

£9m to save 100 theatres



1. Introduction

Supporting, promoting & celebrating

OffWestEnd exists to support, promote and celebrate the full spectrum of Off West End theatres and to draw the general public into the heady darkness and dangerous passion of these little powerhouses perched above a pub, tucked under a railway bridge, packed into a disused warehouse, built around a butcher's shop or suspended above a shopping centre.

Taking risks, supporting new work, & a platform for disadvantaged groups

OffWestEnd theatres play a vital role in London and in society as a whole - taking risks to push the boundaries of live performance as well as entertaining the intellect and stretching the imagination. OffWestEnd theatre is a breeding ground for new writers, for innovation and for imaginative community and outreach programmes. In addition, it is at the forefront of enabling disadvantaged groups – be they female, black & south Asian, disabled, gay, lesbian or transgender – to have a voice. All of this feeds into our culture, reinventing and reinvigorating us.

OffWestEnd – “all theatre starts here”

Our strapline is “all theatre starts here” and there are many West End shows that have transferred from OffWestEnd theatres. Many famous names have launched their careers at OffWestEnd venues, ranging from Victoria Wood & Julie Walters at the Bush Theatre, to Phoebe Waller-Bridge and “Fleabag” which was first seen at the Soho Theatre.

Theatre is in crisis

Theatre is in crisis. Theatres have been closed since March and are likely to remain closed until at least late 2020. When they do re-open, it is likely to be within a much constrained environment: for example, social distancing is likely to lead to fewer available seats and there will be new rules for operating bars and catering. All these factors will mean significantly reduced income.

Theatres need financial assistance to re-open

Theatre will need help to re-open – and this includes all theatre, large and small, across the whole of the UK. This report focuses on OffWestEnd theatre – over 100 independent, alternative and fringe venues across London.

West End theatre has a persuasive economic case for support

It is understandable that many in government see “theatre” as large scale West End theatres, drawing in thousands of visitors to London who not only purchase tickets but who also stimulate the economy by spending money on hotels, restaurants and bars. Given their economic impact, the rationale for providing “bailout” funds to these theatres is very persuasive – and we would support their campaign for financial assistance at this time.

OffWestEnd theatres need support as well

But theatre is an ecosystem and the smaller, independent fringe theatres across London play a huge role in helping to nurture and sustain theatre as a whole. OffWestEnd theatre will need support post lockdown – alongside other theatres across the UK – and this report analyses the needs and identifies the amount required. We hope that government and other bodies will carefully consider the arguments made in this report – and in other documents submitted by organisations such as UK Theatre – and respond positively in order to enable the theatre sector to survive the impact of Covid-19.

Government support must move beyond airlines and other “major players”

Finally, we note the comments expressed by Charlotte Bence from Equity UK that it would be invidious to provide £600m in government bailout funds to each of Easyjet and Ryanair (who had profits in 2019 of £349m and £880m respectively) and to provide nothing to the theatre industry. We share this view.

2.The Numbers

OffWestEnd venues are **currently closed** with limited (if any) part-time staffing. Because of this, it has been impossible to gather sufficient detailed figures from every venue.

This report therefore uses **estimates and averages** based on the data we do have. The following schedule explains how we have used this data to prepare income estimates.

The final row is an **estimate of income lost** in the 6 months following theatre closures in late March 2020.

<i>Area</i>	<i>Figure</i>	<i>Description</i>
Venues	100	There are 126 venues on the OffWestEnd database (see Appendix 2). It is estimated that 20% of these will not survive lockdown or will not need assistance, so this leaves 101 venues – let's say 100.
Spaces	110	Approximately 10% of OffWestEnd venues have 2 performance spaces , meaning a total of 110 spaces.
Average Capacity	120	Appendix 2 includes capacity figures for 50 of our venues, of which 12 have 2 spaces. The average of these is 130 per space. We have then added an estimated average of 110 for the other 76 venues, and then calculated an overall average of 120 per space.
Average Ticket Price	£16	The data we have from venues on average ticket prices would indicate that £16 is a reasonable figure to use as an average ticket price across all venues & spaces.
Maximum income per performance	£1,920	Multiplying the above two rows, i.e. capacity and ticket price.
Performances per week	5	This figure is based on the facts that many venues present 6-7 performances per week including matinees, while others will present only 3-4.
Weeks of the year	47	Many venues do not schedule performances in August and some do not in the week between Christmas and New Year
Total potential annual income	£49,632,000	Multiplying the figures from the relevant 5 rows above (i.e. the ones in pale yellow).
Average potential annual income per space	£451,200	Dividing the total potential income by the 110 spaces.
%age of tickets sold	60%	This is an estimate based on general feedback from venues.
Seats actually sold per space	72	Multiplying 120 seats per space by 60%.
Actual income per performance	£1,152	Multiplying 72 (row above) by £16 (average ticket price)
Total actual annual income	£29,779,200	Multiplying the total potential income by the percentage of tickets sold.
Average actual annual income per space	£270,720	Dividing the total actual annual income by the 110 spaces
Income lost from mid-March to mid-Sept 2020	£13,305,600	This is 21/47 of the annual income, as this 6 month period represents 21 weeks of potential performances (it excludes 5 weeks for August when there would have been fewer performances).

3.The Numbers Post Lockdown

There are three key factors post lockdown – confirmed in the parallel **Audience Survey** also undertaken by OffWestEnd in May 2020 (this can be downloaded from www.offwestend.com/covid19surveys):

- That audiences may be **less willing to return**, at least in the short term – it is estimated that an average of **30%** of previous attendees may be unwilling to return in at least the first 6 months post lockdown – this would mean just **50** attendees per performance (70% of 72 from above table).
- That social distancing and other rules may mean that **venues are only able to sell a limited number of seats** in their spaces:
 - If there was a **2m (or even a 1.5m)** social distancing rule, then venues could only sell a maximum of 1 in 3 of their seats – i.e. **33%** of their capacity.
 - If there was a **1m** social distancing rule, then venues could only sell a maximum of 1 in 2 of their seats – i.e. **50%** of their capacity.
- That venues may feel they need to sell discounted tickets in order to encourage audiences to return – it is estimated that a discount of around **25%** may be necessary.

The following schedule outlines the implications of these factors:

Area	If capacity was 1 in 3	If capacity was 1 in 2	Description
Capacity	40	60	Average capacity of 120 divided by 3 or 2
Likely attendees	50	50	70% of 72 seats sold (from table in section 2 above)
Actual tickets sold	40	50	For the “1 in 3” scenario, although 59 people may want to attend, the capacity is only 40
Discounted ticket price	£12	£12	75% of the £16 average as per the above table
Income per performance	£480	£600	Multiplying the number of actual tickets sold by the discounted ticket price
Income per annum per space	£112,800	£141,000	Multiplying income per performance by 5 performances per week for 47 weeks
Income per annum across all spaces	£12,408,000	£15,510,000	Multiplying above figure by 110 spaces
Previous annual income per space	£29,779,200	£29,779,200	From table in section 2 above
Annual difference	£17,371,200	£14,269,200	The difference between the two rows above
Difference for 6 months	£9,240,000	£7,590,000	This is 25/46 of the above figure as the first 6 months post lockdown will most likely include the Christmas/NY break but not the summer break in August

Therefore the reduction in income for the 6 months post lockdown is between **£7.6m and £9.2m**. Given the estimates used in these calculations, additional research would be helpful in clarifying the exact amount required, but it is likely this will be in the region of **£7-10m**.

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There are many ways in which such funds could be allocated, but whatever mechanism is chosen should be **as simple as possible**, perhaps based upon a theatre’s 2019 figures, using a combination of capacity, number of performances and average ticket price.

Appendix 1 – Comparison with SIT Report

SIT (the **Society of Independent Theatres**) is the industry association for all types of theatrical venues under 300 seats. More information is available at www.sitgb.org.

SIT has produced its own report based on a survey of **54** of their theatre venue members (44 in London, 10 outside). Some London theatres are members of SIT and also fall under the OffWestEnd umbrella.

The following table shows some of the OffWestEnd data from the tables above, compared to the SIT data. In all cases, the OffWestEnd figures are lower than those from the SIT report, which confirms that the estimated figures used in this report for the OffWestEnd sector are reasonable and not exaggerated.

SIT Report			OffWestEnd	
Description	Amount	Per venue	Per space	Notes
Annual turnover (including ticket sales)	£46,600,000	£862,962	£264,960*	<i>From section 2</i>
Annual spend with suppliers (excluding fixed overheads)	£26,400,000	£488,889	N/A	
Value of venue's presence to local economy	£233,400,000	£4,322,222	N/A	
Estimated deficit in turnover due to lockdown	£14,000,000	£259,259	N/A	
Employees / Freelancers / Volunteers / Actors / Technicians	36,200	670	N/A	
Number of seats	9,950	184	120	<i>From section 2</i>
Total annual tickets issued (numerical)	2,100,000	38,889	16,560	<i>72seats x 5perfs x 46weeks</i>
Annual number of different productions	4,340	80	N/A	
Total annual number of performances	21,050	389	230	<i>5perfs x 46weeks</i>

**ticket sales only*

Appendix 2 – List of OffWestEnd Venues

In the following table, the final 2 columns are the capacity of the main space (Cap1) and any second space (Cap2). Figures in **blue** are actuals and those in **green** are an estimated average (see table in section 2 above). Figures in *italics* are an average for spaces where the seating can be arranged in various layouts.

Name	Address	Website	Cap1	Cap2
Above The Stag Theatre	72 Albert Embankment, Lambeth, London SE1 7TP	www.abovethestag.org.uk	110	
Albany, The	Douglas Way, Deptford, London SE8 4AG	www.thealbany.org.uk	110	
Arcola Theatre	24 Ashwin St, Dalston, London E8 3DL	www.arcolatheatre.com	200	100
artsdepot	5 Nether St, Tally Ho Corner North Finchley, London N12 0GA	www.artsdepot.co.uk	110	
Barons Court Theatre	Curtain's Up Pub, 28a Comeragh Road, London W14 9HR		110	
Bathway Theatre	The Old Baths, Bathway, Woolwich, London SE18 6QX	www.bathwaytheatre.co.uk	110	
Battersea Arts Centre	Lavender Hill, Battersea London SW11 5TN	www.bac.org.uk	110	
Bernie Grant Arts Centre	Town Hill Approach Road, Tottenham Green, London N15 4RX	https://berniegrantcentre.co.uk	250	
Big House, The	151 Englefield Road, London N1 3LH	https://thebighouse.uk.com/	110	
Bloomsbury Theatre	15 Gordon Street, London WC1H 0AH	www.thebloomsbury.com	110	
Blue Elephant Theatre	59a Bethwin Rd, Camberwell London SE5 0XT	www.blueelephanttheatre.co.uk	50	
Boulevard Theatre	6 Walker's Court, Soho, London W1F 0BT	https://boulevardtheatre.co.uk/	165	

Bread & Roses Theatre	68 Clapham Manor St, Clapham London SW4 6DZ	www.breadandroses theatre.co.uk	50	
Bridewell Theatre	Bride Lane, Fleet St, London EC4Y 8EQ	www.sbf.org.uk/whats-on	110	
Bridge House Theatre	2 High Street, Penge, London SE208 RZ	www.bhtheatre.com	110	
Broadgate	2 Finsbury Avenue, London EC2M 2PA		60	
Broadway Theatre	Catford Broadway, London SE6 4RU	www.broadwaytheatre.org.uk	110	
Bromley Little Theatre	North Street, Bromley BR1 1SB	https://bromleylittletheatre.org/	110	
Brookside Theatre	21a Eastern Road, Romford RM1 3NH	www.brooksidetheatre.com	110	
Bunker Th [now closed]	53a Southwark Street, London SE1 1RU	www.bunkertheatre.com	110	
Bush Theatre	7 Uxbridge Road, London W12 8LJ	www.bushtheatre.co.uk	172	60
Calder Bookshop & Th	51 The Cut, Waterloo, London SE1 8LF	www.calderbookshop.com	110	
Camden People's Th	58-60 Hampstead Rd, London NW1 2PY	www.cptheatre.co.uk	60	
Canada Water Theatre	21 Surrey Quays Rd, Canada Water, London SE16 7AR	www.canadawatertheatre.org.uk	110	
Canal Cafe Theatre	Bridge Hse, Delamere Terrace Little Venice, London W2 6ND	www.canalcafetheatre.com	60	
Cervantes Theatre	Arch 26, Old Union Arches, 229 Union St, London SE1 0LR	www.cervantestheatre.com	110	
Chapel Playhouse	Basement, Bread & Roses @ The Chapel, 308-312 Grays Inn Road London WC1X 8DP	www.chapelplayhouse.co.uk	65	
Charing Cross Theatre	The Arches, Villiers Street, London WC2N 6NG	www.charingcrosstheatre.co.uk	110	
Chats Palace Arts Centre	42-44 Brooksby Walk, London E9 6DF	https://chatspalace.com/	110	
Chickenshed	Chase Side, Southgate, London N14 4PE	www.chickenshed.org.uk	300	100
Chiswick Playhouse	2 Bath Road, London W4 1LW	www.chiswickplayhouse.co.uk	110	
CLF Theatre	Block A, Bussey Building, , 133 Rye Lane, Peckham, SE15 4ST	www.clfartcafe.org/theatre	110	
Cockpit Theatre, The	Gateforth Street, London NW8 8EH	www.thecockpit.org.uk	175	
COLAB Factory	74-84 Long Lane, London SE1 4AU	www.colabfactory.co.uk	200	50
Colour House Theatre	Merton Abbey Mills, Watermill Way, London SW19 2RD	www.colourhousetheatre.co.uk	70	
Coronet Theatre	103 Notting Hill Gate, London W11 3LB	www.thecoronettheatre.com	110	
Courtyard	Bowling Green Walk, 40 Pitfield Street, London N1 6EU	www.thecourtyard.org.uk	110	
Draper Hall	Hampton Street, corner of Newington Butts, London SE1 6TL	www.draper together.org/draper-hall/	110	
Drayton Arms Theatre	153 Old Brompton Rd, London SW5 0LJ	www.thedraytonarmstheatre.co.uk	51	
Etcetera Theatre	above Oxford Arms Pub, 265 Camden High St London NW1 7BU	www.etceteratheatre.com	42	
Finborough Theatre	118 Finborough Rd, London SW10 9ED	www.@finboroughtheatre.co.uk	50	
Gate Theatre	11 Pembridge Road, Notting Hill Gate, London W11 3HQ	www.gatetheatre.co.uk	75	
Greenwich Theatre	Crooms Hill, London SE10 8ES	www.greenwichtheatre.org.uk	400	50
Hackney Empire	291 Mare Street, London E8 1EJ	www.hackneyempire.co.uk	110	
Half Moon Theatre	43 White Horse Road, London E1 0ND	www.halfmoon.org.uk	85	
Hampstead Th (Studio)	Eton Avenue, Swiss Cottage, London, NW3 3EU	www.hampsteadtheatre.com	110	
Hen and Chickens	109 St. Pauls Road, London N1 2NA	https://www.unrestrictedview.co.uk	110	
Hillingdon Theatres Incl Compass Th & Studio	Glebe Avenue, Ickenham, Hillingdon London UB10 8PD	http://www.hillingdontheatres.uk/	110	
Hope Theatre, The	207 Upper St, Islington, London N1 1RL	www.thehopetheatre.com	50	
Hoxton Hall	130 Hoxton Street, London N1 6SH	www.hoxtonhall.co.uk	110	
ICA Theatre	The Mall, London SW1Y 5AH	www.ica.art	110	
Iris Theatre	St Paul's Church, Bedford St, Covent Gdn, London WC2E 9ED	www.iris theatre.com	254	180
Irish Cultural Centre	5 Black's Road, Hammersmith , London W6 9DT	https://irishculturalcentre.co.uk/	110	
Jack Studio Theatre, The	410 Brockley Road London, SE4 2DH	www.brockleyjack.co.uk	55	
Jacksons Lane	269a Archway Road, London N6 5AA	www.jacksonslane.org.uk	110	
Jermyn Street Theatre	16b Jermyn Street, London SW1Y 6ST	www.jermynstreettheatre.co.uk	70	
Katzpace	24 Southwark Street, London SE1 1TY	www.katzpace.co.uk	50	
King's Head Theatre	115 Upper Street, London, N1 1QN	www.kingsheadtheatre.com	110	
LAMDA Theatres	155 Talgarth Road, London W14 9DA	https://www2.lamda.ac.uk/	110	
Leicester Square Th	6 Leicester Place, London, WC2H 7BX	www.leicestersquaretheatre.com	110	
Lion and Unicorn Th	42-44 Gaisford Street, Kentish Town London NW5 2ED	www.lionandunicorntheatre.com	110	
Little Angel Theatre	14 Dagmar Passage, London N1 2DN	www.littleangeltheatre.com	110	
London Theatre, The	443 New Cross Road, London, SE14 6TA	www.thelondontheatre.com	110	
Lyric Hammersmith: Studio	Lyric Square, King St, London W6 0QL	www.lyric.co.uk	110	
Millfield Arts Centre	Silver St, Edmonton, London N18 1PJ	www.millfieldtheatre.co.uk	110	
Monkey House	97-101 Seven Sisters Rd, London N7 7QP	www.fourthmonkey.co.uk	52	
Museum of Comedy	The Undercroft, St Georges Church, Bloomsbury Way, London, WC1A 2SR	www.museumofcomedy.com	81	
Network Theatre	246a Lower Road, Waterloo, London, SE1 8SJ	www.networktheatre.org	68	
New Diorama	15 - 16 Triton Street, London, NW1 3BF	www.newdiorama.com	110	
Ninth Life Pub	167 Rushey Green, Catford, London SE6 4BD	https://www.ninthlife.pub/	110	
Normansfield	2A Langdown Park, Teddington, Middlesex TW11 9PS	www.langdowndowncentre.org.uk	110	
October Gallery Theatre	24 Old Gloucester Street, Bloomsbury London WC1N 3AL	http://www.octobergallery.co.uk	110	
Old Library	39 Wells Way, London SE5 0PX		100	
Old Red Lion Theatre	418 St John Street, London EC1V 4NJ	www.oldredliontheatre.co.uk/theatre.html	60	
Omnibus	1 Clapham Common Northside, London SW4 0QW	www.omnibus-clapham.org	110	80
Orange Tree Theatre	1 Clarence Street, Richmond , Surrey TW9 2SA	www.orangetreetheatre.co.uk	180	
OSO Arts Centre	49 Station Road, Barnes, London SW13 0LF	https://www.osoarts.org.uk/	110	

Other Palace, The (Studio)	12 Palace Street, London SW1E 5JA	www.theotherpalace.co.uk		120
Ovalhouse	52-54 Kennington Oval, London SE11 5SW	www.ovalhouse.com	98	60
Park Theatre	Clifton Terrace, Finsbury Park, London N4 3JP	www.parktheatre.co.uk	215	96
Pentameters	28 Heath Street (entrance Oriel Place), Hampstead, London NW3 6TE	www.pentameters.co.uk	110	
Platform Theatre	Central St Martins, 1 Handyside St, Kings Cross, London N1C 4AA	www.arts.ac.uk/csm/about-csm/facilities/general/platform-theatre/	110	
Playground Theatre	Latimer Road, London W10 6RQ	https://theplaygroundtheatre.london	150	
Pleasance Theatre	Carpenters Mews, North Road, London N7 NEF	www.pleasance.co.uk	250	65
Polka Theatre	240 The Broadway, Wimbledon, London SW19 1SB	www.polkatheatre.com	110	
Poplar Union	2 Cotall Street, Poplar, London E14 6TL	www.poplarunion.com	100	
Queen's Theatre Hornchurch	Billet Lane, Hornchurch RM11 1QT	www.queens-theatre.co.uk	500	
Questors Theatre	12 Mattock Lane, Ealing, London W5 5BQ	http://www.questors.org.uk/	110	
RADA Theatres	Malet Street, London WC1 6ED	https://www.rada.ac.uk/	110	
Rag Factory	16-18 Heneage St, London E1 5LJ	http://www.ragfactory.org.uk	110	
Rich Mix	35-47 Bethnal Green Rd, London E1 6LA	www.richmix.org.uk	110	
Riverside Studios	101 Queen Caroline St, Hammersmith London W6 9BN	https://www.riversidestudios.co.uk/	110	
Rose Playhouse Bankside	56 Park Street, London SE1 9AR	http://www.roseplayhouse.org.uk/	110	
Rose Theatre Kingston	24-26 High Street, Kingston KT1 1HL	www.rosetheatrekingston.org	110	
Rosemary Branch	2 Shepperton Road, London N1 3DT	www.rosemarybranch.co.uk	110	
Roundhouse	Chalk Farm Road, London NW1 8EH	www.roundhouse.org.uk	110	
Secret Cellar	Vaulty Towers, 34 Lower Marsh, London SE1 7RG	www.secretcellarlondon.com	110	
Shaw Theatre	100-110 Euston Road, London NW1 2AJ	www.shaw-theatre.com	446	
Shoreditch Town Hall	380 Old Street, London EC1V 9LT	http://shoreditchtownhall.com	110	
Soho Theatre	21 Dean Street, London W1D 3NE	www.sohotheatre.com	110	
Southwark Playhouse	77-85 Newington Causeway, London SE1 6BD	www.southwarkplayhouse.co.uk	110	
Space, The	269 Westferry Road, London E14 3RS	www.space.org.uk	104	
Studio 3 Arts	Boundary Road, Barking, London IG11 7JR	http://www.studio3arts.org.uk/	110	
Tara Theatre	356 Garratt Lane, Earlsfield, London SW18 4ES	www.tara-arts.com	92	30
Theatre Collection	26 Crowndale Road, London, NW1 1TT	www.theatrecollection.net	110	
Theatre Deli		www.theatredeli.co.uk	110	
Theatre Peckham	221 Havil Street, London, SE5 7SD	www.theatrepeckham.co.uk	110	
Theatre Royal Stratford East	Gerry Raffles Square, London E15 1BN	www.stratfordeast.com	460	
Theatre503	The Latchmere, 503 Battersea Park Rd, London SW11 3BW	www.theatre503.com	110	
Theatro Technis	26 Crowndale Road, London NW1 1TT	http://www.theatrotechnis.com	110	
Tower Theatre	16 Northwold Road, Stoke Newington, London N16 7HR	www.towertheatre.org.uk	110	
Toynbee Studios	Toynbee Studios, 28 Commercial Street London E1 6AB	www.artsadmin.co.uk	110	
Trafalgar Studios (Theatre 2)	14 Whitehall, London SW1A 2DY	www.atgtickets.com/venues/trafalgar-studios	98	
Tristan Bates	1a Tower Street, London WC2H 9NP	www.tristanbatestheatre.co.uk	72	
Turbine Theatre	Arches Lane, Circus West Village, London SW11 8AB	https://www.theturbine theatre.com/	150	
Under 1 Roof	Unit 9, The 10 Centre, Skeffington Street, Royal Arsenal Riverside, London SE18 6SR	www.under1roofkids.com	110	
Unicorn Theatre	147 Tooley Street, London SE1 2HZ	www.unicorntheatre.com	110	
Union Theatre	Old Union Arches, 229 Union Street, London SE1 0LR	www.uniontheatre.biz	110	
Upstairs at the Gatehouse	The Gatehouse, Highgate Village, London N6 4BD	www.upstairsatthegatehouse.com	110	
Vaults, The	Leake Street, London SE1 7NN	https://www.thevaults.london	200	150
Waterloo East Theatre	Brad Street, London SE1 8TG	www.waterlooeast.co.uk	100	
Watermans	40 High St, Brentford TW8 ODS	www.watermans.org.uk	110	
Watford Palace Theatre	20 Clarendon Road, Watford WD17 1JZ	www.watfordpalacetheatre.co.uk	110	
White Bear Theatre	138 Kennington Park Rd London SE11 4DJ	www.whitebeartheatre.co.uk	110	
Wilton's Music Hall	1 Graces Alley, London, E1 8JB	www.wiltons.org.uk	110	
Yard Theatre, The	Unit 2a, Queen's Yard, White Post Lane, London E9 5EN	www.theyardtheatre.co.uk	110	
Ye Olde Rose and Crown	53 Hope Street Walthamstow, London E17 4SA	www.yeolderoseandcrowntheatrepub.co.uk	75	

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