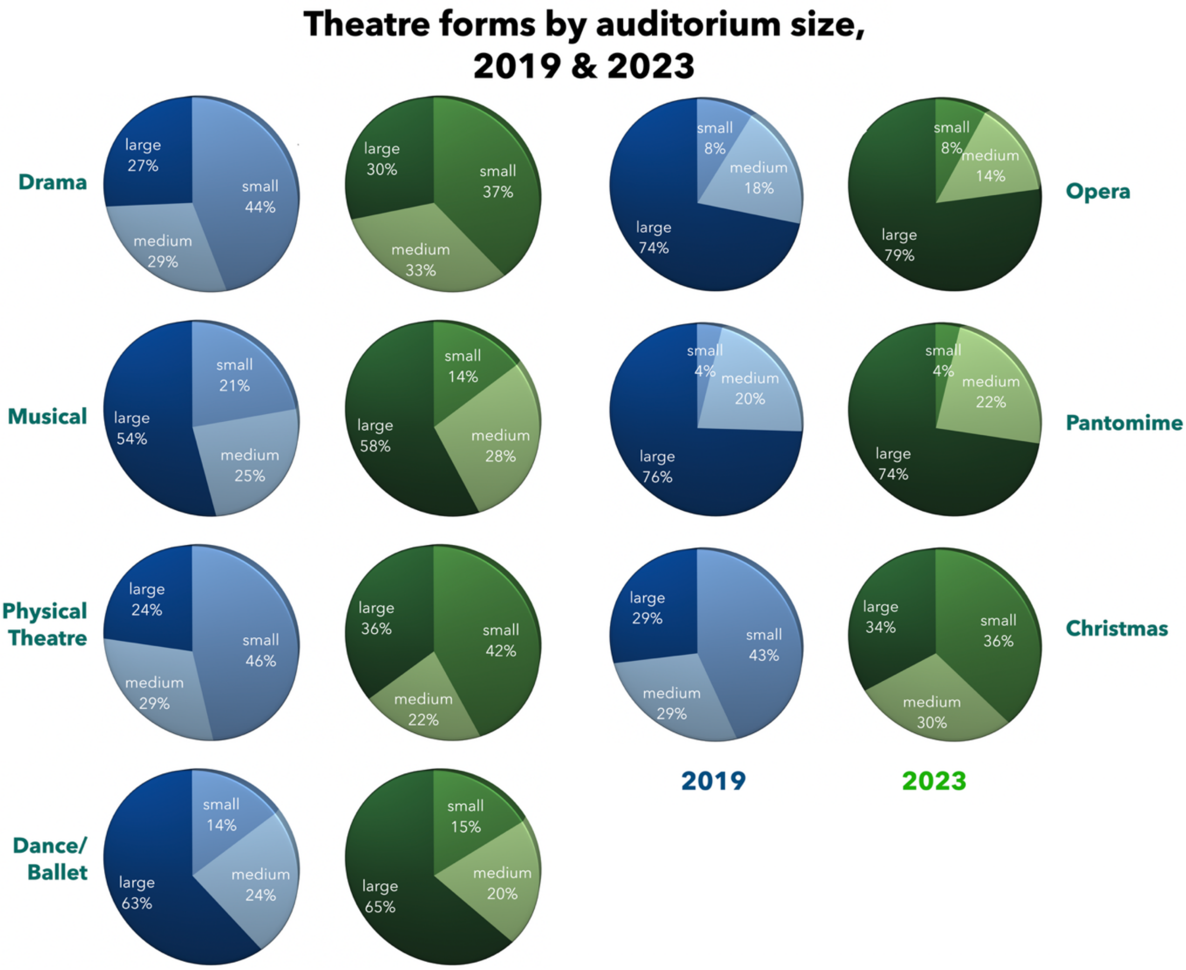


Fig. 18

b. Pantomime is an unusual case. In fact the number of Pantomimes in large theatres was identical across the two years (**61**); this is unsurprising since the same large venues will tend to do a Panto every year. The drop in share of these shows being produced in large venues is due to a couple of additional Pantomimes being produced in medium-scale venues.

c. *Fig. 18* also shows similarities in the programming of various forms: Drama, Physical theatre, and Christmas shows are all programmed in similar ways (roughly a quarter each in large and medium venues and just under half in small venues); between one half and two-thirds of Musicals and Dance/Ballet are in large venues with only around 15% in small venues; Opera and Dance/Ballet are almost unknown in small theatres.

Summary

21. In summary, the proportion of Musicals in the repertoire increased significantly between **2019** and **2023**, seeing a proportionate increase in productions, performances, attendances and box office. The increase in the last two measures suggest that, in programming more Musicals, theatres are moving towards shows with more reliable box office potential.

22. The length of runs increased, again notably for Musicals but also for Christmas shows.

23. Theatres programmed less work in their smaller auditoriums, though shows in small theatres performed better (against capacity) than shows in medium or large theatres. Nonetheless, small theatre box office reduced between **2019** and **2023**.

4. Theatre Tickets

Prices

1. It has often been suggested that ticket prices increased very significantly after the Covid lockdowns. Might the growth of the (typically expensive) Musical between the years explain it? We now have an opportunity to examine the evidence.

2. It is important to note that our data shows us what theatregoers actually spent on tickets, not advertised prices. It is theoretically possible – though commercially unlikely – that the top price tickets increased astronomically and nobody bought them. Nonetheless, we can compare what prices audiences paid for different theatre experiences in 2019 and 2023.

3. *Fig. 19* shows the average prices paid for theatre tickets in the two years. Between the two years, average tickets overall rose from **£42.47** to **£47.91**, an increase of **12.8%**. Given the cumulative inflation rate of **22.6%** between **2019** and **2023**, this means that, contrary to a widespread belief that theatre tickets have soared in price, average theatre tickets were in real terms around **8%** *cheaper* in 2023 than 2019.

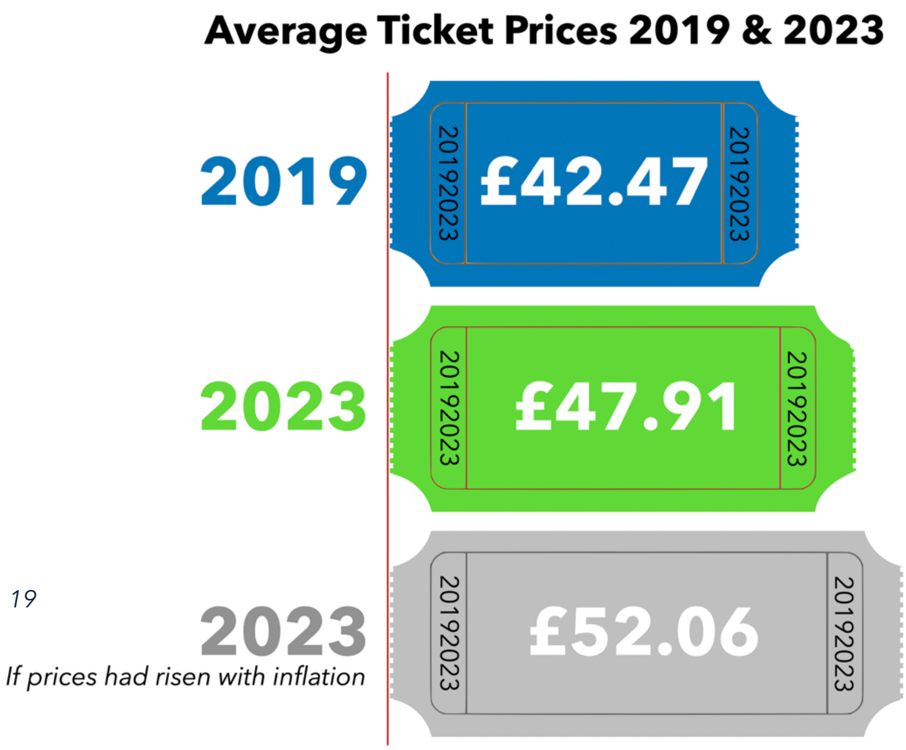


Fig. 19

4. However, average figures vary across forms and regions. It's worth digging into the details to see if there are any hot spots where ticket prices really have increased.

5. *Fig. 20* compares 2023 prices for each of our seven theatre forms compared to the price tickets would have been had they increased according to inflation. Apart from Dance/Ballet which saw a real terms increase (of **5.3%** above inflation) and Christmas shows which increased exactly according to inflation, all theatre forms saw a real-terms reduction in ticket price of between **5.2%** and **12.5%.**

6. Strikingly, the biggest reductions are on the highest-priced tickets, those for Opera and Musical theatre. What this tells us is that, far from pushing up ticket prices, Musical theatre has been significantly responsible for keeping them down.

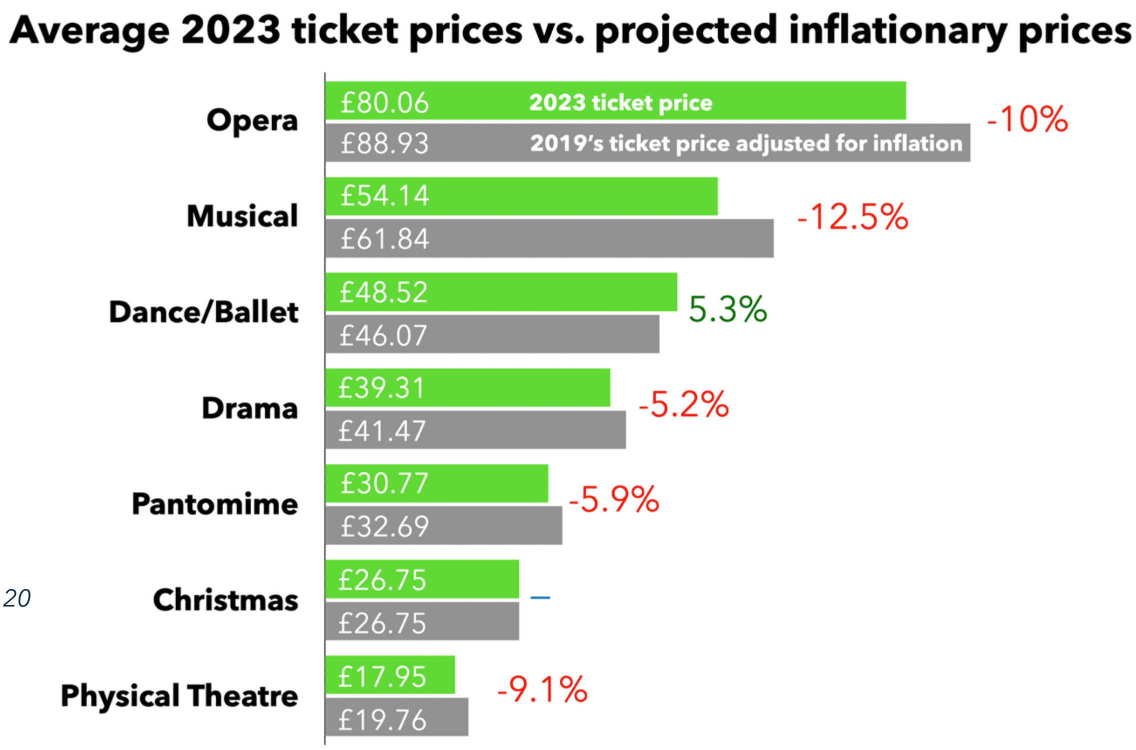


Fig. 20

7. We can break ticket prices down by region. *Fig. 21* shows average ticket prices in 2023 in eleven of the twelve UK regions and nations (henceforth 'regions').[23] There is considerable variation: average ticket prices in London, for example, are more than twice

[23] Because of the relatively small sample size in the region, Northern Ireland does not appear in this chart to protect commercial confidentiality.

the price of average ticket prices in the North West and the East Midlands. Nonetheless, every region saw a real-terms decline in average ticket prices, the highest declines being in the North East (**-20.3%**) and North West (**-18.6%**) and the smallest reductions being in the West Midlands (**-1.5%**) and Yorkshire (**-3.7%**).

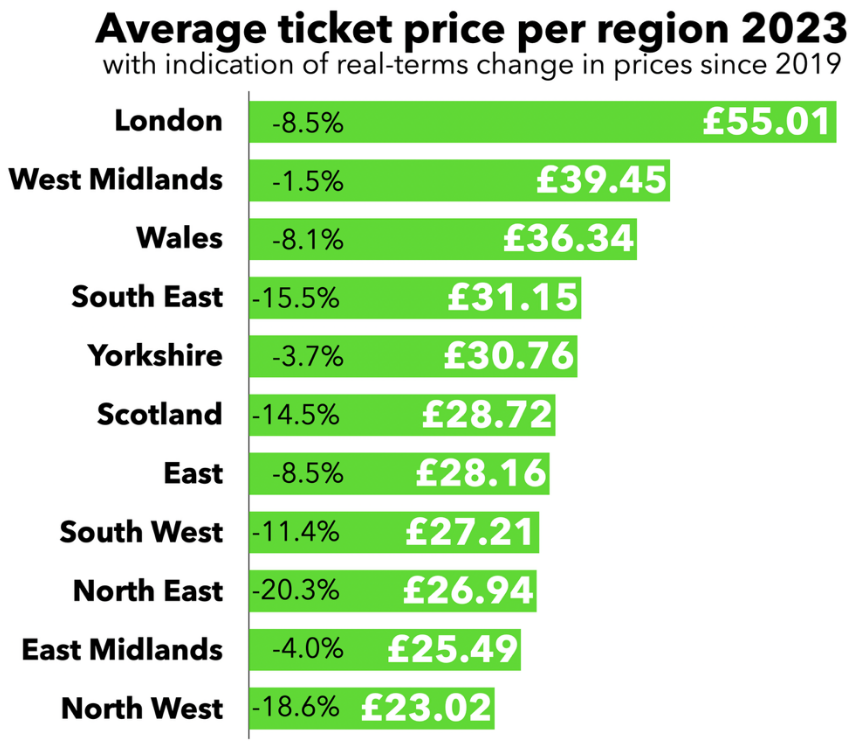


Fig. 21

8. The overall picture then is that ticket prices, in real terms, in all regions and in the great majority of theatre forms were cheaper after Covid than before.

Booking patterns

9. An observation made about theatre audiences after Covid is that they book much later, meaning that theatres have an anxious wait to know if their shows will break even or even find an audience.

10. This claim is widespread. The Audience Agency's panel survey of cultural attitudes found in 2023 that '40% now tend to book for arts and culture events more last-minute than they did pre-

pandemic'.[24] An article for *Arts Professional* in the same year suggested that declining consumer confidence and the deprioritising of cultural spending resulted in 'a shift to later booking patterns'.[25] Similar trends are detected on Broadway.[26]

11. We have some data to help investigate this claim. Our UK Theatre data can tell us exactly how long before a performance each ticket was booked. However, the SOLT data does not have this level of granularity, so, for this exercise, we have excluded London. But we have substantial figures to show the temporal patterns of theatre booking before and after Covid.

12. *Fig. 22* shows when audiences bought their tickets, from up to one week to more than five months before the performance for which they have booked. (The *x* axis is abbreviated so, to be clear, these time periods are mutually exclusive: the first period is up to one week, the second is one week to up to one month, etc.)

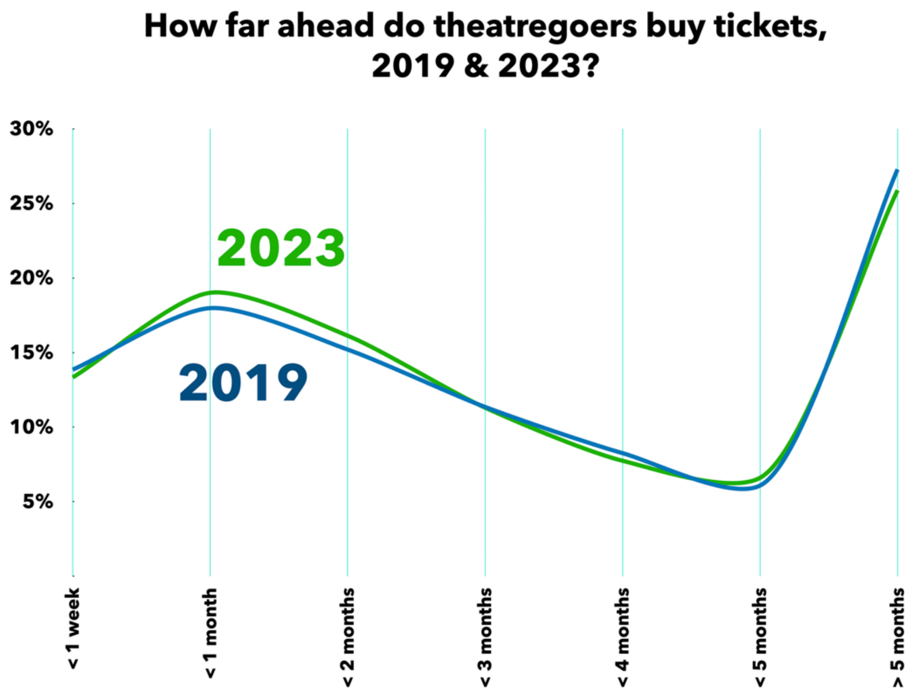
[24] The Audience Agency, 'Late booking trends.' *Cultural Participation Monitor*, March 2023. https://evidence.audienceanswers.org/en/evidence/articles/late-booking-trends Accessed 8 November, 2025. Original emphasis removed.

[25] David Reece, 'Audience behaviour: Where do we go from here?' *Arts Professional* (12 September 2023). https://www.artsprofessional.co.uk/magazine/article/audience-behaviour-where-do-we-go-here See also Oliver Mantell, 'The audience legacy of Covid,' *Arts Professional* (20 March 2025). https://www.artsprofessional.co.uk/magazine/feature/the-audience-legacy-of-covid Both accessed 8 November 2025.

[26] Richard Jordan, 'What do the Tonys tell us about theatre investment today?' *The Stage* (20 June 2024). https://www.thestage.co.uk/opinion/what-do-the-tonys-tell-us-about-theatre-investment-today Accessed 6 March 2025.

13. As the chart shows, there was virtually no change in audience behaviour between **2019** and **2023**. Over a quarter of tickets are purchased five months or more before the performance. Between 15% and 20% of tickets are purchased between one week and one month ahead. The pattern is the same in both years. The average lead time between purchase and performance is **13 weeks** in both years. There is a very slight and hardly significant

Fig. 22



increase in the tendency of audiences to book between one week and two months ahead. Even the often-reported collapse in day sales[27] is not borne out by the data.

14. We can also examine this by sector, comparing booking patterns in the commercial sector with those in the NPOs. *Fig. 23* shows them side-by-side. They reveal two things: one is that almost **30%** of tickets in the commercial sector are bought five months or more ahead of time, compared to just over **22%** in the NPOs; the second is that within those sectors, patterns are almost identical between **2019** and **2023**.

15. In fact, the average lead times between purchase and performance for NPOs were **11 weeks** in **2019** and **12 weeks** in **2023** and in the commercial sector **14 weeks** in **2019** and **15**

[27] See Mantell, *op. cit.*

weeks in **2023**. If anything, audiences were, on average, booking a little earlier after Covid than before.

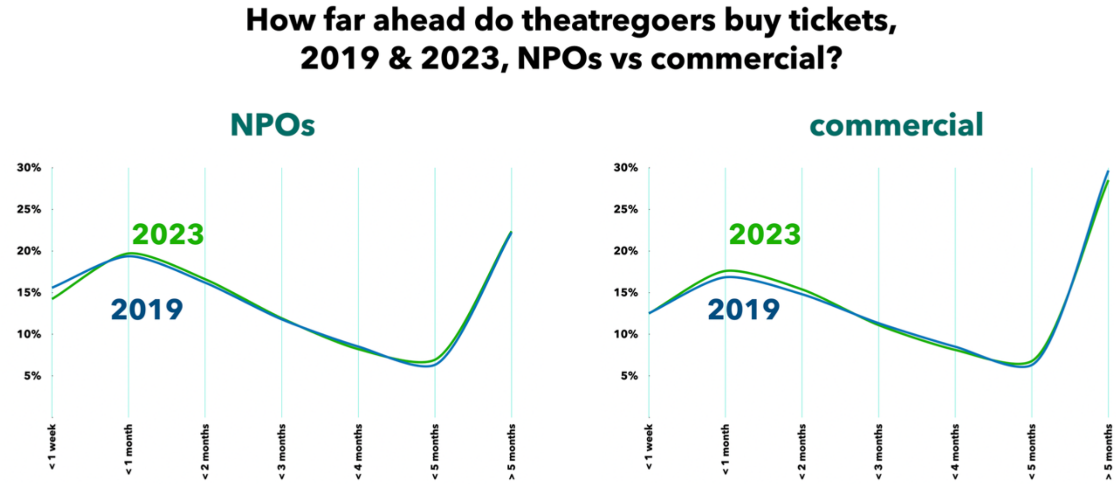


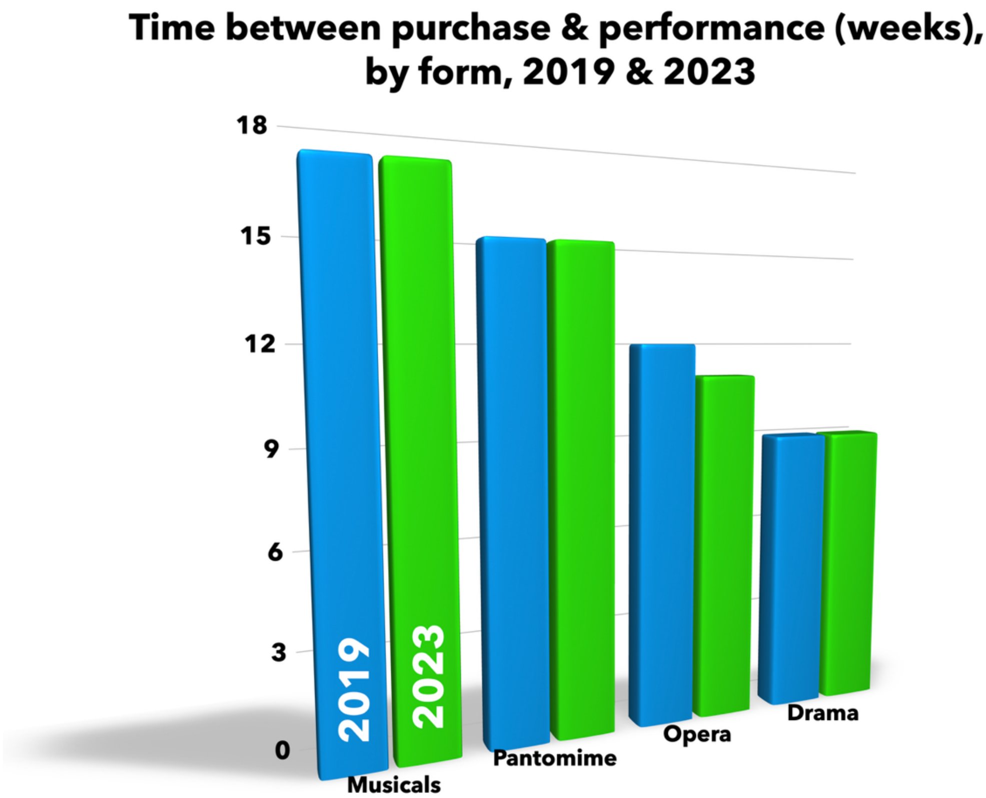
Fig. 23

16. The usual note of statistical caution is needed. These are aggregate figures that hide a great deal of volatility within the sector. There are undoubtedly cases where alarmingly late booking has occurred. It's also important to note that the time of booking should not be considered merely a change in audience temperament and behaviour, but can also be affected by marketing, when booking opens, cast announcements and more. It is certain that theatres will have changed their practice in these respects which will have counteracted any tendency to later booking.

17. However, we see the same stubbornly unchanging pattern if we break down these lead times by theatre form. As *Fig. 24* shows, there has been no change in how far ahead audiences book on average for Musicals (**17 weeks**), Pantomimes (**15 weeks**), and Drama (**9 weeks**). Only for Opera sees a slight reduction from **12 weeks** in **2019** to **10 weeks** in **2023**.

18. However if we compare lead times by form, we see a clear pattern of differentiation between Musicals, Pantomimes, and Drama. *Fig. 25* plots the pattern of ticket buying for these three forms, just looking at 2023 (though the pattern for the two years is very similar). It is clear that audiences are least likely to book far ahead for Drama and most likely to book far ahead for Musicals. Most tickets for Drama are sold between a week and a month before the performance. Pantomimes are either bought very far ahead or two months ahead (in other words, in October, when thoughts begin to turn to the festive season).

Fig. 24

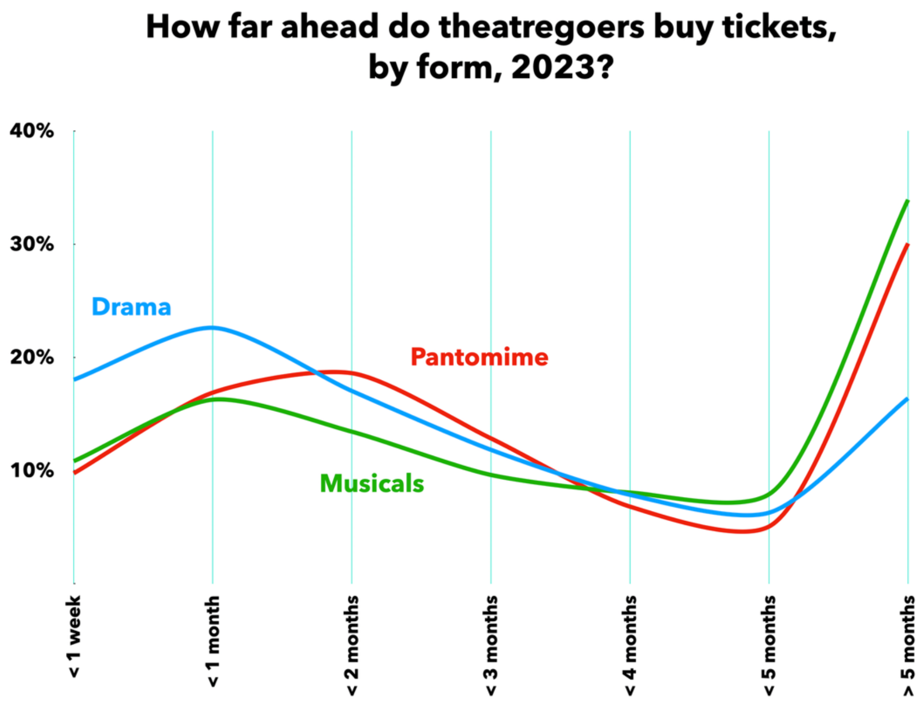


19. This may be a partial explanation for the relative decline in Drama in the overall theatre repertoire and the rise in Musicals and Pantomimes. Even though, as we have seen, Drama continues to fill theatres, at a time when theatres are facing higher costs, Musicals and Pantomimes tend on average to bring in money much earlier and settle nerves of theatre managers concerned, quite reasonably, for the bottom line.

20. Nonetheless, it is striking how little evidence there is (outside London, at any rate) for the claim that audiences are booking later. It may be the case that theatres, some of whom had to dip into

reserves during Covid, are more sensitive to the prospect of late booking and have adjusted their programming accordingly. Nonetheless, the claim of late booking seems unfounded.

Fig. 25



Summary

21. Ticket prices *reduced* in real terms between **2019** and **2023**, with the biggest reduction in the higher-price forms, notably the Musical. Outside London, the smallest drop in prices was in the West Midlands and the largest in the North East.

22. Against common perceptions, it appears that audiences are not, overall, booking later than they used, though it may be that. already by **2023**, programming and marketing strategies had been developed to counter any trend of this kind.

5. Drama

1. Drama – a category that comprises new plays, play revivals, and devised work – dominates the British theatre repertoire at the level of production: Drama makes up by far the largest number of productions in both years. However, we have seen that, while remaining the largest category, it sharply declined as a proportion of the repertoire. We are keen to look more closely to see where this decline is most apparent and where there might be regional variation in the picture.

Drama in the regions

2. *Fig. 26* shows the proportions of all theatre activity in our twelve regions.[28] The chart demonstrates clearly that while Drama production is relatively dispersed across the country, London's domination of the national picture increases as we move from productions to performances, attendances and box office.

    a. **22.6%** of all Drama productions were performed in London in **2023**, but there is substantial production activity in all other regions, with particular strengths in the South East and Southwest, and East and North East of England.

    b. However, as soon as we look at performances, the picture changes. In **2023**, almost **60%** of all Drama performances took place in London. This represents almost ten times greater a share than that of the next highest regions (the South East and South West, both with **6.2%**).

    c. Attendances were even more concentrated in **2023**, with over two-thirds (**69.1%**) of all attendances at Drama productions taking place in London and no other region having more than a **6.1%** share (South East).

[28] This is a good moment to note that 'productions' in a region does not necessarily mean the show was originally produced in that region. A show might originate in one region and then embark on a tour of other regions. That show will appear in the figures for all the regions it appears in. Performances, attendances and box office are not double-counted in this way.

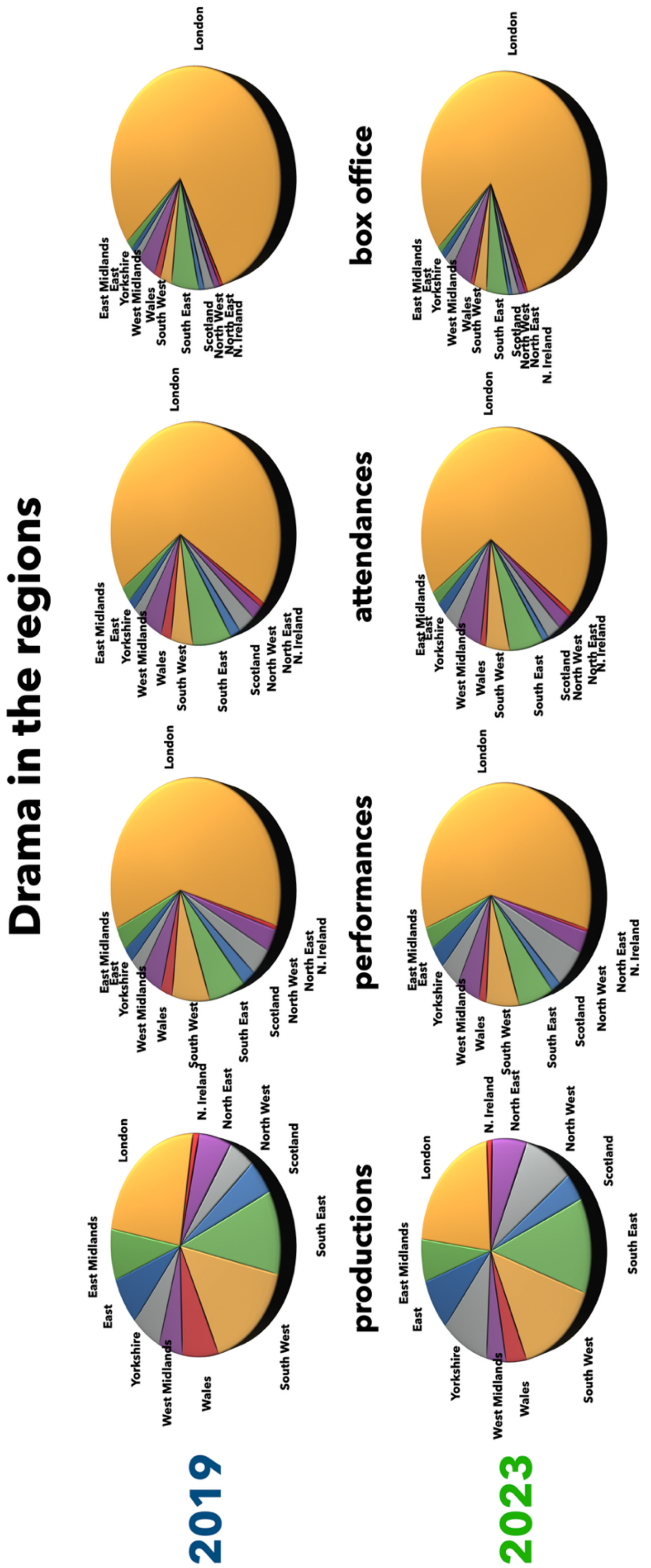


Fig. 26

d. Finally, when we come to box office, the dominance of London is unmistakeable. Over four-fifths (**80.1%**) of all Drama income in **2023** came into London box offices.

Seven of the other eleven regions attract something around 1% of national box office income each. The West Midlands, perhaps boosted by the presence of the Royal Shakespeare Company, has the second largest share, after London, with **4.6%**.

3. The picture changed slightly between the two years.

    a. Between **2019** and **2023**, there was a small reduction in both London's share of Drama productions (from **24.9%** to **22.6%)** and of performances (from **61.1%** to **59.8%**).

    b. Conversely, there were small increases in both London's share of audiences (from **68.5%** to **69.1%**) and of box office (from **78.9%** to **80.1%**).

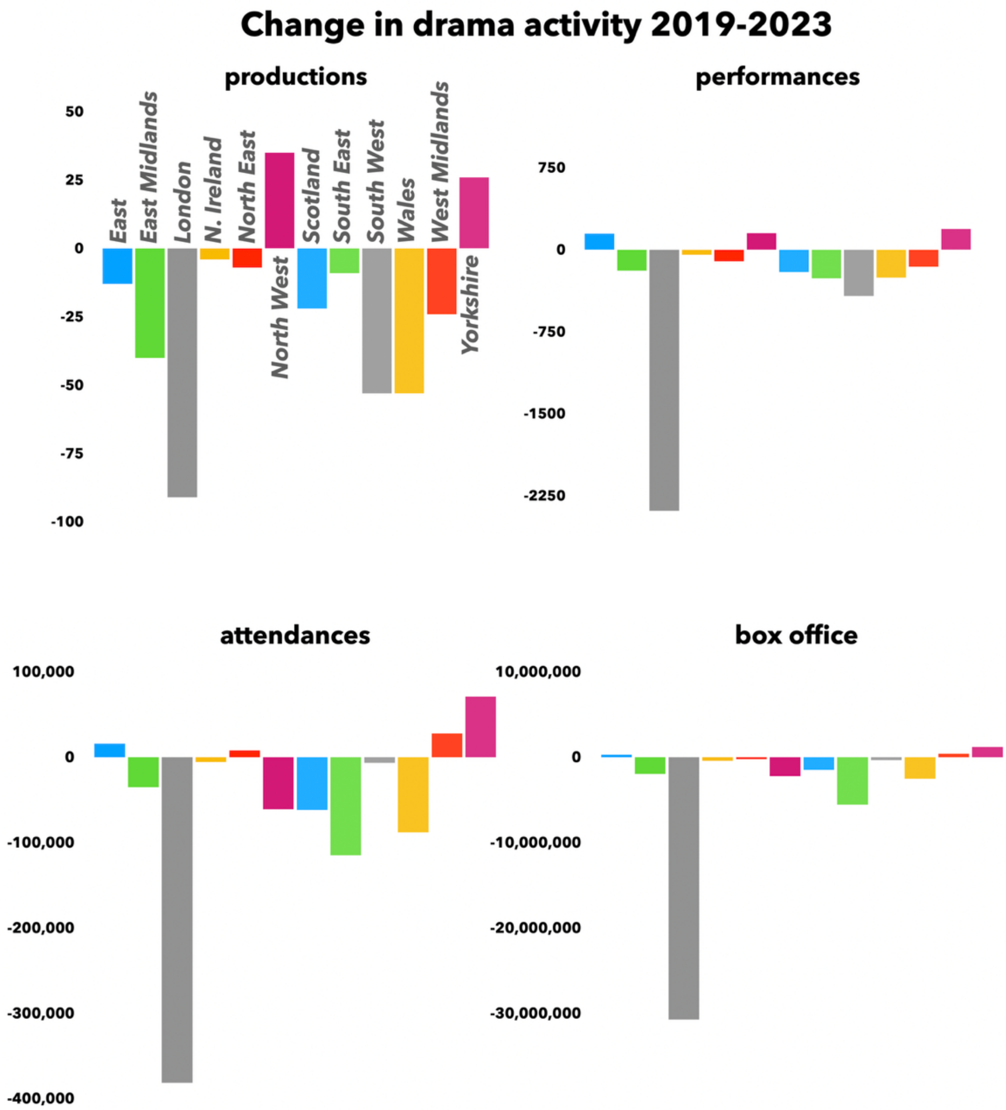


Fig. 27

4. Analysis of the share is useful but it masks the raw changes in Drama activity. *Fig. 27* shows the rise and fall of Drama in our four indicators, not as proportions but in sheer numbers of productions, performance, attendances, and box office. Largely because of London's dominance in Drama, it has taken the biggest hit on all indicators from the overall drop.

    a. It shows that between **2019** and **2023** absolute numbers of productions and performances of, attendances at, and box office income for Drama were down in almost all regions and by almost all measures. Yorkshire was the only region to be up on all indicators; the North West was up on productions and performances; the West Midlands is up in attendances and box office; the North East saw a small rise in attendances and the East in attendances and box office.[29]

    b. Every other indicator shows a decline in the amount of Drama activity in our theatres. Most striking is the decline in London Drama by all measures.

5. However, the absolute numbers are less significant than the trends moving through the data. Our data is far more complete for London than for the regions; in particular, in subsequent years, it will be enormously valuable to have data from more major regional producers (such as the Ambassadors Theatre Group) to give us a fuller and more granular picture of the distribution of theatre activity across the UK. But at present, our data almost certainly overstates the dominance of London.

Drama in the NPOs (subsidised theatre)

6. However, by focussing on Arts Council NPOs, for which our data is fuller than for commercial theatres in the regions and nations, we can compare subsidised theatre in London with that of other areas of the country.

7. *Fig. 28* shows theatrical activity around the production of Drama in NPOs in all regions and it shows a slightly different picture than in *Fig. 26*:

[29] Box office is calculated in real terms. If the region saw an actual rise in income but it was lower than the 2019 figure increased according to inflation, it is shown as a fall.

Drama in the regions (NPOs only)

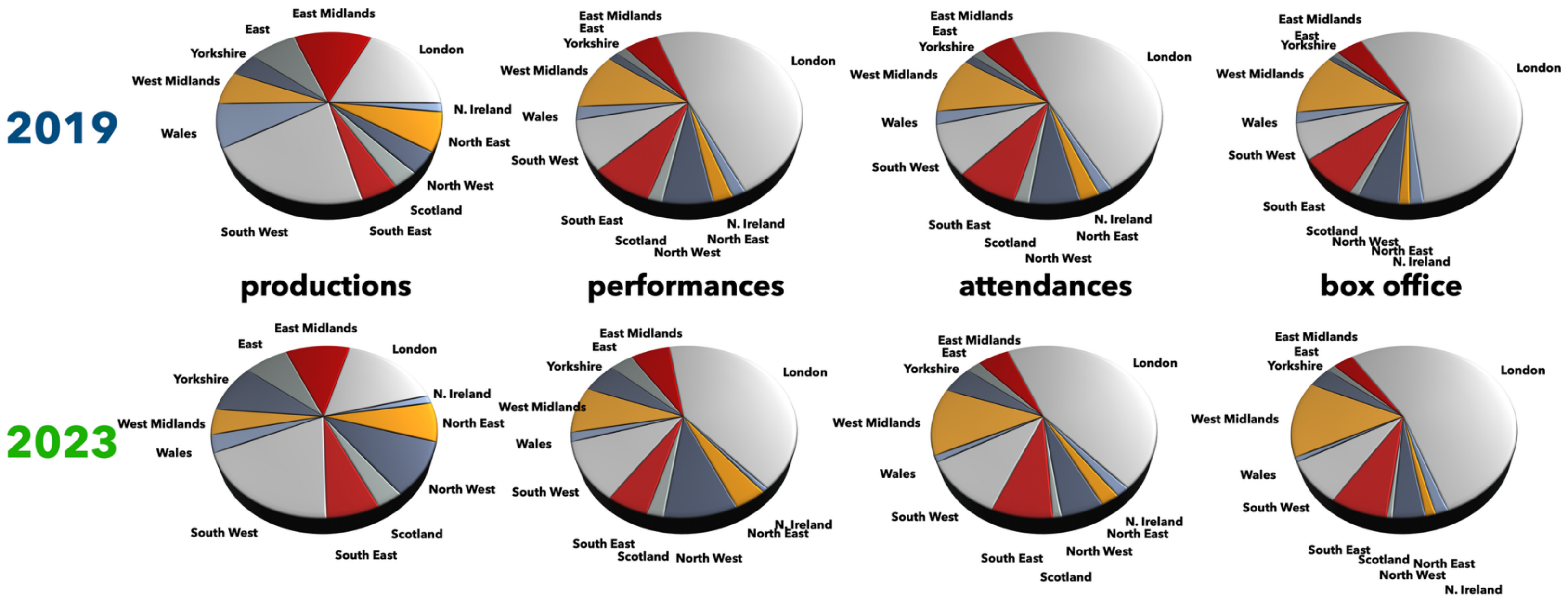


Fig. 28

a. London continues to dominate, though not as overwhelmingly. Its share of activity is down on all measures. While London's **2023** share of box office reached over four-fifths of national income for Drama in our total figures; for NPOs it represents a more modest **53.6%**. It is below 50% of share in both years for all measures apart from box office, confirming the devolutionary principle of subsidy.

b. NPOs in nine of the twelve regions increased their share of Drama on some measure; the North East and West, Scotland, and South East increased their share of Drama productions; the East, North West, South East, and West Midlands increased their share of Drama performances; the East, Northern Ireland, South West, and West Midlands increased their share of Drama attendances; and the East, South West, and West Midlands their share of Drama box office. Yorkshire increased its share on all measures, while the East Midlands, London, and Wales saw decline in their share of national Drama on all measures.

Drama in London

8. We can also compare the performance of Drama in the commercial and subsidised sectors (noting, as above, that there is commercial activity in NPOs and subsidised work in the commercial sector).

9. *Fig. 29* shows how Drama activity is shared between the commercial and subsidised sectors. The sectors are about equal in their share of productions, but the commercial sector increasingly dominates as we go through numbers of performances and attendances and box office share. The picture is similar across the two years but the commercial sector has slightly increased its share of attendances and box office.

10. Overall London saw a decline of **25.3%** in raw numbers of Drama productions between **2019** and **2023**. This overall decline is made up of a **22.7%** decline in Drama productions in the subsidised sector and a **27.9%** drop in the commercial sector. In raw numbers, that's a decline from **359** Drama productions in

2019 to **268** in **2023** (from **176** to **136** in the subsidised sector, **183** to **132** in the commercial sector).

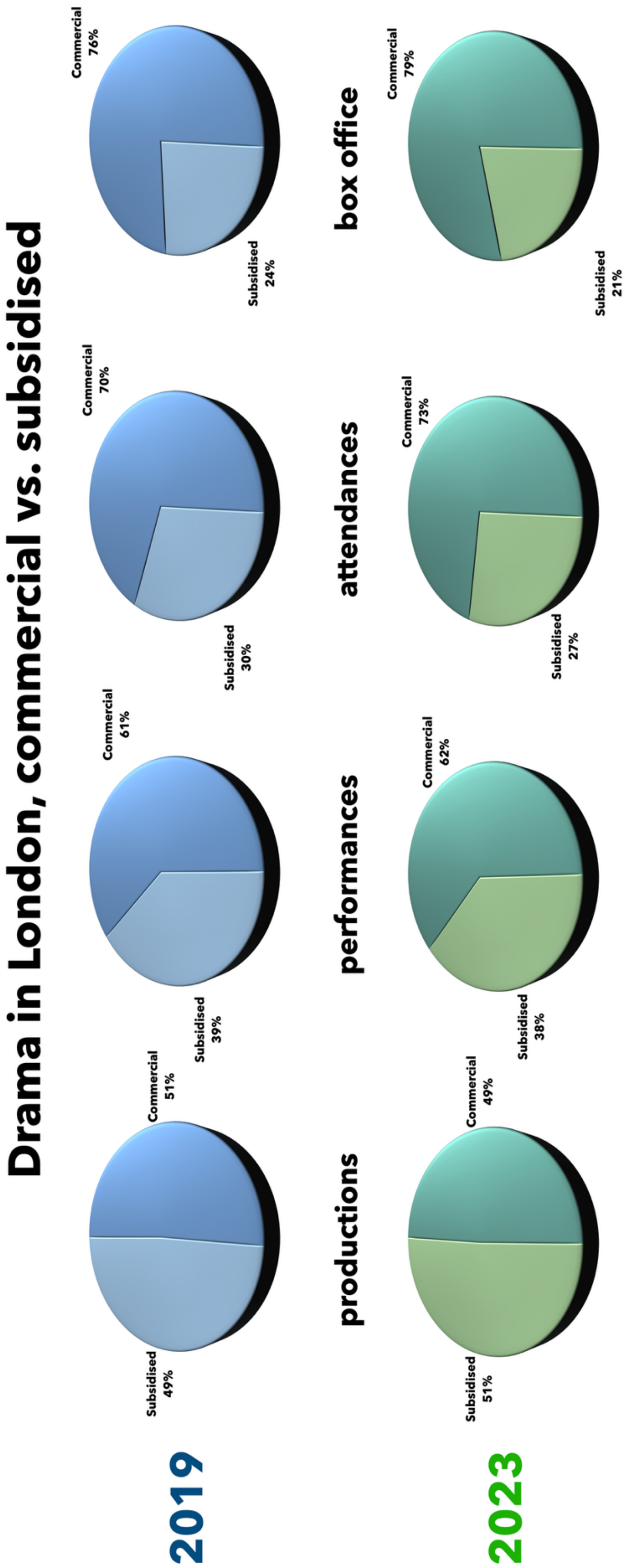


Fig. 29

11. In fact, Drama in London is down on all measures, except commercial box office which saw a **12.6%** real-terms increase across the two years. Particularly badly hit were productions and performances (and attendances in the subsidised sector).

12. This reflects a small but significant shift in London theatregoing between 2019 and 2023. *Fig. 30* shows the proportions of what types of shows audiences attended in the two years. For readability, we have combined Dance/ballet & Physical theatre into one category and Pantomimes and Christmas shows into 'Seasonal'. There is a **5.6%pt** rise in the share of attendances represented by Musical theatre and a **5.3%pt** drop in the share represented by Drama. There is also a **2.7%pt** drop in Dance and Physical theatre and a **1.8%pt** rise in attendances at Pantomimes and Christmas shows. In other words, London's theatregoers saw

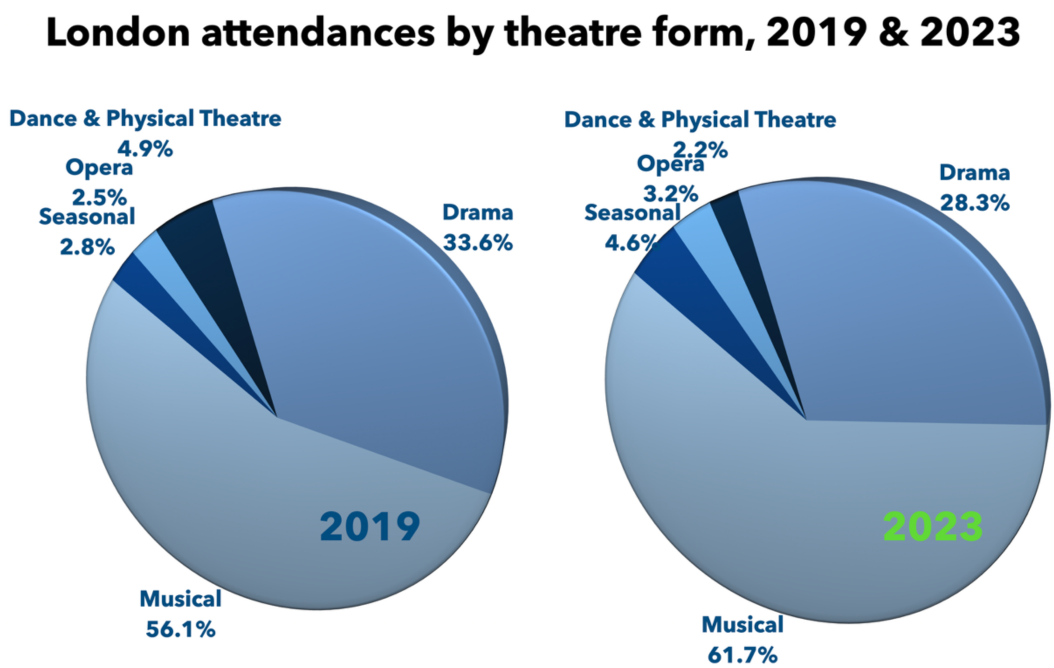


Fig. 30

a small shift away from Drama and Dance towards Musicals and Christmas shows.

13. Ticket prices in London pretty much follow the national trend, being around **5%** lower in real terms in 2023 than they were in 2019. That percentage decline is around the same between the commercial and subsidised sectors, though, as one might expect, tickets are more expensive in the former: in **2023** the average price paid for a ticket in a subsidised theatre was **£35.76** and

£49.15 for a commercial-theatre ticket, a little over a third higher. (The differential was very similar in 2019.)

Summary

14. Drama dropped by **24%** as a proportion of the theatre repertoire between **2019** and **2023**. There were falls on most measures in Drama activity across all regions and nations, except the West Midlands and the East of England which saw rises.

15. Drama production is dominated by London, where **80%** of all Drama income is generated. Between **2019** and **2023** there was a small reduction in London's share of Drama production and a small increase in the capital's share of audience and box office.

16. In London, subsidised NPOs presented just under half of Drama productions in **2019** and just over half in **2023**. On all other measures (performances, attendance and box office) subsidised theatre did less well than commercial theatre.

6. New Work

1. While revivals are an important part of a broader theatrical ecosystem, new work will be at the heart of any healthy theatre culture. By new work we mean any show being performed for the first time, including new Musicals, Operas and seasonal shows, as well as new plays, new adaptations and translations, and devised work. New work involves telling new stories, whether through drama, dance, or song. New work is where our theatre most directly tries to hold the texture of our times, to find new forms for new experiences, to find a shape with which to grasp the intangibilities of our age.

Definitions

2. There are various types of 'new theatre' in this report, so it's worth taking a moment to define them. *Fig. 31* shows the way that six categories of new work, like Russian dolls, sit inside each other, each a subcategory of the next.

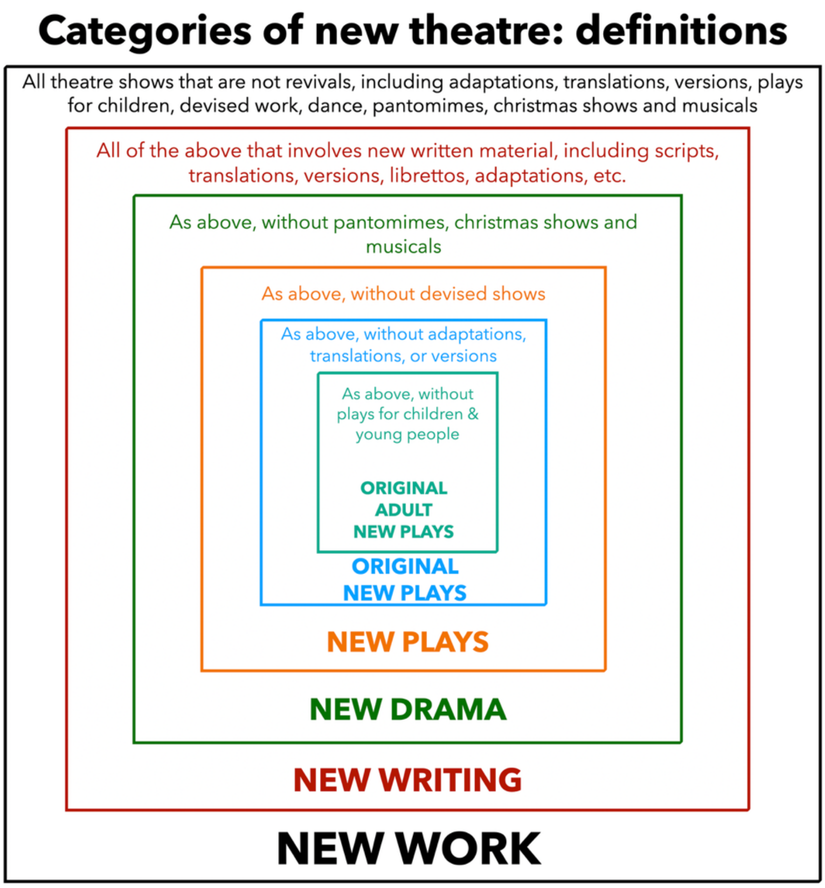


Fig. 31

a. ‘New work’ involves any new theatre show that is offering original material. The only kinds of core theatre it excludes are revivals.

b. ‘New writing’ excludes any new work not involving a new written element.

c. ‘New drama’ is new writing without Pantomime, Christmas shows, and Musicals.

d. ‘New Plays’ is new drama without devised work

e. ‘Original New Plays’ is new plays without adaptations, translations,[30] or versions

f. ‘Original Adult New Plays’ is the same as ‘Original New Plays’ but excludes plays for children & young people. At this point we arrive at the category of theatre that is generally what people mean by ‘new writing’: the kind of new plays performed on the stages of the Royal Court, Traverse Theatre, and elsewhere.

3. In the last three decades of the twentieth century, such studies as there were found that new work constituted **12-20%** of the repertoire. In our reports covering 2013 and 2014, we found that new work had risen sharply, making up the majority of theatre activity in all our measures. For example, in 2014, new work constituted **62%** of all productions, **65%** of all performances, **64%** of attendances and **63%** of all box office income.[31]

4. New work, of course, always comes with risk and, in straitened times, it would be sad but unsurprising if this were a risk that theatres (battling with inflation and energy bills) and audiences (facing a cost-of-living crisis and having learned in lockdown to spend their money elsewhere) were reluctant to take. We now have an opportunity to see exactly how new work has fared on English stages between **2019** and **2023**.

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[30] The situation with translations is slightly more complicated than this sounds. Old translations are excluded from new work; what is excluded here (in Original New Plays) are new translation of old plays, but this category still includes foreign-language plays that premiered on a British stage in an English translation.

[31] Brownlee, Edgar, Rebellato, *op. cit.*, p. 18.

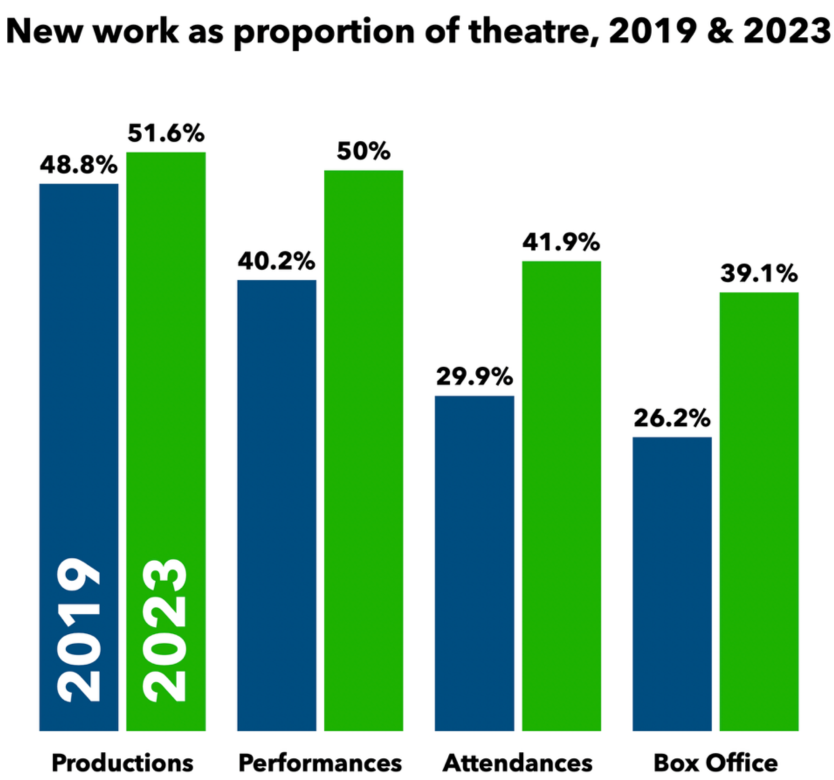
5. In fact, as *Fig. 32* shows, between **2019** and **2023** new work rose as a proportion of theatre on all measures.

    a. New work accounted for **under half** of all productions in **2019** but **over half** in **2023**. Productions of new work fell from **815** to **737,** a drop of **9.6%**, but substantially lower than the overall **14.5%** fall in numbers of productions.

    b. In **2019**, **two-fifths** of performances were of new work; in **2023**, new work constituted **half** of all performances. While raw numbers of theatre performances fell slightly (by 3.6%), performances of new work saw an absolute rise of around **20%** from **17,124** in **2019** to **20,559** in **2023**.

    c. The number of attendances that were for new work leapt from **29.9%** in **2019** to **41.9%** in **2023**. Raw numbers of attendances at new work rose from **7.3mn** to just over **11mn**, an increase of almost **50%** compared to the overall rise in theatre attendances of just under **7%**.

Fig. 32



    d. Box office income in Drama also rose considerably in real terms from **26.2%** to **39.1%** between **2019** and **2023**; in the later year new work accounted for **two-fifths** of all box office spending.

6. This is a remarkable success story for new work. It is striking, however, that even the higher **2023** figures are considerably (**10-22%pts**) lower than those we found in **2014**. It is important to be clear that the data set we are working with for **2019** and **2023** is different from that we used in **2013** and **2014**, the method of obtaining the figures has changed, some of the theatres will have left the data and others entered, and so on. However, these are both very large data sets, and it would appear that between **2014** and **2019** there was a substantial decline in new work on English stages, from new work constituting **62%** of productions in **2014** to **49%** in **2019**.[32] The rise in new work between **2019** and **2023** is less flourishing than fightback.

7. As we will see, the same pattern is visible in the figures for new work within Drama (i.e. without the large number of new Musicals)

New work by theatre form

8. Not all theatre forms prize new work equally. As *Fig. 33* shows, more than half of all Drama, Physical Theatre, Pantomimes and Christmas show productions are new work. Around a third to a half of Musicals are new work. New work is a very small proportion of Dance/Ballet and Opera. These figures are consistent over both years.

9. Although productions of new work fell in absolute terms in most theatre forms (with the notable exception of Musical theatre[33]), some of these falls were proportionately lower than the overall fall in productions; consequently, as *Fig. 33* shows, new work increased as a proportion of every theatre form except Pantomime. By **2023**, new work made up **65.1%** of Drama productions, **75.3%** of Pantomimes, **78.1%** of Physical Theatre, and a whopping **86.4%** of Christmas shows.

[32] Brownlee, Edgar, Rebellato, *op cit.,* p. 18.
[33] Numbers of new Musicals rose in absolute terms from **82** in **2019** to **97** in **2023,** a rise of **18.3%**.

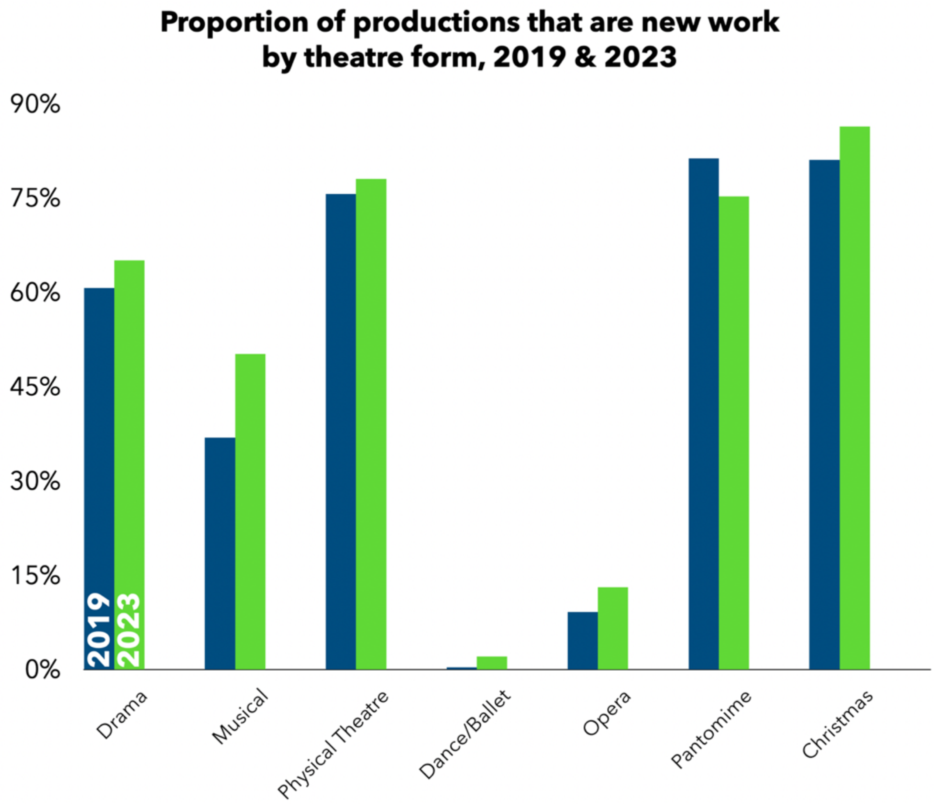


Fig. 33

10. The rise in Drama productions that were new work (from **60%** to **65.1%**) should be set in a longer history. According to our earlier reports the proportion of Drama productions that were new work in **2013** was **69%** and in **2014** **67%**.[34] Thus, as we have seen with new work as a whole, we seem to be witnessing a u-shaped fall and rise in the fortunes of new Drama, which has still not regained its place in the Drama repertoire that it achieved a decade earlier.

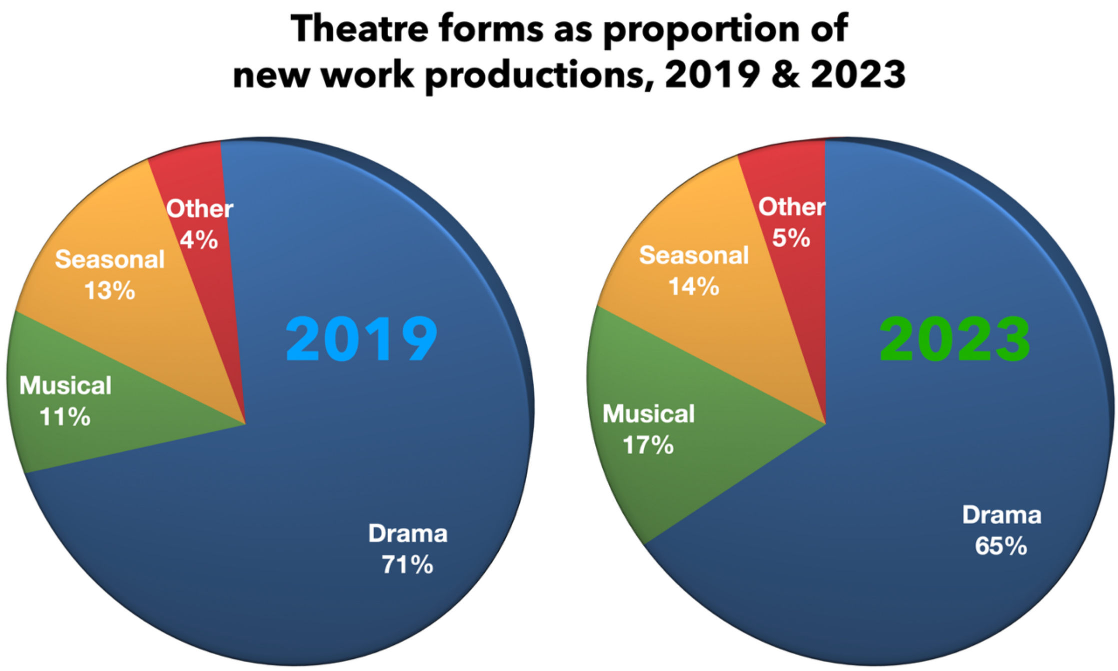
11. Strikingly, the most significant rise is in the Musical. **36.9%** of Musical theatre productions were new work in **2019** but **50.2%** in **2023**. Given the Musical's dominance of the repertoire in performances, attendances and box office, it will be very important to the shape of UK theatre that more than half of Musical theatre productions were new work in 2023.

    a. *Fig. 34* shows the proportions of each theatre form within the new work category. For clarity, we have combined Christmas shows and Pantomime as 'seasonal' and clustered Physical Theatre, Dance/Ballet and Opera, which have relatively small numbers, as 'Other'.

[34] Brownlee, Edgar, Rebellato, *op. cit.*, p. 18.

b. We can see that the Musical has notably increased its share of new work productions between **2019** and **2023**, from **11%** to **17%**, while as a result Drama's share of new work productions has reduced from **71%** to **65%.**

Fig. 34



12. We can pursue the effect of the Musical's rise in new work through our other measures. *Fig. 35* includes the Musical's share of performances, attendances, and box office.

    a. Drama takes the largest share of all new work activity in **2019**, **60%** of all new work performances, and **between 40% and 50%** of attendances and box office.

    b. The rise of the Musical in the new work category in **2023** sees it accounting for about **one third** of all performances (compared to just over **one fifth** in **2019**), **48%** of all new work attendances, and **over half** (**56%**) of new work box office. In those last two categories, the Musical has overtaken Drama with the largest share of activity.

    c. The Musical's domination of activity is not as total as it is for theatre as a whole (see *Fig 6 & 7*). Audiences are probably less familiar with a 'new work' culture in the Musical; the

‘New Musical’ has perhaps less cachet than the ‘New Play’. There are no major theatres whose sole function is to find and stage new Musicals in the way that there are for the new play.

Proportion of theatre forms within new work, 2019 & 2023

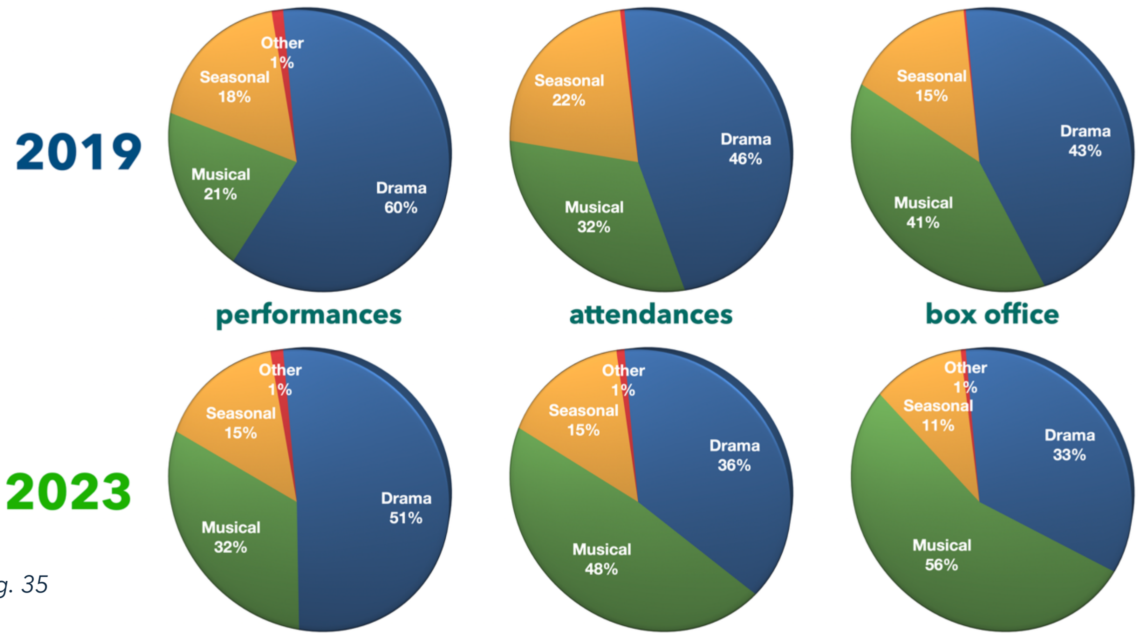


Fig. 35

d. There is some broad evidence that a culture for new Musicals is growing and becoming more mainstream. If we look at ticket prices for Musicals generally and compare that with ticket prices for all theatre, we can see that new Musicals are considerably cheaper than Musicals as a whole (see *Fig. 36*). But while in 2019, tickets for new Musicals are less than half the price for Musicals as a whole, in 2023 they are more than half the price. This says that audiences are prepared to take more of a risk (by paying more) for new

Ticket prices for musicals, new musicals, & all theatre, 2019 & 2023

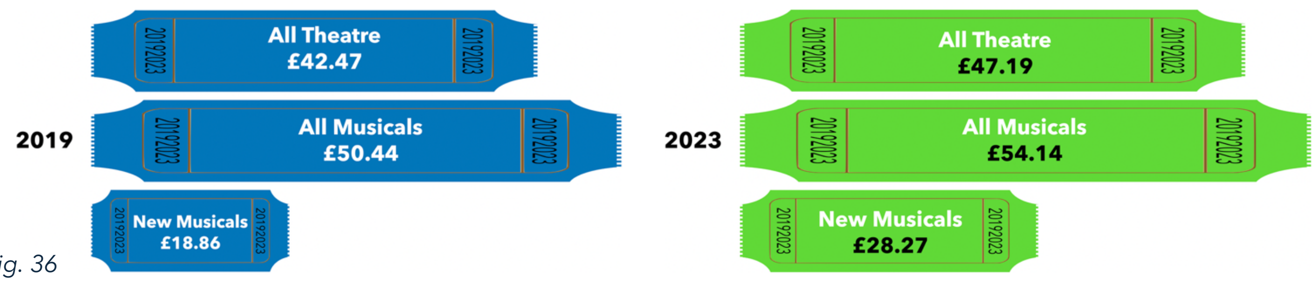


Fig. 36

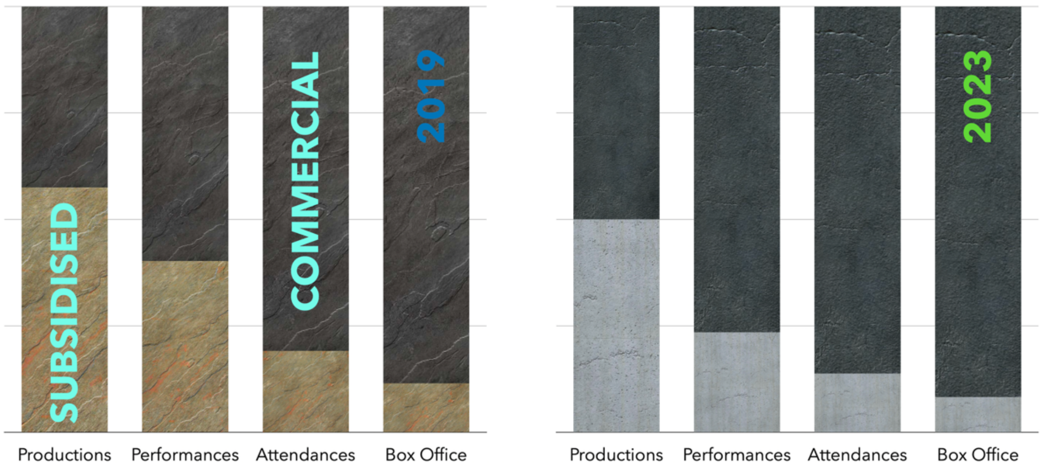
Musicals and that these are likely in larger venues and fuller productions.

e. This is confirmed elsewhere in our data. The length of run for a new Musical increased from an average of **40** performances in **2019** to **54** performances in **2023**. The average attendance at a new Musical performance grew too, from **659** to **805**.

f. The task of producing the new Musical is shared between the commercial and public sectors, though the commercial sector is taking an increasing interest in this work (*Fig. 37*). While **42%** of new Musicals were produced in the commercial sector in **2019**, that figure increases to fully half (**50%**) in **2023**. The figures for performances, attendances and box office had also risen, with **92%** of box office income for new Musicals being generated in the commercial sector in **2023**.

Share of new musical activity, subsidised vs. commercial sector, 2019 & 2023

Fig. 37



g. It will be interesting to see, in future years, how a new Musical culture can be fostered and sustained.

New work in the regions

13. We can look at the place of new work across the regions and *Fig. 38* shows the change in amount of activity between 2019 and 2023. We have excluded the North West and Yorkshire from these

charts because there are more theatres in the 2023 data than in the 2019 data for both regions, which distorts the results.

14. The picture is extremely variable. In terms of productions, only two regions saw an actual increase; the rest saw declines in productions of new work from the North East's **7.6%** drop to Wales's **40.2%**.

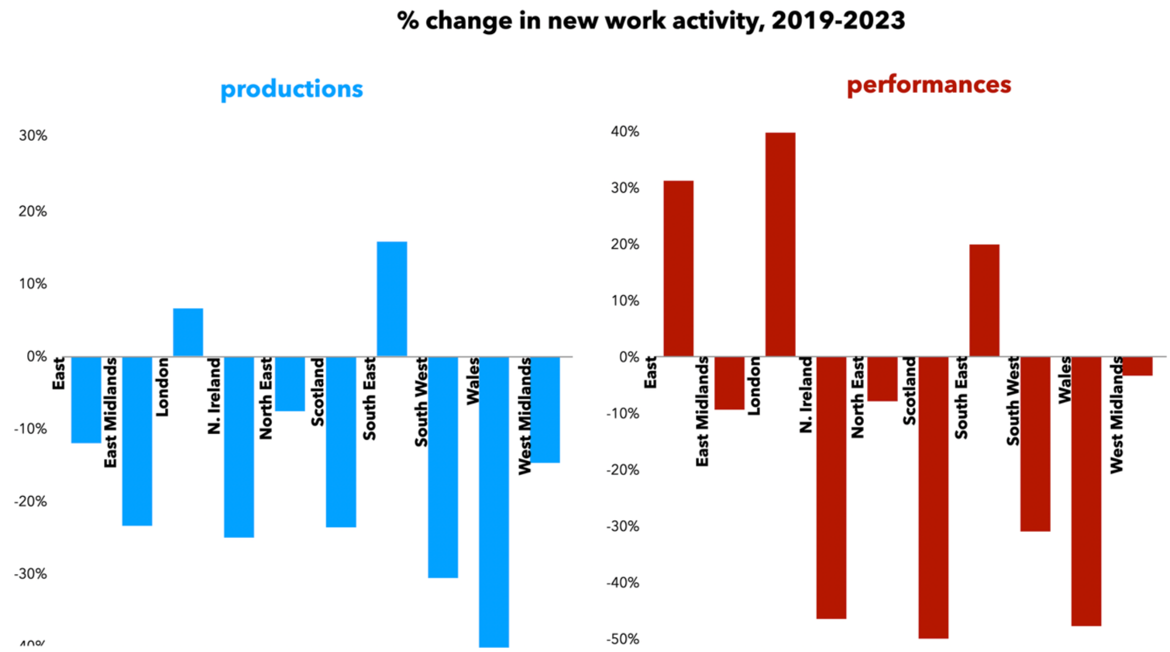


Fig. 38

15. Numbers of performances of new work are up in the same regions that saw rises in productions of new work, but the East of England now joins that group. There are declines in the other same regions and it is striking that the three nations of Scotland, Wales and Northern Ireland have all seen almost a 50% decline in numbers of new work performances. (We should be cautious about taking this as an accurate picture as UK Theatre membership is less full in those nations and the numbers of theatres is relatively small.)

16. *Fig. 39* shows the change in attendances and box office income for new work.[35] The picture here is more encouraging with all but three regions (Scotland, South West, Wales) showing an increase

[35] Our sample of theatres in Northern Ireland is so small that to include that region in this chart would breach commercial confidentiality so we have omitted them here.

in attendances at new work and seven regions showing a real-terms increase in box office.

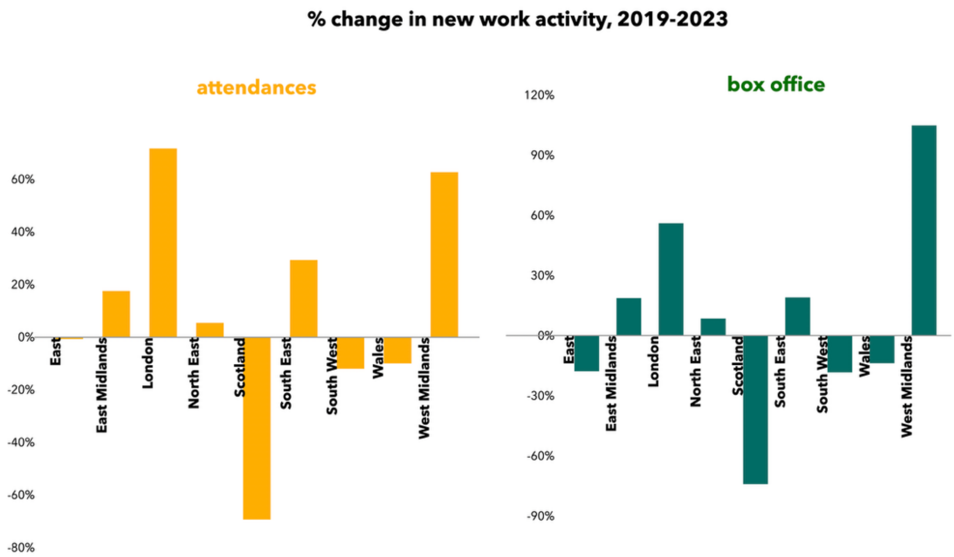


Fig. 39

17. The picture is mixed. Some regions have turned a reduction in new work into increased attendances (East, East Midlands, North East, West Midlands) and/or increased box office (East Midlands, North East, West Midlands). The East of England managed to increase performances of new work despite reducing the number of new work productions. London and the South East turned a small increase in new work activity into much higher performances, attendances, and box office. Scotland uniquely saw a reduction in new work, and then even heavier falls in the other measures.

New writing

18. New writing across all sectors of theatre shows very strong improvement between **2019** and **2023**. The same pattern we have seen elsewhere characterises the change in new writing before and after Covid. *Fig. 40* shows the change in activity. Numbers of new writing productions fell by **11.5%**, less than the overall drop of **14.5%**. Numbers of performances, however, rose by **21.6%** (against an overall fall of **3.6%**), while attendances and real-terms box office rose by **53.8%** and **54.5%** (against a rise of **6.8%** and a drop of **1.7%**, respectively).

19. Given these figures it is not surprising also to see that new writing's performance against potential has increased. Attendances as proportion of total capacity rose from **68.5%** in **2019** to **74.6%** in **2023**. New writing's box office against capacity rose from **66.4%** to **71.6%**.

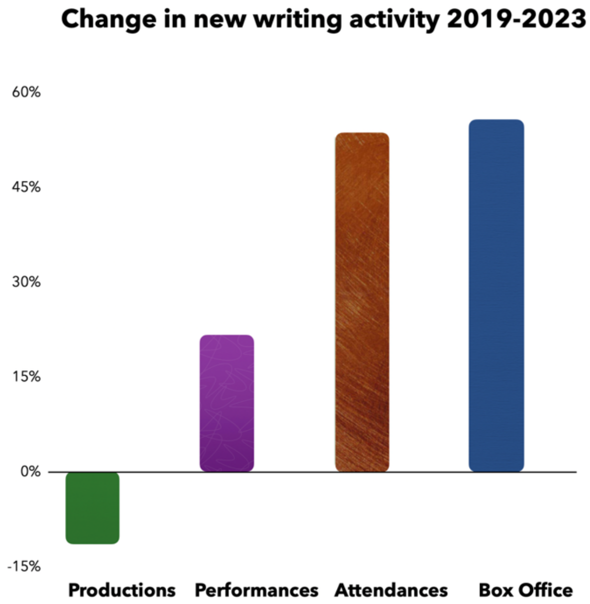


Fig. 40

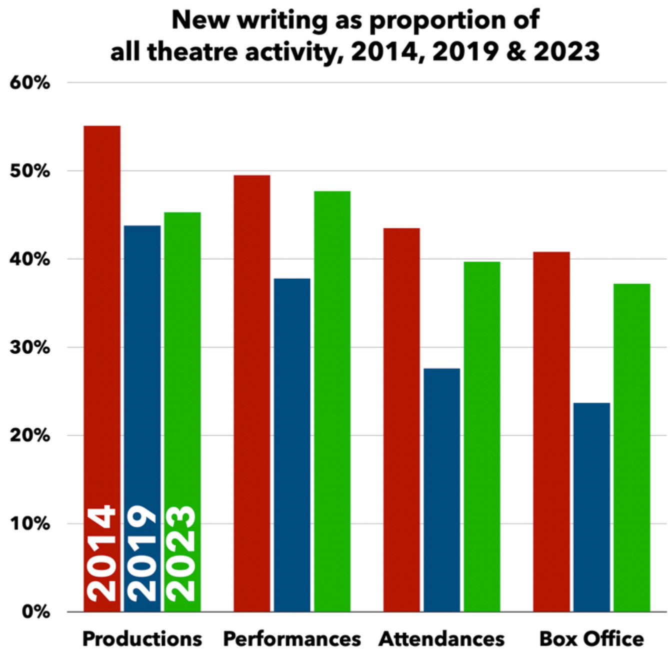
20. This can be compared to the situation a decade earlier. New writing's attendance against capacity was **61.7%** in **2013** and **57.5%** in **2014**, and its box office performance against potential was **60.9%** in **2013** and **49.3%** in **2014**.[36] This suggests we have seen a very significant rise in performance for new writing from the mid-2010s to the mid-2020s.

21. However, this masks a more complicated story. As *Fig. 41* shows, there was a small increase in new writing as a proportion of all theatre productions, and larger increases in new writing's share of all theatre performances (from **37.8%** in **2019** to **47.7%** in **2023**, an almost **10%pt** increase), attendances (from **27.6%** to **39.7%**, a rise of more than **12.1%pts)** and box office **(23.7%** to **37.2%**, a rise of **13.5%pts)**.

[36] Brownlee, Edgar, Rebellato, *op cit.*, p. 23.

22. However, the figures for **2014** were higher on all four measures than either **2019** or **2023**. The longer story seems to be, in fact, that new writing experienced a steep decline in the second half of the 2010s, from which it has been incompletely recovering. As we have shown for new work as a whole, not so much flourishing as a fightback.

Fig. 41



23. New writing has held and increased its share of all theatre activity. shows that the proportion of productions that involve new writing has increased a little, but almost half of all theatre performances in **2023** were of shows that involved new writing. The share of all theatre attendances for new writing increased by **12.1%pts** from **27.6%** to **39.7%** and new writing's share of all box office rose from **23.7%** to **37.2%**, a rise of **13.5%pts**.

New Plays

24. We can focus down on new plays to compare that with the overall picture for new writing (see *Fig. 42*).

    a. Numbers of new plays produced in **2023** were **29.2%** lower than they were in **2019**. As such, they were much more severely hit than the broader new writing category

(**-11.5%**), and indeed over twice as hard as overall theatre productions (**-14.5%**).

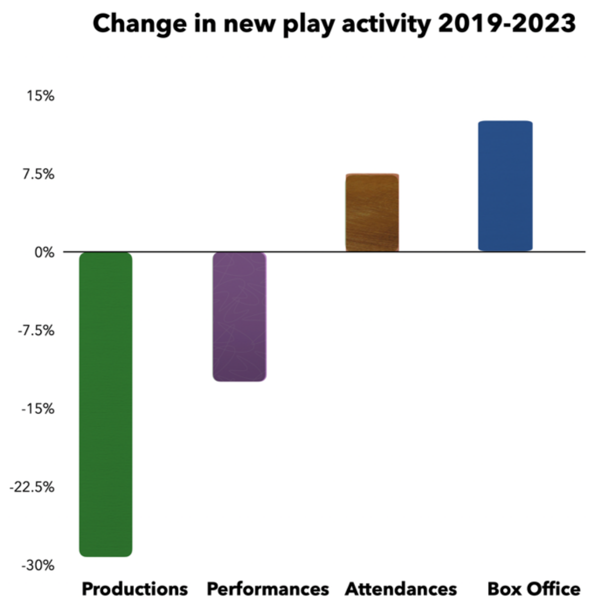


Fig. 42

b. While new writing performances are up, new play performances are down by **12.4%**, though less than the number of productions, which means that runs of new plays got longer: the average run for a new play in **2019** was **19**, and in **2023** it was **23**.
c. Attendances in **2023** were also up by **7.4%** compared to **2019,** which is higher than the rise for theatre overall (**6.8%**); it's also worth noting that, because of the decline in performance numbers, average attendance *per performance* of a new play was up, from **340** in **2019** to **416** in **2023**.
d. It is also striking that a new play, on average, filled **74.1%** of its seats in **2019** and **75%** of its seats in **2023**. And new plays were performed in larger theatres too: in **2019** new plays were performed in theatres with an average total capacity of **414** seats; by **2023**, that had increased to **584** seats, a **41%** increase in average size of auditorium.
e. Because of these rises, box office for new plays also bucks the general trend, rising, in real terms **12.5%** in **2023** compared to **2019**, substantially above the overall **-1.7%** decline in theatre box office income. This also means that average box office *per performance* rose well above inflation. On average each performance of a new play in **2019** generated **£15,411**; if that had risen according to inflation the **2023** income would have been **£18,895**. The

actual figure for **2023** is **£23,990**, **27%** higher in real terms than the **2019** figure.

25. The sharp decline in numbers of new play productions will be grounds for concern for anyone who cares about the health of the new play in the British theatre repertoire. However, it should also be encouraging to see that new plays that did get on in **2023** typically had longer runs, bigger audiences in bigger houses, and attracted bigger box income in real terms than in **2019**. The new play is, therefore, holding its own.

Devised work

26. Another important form of new theatre is devised work, a shorthand term for a diverse range of theatre shows generally created collaboratively in the rehearsal room by the performers and other creative associates which is virtually always new work. Typically more *avant garde* in approach, style and feel, there have been concerns that the theatre's financial constraints would put pressure on such innovative and upstream theatre practice.

    a. The number of devised shows in our theatres slightly declined from **156** in **2019** to **142** in **2023**. But this small drop (less than **9%**) is well below the overall shrinkage in theatre production with the result that devised work increased as a proportion of all theatre productions from **9.3%** in **2019** to **9.9%** in **2023**.

    b. Devised work's share of performances similarly increased from **4.1%** to **5%** and its share of all attendances from **1.5%** to **1.9%**.These numbers are small but the increases are proportionately large; the audience for devised work in our data increased by **over 25%** between 2019 and 2023.

    c. The share of all box office also increased slightly from **0.9%** to **1.1%** which again may seem small but represents nearly a 15% rise in the sector share of box office income (and as a raw figure is significantly above inflation).

d. There are several reasons why devised work's numbers are small.

   i. First, our data, derived from UK Theatre and SOLT, does not include a large number of London fringe theatres for example. Our data, therefore, undoubtedly underrepresents the significance of Devised work in the national picture.

   ii. Devised shows typically have short runs. The average run length for this work in **2019** was **11** performances and though that number had increased in **2023** to **14**, these were less than half of the average run length of all theatre which was **26** performances in **2019** and **29** performances in **2023**. For that reason, their attendances and box office will typically be limited.

   iii. Finally, devised work is typically performed in smaller theatres than many other theatre forms, modes, and styles. *Fig. 43* shows the distribution of various types of theatre into small, medium and large auditoriums in **2023**. While **45%** of theatre productions and **30%** of Drama productions were performed in large auditoriums, only **21%** of devised work found its way to the largest stages. Conversely, while **27%** of theatre productions and **37%** of Drama productions were performed in the smaller spaces, almost half (**48%**) of devised shows were shown in these more intimate spaces.

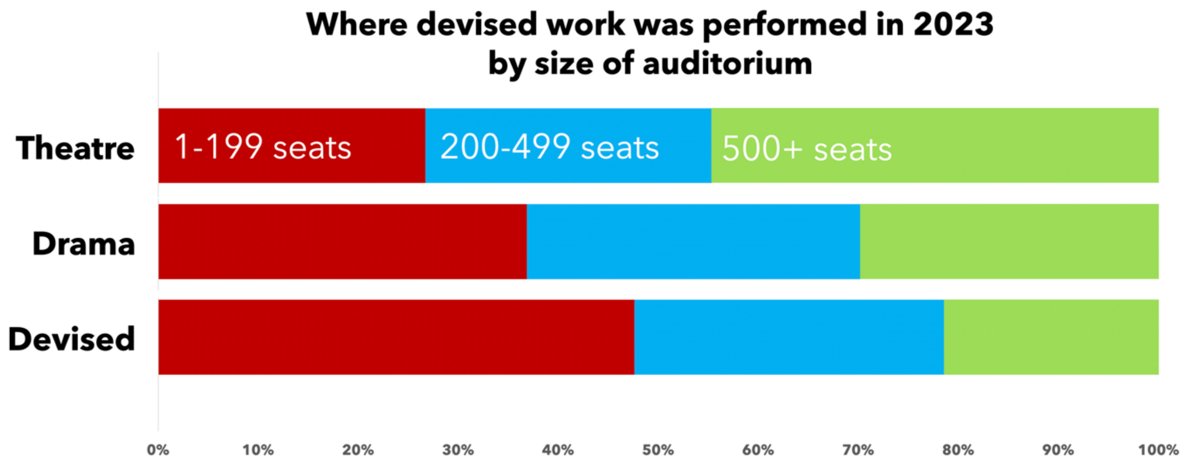


Fig. 43

27. That said, these figures show that concerns that experimental work might have been reduced after Covid and during the cost-of-living crisis are unfounded. Devised work indeed continues to show the flourishing and growth that we demonstrated in a previous report a decade ago.[37]

Adaptation

28. The suggestion is sometimes heard that our theatre, rebuilding after Covid, has turned to existing intellectual property that has some recognition with the public who will be more likely to book. One particular area that might manifest itself is in theatrical adaptations of existing novels and films. So how did adaptations fare?

29. There is evidence to support this suggestion. Adaptations rose as a proportion of the overall theatre repertoire on all measures:

    - From **25.9%** of theatre productions in **2019** to **26.2%** in **2023**
    - From **35.6%** of theatre performances in **2019** to **40.8%** in **2023**
    - From **41.2%** of theatre attendances in **2019** to **46.9%** in **2023**
    - From **46%** of theatre box office in **2019** to **50.9%** in **2023**

30. The growing success of adaptations is visible in other measures too. From **2023**, Adaptations:

    - achieved longer runs than they had in **2019** (from **35** performances to **45**)
    - were performed in larger auditoriums (from average **936** seats to **967**)
    - filled their seats better (from **71.5%** of capacity to **76.3%**), and
    - performed better at the box office (a real-terms rise of **8.7%** in income and going from achieving **70.6%** of potential box office to **72.6%**)

[37] Brownlee, Edgar, Rebellato, *op cit.*, pp. 24-26.

31. Adaptation is a very broad category; most Musicals are adaptations of one sort or another; quite a few ballets are transformations of other sources; as are Pantomimes and Christmas shows. For that reason, the success of adaptations should not be surprising. But what is the place of adaptation in new work?

32. The advance of the new adaptation is more measured, making very small increases (less than **1%pt**) in its share of New Work productions and performances between the years, though taking an **8.5%pt** larger share of box office and **10.5%pt** more of attendances.

33. It's helpful to strip out those theatre forms that have traditionally relied on the adaptation and focus on the new play. Have theatres shied away from the original new play in favour of existing IP?

34. The answer is no. As *Fig. 44* shows, adaptations were a much more significant portion of the new play repertoire in **2019** but declined on every measure in **2023**. Adaptations made up **over**

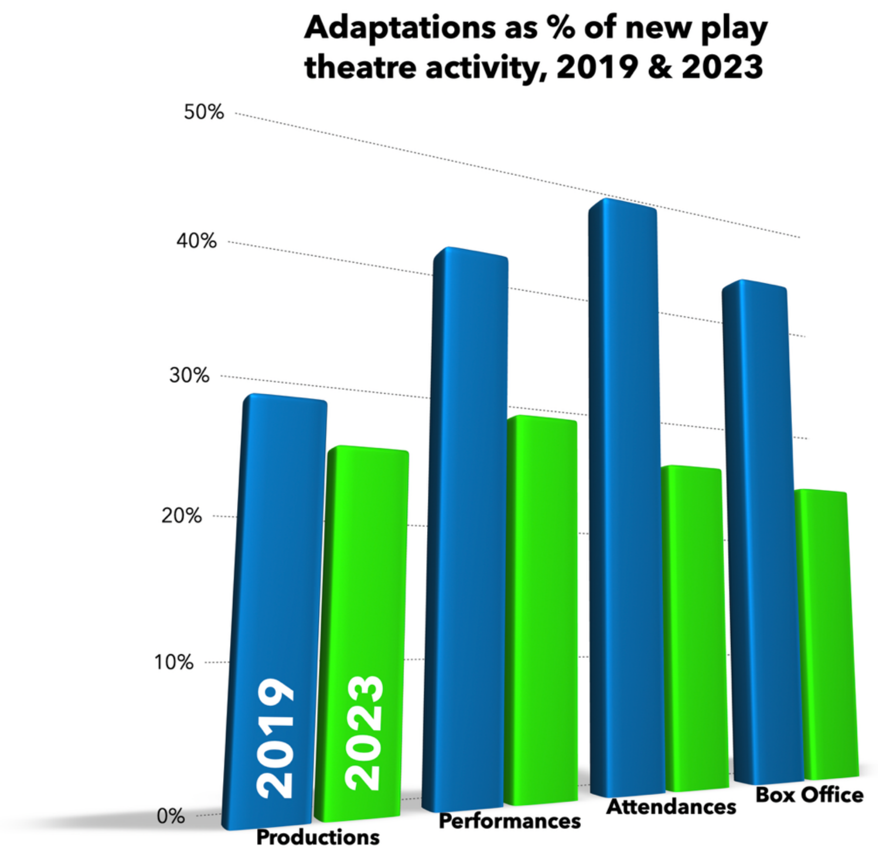


Fig. 44

40% of new play performances, attendances and box office in **2019**, but **less than 30%** of those measures in **2023**.

35. Also, the proportion of adaptations that were new has also risen, from just under half of shows (**48.8%**) in **2019** to just over half (**52.3%**) in **2023**. New adaptations have increased as a proportion of all adaptation activity:

- From **40.9%** of performances of adaptations in **2019** to **45.3%** in **2023** (a **4.3%pt** rise in share)
- From **24.4%** of attendances at adaptations in **2019** to **36.4%** in **2023** (a **12%pt** rise in share)
- From **17.3%** of box office for adaptations in **2019** to **31.4%** in **2023** (a **14.1%pt** rise in share)

36. These figures understate the success of the new adaptation, because while fewer new plays are adaptations, the rise of the new Musical (very often an adaptation) has swept the figures for the adaptation along with it. Despite adaptation reducing (as did almost all kinds of theatre) its productions (by **7%**) between **2019** and **2023**, its performances increased by **22%**, its attendances by **81%** and its real-terms box office by a remarkable **97%**.

37. By contrast, productions of 'old' adaptations decreased by **19%**, their performances and attendances increased by only **2%** and their real-terms box office declined by **10%**.

Original new plays

38. A core part of the UK theatre repertoire is the new play. The category 'original new plays' strips out translations, versions, and adaptations, to give us the new styles and stories that have transformed our theatres.

39. Original new plays dropped slightly as a proportion of all theatre, from **19.2%** in **2019** to **16%** in **2023**. However on all other measures, they increased a little:

- from **10.7%** of performances in **2019** to **12%** in **2023**
- from **5.9%** of attendances in **2019** to **7.9%** in **2023**
- from **5.6%** of box office in **2019** to **7.6%** in **2023**

40. Perhaps the most useful measure of the place of the new play is its place within the category of 'Drama'. Again, the original new play increased:

- from **20.6%** of performances in **2019** to **26.4%** in **2023**
- from **17.4%** of attendances in **2019** to **27.2%** in **2023**
- from **20.8%** of box office in **2019** to **31.6%** in **2023**

41. The original new play attracts audiences. It filled on average **77%** of its seats in **2019** (beating every theatre form except the Musical and Pantomime) and **74.3%** in **2023** (slightly down but still less than **2%pts** short of the average attendance of **76.2%**).

42. The new play contains three main types: the new original adult play, the new original children's play, and the new adaptation. The proportions of those are similar across the two years though, as *Fig. 45* shows, adult new plays and children's plays slightly

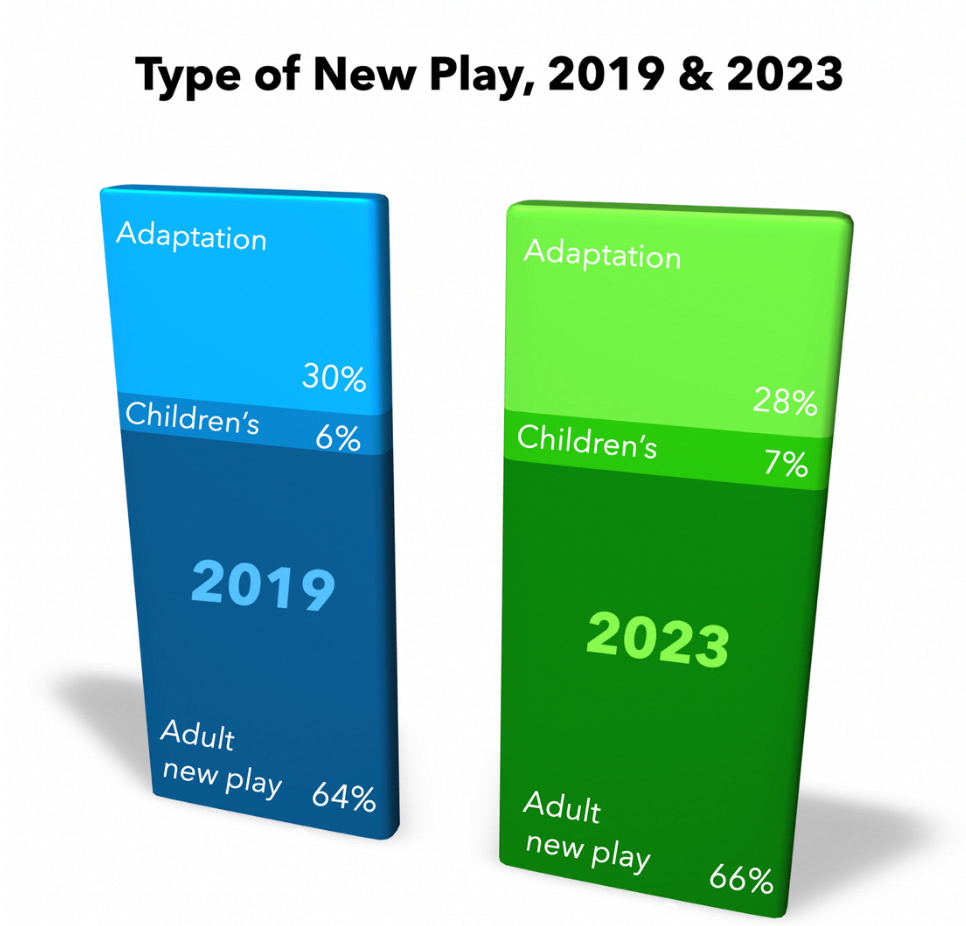


Fig. 45

increased in **2023** and new adaptations have slightly decreased as a proportions of the whole.[38]

Original adult new plays

43. If we then exclude plays for children, we arrive at the original adult new play, which is at the heart of the repertoire, and something for which UK theatre is known internationally. For at least a century, UK theatres have discovered hundreds of playwrights and thousands of plays that have gone on to be performed on stages around the world.

44. As the 'adult original new play' accounts for over 90% of the 'original new play' category, it is unsurprising to see that it performs much in the same way. As a proportion of all theatre productions, it fell from 17.6% in 2019 to 14.5% in 2023 but saw increases on all other measures:

    - from **10.2%** of performances in **2019** to **11.5%** in **2023**
    - from **5.8%** of attendances in **2019** to **7.8%** in **2023**
    - from **5.6%** of box office in **2019** to **7.5%** in **2023**

45. As a proportion of Drama, it fell from **30.7%** of productions to **28.5%**, but its increases were more substantial:

    - from **19.7%** of performances in **2019** to **25.3%** in **2023**
    - from **17.1%** of attendances in **2019** to **26.7%** in **2023**
    - from **10.7%** of box office in **2019** to **31.4%** in **2023**

46. Within the category of 'new writing' the 'adult original new play' is most successful at filling its seats in any category except the new Musical in 2023, as *Fig. 46* shows.
    a. Achieving **77.5%** of capacity in **2019**, it not only outperformed the new Musical (at **64.9%**) but actually outperformed Musical theatre as a whole (at **77.4%**).

    b. The adult original new play fell back a little in **2023** to **74.7%**.

[38] This chart focuses only on these three forms, which is why the percentages differ slightly from those given in *Fig. 44*.

c. However, the performance of new writing as a whole seems to have improved significantly in the last decade.

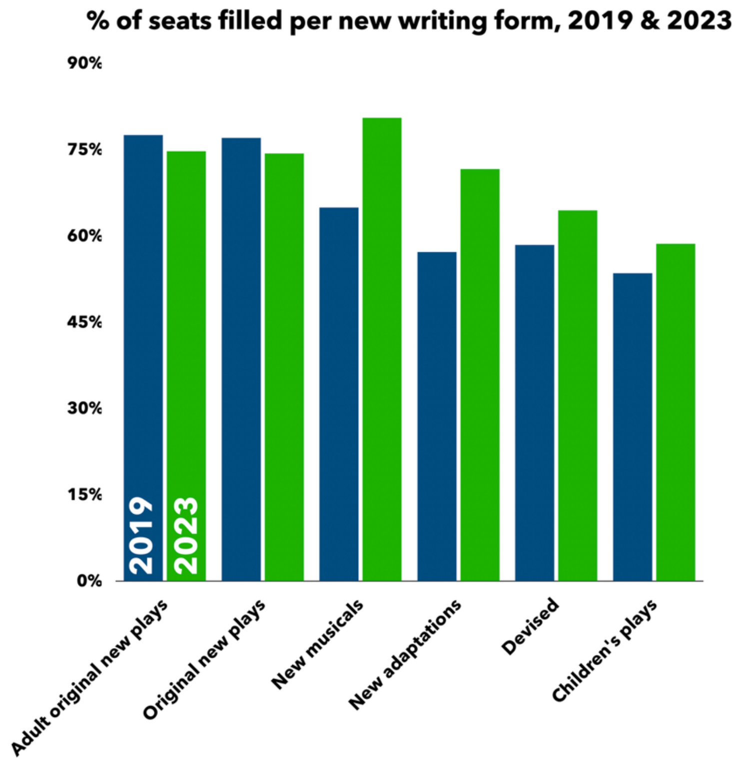


Fig. 46

47. The adult original new play has also improved its performance on other measures:

a. The average auditorium size for an adult original new play increased between **2019** and **2023** from **412** seats to **570** a **38.6%** increase.

b. The average length of run from for an adult original new play increased substantially from over **14** performances to over **21** performances, a **51.1%** increase.

c. The adult original new play achieved just under **77%** of its box office potential in **2019** and **2023**, outperforming all of our seven theatre forms, including the Musical and Pantomime in both years.

48. It is clear that the adult original new play, while having reduced slightly as a proportion of the repertoire, continues to perform extremely strongly with audiences.

Summary

49. Between **2014** and **2019** new work declined as a proportion of the repertoire on all measures. For example, in **2014** new work was **62%** of all theatre productions but in **2019** it was **49%**.

50. However, between **2019** and **2023**, either side of Covid, new work rose as a proportion of theatre on all measures. In **2023** new work rose to just **over half** of all theatre productions and **a half** of all theatre performances, while its share of attendances increased by over **10%pts**. As a proportion of Drama rather than theatre, new work rose from just over **60%** to **65.1%**, but still lower than the proportions it achieved a decade earlier.

51. As a proportion of new work, Musicals rose by **52%**; Musicals accounted for over half of new work box office by **2023**.

52. New plays declined in terms of numbers of productions, but those that did get produced had longer runs and made more at the box office. Original new plays for adults also declined in numbers of productions, but increased on all other measures, and in **2023** proved more successful in filling seats than any other form of new writing including Musicals.

53. Devised work increased as a proportion of all theatre productions, performances, attendances, and box office, continuing the pattern of increasing activity noted in our reports in **2013** and **2014**.

54. As a proportion of theatre repertoire, adaptations (old and new) rose on all measures between **2019** and **2023**, generating **more than half** of all theatre box office in the latter year. In **2023** they had longer runs than in **2019**, were performed in larger auditoriums, filled more seats and performed better at the box office.

55. Absolute numbers of *new* adaptations declined between the two years, but almost doubled their attendances and their real-terms box office.

7. Revivals & Translation

1. New work always exists in a context. New work has usually been staged alongside and fed by work from the world history of drama. Native new theatre work in Britain has often been fed by contemporary work from abroad. It's worth examining the balance between the new and old and between British and foreign work.

Revivals

2. By revivals we mean new productions of old work: usually a play, a musical, or an opera. (When an old production is remounted we consider that to be a continuation of the same production.) Although musicals in particular can be substantially rewritten, new songs interpolated, other numbers removed, unless it is specifically marketed as an entirely new version, we consider it a revival of the original.[39]

3. Revivals make up around **two-fifths** of the repertoire: they were just over two-fifths (**43.7%**) of all productions in **2019** and just under (**38.8%**) in **2023**.

    a. Productions of revivals declined in absolute terms from **631** productions in **2019** to **461** in **2023**, a **26.9%** drop.

    b. There was also a **18.1%** drop in performances, an **11.7%** drop in attendances, and a **20.2%** real-terms drop in box office income.

4. We can see the changing place of revivals more clearly in *Fig. 47* which shows the proportion of revivals within our theatre forms. The chart is based on numbers of production.

    a. It is immediately clear that Opera is a form unusually dominated by revivals. (If we exclude that form, new work made up **58.9%** of the repertoire in **2019** and **63.8%** in **2023**.)

[39] We should note that in classifying Dance/Ballet (and sometimes Physical Theatre) the notion of a revival is often complex (a remounting of a ballet will often involve new choreography or a reinterpretation of existing choreography that blurs the distinction between new work and revival). Dance/Ballet are excluded from our figures here.

b. New work increased as a proportion of most theatre forms:

- from **81.1%** to **86.4%** of Christmas shows
- from **60.7%** to **65.1%** of Drama
- from **36.9%** to **50.2%** of Musicals
- from **9.2%** to **13.1%** of Opera
- from **75.7%** to **78.1%** of Physical Theatre

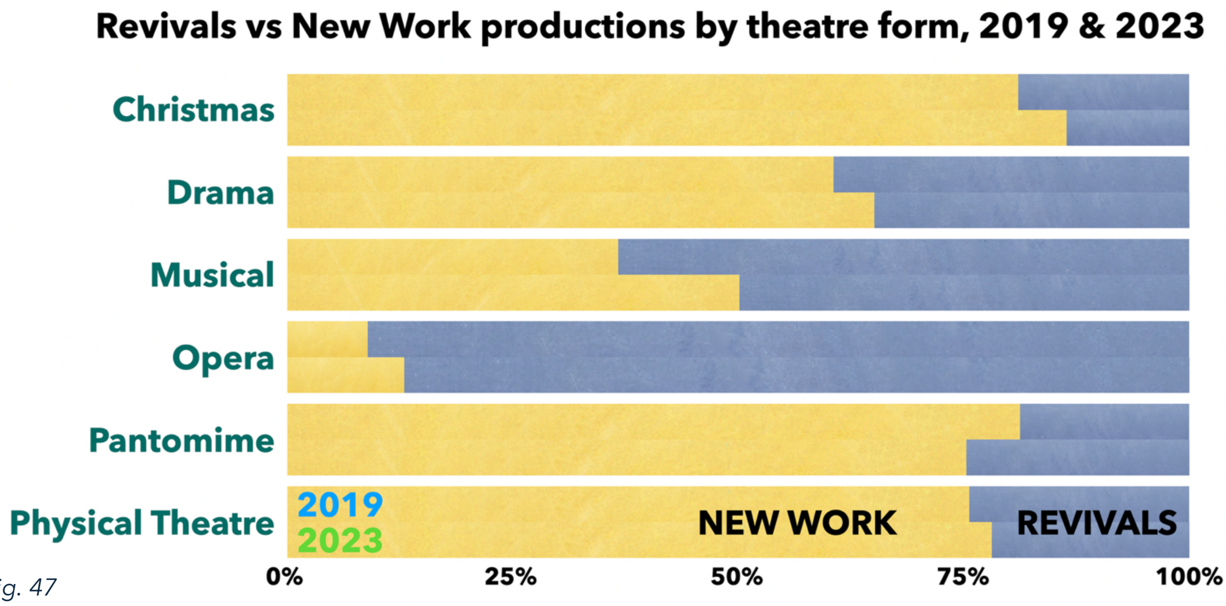


Fig. 47

c. The proportion of Pantomimes that were new work seemed to drop slightly from **81.3%** in **2019** to **75.3%** in **2023**. We should say, though, that it is often difficult to determine whether a Pantomime is new or a revival. Is a version of *Mother Goose* ever entirely new or ever entirely old? The form, with its mixture of improvisation and canonical stories blurs the distinction between new and old and we advise more caution in handling these figures than for other forms.

d. Nonetheless, revivals account for around a third of all Drama and around half all Musicals.

5. We can also look at some theatre forms and modes that are particularly important in the repertoire:

a. Revivals of plays reduced in number from **340** in **2019** to **219** in **2023**, a reduction of **over a third**.

b. Revivals of adaptations went from **221** in **2019** to **179** in **2023**, a reduction of **19%**.

c. Revivals of Musicals dropped by **8.2%**, going from **159** in **2019** to **146** in **2023**. (This is not due to a drop in Musical theatre production as such but by the **18.3%** rise in numbers of new Musicals across the years.)

6. The revival outperformed new work in average attendances, filling **74.2%** of its seats in **2019** and **77.4%** in **2023** (compared to **69.7%** and **74.6%** for new work).

7. The revival outperformed new work at the box office achieving **70.5%** of its potential income in **2019** and **72.9%** in **2023** (against **55.7%** and **59.2%** for new work).

8. However, revivals made up a smaller share in **2023** of all activity (productions, performances, attendances, and box office) than in **2019** for all forms except Pantomime, where the revival increased its share. So if we look at, say, the share of box office accounted for by Opera revivals in **2023**, it will be a lower proportion of that income than in **2019**; the same is true for all measures in all forms, with Pantomime being the only one to buck the trend.

What does British theatre revive?

9. We have divided all revivals into three eras:

- Classical (before 1850)
- Modern (1850-1945)
- Postwar (after 1945)

a. For the purposes of this section, we are only counting revivals of Drama, Musicals and Christmas Shows. Opera is so reliant on the repertoire that it skews our data; it is exceptionally difficult to trace whether a Pantomime is a new version of, say, *Mother Goose*, or a revival of a previously-performed version of *Mother Goose*, and rather than offer inaccurate data, we've decided to omit it.

b. With Dance/Ballet and Physical Theatre the notion of a revival is often more complex (a remounting of a ballet will often involve new interpretations of existing choreography that blurs the distinction between new work and revival).
c. Revivals include 'versions', because we want to capture broadly the ways in which our contemporary theatre is engaging with the drama of the past.

10. The number of revivals declined by **22.4%**, higher than the overall decline in productions between **2019** and **2023**. As a proportion of the theatre repertoire as a whole, revivals dropped from **22.6%** to **19.7%** across the two years, a modest but noticeable fall.

11. There was a shift in the proportions of each era revived as *Fig. 48*

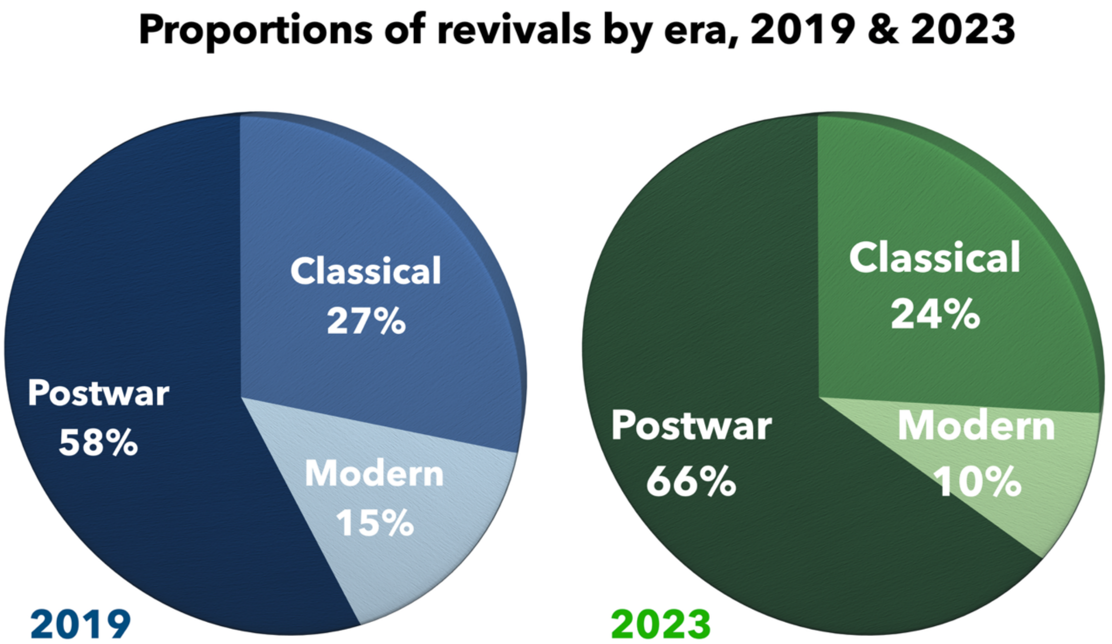


Fig. 48

shows.

a. Between **2019** and **2023**, there was a drop in the proportion of Classical and Modern work in the repertoire by **3%pts** and **5%pts** respectively.

b. In raw numbers of productions, Classical work dropped by a little **under a third**, while the Modern repertoire more than **halved**.

12. Within those eras we can explore what was revived, to see how far our theatre represents the breadth and depth of the global dramatic heritage.

13. *Fig. 49* shows the most performed playwrights from the classical period in our theatres.[40]

   a. The **2019** chart shows all classical playwrights from the period who had more than one production. he figures around the chart show the raw numbers of revivals and it is clear, if perhaps unsurprising, to see that Shakespeare entirely dominates the classical repertoire, gaining **74** and **60** revivals in the two years, with no other playwright receiving more than **3** revivals in either year.

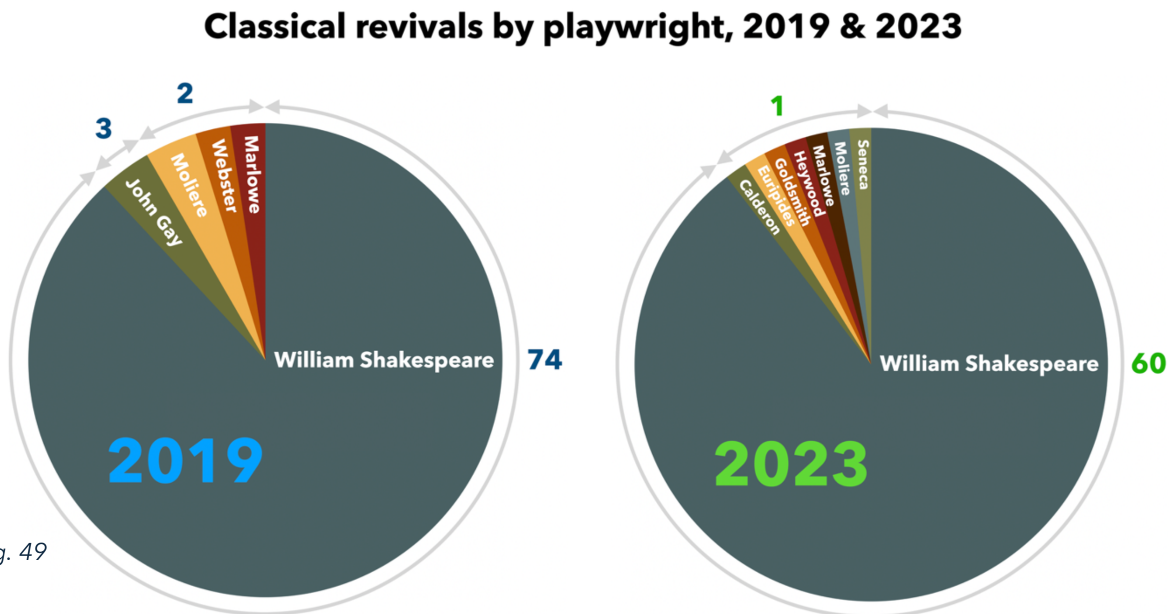


Fig. 49

   b. Only **11** other classical playwrights featured in our data for **2019**. Most were Shakespeare's contemporaries (Webster, Marlowe, Jonson, Beaumont), the rest are Restoration dramatists (Congreve, Otway, Vanbrugh, 'Ariadne '), plus John Gay, Moliere and Euripides. There is one presumed woman (the anonymous and pseudonymous 'Ariadane'). Only **3.3%** of these playwrights wrote in a language other than English.

[40] The numbers around the chart show the number of productions of plays by that playwright and the curved arrows show which playwrights had that number of revivals; e.g. in 2019, Marlowe, Webster, and Moliere had two revivals each.

c. The classical repertoire has narrowed further in **2023**. Shakespeare now accounts for over **89%** of all classical revivals.

d. On this chart we have not just shown playwrights who had more than one production; the chart shows all classical-era playwrights who had any production at all. In other words, apart from Shakespeare, only **7** classical playwrights were presented in our theatre in 2023. Marlowe, Euripides, and Moliere were again performed, alongside Seneca, Heywood, Goldsmith, and Calderón. No women are represented, though the proportion of foreign-language playwrights has risen to **4.5%**.

14. *Fig. 50* shows which were the most revived playwrights of the modern period. Both charts show all playwrights who received more than one production in each year. The figures around the chart show the raw numbers of revivals.

Modern revivals by playwright, 2019 & 2023

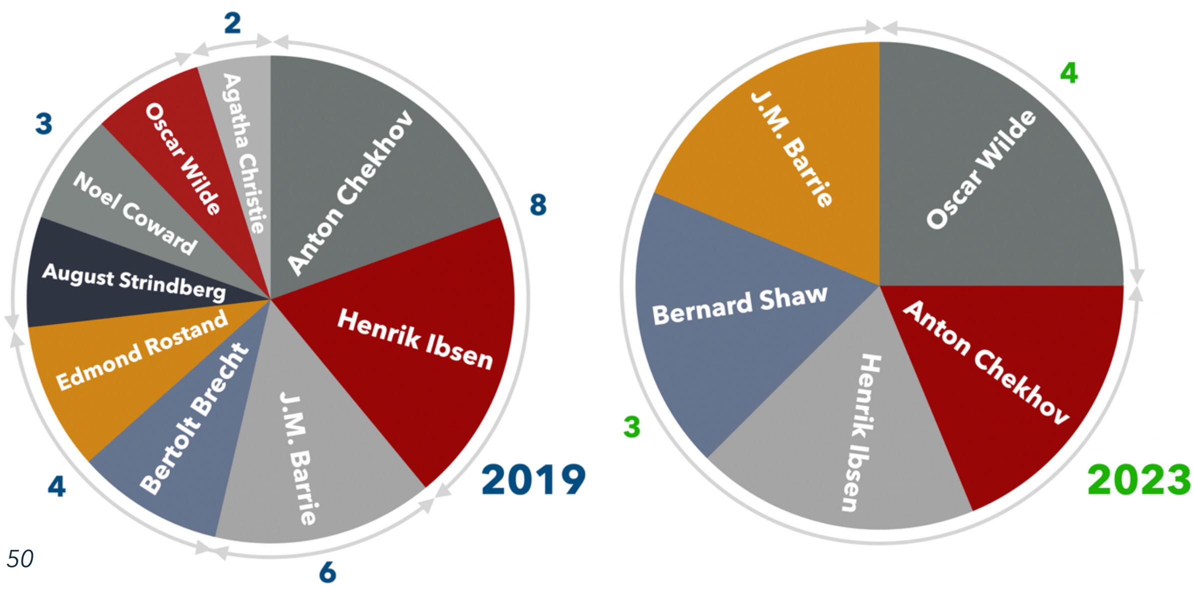


Fig. 50

a. **Nine** Modern playwrights had more than one production in **2019**, led by Chekhov and Ibsen with eight productions each. J.M.Barrie, whose numbers are always boosted by the seasonal appeal of *Peter Pan*, is next with six productions; **six** other playwrights have between 2 and 4 revivals.

b. In **2019**, **12** further playwrights (Kaufman & Hart's collaboration counting as one) are represented with a single production each. In other words **21** Modern playwrights had their plays on our stages in **2019**.

c. There are **three** women in the list (Christie, Du Maurier, and Sowerby) and **16.4%** of the playwrights represented wrote in a language other than English, and their plays represent **56.4%** of Modern-era productions.

d. We see the same narrowing of the Modern repertoire in **2023** that we saw for the Classical era. There are only **five** Modern playwrights who had more than a single production in 2023 and **6** others had a single production each. In other words, **11** Modern playwrights had productions on our stages. There are **two** women on the list (Dodie Smith, Lillian Hellman) and while the proportion of non-English-language playwrights on the list is higher than in **2019** the proportion of productions is lower (both figures for **2023** being **36.4%**)

15. Finally we turn to the Postwar repertoire. *Fig. 51* shows all playwrights who had more than two revivals in the two years.[41] Again, the figures around the chart show the raw numbers of revivals.

a. Arthur Miller leads the pack in **2019**, with a remarkable 11 productions. But **14** other playwrights had more than 2 productions that year. And another **153** playwrights had 1 or 2 plays revived in **2019** (including both authors of this report). In other words, **168** playwrights had work revived in **2019**.

b. Of these writers, we estimate[42] **28.6%** are women; **26.8%** of the productions were of plays written by women.

---

[41] Where a playwriting team mostly work together – as in Henry Lewis, Jonathan Sayer, and Henry Shields, writers of *The Play That Goes Wrong* and other shows – we count them as a single team in our figures. When playwrights work sometimes solo and sometimes in collaboration we have tended to attribute a fraction of the credit to them; this is why Terry Deary and Alan McHugh who write both solo and in collaboration are credited with fractions of plays.

[42] As explained in the Gender chapter, while we have tried where possible to ascertain and respect the gender self-identification of the playwrights in our data, it has not be

c. The picture in **2023** is, again, much narrowed. Only **five** playwrights had more than 2 productions in that year. A further **146** writers had 1 or 2 plays revived (including one of the authors of this report). In other words, **151** playwrights had work revived in **2023**, a reduction of just over **10%**.

d. Of the writers, we estimate **27%** are women, a slightly smaller proportion; but exactly the same proportion of productions, **26.8%**, were of plays written by women.

Postwar revivals by playwright, 2019 & 2023

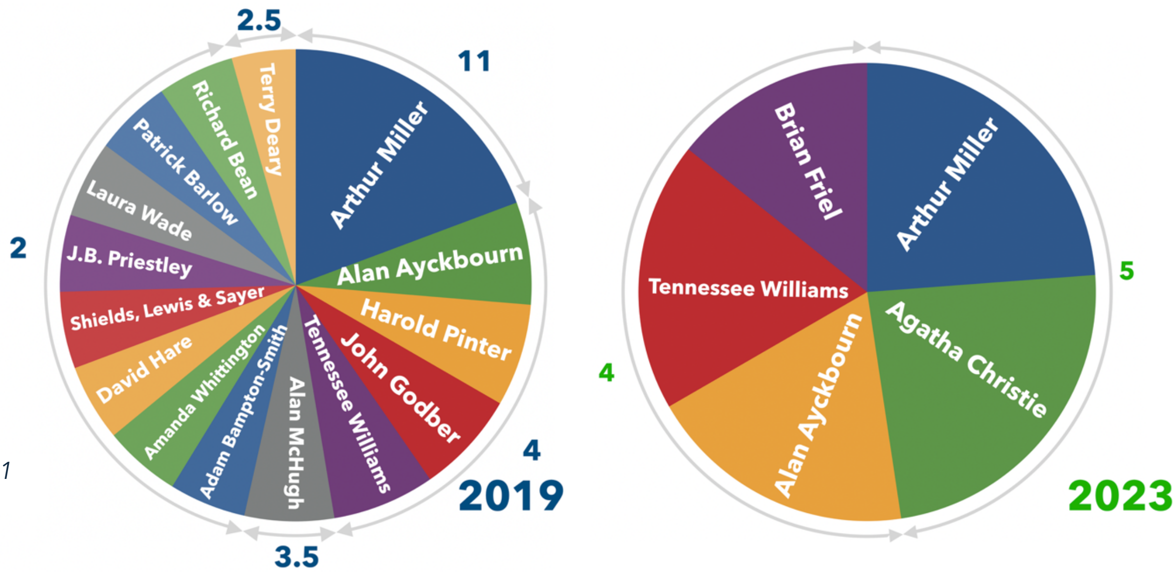


Fig. 51

16. The performance of revivals varies by period revived.

a. Classical revivals filled more of their seats in **2023** than in **2019** (**71%** rising to **75.2%**), as did Postwar revivals (**75.7%** rising to **78.7%**). Modern revivals went in the other direction (**68.8%** dropping to **62.7%**)

b. The same picture is found in box office against potential, Classical revivals achieving **66.8%** in **2019** and **72%** in **2023** and Postwar revivals achieving **72.6%** and **74.4%**. Modern revivals dropped from making **61.2%** to **56.2%**.

possible within constraints of time and budget to find this information in all cases. For that reason these figures should be regarded as estimates.

Shakespeare

17. Returning to the classical repertoire, the extent of Shakespearean performance allows us to dig deeper into what Shakespeare plays are being performed. For the purposes of this analysis, we are defining quite broadly what 'a production of a Shakespeare play' is; this includes some rewrites of specific plays, amalgamations of plays (as in Robert Icke's *Player Kings*), strong reimaginings of the plays incorporating dance and new music. Our aim here is to examine how our theatre has engaged with the Shakespeare canon, but it means numbers are similar but not identical to those used for the analysis of classical revivals.

    a. Across the two years, **29** of Shakespeare's plays were performed. **26** different plays were produced in **2019** and **20** in **2023**.

    b. *Fig. 52* shows what those plays were. *Macbeth* is the most popular play in both years, with **13** productions in **2019** and **11** in **2023**, perhaps suggesting that late 2010s and early 2020s Britain preferred to see itself theatrically reflected in murderous conspiracy and bloody civil war than in romantic comedy. That said, *As You Like It* and *A Midsummer Night's Dream* are in the top five produced plays in both 2019 and 2023. *Henry V* is the most popular history, in sixth place for both years.

    c. Seventeen of Shakespeare's plays were performed in both years. **Nine** were performed in **2019** but not in 2023 (*Antony and Cleopatra*, *The Taming of the Shrew*, *Measure for Measure*, *Richard II*, *King John*, *Timon of Athens*, *Henry VI*,[43] *The Merry Wives of Windsor*, and *Pericles*); three were performed in 2023 but not in 2019 (*Julius Caesar*, *Titus Andronicus*, and *Cymbeline*).

    d. The categorisation of Shakespeare plays into genres is notoriously difficult, sometimes arbitrary, often changeable. Certain supposed genres (late romances, problem plays) were nineteenth-century inventions. The division of the

[43] Our data does not specify which part or if this is a compilation of the three Henry VIs.

plays in the First Folio of 1623 has not always aged well, contemporary audiences being less likely to experience *The Merchant of Venice* or *The Taming of the Shrew* as 'comedies', for example. We have decided to divide the

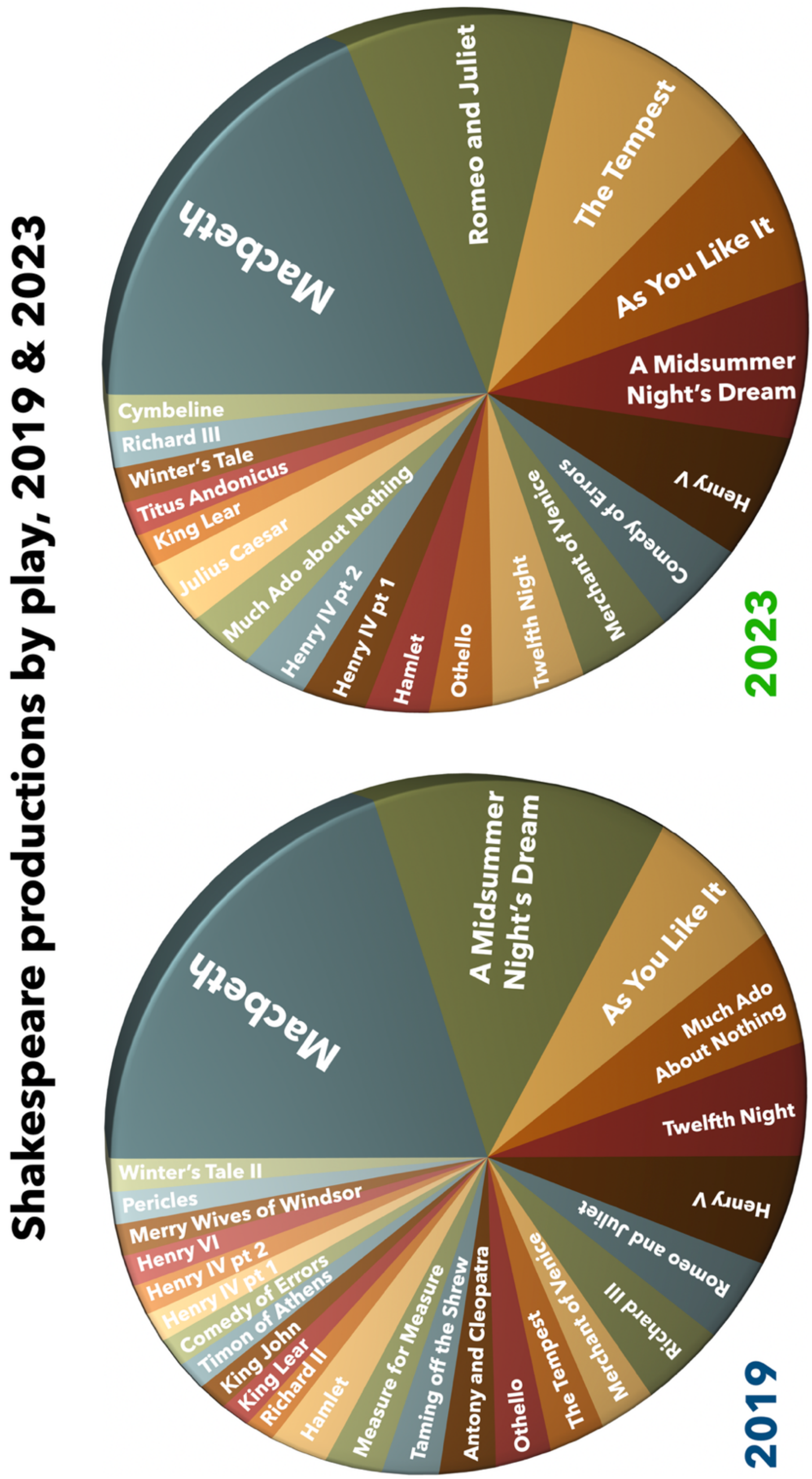


Fig. 52

canon of Shakespeare's plays into four genres: tragedies, comedies, histories, and 'other' (largely generically-complicated plays like *Measure for Measure* and *Cymbeline*, and the plays that have stopped feeling like comedies mentioned above). *Fig. 53* shows how the proportions of productions of these genres has changed.

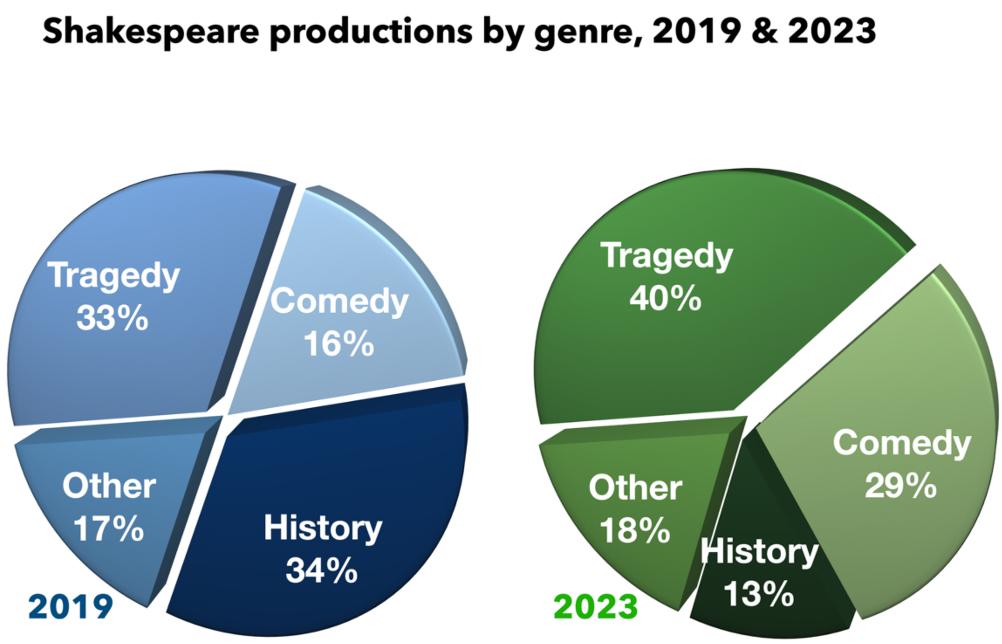


Fig. 53

e. As the most commonly-produced Shakespearean genre – perhaps appropriately for the era of Covid – between **2019** and **2023**, tragedy overtook history. Comedy also increased its share considerably in **2023**, almost doubling. The increase in tragedy and comedy is at the expense of Shakespeare's histories which decline by almost two thirds from its **2019** share of productions.

18. It is not possible categorically to interpret these shifts in the repertoire. However, a few things should be noted:

a. There is an absolute and proportionate shrinkage in production of plays from the Classical (**-29.1%**) and Modern (**-51.8**) eras that outstrips the general decline in production of **14.5%**. The decline in new productions of postwar plays is **11.4%** (slightly less than the general drop, meaning a small shift in the repertoire towards this era of revivals).

b. The shifts in the classical repertoire between **2019** and **2023** show a greater reliance on the work of Shakespeare and a certain reluctance to programme a wide range of classical plays beyond his (despite pockets of more adventurous programming). From **12** classical playwrights produced in **2019** to **8** in **2023**, the non-Shakespeare proportion of productions shrinking from **18%** to **11%**, there is a risk that most of the classical repertoire will simply disappear.

c. A similar picture is visible with the Modern repertoire, which shows a significant narrowing of range (from **21** playwrights in **2019** to **11** in **2023**). It is also noteworthy within the Modern repertoire that seeing Wilde knock Ibsen and Chekhov off the top slot, we are seeing the repertoire tilt from drama to comedy, brilliant though that comedy is. (Though the Classical increase in productions of Shakespeare's tragedies is also notable.) There are fewer foreign plays and fewer plays by women. Is this symptomatic of a risk-averse attitude to post-Covid programming and a perception that British comedies are more likely to attract audiences than foreign dramas?

d. The postwar picture is more stable, but even so shows evidence of retrenchment, with fewer writers being revived, fewer plays by women being given new productions, and a greater reliance on a tiny handful of big-name writers. In addition, the place of foreign plays on UK stages is very restricted.

19. These trends should be monitored in future to see if they continue. The balance between revivals and new work broadly stayed the same between 2019 and 2023, but it is worth examining the status of translations to see if there is more evidence of theatres turning their backs on foreign-language Drama.

Translations

20. Foreign plays in revival will often have new translations commissioned and reworked by British playwrights. If this is

explicitly a rewriting and reimagining of the original play in a substantially new version – as in Inua Ellams's relocation of Chekhov's *Three Sisters* to the Biafran Civil War at the National Theatre in 2019 which was marketed as 'after Chekhov' – we call that a 'version'; if the production is marketed as the original play by the original author – such as Strindberg's *Creditors* at Theatre by the Lake, Keswick, in 2019 with English text by Howard Brenton – we treat it as a translation. The distinction is not cut and dried and inevitably we have had to use our judgment in some tricky cases.

21. Nonetheless, we are in a position to discuss the place of translations on UK stages before and after Covid.

    a. Productions that are translations fell sharply between **2019** and **2023**, from **34** to **14**, a drop of almost **60%**. This is a decline from an already low base: texts in translation in **2019** account for only **2%** of all theatre; in **2023**, they account for **1%**.

    b. The length of run for translations also fell sharply, from an average of just over **32** performances in **2019** to **17** performances in **2023**. The average ticket price (or, more precisely, the average price paid for a ticket) for a translation fell in real terms by **8%**.

    c. As a consequence of such heavy falls, all other indicators are down. The number of attendances at translations fell by **76.6%**; the number of performances by **78.4%** and the real-terms box office by **78.5%**. These are significant changes: in **2019** translations accounted for **3.3%** of attendances and **4%** of all theatre box office income; in **2023** those figures had both fallen **below 1%**.

22. Translations appear to be vanishing from UK theatre. In 2013 and 2014 – using, it should be noted, a different dataset – we noted 39 and 29 translations, respectively. **2023**'s **14** translations is less than half of the previous lowest number.

23. It should be noted this decline is not reflected in a lack of audience interest. An average auditorium for all theatre in our data was **72.8%** full in **2019** and **76.2%** full in **2023**. Translations

comfortably outperform the average, filling on average **77.6%** of seats in **2019** and a remarkable **84.1%** of seats in **2023**. To put that in context, in terms of average attendance, translations outperform all of our seven theatre forms except Pantomime in **2019** and all of them in **2023**.[44]

24. Translation is a means by which UK theatre is able to pay attention to how other theatres in the non-anglophone world have taken and are taking the temperature of their times. It would be an alarming sign of parochialism for our theatre to abandon those other perspectives and turn entirely inward.

Versions

25. However, non-anglophone theatre is also represented through versions, which are old plays rewritten, often very freely, by a contemporary playwright, producing something between a translation and a wholly new play. These are almost always versions of plays from the classic repertoire that are well enough known that one might expect an audience to appreciate the choices made in the new version. 'Versions' of new foreign plays are rare.

26. We can see the place of the version on UK stages.

    a. Productions of versions have declined by **46.9%**, from **64** in **2019** to **34** in **2023**. These numbers are small, though about twice those of translations; versions accounted for **3.8%** of all theatre in **2019** and **2.4%** in **2023**.

    b. Unlike with translations, the effect of this decline on other indicators is more limited, in part because run lengths for versions increased (from an average of almost **22** to just over **25**). The average ticket price for a version rose **17%** in real terms.

[44] This does not, of course, entail that filling our theatres with translations would see audiences increase overall, as it may be the case that theatres have reduced their programming of translations to accommodate declining demand.

c. Numbers of performances of versions between **2019** and **2023** were down by **38.3%**, attendances by **30.1%** and real-terms box office by **18.3%**.

d. Versions perform slightly below the average for theatre overall in terms of attendances: **70.4%** in **2019** (against an overall average of **72.8%**) and **68.7%** in **2023** (against an overall average of **76.2%**). However, the number of attendances per performance has risen from **376** to **426**, a **13.2%** rise (strongly outperforming the overall rise in theatre attendances of **6.8%**)

27. Although productions of both versions and translations have declined in absolute terms, the decline in versions is smaller, meaning (as *Fig. 54* shows) that the way non-anglophone plays are presented on UK stages is increasingly through the version.

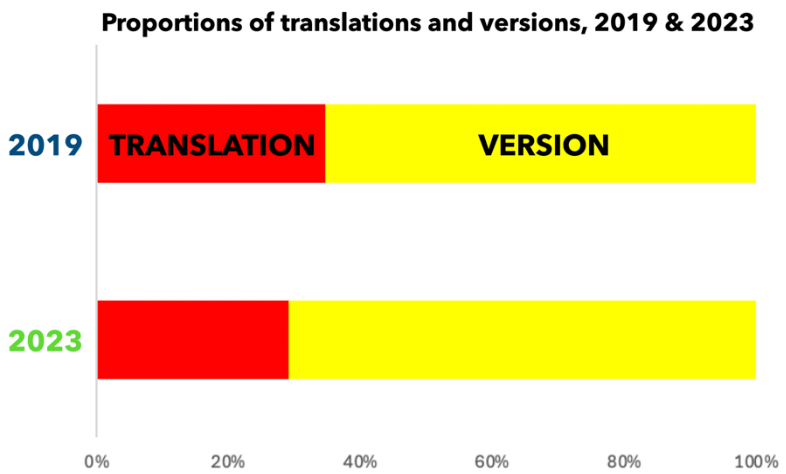


Fig. 54

28. Versions are a significant way in which contemporary writers (and writer-directors like Robert Icke and Simon Stone) engage in creative dialogue with plays from the world canon, finding new ways for them to speak to our times. The benefit is placing new light on familiar plays; the risk is domesticating these plays, stripping away their 'otherness' – the historical and cultural differences from which we can learn. It will be important to trace whether versions continue to eclipse the translation and how both fare within the repertoire.

Summary

29. Revivals declined in terms of productions, performances, attendances and box office either side of the Covid lockdown. However, by **2023** revivals accounted for **over a third** of all Drama and **over half** of Musicals. Revivals outperform new work in both attendances and box office.

30. Between **2019** and **2023**, the proportion of postwar revivals increased, while modern and classical revivals declined. In **2023**, **89%** of all classical revivals were Shakespeare, with *Macbeth* leading the pack in both years. Tragedy overtook history as the most popular Shakespeare genre for producers.

31. Productions of translations fell sharply between **2019** and **2023**, declining by **60%**. Nonetheless, translations do extremely well in filling their seats, achieving **84.1%** of capacity in **2023**. Versions declined between the two years, though by a smaller proportion than translations.

8. Gender

1. In previous surveys we conducted covering 2003-2009 and 2013-2014, we were keen to look at the gender balance of playwrights in the British repertoire. Our findings were that – stubbornly, unchangingly – over those 11 years, women playwrights accounted for only **31%** of all new plays. We were keen to see if the situation had changed.

2. The #MeToo movement that highlighted the sexual harassment and exploitation of women was strongly felt in UK theatre, with several prominent figures exposed for their predatory behaviour. Many other leading figures, very prominently Vicky Featherstone and Lucy Davies at the Royal Court Theatre, took steps to foster a conversation about the problems and agree new standards of behaviour and reporting. Although #MeToo predated the Covid lockdown, it will be interesting to see if the heightened awareness of gender inequality is reflected not just in backstage practice but onstage as well.

3. Cultural understandings of gender and sensitivities around gender identification have moved on since the early 2010s, with a broad conversation about the meaning and fluidity of gender. While this report is not the place to join that debate in full, we have made some decisions in how we judge the gender of a playwright.[45]

    a. There has been considerable 'culture war' debate about trans identities. The position of the two named authors of

[45] A note on methodology: we do not have the resources to conduct an exhaustive investigation into the personal identification of every playwright mentioned in our data. Instead, where a playwright's gender identification is common knowledge, our researchers were asked to reflect that. Where it is not known, our researchers were asked to conduct a brief internet search for evidence of gender identification (interviews, marketing, etc.). If that yielded nothing, the author was marked as not known. (**2.5%** of playwrights were marked as not known in **2019** and **5.9%** in **2023**. These playwrights are not included in these charts.) As a second stage of checking, we then took a random sample of 75 writers from each year and checked more extensively what we could find about their gender identification. We found that in **2019** one playwright who had been initially identified as a woman should instead be identified as non-binary and in **2023** two playwrights (one identified as a man and one identified as a woman) should be re-identified as non-binary. These changes are fairly small but we have applied these adjustments across the data.

this report is that trans women are women and trans men are men. We do not wish to imply that this position is – or is not – the view of all members of the British Theatre Consortium or the organisations that have supported this work.

b. While there are a range of candidates for naming other genders beyond the traditional binary, we have not yet encountered any such identification beyond 'non-binary' so that currently stands as the third gender identity.

c. Some plays are co-written by men and women. This is an interesting phenomenon in itself, but for the purposes of considering the gender of playwriting in this country, we followed our practice in the 2014 report and a play co-written by a man and a woman counts half in each of the male and female figures.

4. The gender balance of *all* writers of plays can be shown in *Fig. 55*. **32.2%** of plays in **2019** and **35.1%** in **2023** were written by women. Women are increasing their share of the play repertoire.

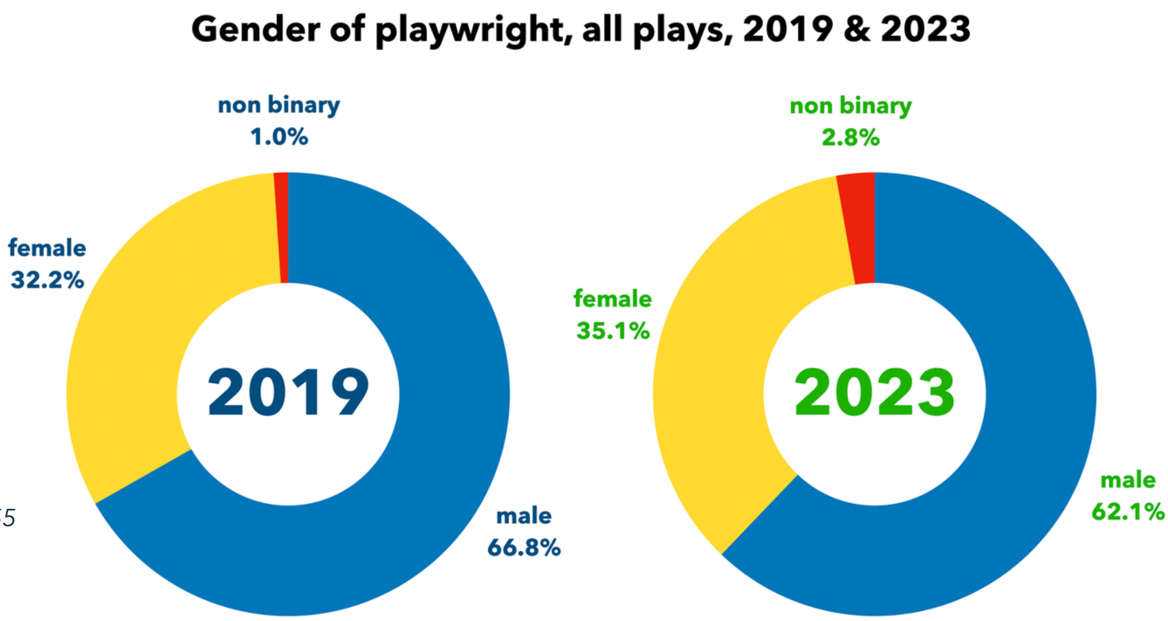


Fig. 55

5. Beyond the headline figure of productions, the picture is mixed. *Fig. 56* shows how performances, attendances and box office are accounted for by the gender of the playwright.

Theatre activity by gender of playwright, 2019 & 2023

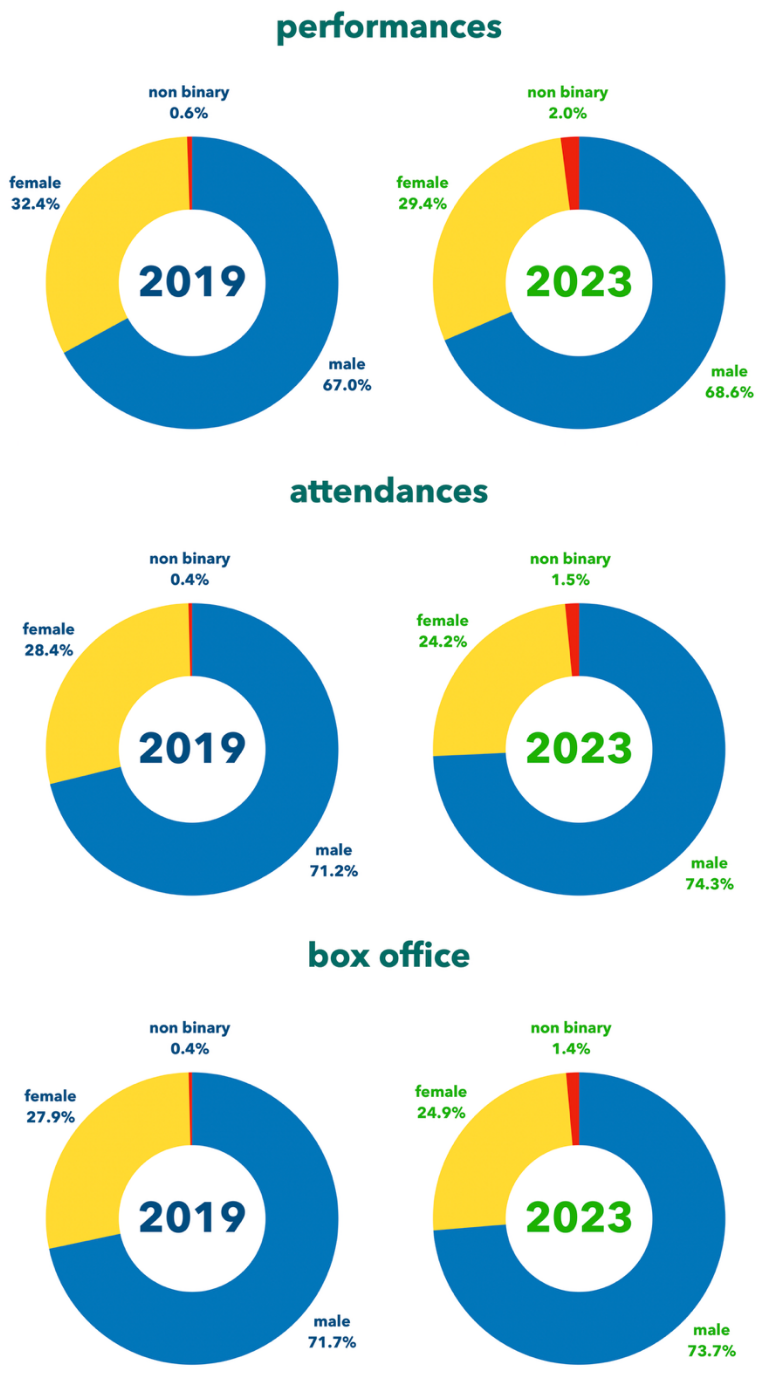


Fig. 56

a. Unlike the figures for production, women playwrights' share of activity fell on all measures between **2019** and **2023**, from **32.4%** of performances to **29.4%**, from **28.4%** of attendances to **24.2%**, from **27.9%** of box office income to **24.9%**.

b. There are some other interesting phenomena: the average length of run of a play by a woman was just **over 22 performances** in **2019**, slightly longer than for a play by a man which was just **under 22 performances**. However, in **2023**, the average run length for a woman playwright was only slightly longer at **22.7 performances**, but plays by men had an average **29.8 performances**. This has a knock-on effect on the total audience for plays by women, which was **17.4%** lower than for plays by men in **2019** and **24%** lower in **2023**.

c. These falls are not, however, entirely consistent. The decline in attendances at plays by women (**4.2%pts**) is larger than the decline in box office (**3%pts**), which has further interesting effects which are more encouraging than these raw figures.

    i. Ticket prices for plays by women were **2.4%** lower in **2019** than for plays by men, but were **3.5%** higher in **2023**.

    ii. Also, in **2019** a play by a man filled on average **66.2%** of its seats and a play by a woman filled **62.4%**; these figures rose sharply in **2023**, with plays by men filling **72.9%** of capacity and plays by women filling **74.9%**.

    iii. As a result of both shifts, plays by women in **2023** achieved **75.4%** of potential box office compared to **73.4%** for plays by men.

d. In other words, although plays by women had fewer productions, shorter runs and smaller audiences overall, they could charge higher ticket prices, filled their auditoriums more successfully, and outperformed plays by men in terms of potential box office.

New plays

6. We have already seen that women playwrights account for **32.2**% of all plays in **2019** and **35.1%** in **2023** and that is the whole

repertoire of plays, including revivals, where women are rarer. It seems likely, then, that women playwrights will have broken through the glass ceiling identified from the mid-2000s to mid-2010s of **31%** of *new* plays.

7. And indeed they have, very strikingly. *Fig. 57* shows that women wrote **39.4%** of new plays in **2019** and **41.7%** of new plays in **2023**. This is emphatically greater than the proportions recorded a decade earlier.

8. There are other indicators of definite progress towards equality in the category of new plays:

    a. Attendance as percentage of capacity for plays by women went from **62.9%** in **2019** to **72.4%** in **2023** (plays by men went from **70.8%** to **72.8%**). By 2023, the attendance gap between men and women was almost closed.

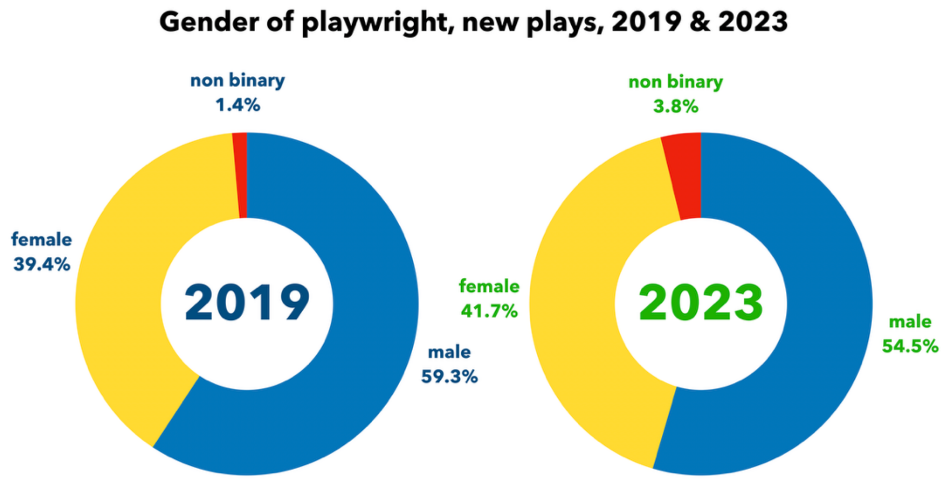


Fig. 57

    b. Box office as percentage of potential for plays by women went from **62.2%** in **2019** to **74.8%** in **2023** (plays by men went from **70.4%** to **73.5%** – which means that in 2023 plays by women filled a *higher* proportion of their seats than plays by men).

9. However, if we look at other measures, the story is different:

    a. Plays by men had almost **19** performances in **2019** and over **28** performances in **2023**. Plays by women had over **20** performances in **2019** (in other words longer runs than plays by men) but fewer than **19** performances in **2023** (considerably fewer than plays by men).

New play theatre activity by gender of playwright, 2019 & 2023

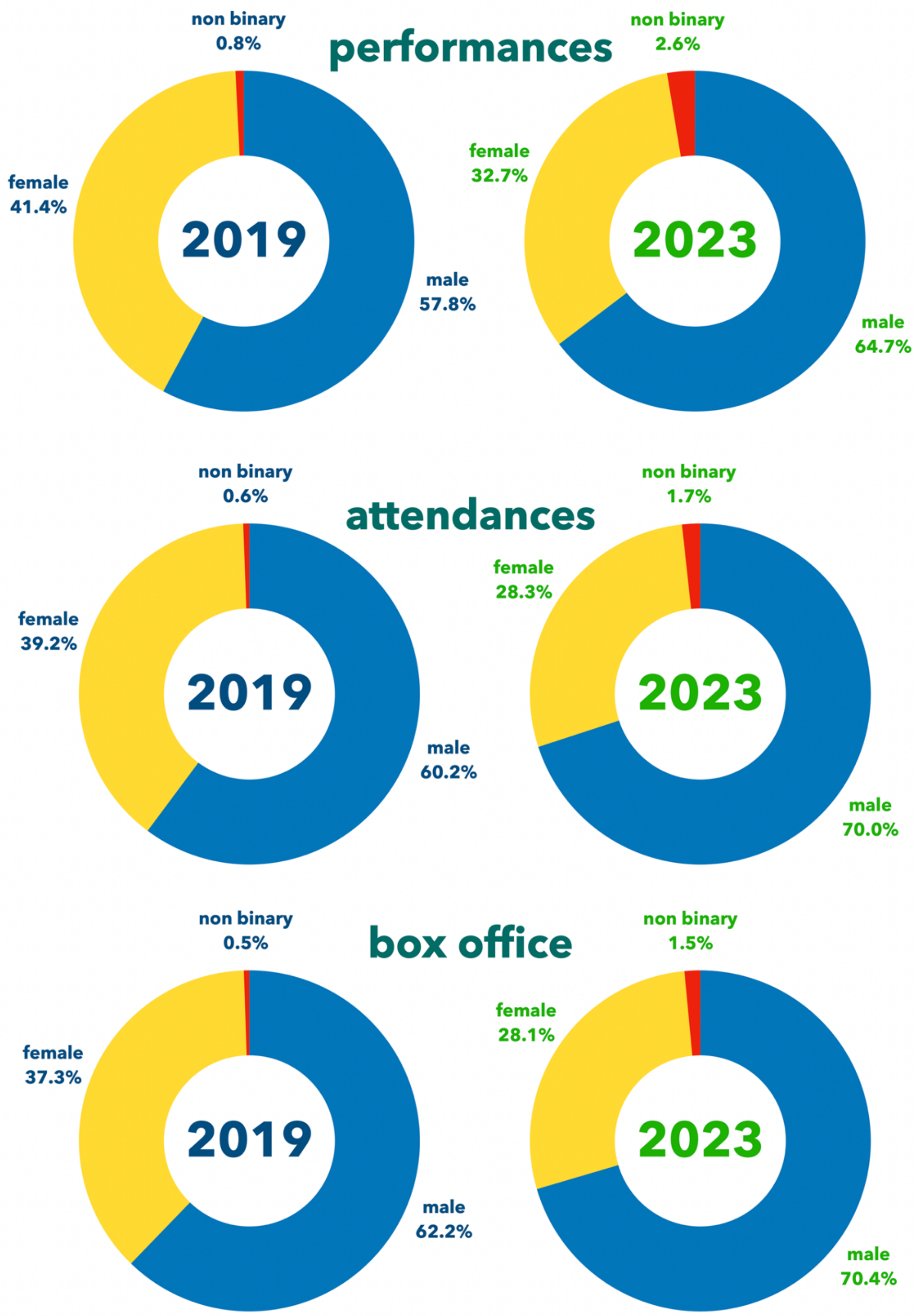


Fig. 58

b. Plays by women were performed, on average, to bigger auditoriums than men in **2019**: plays by women were performed in theatres with an average **521** while plays by men were performed to **508**. In **2023**, the situation had reversed: plays by women were performed in theatres with an average **504** while plays by men were performed to **628** (approximately a ratio of 4:5).

10. This reversal is also visible in other measures of theatre activity, as shown in *Fig. 58*.

    a. While women playwrights made a strong showing in **2019**, their plays making up **around two-fifths** of performances of, attendances at, and box office for new plays, these measures had all dropped to **below a third** in **2023**.

    b. This will be in part the result of women playwrights being given smaller theatres and shorter runs.

11. Plays by writers identifying as non-binary increased across our era. It is not possible to say at this stage whether this is a product of more non-binary writers entering the profession or non-binary writers feeling more able to identify as such in 2023 than 2019. These figures are worth watching as, at some point, it may be appropriate to ask theatres to more consciously consider how they are finding, supporting, and programming non-binary writers.

Types of theatre

12. We can look at the gender distribution of playwrights in some specific types of theatre: translations, adaptations, musical theatre (writer here meaning librettist), and children's & young people's theatre. *Fig. 59* shows the proportions of men, women, and non-binary writers in these four types of theatre across the two years.

    a. Gender equality improved between **2019** and **2023**: in all four theatre types, women's representation as playwrights increased. In translations men and women writers were fifty-

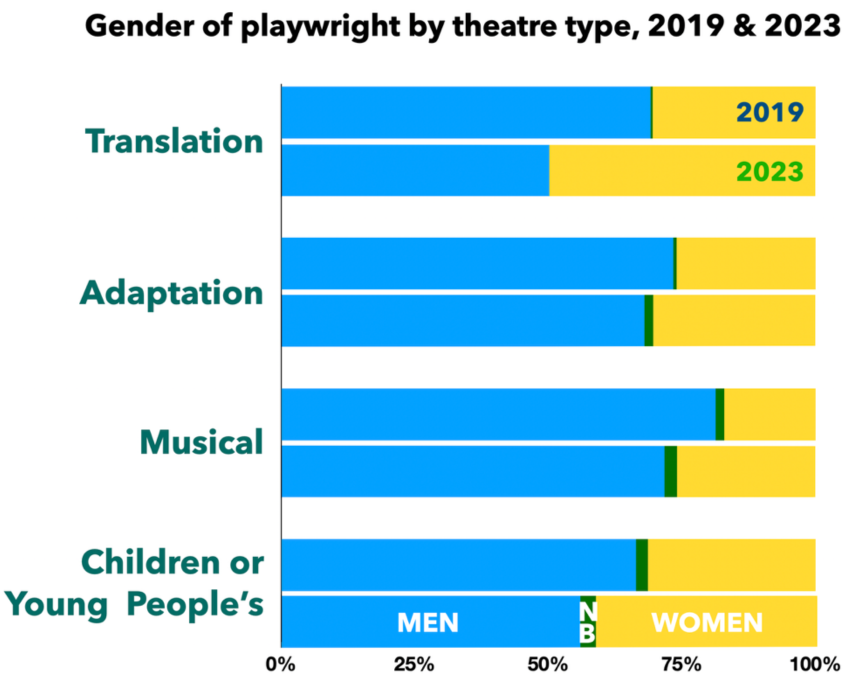
fifty (though the numbers here were extremely small, so one more writer would have changed that figure dramatically).

b. The next most favourable theatre type for women is children's and young people's theatre, where women made up **31.4%** of writers in **2019** and **41.4%** in **2023**.

c. Although there are improvements for women in adaptations and musical theatre, these are fields still dominated by male writers. **73.4%** of adaptations and **81.3%** of musicals were written by men in **2019**; in **2023**, those numbers had reduced but still men wrote **67.7%** of adaptations and **71.5%** of musicals.

d. Non-binary writers increased in all theatre types except in translation, where our figures detected no translation by a non-binary writer staged in 2023. (We should reiterate, though, that it is possible that the non-binary identification of a writer evaded our researchers.)

Fig. 59



Summary

13. The number of new plays written by women has increased from **31%** of theatre repertoire in **2013** and **2014** to **39.4%** in **2019**

and **41.7%** in **2023**. Plays by women played to bigger audiences than plays by men in **2019**, but not in **2023**. In **2019** new plays by women were around **two-fifths** of new play performances, attendances and box office, but those measures dropped to **below a third** in **2023**. For women playwrights overall, including authors of revived plays, the number of productions increased from **32.2%** to **35.1%** between the two years. Male playwrights still dominate the writing of adaptations and musicals.

9. Regions & Nations

1. It is well established that the UK's professional theatre is not distributed evenly, with particularly concentrations in the major cities, particularly London. Addressing the regional gaps in cultural access has been a policy goal of government and funding bodies since at least the early 2010s.

    a. The Arts Council's strategy for 2013-2023, *Great Art and Culture for Everyone*, set five goals, one of which was that 'Everyone has the opportunity to experience and to be inspired by the arts, museums and libraries'.[46] This will include 'Increas[ing] the geographical reach of arts and culture through funding the touring of work',[47] and working with 'local communities, arts and cultural organisations, local authorities and the private sector to encourage inspirational culture programmes, particularly in places where engagement is low'.[48]

    b. Some of this work was interrupted by the Covid pandemic, which required some dramatic shifts of funding and policy. The Council's strategy for 2020-30, *Let's Create*, renewed its aspiration to foster a country 'in which culture forms and transforms communities, and in which cultural institutions are inclusive of all of us, so that whoever we are *and wherever we live*, we can share in their benefit'.[49]

    c. Pursuing this policy, in July 2021, as part of the *Delivery Plan 2021-2024*, the Council drew up a list of 54 'Priority Places' based on a range of criteria, aiming to identify places experiencing underinvestment in culture, high levels of deprivation and need.[50] These places would be targeted for support.

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[46] Arts Council England, *Great Art and Culture for Everyone: 10-Year Strategic Framework*, 2nd ed., Manchester: Arts Council England, 2013, p. 46.
[47] *Ibid*., p. 47.
[48] *Ibid*., p. 48.
[49] Arts Council England, *Let's Create: Strategy 2020-2030*, Manchester: Arts Council England, 2021, p. 62 (*emphasis added*).
[50] Arts Council England, *Methodology for identifying priority places*, Manchester: Arts Council England, September 2021.

d. In February 2022, the Conservative Government under Boris Johnson announced a 'levelling up' agenda, aimed specifically at broadening access to the arts. The then-Culture Secretary Nadine Dorries declared 'Culture enriches people's lives [...] Everyone should have access to it no matter where they live'.[51] A new list of 109 'Levelling Up for Culture Places' outside London were identified as well as the existing five 'London Priority Places' to be targeted for support under a Cultural Development Fund. The other side of this policy was the devolution of funding away from London, with several London institutions losing their funding with the aim of encouraging some, like the English National Opera, to relocate outside London.

e. In December 2024, the new Labour Government published an English Devolution White Paper, which again lamented that 'arts and culture funding has been far too concentrated in certain parts of the country to the exclusion of others' and hoping to build policy initiatives that will 'ensure every part of the U K has the chance to access the arts and see themselves reflected in our national story'.[52]

f. At the same time, Culture Secretary Lisa Nandy announced an independent review of Arts Council England, led by Baroness Margaret Hodge, including particular focus on whether it has the appropriate tools 'to ensure every region across the country has access to high-quality arts and culture'. Making the announcement, Nandy declared, 'Arts and culture must be for everyone, everywhere'.[53]

[51] 'Over 100 places to see improved access to culture and arts across England', Press Release, Department for Digital, Culture, Media & Sport and Arts Council England, 23 February 2022. https://www.gov.uk/government/news/over-100-places-to-see-improved-access-to-culture-and-arts-across-england Visited 4 October 2025.
[52] Communities & Local Government Ministry of Housing, *English Devolution White Paper - Power and Partnership: Foundations for Growth*, CP 1218, London, 2024, p. 71.
[53] 'Independent review to ensure access to high quality arts and culture in every region', Press Release, Department for Culture, Media & Sport, Arts Council England, and The Rt Hon Lisa Nandy MP, 17 December 2024.

Regional theatre activity

2. For all of these reasons, it will be important to establish whether we see any changes in the distribution of activity between 2019

Regional share of national theatre activity, 2019 & 2023

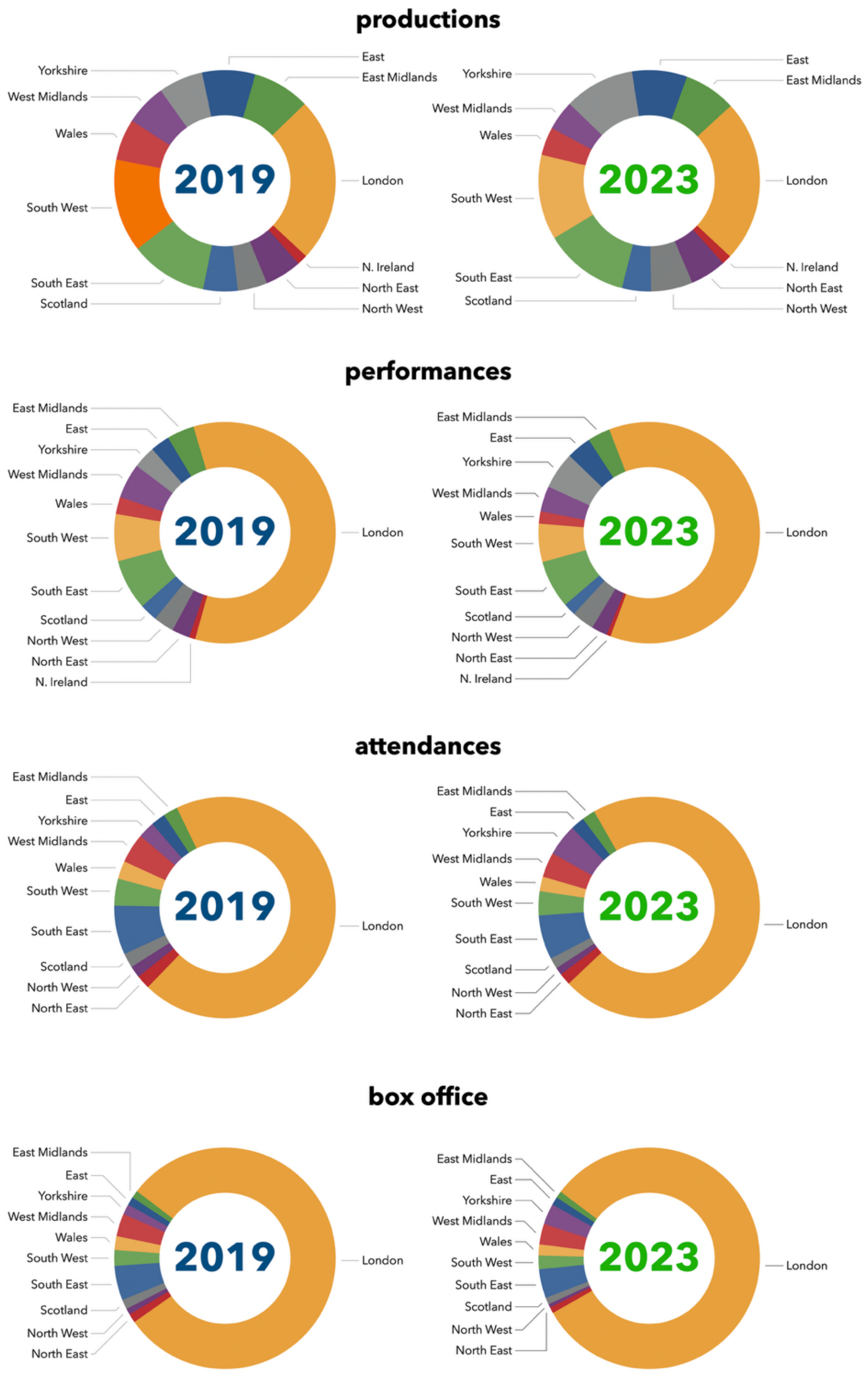

Fig. 60

and 2023, to see how far the effects of the policy environment and the Covid pandemic have reshaped the national picture. It will also establish a baseline against which future developments can be judged.

3. *Fig. 60*[54] shows the how all of the UK's theatre productions, performances, attendances, and box office are distributed regionally in both **2019** and **2023**.[55]

    a. First, we can see at a glance that while productions are spread across the UK's regions and nations, London increasingly dominates as we look at performances, attendances, and box office. It is also the case that London increased its share of activity on all indicators between 2019 and 2023.

    b. As a share of total UK activity, London took:

        - **36.3%** of productions in **2019** and **37.5%** in **2023**
        - **59%** of performances in **2019** and **61.5%** in **2023**
        - **68.7%** of attendances in **2019** and **70.6%** in **2023**
        - **79.3%** of box office in **2019** and **81.1%** in **2023**

    c. There were some other changes in the distribution of this activity. The East of England, North East and North West, and the South East increased their share of productions and all of those bar the North East also increased their share of performances. (Yorkshire also increased its share of all measures, though, as previously stated, this is due to different theatres being in the data for the two years.)

    d. The East Midlands, Scotland, South West, Wales and West Midlands saw declining shares of activity on all measures.

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[54] For reasons of commercial confidentiality, Northern Ireland is included in the charts for productions and performances but not those for attendance and box office.

[55] Here it is important to remember that these charts capture only the theatres in our data. We have a very full picture of London theatre and a somewhat less complete picture of the English regions, and a less complete picture still of the other UK nations. These will, therefore, slightly overstate London's dominance.

Regional theatre and population

4. Not all regions are the same in terms of population density and it would be unreasonable to expect equal distribution of theatrical activity between them. *Fig. 61* shows the same information from **2023** as *Fig. 60* in a different form, but also adds a dotted line showing each region's share of UK population (left to right, from biggest the smallest population).[56]

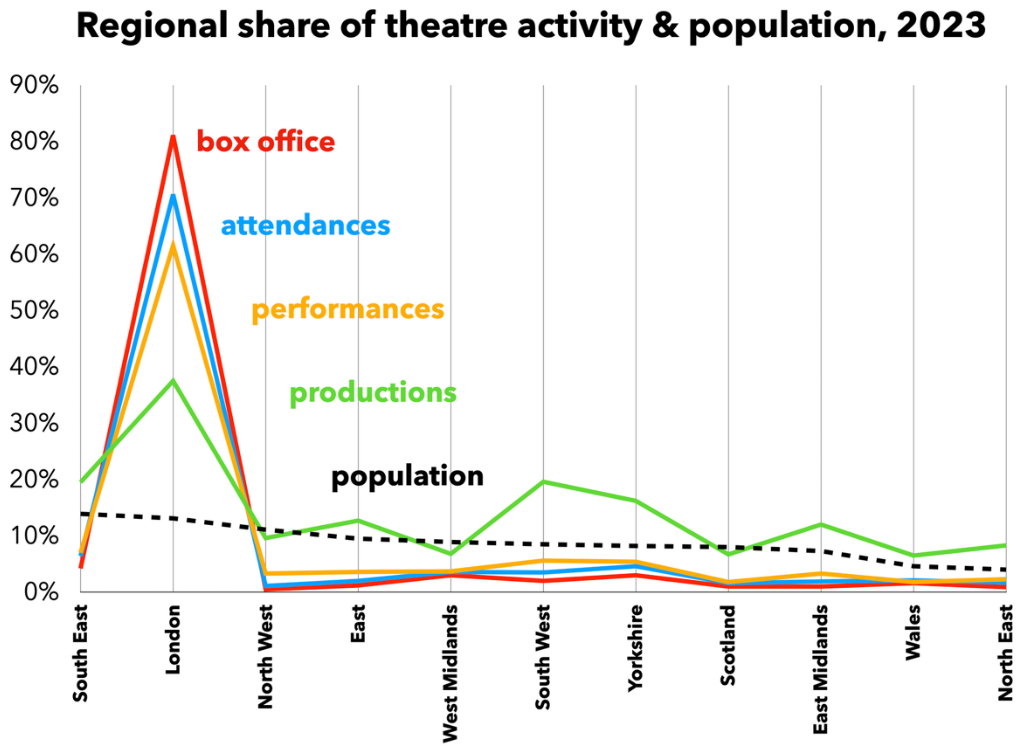

Fig. 61

a. It confirms that productions are more evenly spread, with eight of the eleven regions and nations showing a higher number of productions than would be expected by head of population.[57]

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[56] Estimates of mid-2023 UK regional population come from H. M. Treasury, *Country and regional analysis*, 20 November 2024 https://www.gov.uk/government/statistics/country-and-regional-analysis-2024/country-and-regional-analysis-november-2024 Visited 18 October 2025. We should sound a note of caution; theatres are distributed very differently in different regions and nations, the central belt of Scotland having a much higher density of theatres than Scotland as a whole. Also, our data is much more complete for London than for other regions.

[57] Statistically-minded readers will wonder how there can be so much of the green (productions) line above the black dotted (population) line and so little below; the answer is that because of touring, co-productions, and transfers, several productions

b. On all other measures, though – performances, attendances, and box office – theatre activity in every region is below the national share even when adjusted for population.

5. London is, of course, one of the great theatre cities in the world and it is not surprising to find it accounting for so much of the national theatre picture. It distorts the data because it is, in a sense, an outlier. It is not necessarily terribly meaningful to say that all regions and nations outside London are below average any more than it would be to observe that all buildings apart from the Burj Khalifa are below average in height.

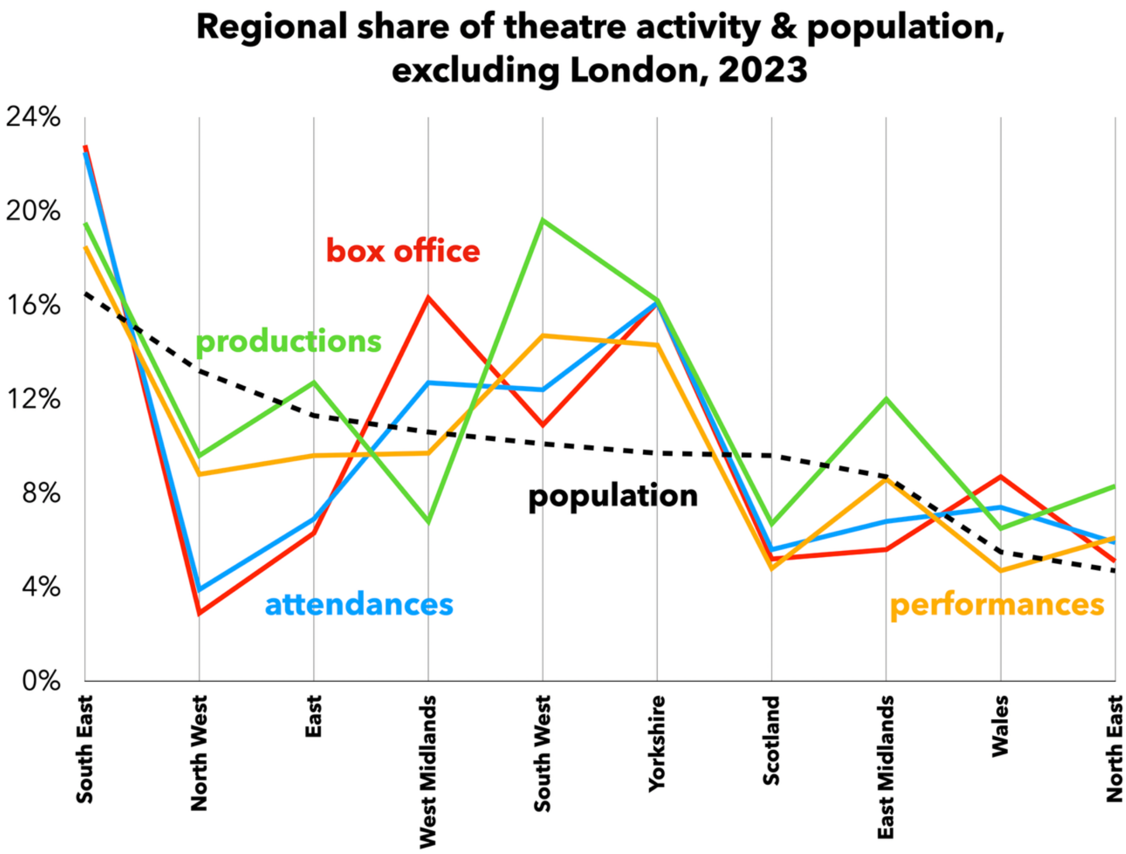

Fig. 62

6. If we remove London entirely from the calculation and only look at **2023**'s theatre activity outside London, the picture (shown in *Fig. 62*) starts to look more varied and indeed more equitable.

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can appear in more than one region in our data, so while there were 1,429 discrete theatre productions in 2023, over half of them (57.5%) were performed in more than one region. *Fig. 60* and *Fig. 61* show how many separate theatre shows were performed in each region.

a. The considerable variation between non-London regions is much more visible:

- The share of productions is above share of population in the **South East**, **East**, **South West**, **Yorkshire**, **Wales** and **North East.**

- The share of performances, attendances, and box office are all above share of population in the **South East**, **West Midlands**, **South West**, **Yorkshire**, **Wales**, and **North East**.

b. However, despite these variations, the chart also shows a general trend in theatre activity that follows population. Perhaps the most striking anomalies are low attendance and box office in the North West and East of England, and a surprisingly low share of productions in the West Midlands. Otherwise, outside London, activity is broadly following population share.

7. We can dig further into this by relating in a different way the number of separate productions available to see by head of population. *Fig. 63* shows how many shows there are per 100,000 people in each region.

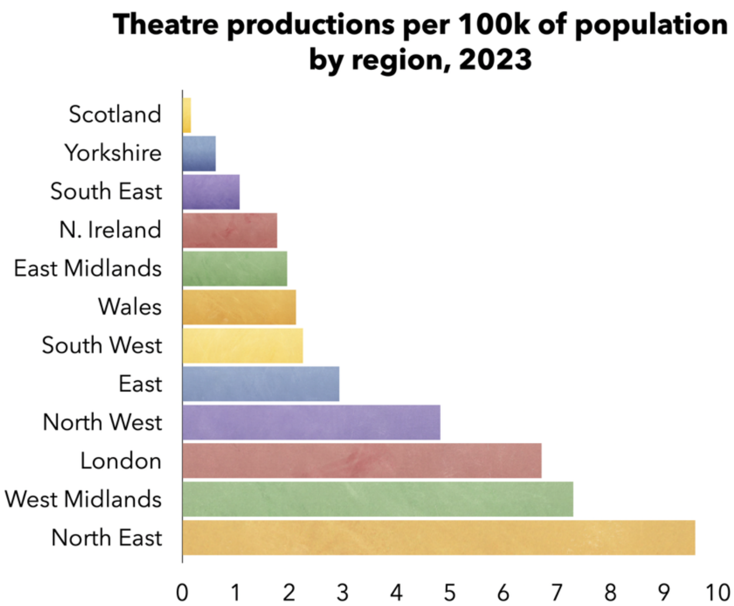


Fig. 63

8. Despite the density of theatres in London, far more than any other region, it has only the third highest number of productions per population. This is no doubt because of the West End and its long runs; typically a West End theatre will have one or two shows in it per year, whereas a major producing regional theatre with a main house and studio might have a dozen or more and a receiving house might have forty or more separate theatre shows.

9. Finally, we can consider theatre visits per head of population (see *Fig. 64*). Excluding London, the average proportion of theatre visits to population is 13.6%, a proportion of just over 1 theatre visit per 8 people. As the chart shows it is above that in London, the North East, South East, South West, Wales, the West Midlands, and Yorkshire and below that elsewhere.[58]

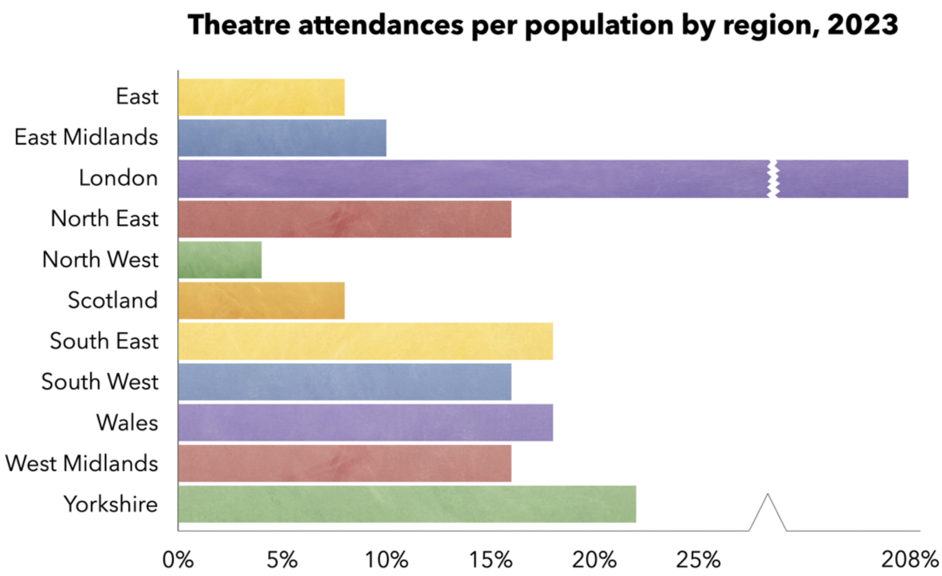


Fig. 64

a. This does not mean that 1 in every 8 people go to the theatre in the UK. Some people go several times while no doubt more than 1 in 7 will often not go in the course of a year.

b. This also does not mean that, for example, 22% of the population of Yorkshire goes to the theatre; it could be more, if Yorkshiremen and women travel to Manchester or London to attend theatre performances; it could be less if

[58] Since these are our partial numbers of theatre visits but full measures of population, any theatres not in our data can only increase these proportions.

the figures include people from other regions visiting Yorkshire's theatres.

c. This is most clearly shown in the case of London. This suggests that for every 100 Londoners there are 208 theatre visits. This does mean, technically, more than 2 theatre visits per person, but that excludes the tourists who flock to London, in part because of its celebrated theatre scene. It may well be that once these visitors are taken into account, London's theatre attendances may seem similar to other regions.[59]

Theatre seats across the UK

10. Where does theatre happen in the UK? *Fig. 65* shows where all the seats offered for sale are distributed across the UK. This does not just reflect size and number of theatres but how the theatres were configured, how many productions were put on, how long the runs were, what periods theatres were dark. A city like London with lots of long-running shows will have many more seats to sell over and above its larger density of theatres.

    a. But we can see that, in our data, London has over half of all the theatre seats for sale in the UK, rising from **63.5%** to **66%** of the total across the two years.
    b. The South East has the second largest concentration of seats, with around **7.5%** in both years.
    c. Four areas increased the raw number of seats on sale in **2023**, compared to **2019**: the South East (**+4%**), London

[59] It may be a little fanciful but we can explore the figures: in **2023,** London attracted **20.3**mn overnight stays from overseas visitors; in addition there is domestic tourism which has been calculated as **217mn** day trips to London and **15.9mn** overnight stays. In that sense, London's potential theatregoing population in **2023** might be regarded as **262.2m**, making the proportion of visits to population not **208%** but **7.1%**. No doubt similar calculations could be made to take into account the Edinburgh Festivals, Manchester International Festival, and any other regional theatre events that attract overseas visitors. Sources: Office for National Statistics, *Travel Trends: 2023*, 17 May 2024. https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2023 and Visit Britain, *GBTS, Volume and value by region, overnights and day visits, 2022 to Q2 2025,* 2025 https://www.visitbritain.org/research-insights/england-domestic-tourism-regional-and-subregional-data Both visited 24 October 2025.

(**+6%**), the East of England (**8.9%**) and Yorkshire (**77.8%**, though this is largely due to different theatres being in the data)

Distribution of theatre seats, 2019 & 2023

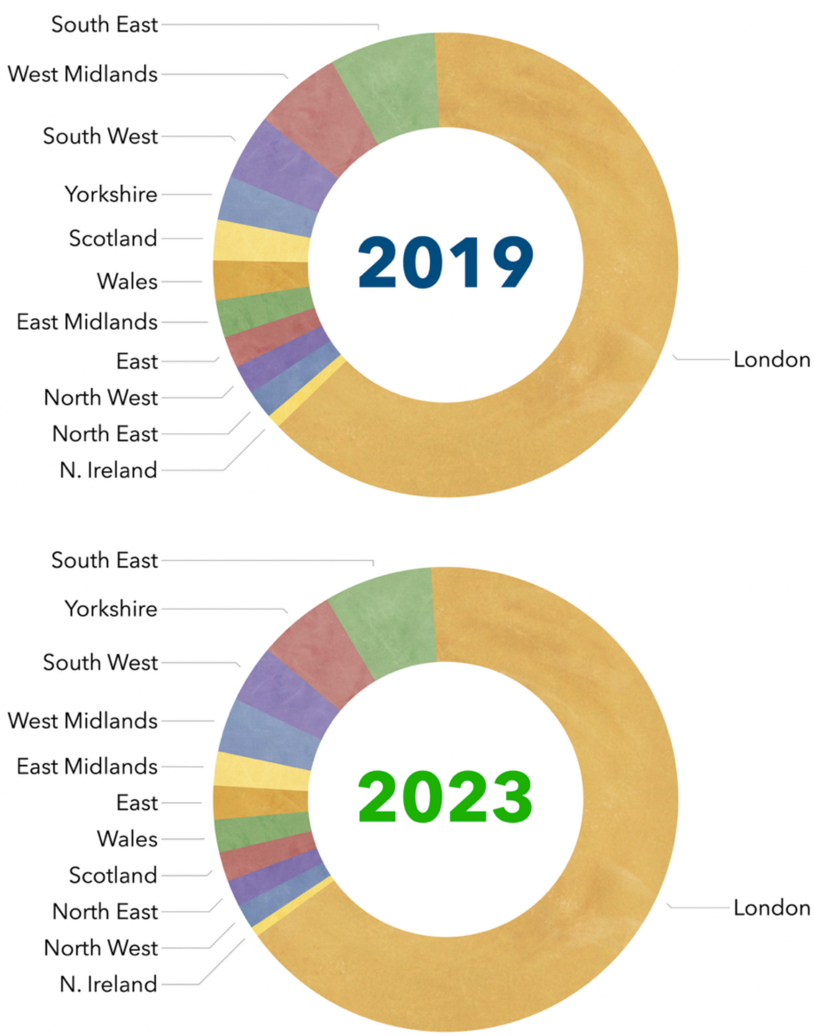


Fig. 65

d. All other areas offered fewer seats on sale in **2023**, compared to **2019**: the East Midlands (**-6.1%**), the North East (**-6.2%**), the South West (**-10.3%**), the North West (**-12.7%**), Wales (**-16%**), Scotland (**-26.4%**) and the West Midlands (**-36.5%**).

11. It's helpful to compare change in overall capacity (all seats available) with the average auditorium size (see *Fig. 66*). The blue bars represent the change in the total capacity in the region and the red the change in average auditorium size. What it shows is

that while overall capacity went down in most regions, average auditorium size went up in all but three of the eleven regions listed here. This is further evidence of a shift of work towards larger theatres.

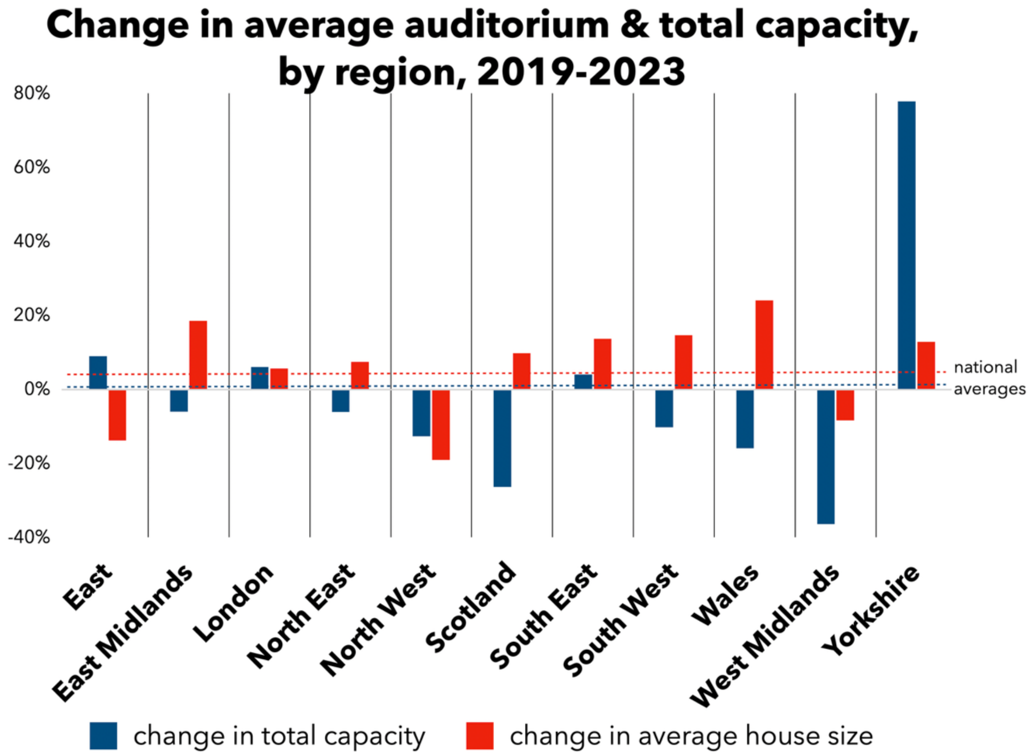


Fig. 66

Regional variations

12. We have already explored some national trends in amounts of production and shifts between different proportions of types of theatre. Are these national trends reflected evenly in the regions and nations of the UK?

13. The national change in numbers of theatre productions between **2019** and **2023** is **14.5%**. *Fig. 67* shows the percentage change in productions by region and nation (hereafter 'region').[60] The **14.5%** average is indicated by the dotted blue line.

[60] As elsewhere, because the theatres in the data are so different in the North West and Yorkshire, we have excluded those regions from this chart.

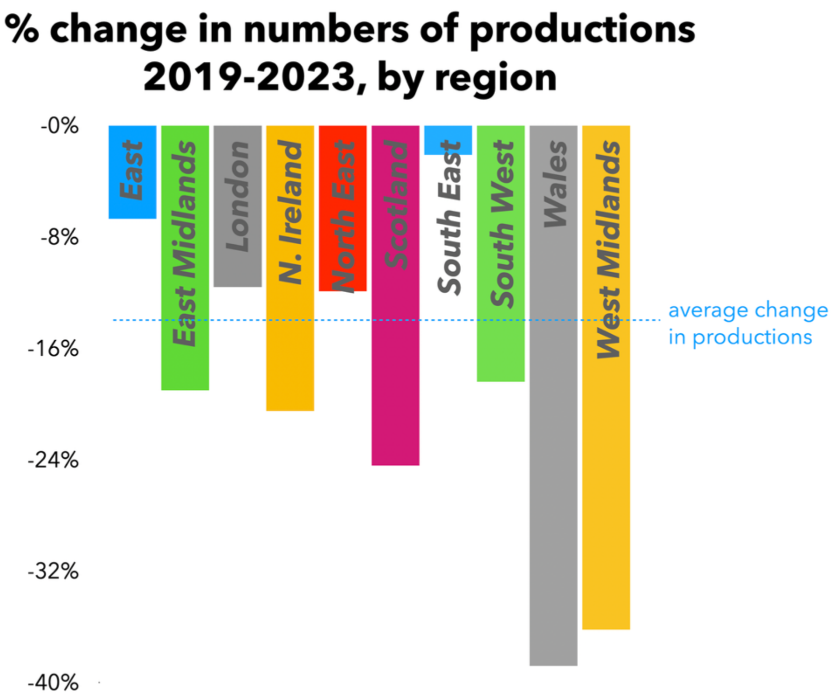


Fig. 67

a. We can see that productions fell further than the national average in the East Midlands and West Midlands, the South West, and in Northern Ireland, Scotland, and Wales.

b. Conversely, while there was a reduction in productions, it was less severe than the national average in the East, London, North East, and South East.

14. What types of theatre are produced in these regions and how did that change between the years?

a. *Fig. 68* shows what proportions of our seven theatre forms were produced in each region in both years. It can be usefully compared to *Fig. 6*, which shows the change in proportions nationally.[61]

b. Nationally, Drama made up **57%** of the repertoire in **2019** and **51%** in **2023**, but this is not uniformly repeated by region:

[61] Our data for Northern Ireland would identify individual theatres, so we have decided to omit Northern Ireland from this chart.

- Drama was a larger-than-average proportion of the regional repertory over both years in the **East**, **East Midlands**, **North East**, and **South West**.

% of each theatre form by region, 2019 & 2023

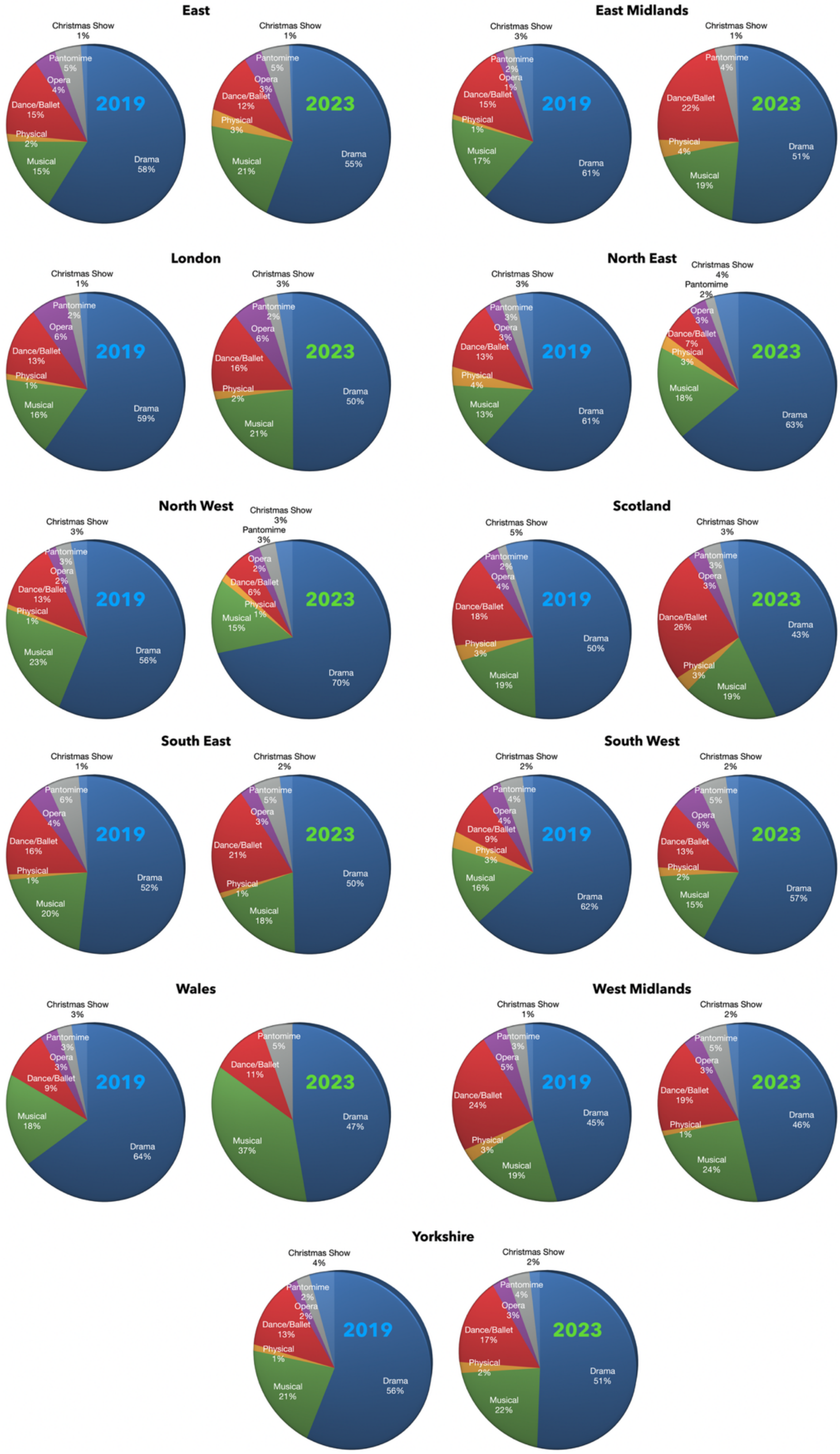


Fig. 68

- Drama was a larger-than-average proportion of the regional repertory in one of those years in **London**, the **North West**, and **Wales**. London and Wales go from being above average in the share of Drama in the repertoire to being below average. The North West does the opposite move, quite dramatically.
- Drama was a lower-than-average proportion of the regional repertory in both years in **Scotland**, the **South East**, the **West Midlands**, and **Yorkshire**.
- The region that saw proportionately most Drama productions in **2019** was **Wales**; in **2023** it was the **North West**.
- The region that saw proportionately the fewest Drama productions in **2019** was the **West Midlands**; in **2023** it was **Scotland**.

c. Nationally, the Musical made up **14%** of the repertoire in **2019** and **17%** in **2023**, but again there are regional variations.

- The Musical was a larger-than-average proportion of the regional repertory over both years in most areas: the **East**, **East Midlands**, **London**, **Scotland**, **South East**, **Wales**, **West Midlands**, and **Yorkshire**. In Wales, the Musical gained **19%pts** in its share, the largest rise in any form in any region.
- The Musical was a larger-than-average proportion of the regional repertory in one of those years in the **North East** (where it went from making up a below-average share of the repertoire to an above-average share) and the **North West** and **South West** (where it made the opposite move).
- In no UK region or nation did the Musical make up a below-average share of the repertoire in both years.
- The region that saw proportionately most Musical theatre productions in **2019** was the **North West**; in **2023** it was **Wales**.
- The region that saw proportionately the fewest Musical theatre productions in **2019** was the **North East**; in **2023** it was the **North West**.

d. Dance/Ballet is the third largest theatre form in the national repertoire, making up **14%** of theatre productions in **2019** and **17%** in **2023**.

- Dance forms a larger-than-average proportion of the regional repertory over both years in the **East Midlands**, **Scotland**, the **South East** and **West Midlands**.
- Dance forms a larger-than-average proportion of the regional repertory in one of those years in the **East Midlands** (where it went from holding an above-average share to a below-average share) and **Yorkshire** (where it went from below average to very slightly above average)
- Dance made up a lower-than-average proportion of the regional repertory over both years in **London**, **the North East** and **North West**, **South West** and **Wales**.
- The UK's Dance capital of **2019** was the **West Midlands**; in **2023** it was **Scotland**. Dance in Scotland gained **8%pts** as share of repertoire, the largest rise in Dance's share in any region.
- The region where Dance made up the lowest share of the repertoire in **2019** was the **South West**; in **2023** it was the **North West**.

e. Pantomimes are proportionately most common in the South East; Operas in London; Christmas shows in the North East; and Physical Theatre in Scotland.

15. It's useful to compare the regional and national performance of each theatre form. *Fig. 69* is a 'heat map' that shows attendance at each form by region (calculated as attendance as percentage of capacity): red squares are where that theatre form performed lower than the national average and green squares show whether it performed higher than average. Columns where there is a mixture of red and green suggest a more equitable distribution between the regions; columns dominated by red with only one green cell will often be evidence of unequal regional distributions.

a. It is immediately clear that London outperforms the national average in most forms in both years. In **2019**, it outperforms the UK average in every form except

Pantomime; in **2023**, it outperforms the UK average on everything except Christmas shows.

b. A few regions show particular strengths compared to the UK average: in **2019**, the East of England (Musical, Physical Theatre, Pantomime, and Christmas) and the South West (Physical Theatre, Dance/Ballet, and Christmas); in both years, the North East and West Midlands outperformed the average in several forms.

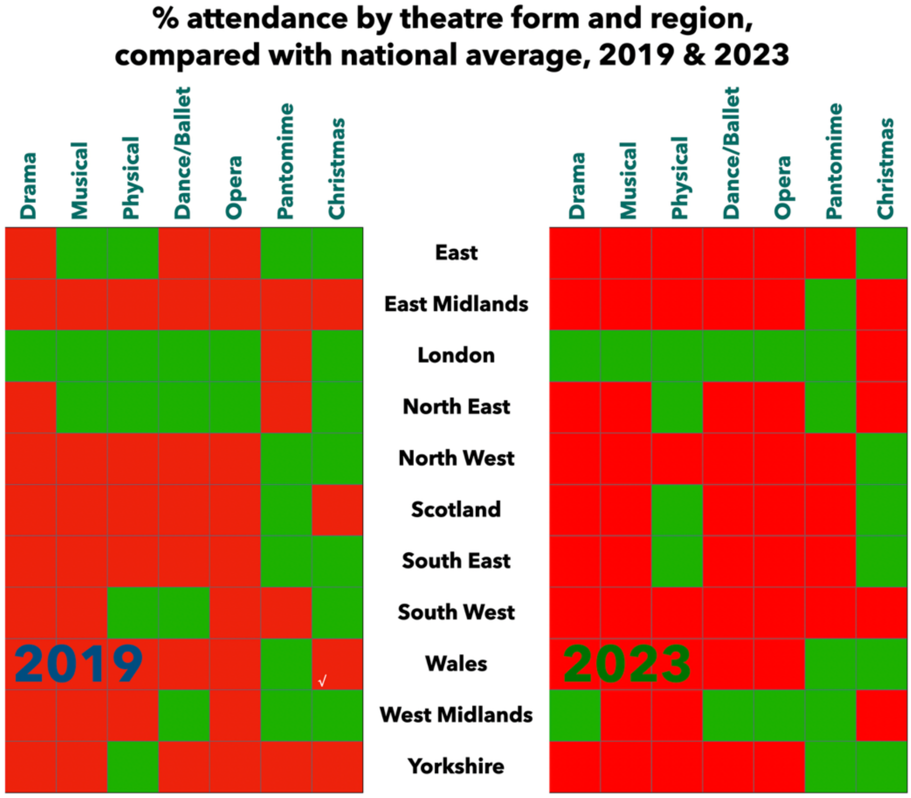


Fig. 69

c. The enormous audience for the Musical in London (**83.5%** and **82.5%** of capacity in our two years), means that almost everyone else is performing below average, despite several regions reporting attendances well above 70% and sometimes into the 80s.

Performance against potential

16. A further way of looking at the performance of theatre in the UK regions and nations is to look at their performance against potential, both in attendances (how many of the total seats did they fill) and in box office (what percentage of total potential box office did they make).

17. In conversation with several theatre makers, we have heard it suggested that London bounced back from Covid much more quickly than the non-London regions.

18. *Fig. 70* makes a raw comparison between London and the rest of the UK [rUK].

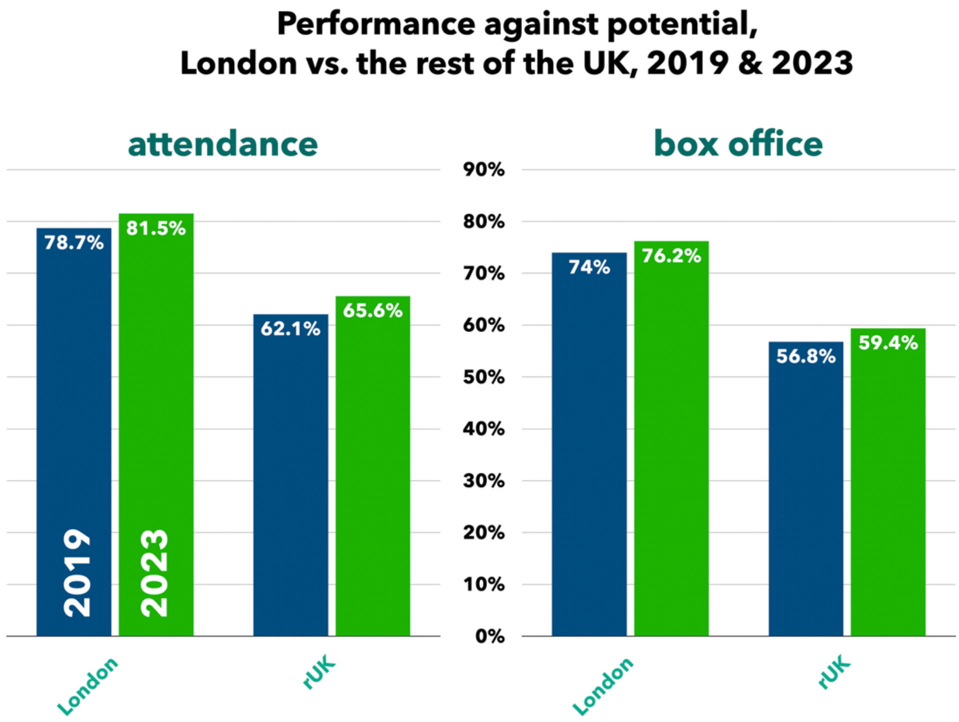


Fig. 70

a. What it shows is that in **2023**, after Covid, London's performance against potential was much stronger than the rest of the UK both on attendance (**81.5%** in London against **65.6%** in rUK) and box office (**76.4%** in London against **59.4%** in rUK).

b. However, it also shows that this was already the case in **2019**, before Covid. Then, London outpaced the rest of the UK in performance against potential in attendances (London filling **78.7%** of its seats and rUK filling **62.1%**) and box office (London achieving **74%** of potential box office income and rUK achieving **59.4%**).

c. In fact, putting London's higher performance aside for a moment, if anything the rest of the UK improved its performance a little more strongly than London, between the two years:

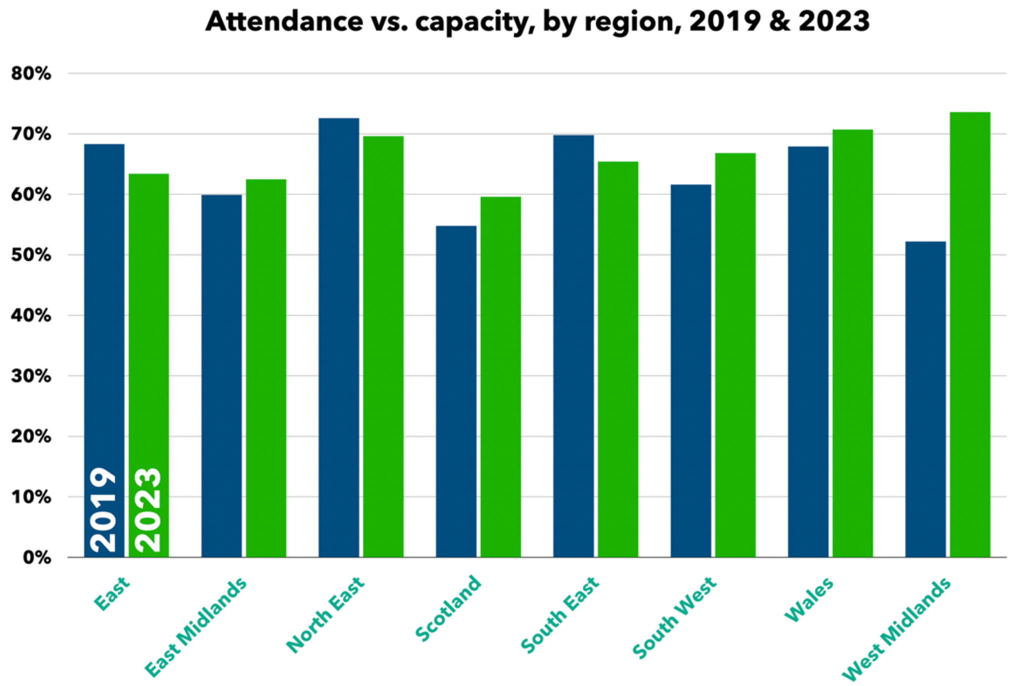
- London's attendance against potential rose by **2.8%pts**, while rUK's rose by **3.5%pts**.
- London's box office take against potential income rose by **2.2%pts**, while rUK's rose by **2.6%pts**.
- The gap between London and rUK correspondingly narrowed both in attendances (from a gap of **16.6%pts** to **15.9%pts**) and in box office (from a gap of **17.2%pts** to **16.8%pts**).

19. Of course, London's performance is consistently stronger on both measures and has less room for improvement. But that should not diminish clear evidence that the non-London regions and nations have had some striking success in attracting attendances and income in the post-Covid period.

20. This success is not uniform outside London. *Fig. 71* and *Fig. 72* show how this performance against potential is distributed across the UK regions and nations.[62]

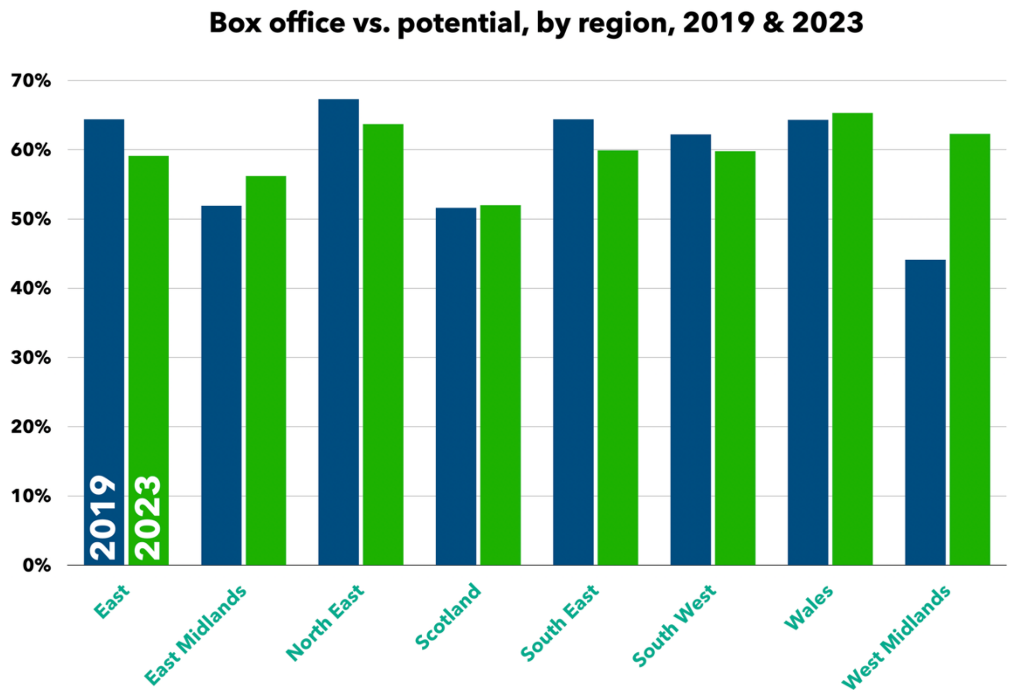
    a. Between **2019** and **2023**, the **East Midlands**, **Scotland**, **Wales**, and **West Midlands** improved their performance against potential in both attendance and box office.
    b. **South West** improved its performance for attendance but not for box office.
    c. The performance against potential declined on both measures in the **East**, **North East**, and **South East**.

[62] Because there are different theatres for 2019 and 2023 in the data for both the North West and Yorkshire, it would be misleading to include them here. Northern Ireland has been omitted from these charts for reason of commercial confidentiality. London is not included because its figures are shown in *Fig. 70*.



Attendance vs. capacity, by region, 2019 & 2023
80%
70%
60%
50%
40%
30%
20%
10%
0%
2019
2023
East
East Midlands
North East
Scotland
South East
South West
Wales
West Midlands

Fig. 71

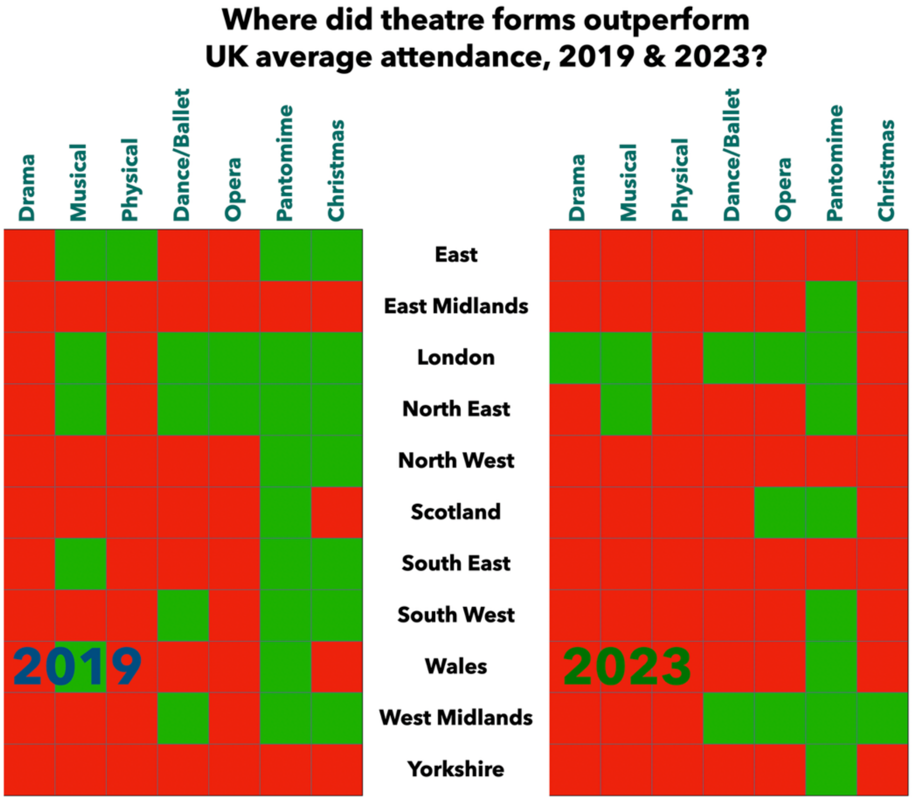


Box office vs. potential, by region, 2019 & 2023
70%
60%
50%
40%
30%
20%
10%
0%
2019
2023
East
East Midlands
North East
Scotland
South East
South West
Wales
West Midlands

Fig. 72

21. We can break this down further by theatre form in the regions. The same ‘heat maps’ as before will show nationally where there are particular audience strengths. One would expect to see more green cells in the three forms that typically have the highest attendance against capacity (Pantomime, Musicals, and Opera) and the more even the red and green, the more dispersed the UK audience will likely be.

Fig. 73



a. The average UK audience compared to capacity was **72.8%** in **2019** and **76.2%** in **2023**; we can see which forms in which regions outperform this. Pantomime performs well everywhere, achieving more than average houses in **2019** everywhere but the East Midlands and Yorkshire, and the East, North West and South East in **2023**.

b. Drama did not beat UK average attendance anywhere in **2019**; Physical Theatre was below average attendance everywhere in **2023**.

c. The theatre form that filled the largest proportion of its seats in any region in **2019** was **Pantomime** in the **North**

West; In **2023**, it was **Christmas shows** in the **West Midlands**.

22. We can also compare box office performance (against potential) by region and theatre form (see *Fig. 74*). We know from *Fig. 7* that London takes well over half of all box office income in our data, and this tends to mask regional variations.

    a. London's dominance is more comprehensive across all theatre forms. In **2019** it performs above average in all forms at the box office (as proportion of total potential box office), but there are also above-average pockets of activity in the East, South West and West Midlands and in Christmas shows. By **2023**, its box office is so strong that almost every form in almost every region is now below average.

    b. The highest records for box office against potential in both years were for Pantomime in London.

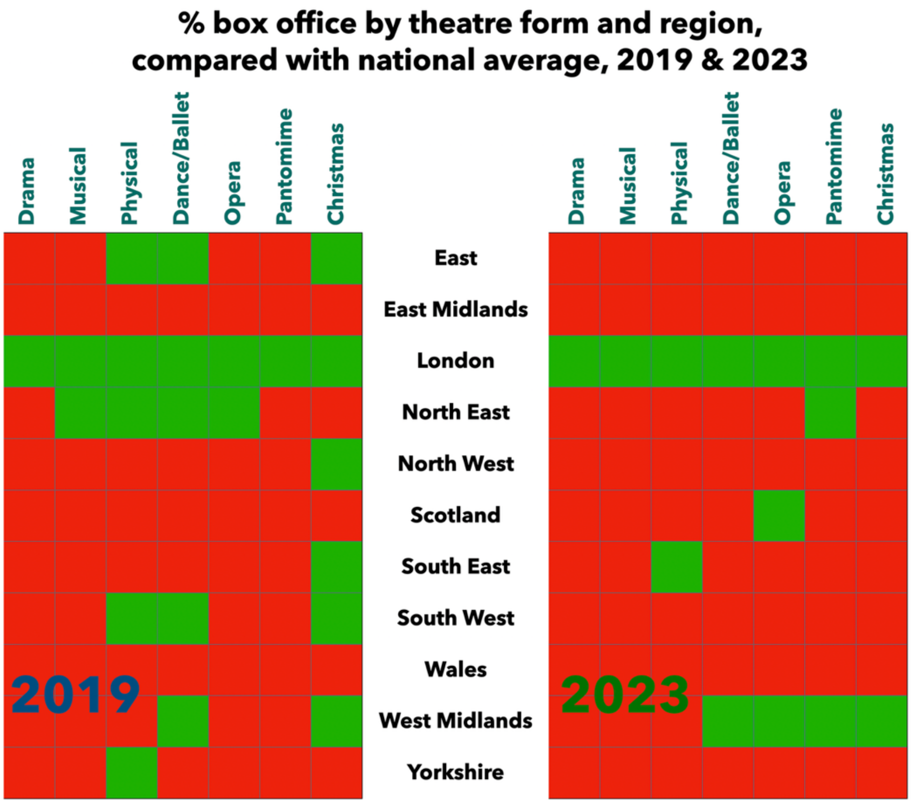


Fig. 74

23. Finally, we can look at where particular kinds of theatre outperformed the average UK box office against potential which

was **69.7%** in **2019** and **72.4%** in **2023**. *Fig. 75* shows where in these two years any particular kind of theatre outperformed those averages.

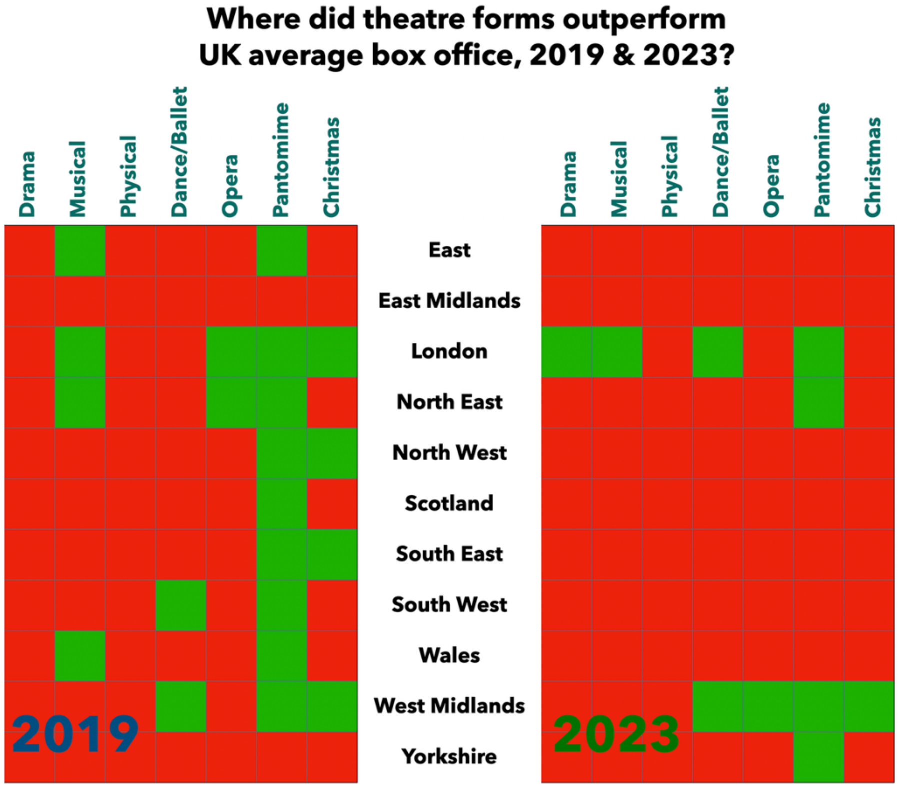


Fig. 75

a. In **2019** there were **17** instances of theatre forms outside London outperforming the national average; in **2023**, this figure had fallen to only **6**.

b. The lack of green cells in *Fig. 75* suggests that UK theatre in **2023** had become increasingly concentrated in Pantomime and/or London.

Summary

24. London, a world theatre city, dominates the National picture and there is clear room for targeting areas with historically low levels of cultural investment. However, the dominance of London also risks obscuring the diversity of theatre in the regions and nations, all of which show signs of distinct activity.

25. Between 2019 and 2023, the regions and nations outside London improved their performance against potential, both in attendance and box office, slightly more than London did.

26. What cannot be ignored, however, is that after the Covid interruption London increased its share of all theatre activity on all measures and increased its dominance of the national picture across all theatre forms.

Conclusions

1. Even in normal times, theatres that need to close (say, for refurbishment) can take time to win their audiences back. In 2020-2021, all UK theatres were forced to close, twice, for extended periods.

2. Despite this, by 2023, UK theatres appear to have bounced back. Although the number or productions and performances dropped sharply, audiences in 2023 were substantially larger than they had been on the eve of the Covid crisis. Average houses were larger after Covid, filling 76.2% of seats (compared to 72.8% in 2019). Real-terms box office income was slightly down, but theatres achieved 72.4% of their entire potential box office (up from 69.7% in 2019).

   How did theatres achieve this?

3. First, we have seen a shift in the repertoire towards the Musical.

   a. It is clear that theatres have leaned into types of theatre that historically attract larger audiences, who book earlier, and pay higher ticket prices: principally, Musicals, which went from 14% to 17% of all theatre productions (but accounted for over half of all attendances and almost two-thirds of all theatre box office income).

   b. There are, of course, risks in mounting expensive theatre forms like Musicals; while the gains for a success are large, so are the losses for a failure. This was not risk-averse programming, but it was highly box-office-conscious and audience-focused. This may be why the commercial theatre, more used to such imperatives, recovered more quickly than the subsidised theatres.

   c. The new Musical was one of the welcome beneficiaries of this strategy. While in 2019 the proportion of Musicals that were new was a little over a third, by 2023 it was over half.

4. Second, ticket prices were lower in real terms after Covid than before.

a. In fact, our data only tells us what people paid, not the face value of the ticket. It may be that ticket prices generally were lower; there is some evidence that ‘premium seats’ in theatres sold less well than the cheaper seats; it is likely, too, that theatres are attracting audiences with numerous special ticket deals. Nonetheless, people paid less in real terms for their tickets in 2023 than in 2019.

b. It is notable that Musicals, despite driving the box office revival, saw the largest real-terms reduction in ticket prices.

c. Despite rumours to the contrary, our figures provide no evidence that audiences are booking later. One way of reconciling the perception with the data is that possibly audiences were booking later in 2021 and 2022 and theatres have adjusted their programming and marketing in 2023 to counteract this trend: by programming more work for which audiences typically book earlier (such as Musical theatre), opening up booking earlier, making use of star names in publicity, and so on.

5. Third, there is some evidence of cautious programming and thus a narrowing of the repertoire.

    a. New work continues to be a core part of the UK theatre repertoire, rising to over half of all productions, and accounting for half of all performances. Most new work is Drama; that is, plays and devised work. However, Musicals made up 17% of new work productions in 2023 (up from 11%) and over half of new work’s box office (up from about two-fifths). The Musical is a major force behind the sustained strength of new work in the UK theatre repertoire.

    b. Despite a sizeable drop in the number of productions of new plays, those new plays that were performed in 2023 had longer runs and made more at the box office. More specifically, original new plays for adults filled more of their seats than any other theatre form, including Musicals, old or new. That said, we want to sound a note of alarm at the real decline in numbers of new plays produced: for a century or more, the new play has been at the heart of British theatre programming – but is by its very nature an unknown quantity. There is compelling evidence that theatre programming has shifted emphasis towards shows with some already-familiar element: adaptations and well-known plays, perhaps also big-name casting. It is to be hoped that conditions allow theatres to embrace once again the theatrical excitement of the unknown.

c. This is also confirmed by changes in the pattern of revivals. Revivals make up around two-fifths of all theatre shows. In 2023, there were fewer revivals and the range of revivals was much narrower.

    i. The Modern repertoire (1850-1945) shrank dramatically, down to only 1 in 10 revivals. Was there a perception – from directors and/or audiences – of that period as characterised by the crepuscular Ibsen and the languid Chekhov? These two were knocked off the top spot in 2023 by the dazzling wit of Oscar Wilde.

    ii. The Classical repertoire (before 1850) has winnowed to little more than Shakespeare, who accounts for 89% of all Classical revivals in 2023. Intriguingly, the most popular play in both years was *Macbeth*, crowding out the lighter comedies. Is it fanciful to imagine that the succession of governments with their in-fighting and polarisation found its echo in one of Shakespeare's bloodiest plays?

    iii. The Postwar repertoire (after 1945) continued to be the most popular source for revivals, indeed rising to provide two-thirds of all revived plays. Arthur Miller led the way by some distance in 2019 but was joined by Agatha Christie in 2023, the two becoming jointly the most revived Postwar playwrights. Otherwise, the pool of revived playwrights narrowed considerably. While fourteen playwrights had more than two revivals in 2019 that number had fallen to only five in 2023.

iv. In all eras, English-language writers increasingly dominate. New translations appear to be in alarming decline, falling from 34 in 2019 to only 14 in 2023. 'Versions' – effectively new plays based on or in close dialogue with a canonical play – have taken up some of the slack. Nonetheless, it may be that, in the urge to provide audiences with the known and familiar, that British theatre is turning its back on other cultures and eras.

d. Despite falls in new plays, certain revivals, and translations, it is important to note that all three forms punch above their weight in terms of attendances and box office.

6. Despite this, New Work has strengthened its place in the repertoire, led by the rise in new Musicals. In 2023, more than half of all productions were New Work of one kind or another.

7. However, the picture is not consistent nationally. London, as one of the great theatre cities of the world, unsurprisingly dominates the national picture, in 2023 accounting for more than a third of all productions, over three-fifths of all performances, over two-thirds of all attendances, and over four-fifths of the national box office. These figures were an increase on their equivalents in 2019.

   a. London also filled more of its seats and achieved more of its potential box office in 2023 than it had in 2019. That said, the rest of the UK also increased its performance on these measures and proportionately improved even more than London did.

   b. But this bird's eye view masks lots of regional variation. The upsurge of attendances and box office outside London is entirely due to a rise in audiences in the North East, South East, East Midlands and West Midlands, though this is complicated by changes in the number of theatre shows produced, size of auditorium, length of run and so on. For example, in 2023 compared to 2019, Scotland and Wales had smaller audiences and box office but filled more of its seats and achieved more of its potential box office income.

c. There is, however, plenty of evidence that theatrical activity is concentrating more uniformly in London.

8. The place of women playwrights in the UK theatre repertoire has significantly improved since the early 2010s and improved again between 2019 and 2023.

    a. In 2019, plays by women were just under two-fifths of all new plays and in 2023 well over two-fifths. These figures are much higher than the figure of 31% in both 2013 and 2014.

    b. On other measures, however, plays by women fell back slightly between 2019 and 2023. In 2019 plays by women amounted to between 37% and 42% of performances, attendances, and box office; In 2023, plays by women amounted less than a third of these measures.

    c. In 2019, plays by women on average had longer runs than plays by men, and were performed in larger auditoriums. But by 2023, plays by men had overtaken women on these measures.

    d. It is unclear whether theatres consider plays by women to be less likely to attract audiences, nor why they should think this. The evidence is, though, that theatres seemed, on average, to programme plays by men more confidently in 2023 than in 2019.

9. The UK appears to have survived what could have been a catastrophe for theatre. Our theatres have pulled off a minor miracle in finding ways to bring audiences back to the theatre quickly, and in very large numbers. How they did this is beginning to become clear, as this report has shown, and shows patterns of commercial-mindedness that may be described as simultaneously bold and cautious. It will be vital to continue to track these patterns in subsequent years to see if we are seeing a sustained shift in the pattern of the UK's theatre repertoire.

Appendices

Reporting theatres

All theatres included in anonymous aggregate datasets provided by either the UK Theatre Evidence Centre or data collected by SOLT

UK Theatre

Almeida, London
Birmingham Hippodrome
Birmingham Repertory Theatre
Bradford Theatres
Bristol Old Vic
Capital Theatres, Edinburgh
Chichester Festival Theatre
Chipping Norton Theatre
Citizens Theatre, Glasgow
Cliffs Pavilion, Southend
Curve, Leicester
Derby Playhouse
Dundee Rep and Scottish Dance Theatre
Everyman Theatre, Cheltenham
G Live, Guildford
Grand Opera House, Belfast
Hackney Empire
Hall for Cornwall
Hampstead Theatre
Harrogate Theatre
HOME, Manchester
Hull New Theatre
Hull Truck Theatre
Kiln Theatre
Leeds Grand Theatre & Opera House Ltd
Leeds Playhouse
Lighthouse, Poole
Lyceum Theatre, Crewe
Marina Theatre, Lowestoft
Marlowe Theatre
Mayflower Theatre
Mercury Theatre Colchester
New Theatre, Cardiff
New Vic Theatre
New Wolsey, Ipswich
Newcastle Theatre Royal
Northampton Arts Management
Northcott Theatre, Exeter
Northern Ballet
Northern Stage
Norwich Theatre Royal
Nottingham Playhouse
Octagon Theatre, Bolton
Orange Tree, Richmond
Orchard, Dartford
Other Palace, London
Palace Theatre Redditch
Palace Theatre, Southend
Park Theatre
Pavilion Theatre, Glasgow
Pitlochry Festival Theatre
Queens Theatre, Hornchurch
Rose Theatre, Kingston
Royal Exchange Theatre, Manchester
Royal Shakespeare Company
Sheffield Theatres
Stephen Joseph Theatre, Scarborough
Storyhouse, Chester
Swindon Arts Centre
Theatr Clwyd
Theatre by the Lake

Theatre Royal, Bury St Edmunds
Theatre Royal, Plymouth
Theatre Royal, Stratford East
Venue Cymru
Wales Millennium Centre
Watermill Theatre, Newbury
Watford Palace Theatre
Wiltshire Creative
Worthing Theatres
Wycombe Swan
Wyvern Theatre, Swindon
Young Vic
Yvonne Arnaud Theatre

SOLT

Adelphi
Aldwych
Ambassadors
Apollo
Apollo Victoria
Arts
Barbican
Bush
Cambridge
County Hall
Criterion
Dominion
Donmar
Duchess
Duke of York
Fortune
Garrick
Gielgud
Gillian Lynne
Globe
Harold Pinter
Her Majesty's
London Coliseum
London Palladium
Lyceum
Lyric Hammersmith
Lyric
Menier Chocolate Factory
National Dorfman
National Lyttleton
National Olivier
New Wimbledon
Noel Coward
Novello
Old Vic
Open Air (Regents Park)
Palace
Peacock
Phoenix
Piccadilly
Playhouse
Polka
Prince Edward
Prince of Wales
Royal Court Downstairs
Royal Court Upstairs
Royal Opera
Sadlers Wells
Savoy
Shaftesbury
Soho Place
Soho Theatre
Sondheim
St Martin's
Theatre Royal Drury Lane
Theatre Royal Haymarket
Trafalgar
UCL Bloomsbury
Unicorn
Vaudeville
Victoria Palace
Wanamaker
Wembley Park
White City
Wyndhams

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