



# Summary findings of the London Assembly small theatre survey

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## About this report

The London Assembly's theatre survey was conducted in February-April 2013, as part of an investigation into challenges facing the sector led by Tom Copley AM on behalf of the Economy Committee.

We also invited theatregoers to share their views and experiences of small theatres, with a selection of submissions included in this report.

The investigation has also included visiting a range of small theatres, inviting written submissions, meetings with key organisations in the sector. For more information visit: [www.london.gov.uk/smalltheatres](http://www.london.gov.uk/smalltheatres)

Survey responses from non-resident production companies and venues with a capacity over 400 seats are not included in these results.

Cover image: [Theatre 503](#) ('The Life of Stuff')  
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# Survey findings overview

## WHO RESPONDED?

We received 55 survey responses – 50% of the small theatre sector – with responses from theatres of different building and organisational types.

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## THEATRE FINANCES

The income of small theatres varies from those below £100,000 to those above £1 million. Half of theatres feel insecure about their financial future.

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## PUBLIC FUNDING

Most small theatres receive little public funding – half get none at all. Those that are funded tend to receive support from multiple public bodies.

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## MARKETING & SALES

Theatres advertise in a variety of ways. However many struggle to attract large audiences and very few regularly sell out, despite recent sales increases.

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## GEOGRAPHICAL REACH

Small theatres find it difficult to attract tourists to shows – audiences tend to be local residents of people from the rest of London.

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## STATE OF THEATRE BUILDINGS

Three-quarters of buildings require upgrade or repairs, but most theatres have not been able to raise any money to carry out the work.

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## THREATS TO THEATRE BUILDINGS

Over a third of theatres are at risk of sale or conversion, but there is very low awareness of new legislation that might protect theatres.

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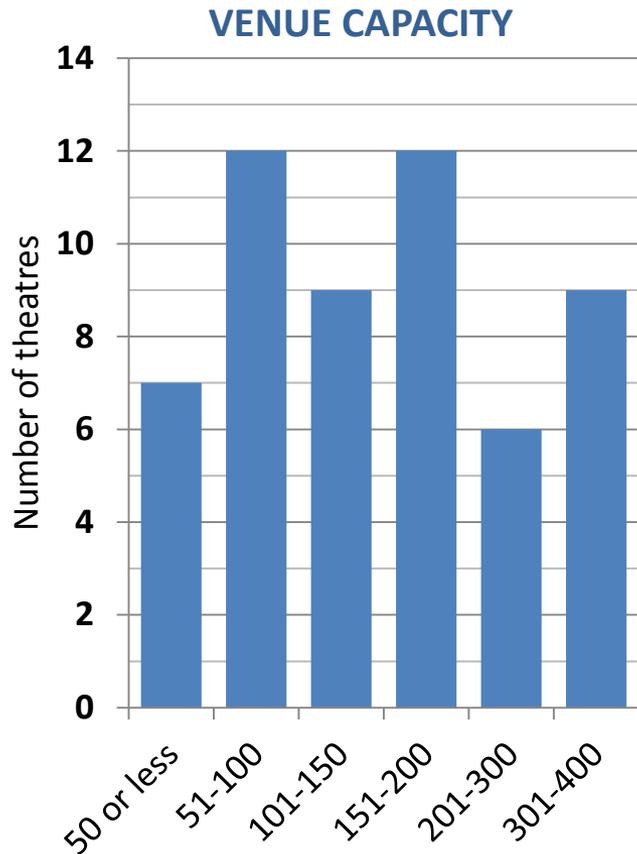
## SHOWS & REHEARSALS

Most small theatres would like to stage more shows but are prevented. Finding affordable rehearsal space is also a significant problem.

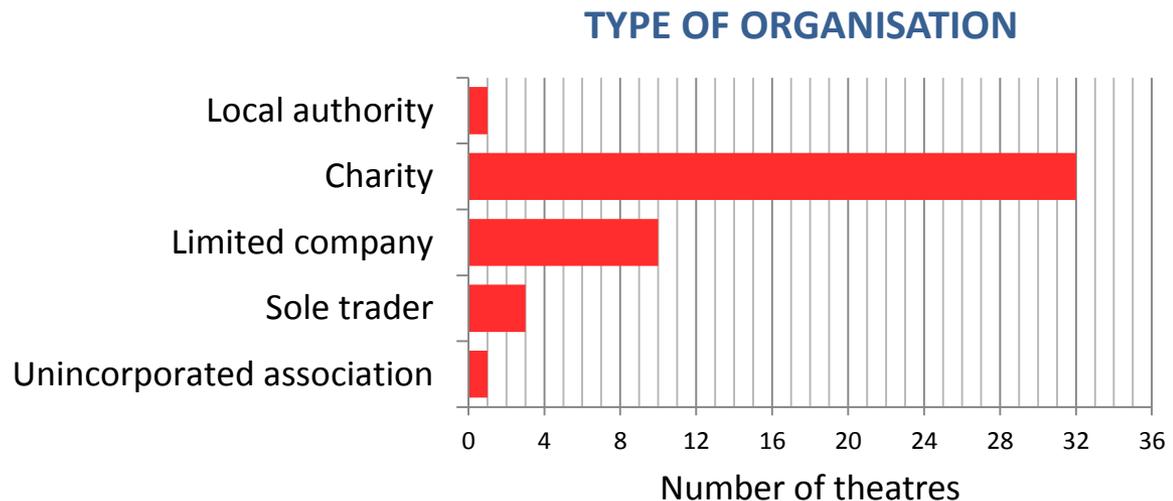
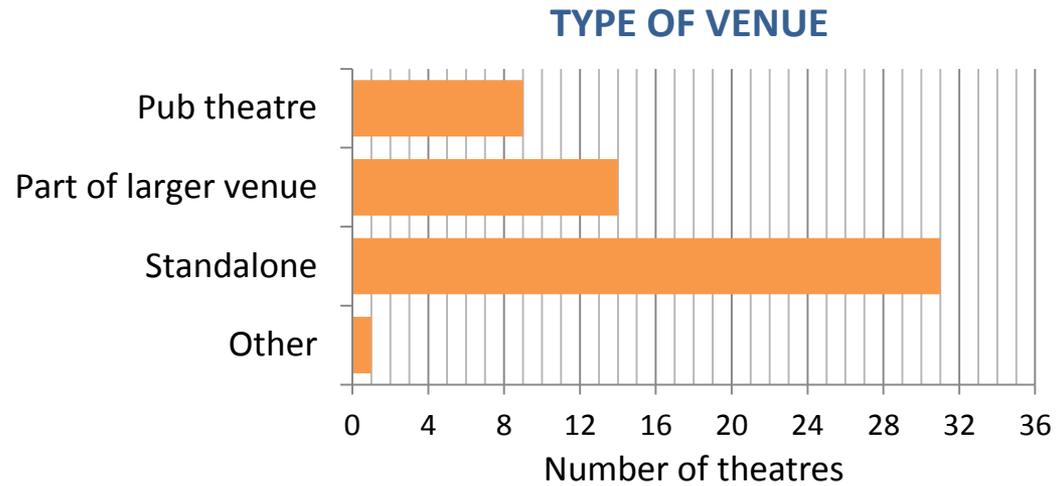
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# Who responded?

We received 55 responses from theatres with a capacity of 400 seats or fewer. This represents almost half of all theatres of this size in London.



Ten respondents had a second performance space, eight within the same venue and two at other locations.



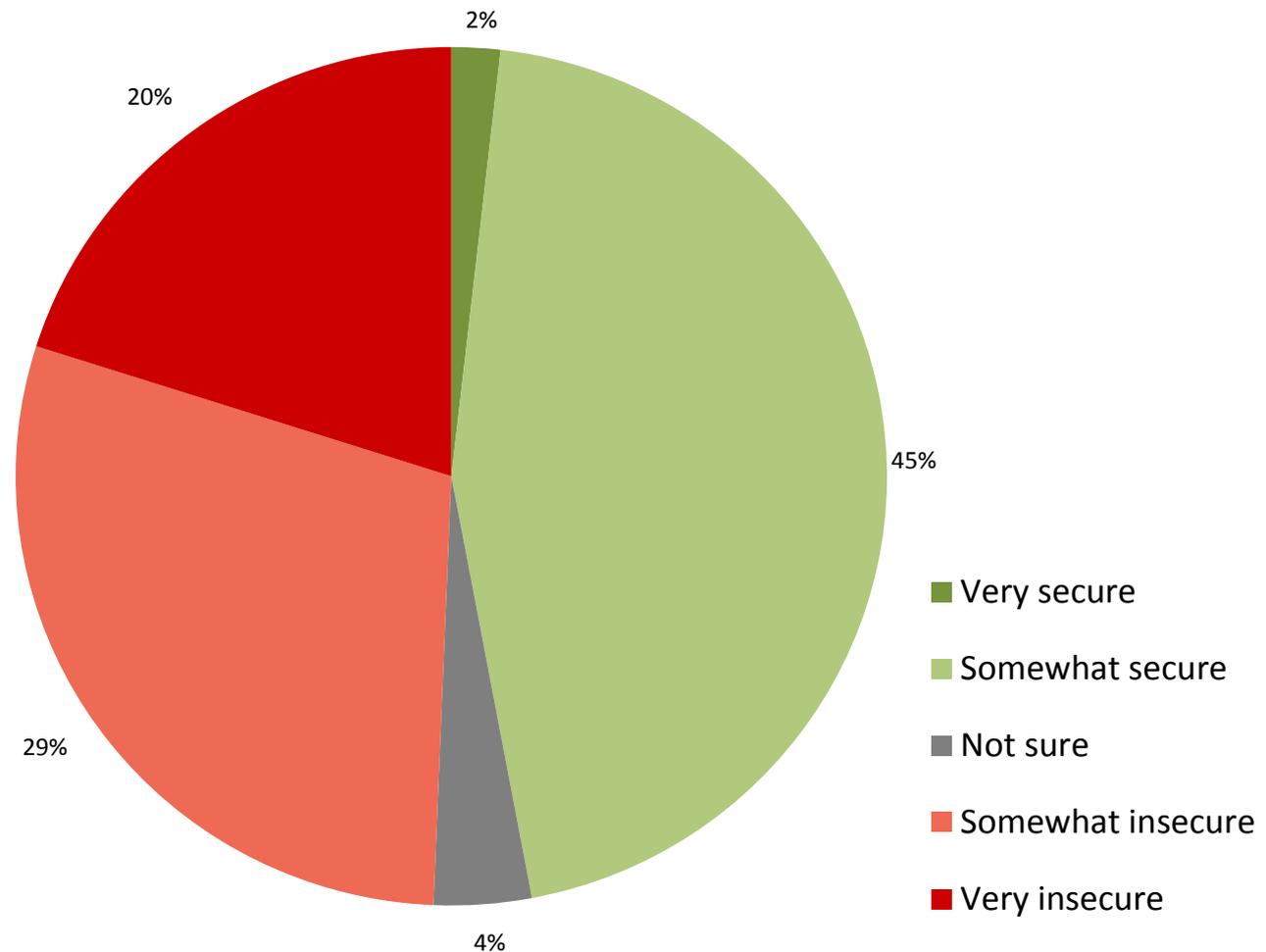
# Theatre finances

About half of theatres feel insecure about their financial future. Our findings also suggest a degree of polarisation between theatres with high incomes and those with low incomes.

## TURNOVER OF ORGANISATION

Turnover	%
£100,000 or under	30%
£100,001 to £250,000	15%
£250,001 to £500,000	13%
£500,001 to £1 million	17%
Over £1 million	25%

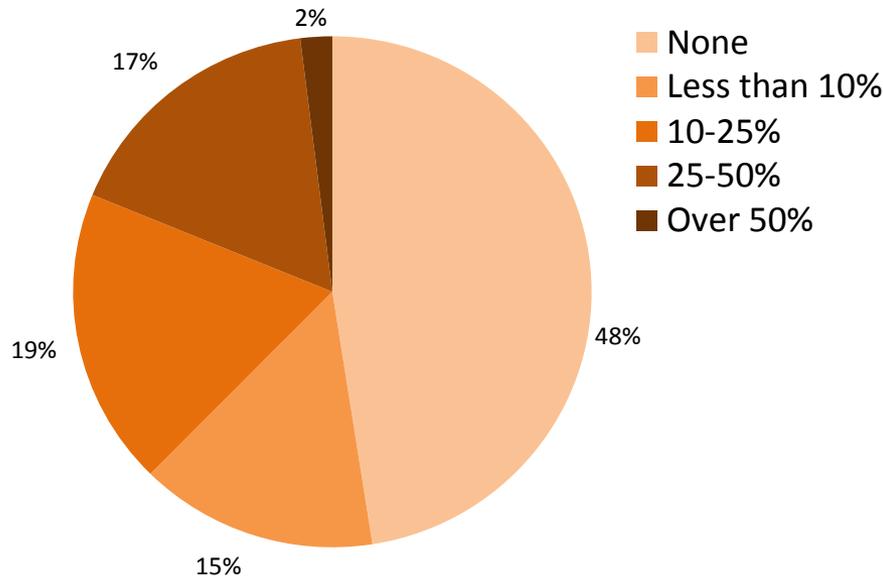
## HOW SECURE IS THE FINANCIAL FUTURE OF THE THEATRE?



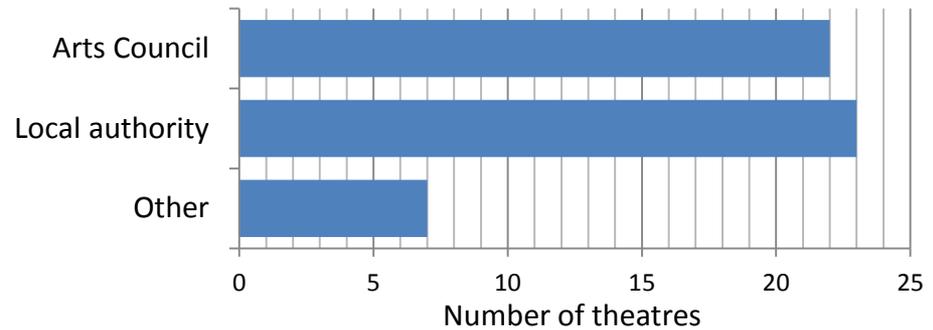
# Public funding

There have been cuts in public funding, although most theatres receive no or very little support. Those that are publicly funded are likely to have support from multiple sources.

## FUNDING FROM PUBLIC SOURCES



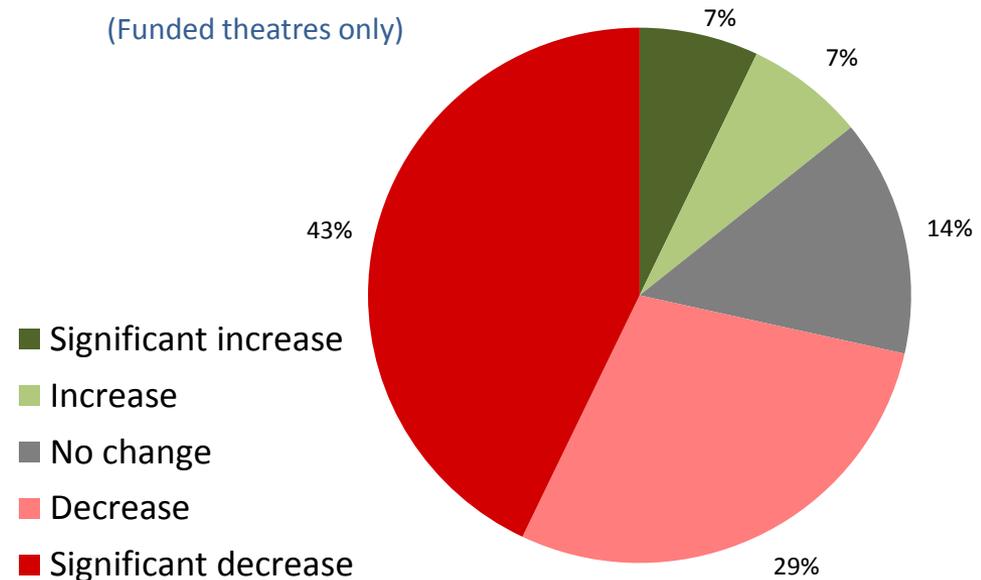
## SOURCES OF PUBLIC FUNDING (Funded theatres only)



## NUMBER OF PUBLIC FUNDING SOURCES

Number of sources	%
None	47%
One	22%
Two	22%
Three or more	9%

## CHANGE IN PUBLIC FUNDING OVER PAST 3 YEARS (Funded theatres only)

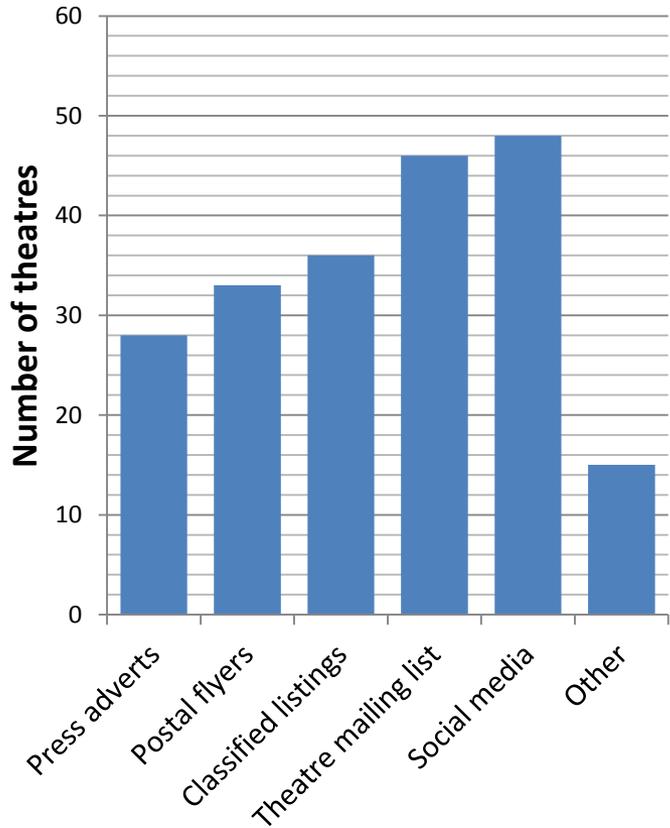


# Marketing and sales

Theatres advertise in a variety of ways. Resource constraints mean paid-for methods are less common.

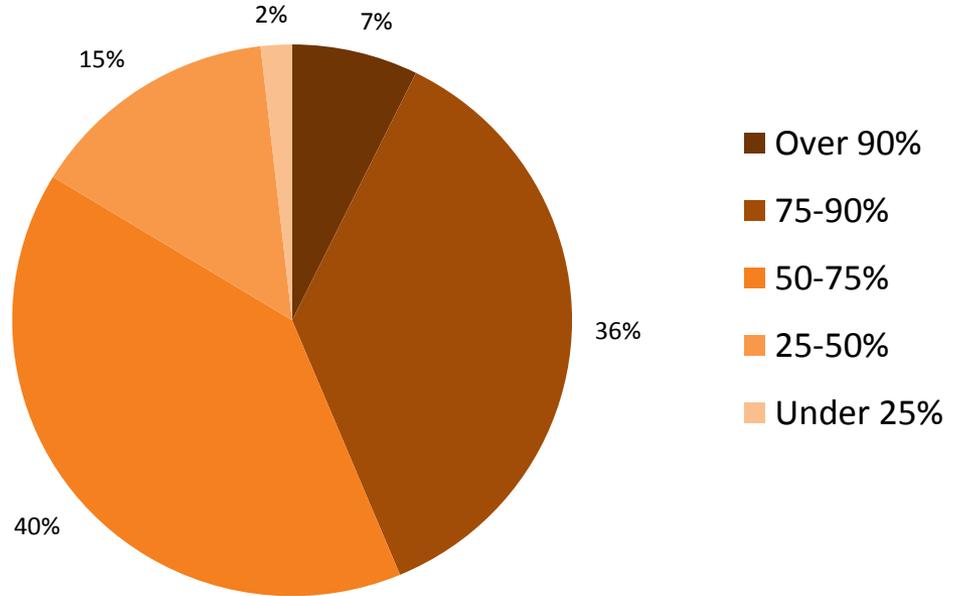
Many small theatres struggle to attract large audiences and very few sell out, although most report a recent increase in sales.

### ADVERTISING METHODS USED



Other methods include local poster displays, theatre websites, distributing flyers to other venues, and encouraging critics to review shows in the press.

### PROPORTION OF TICKETS SOLD IN PAST YEAR



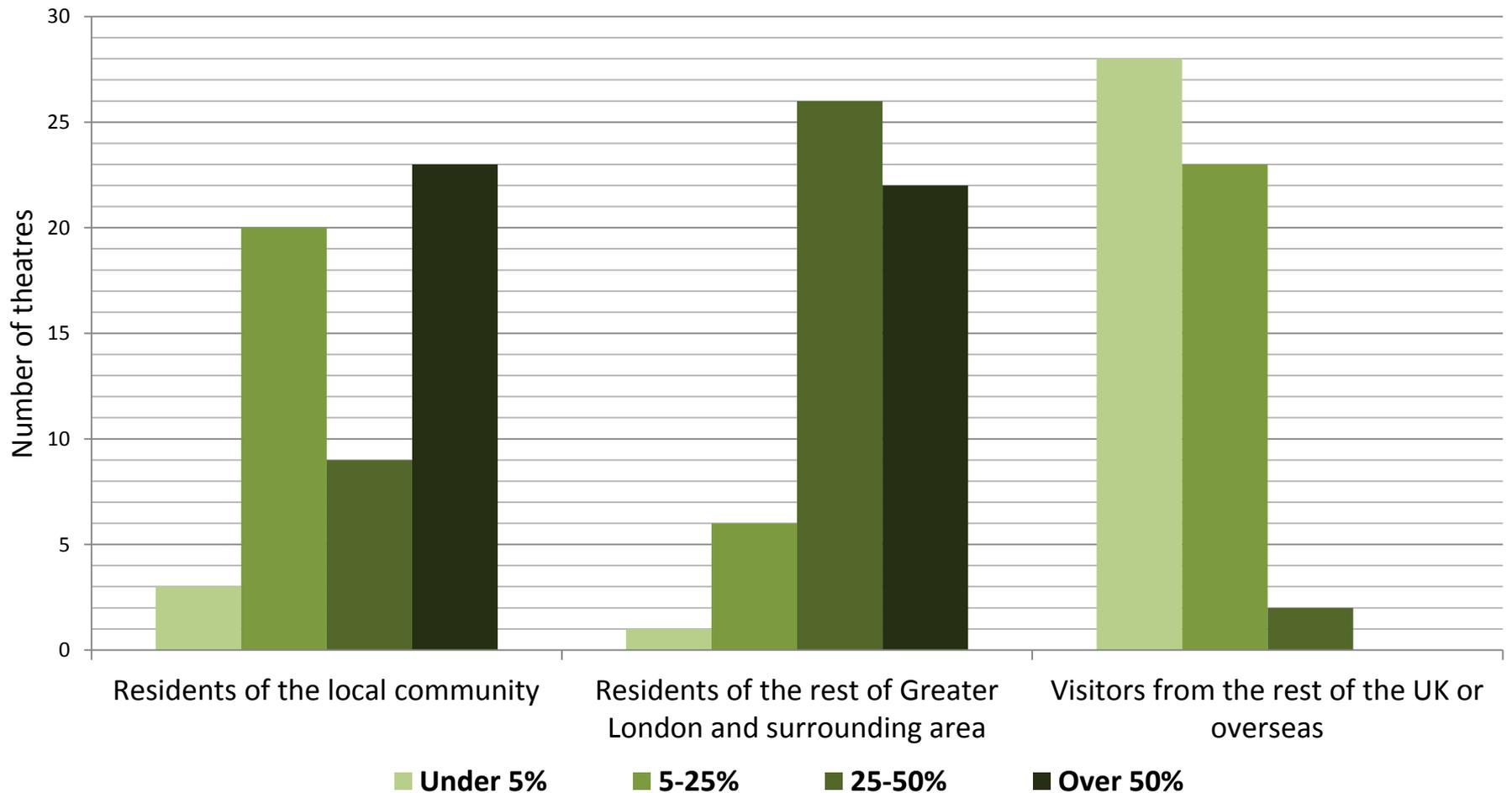
### CHANGE IN TICKET SALES IN PAST YEAR

Change	%
Sales have increased	55%
Sales have decreased	20%
No change	25%

# Geographical reach

Tourists comprise a very small proportion of the small theatre audience, in contrast to the West End. Some small theatres attract people from across Greater London, while for others the audience comes predominantly from the local community.

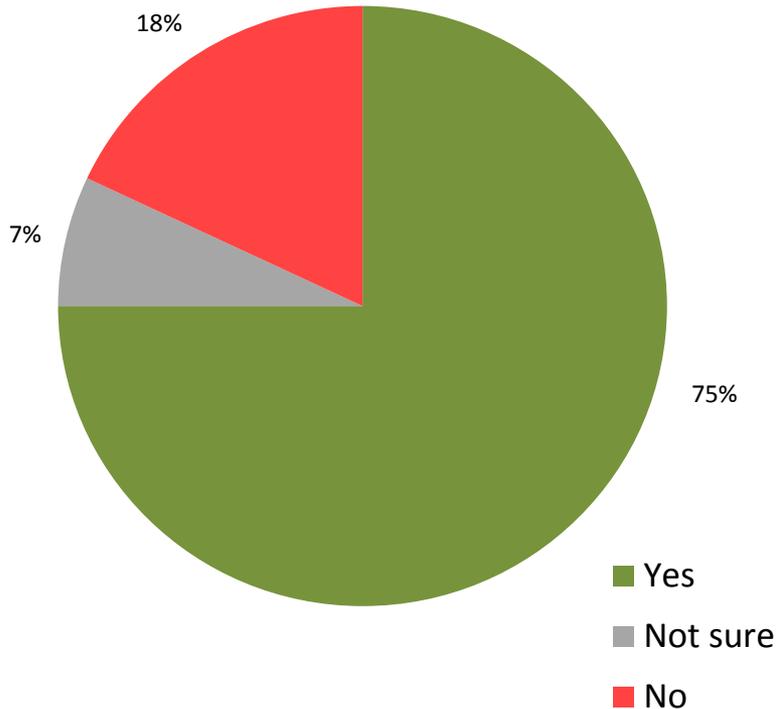
## WHAT PROPORTION OF THE THEATRE'S AUDIENCE COMES FROM THE LOCAL COMMUNITY, ACROSS LONDON OR ELSEWHERE?



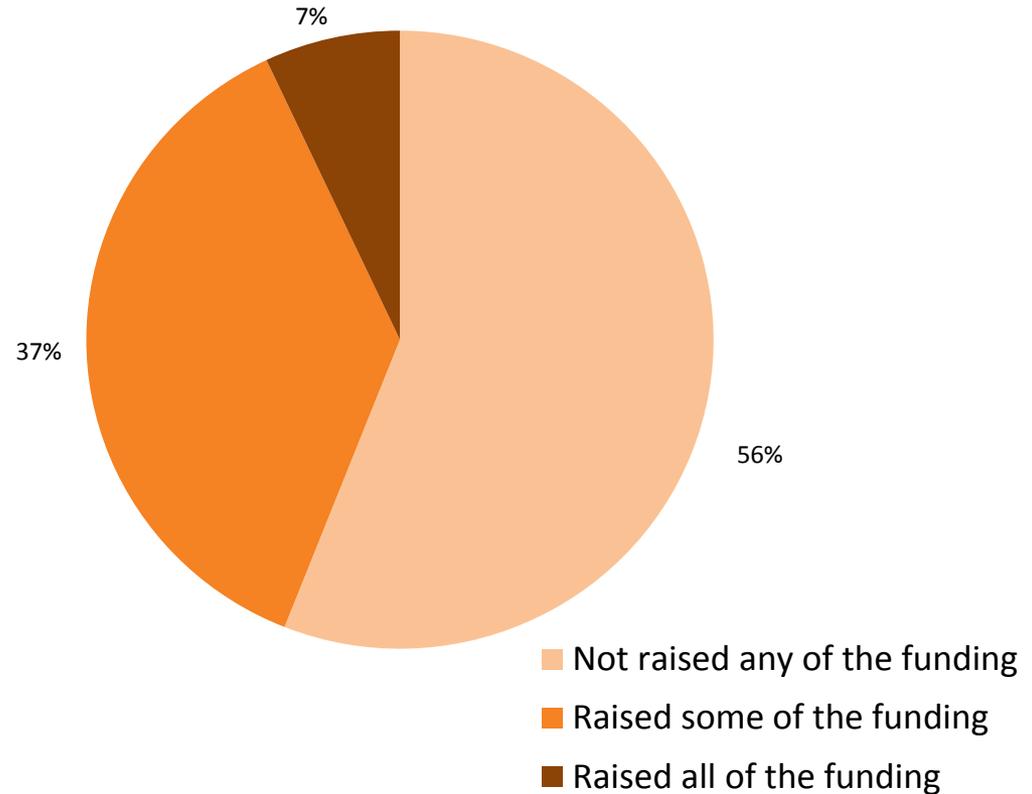
# State of theatre buildings

Many theatre buildings require significant upgrade or renovation. However very few theatres have been able to raise sufficient to undertake the work.

### DOES THE THEATRE REQUIRE SIGNIFICANT UPGRADE OR RENOVATION?



### HAS THE THEATRE RAISED FUNDING FOR THE REQUIRED WORK?



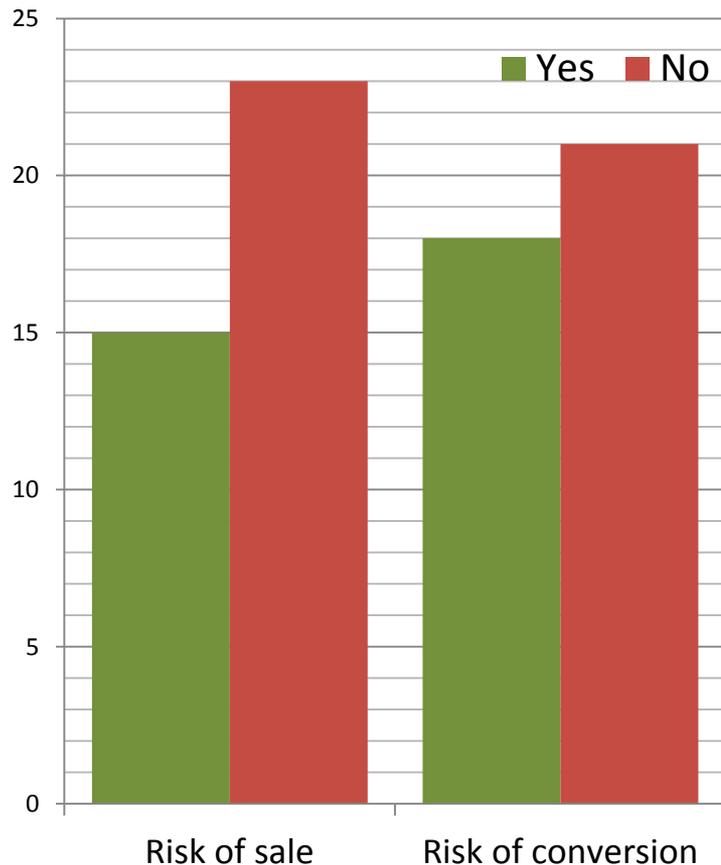
The most common types of renovation required are installing heating and air conditioning, insulation, new roofing, sound-proofing, better disabled access, lighting, upgrading toilets and auditorium seating, refurbishing exteriors, and adding studio or rehearsal space.

Only 5% of theatres requiring building work charge a restoration levy on ticket sales.

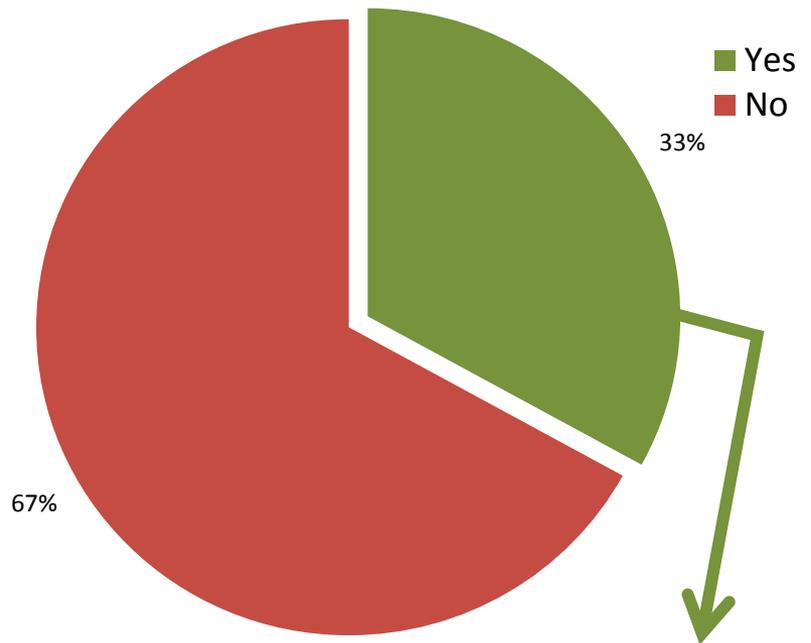
# Threats to theatre buildings

Over a third of theatres may be at risk of being sold and/or converted for other uses. However most theatres are unaware of new community assets legislation.

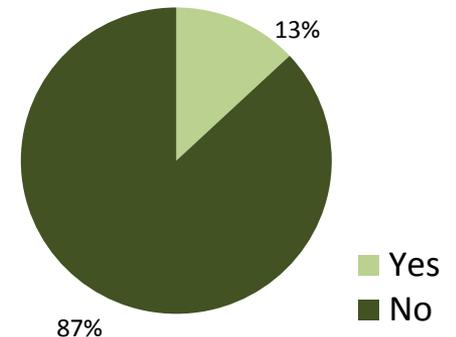
**IS THERE A RISK OF THE THEATRE BEING SOLD OR CONVERTED FOR ANOTHER USE?**  
(leaseholders only)



**ARE YOU AWARE OF NEW LEGISLATION PROTECTING 'COMMUNITY ASSETS'?**



**HAVE YOU DISCUSSED REGISTERING AS A COMMUNITY ASSET?**  
(if aware of legislation)

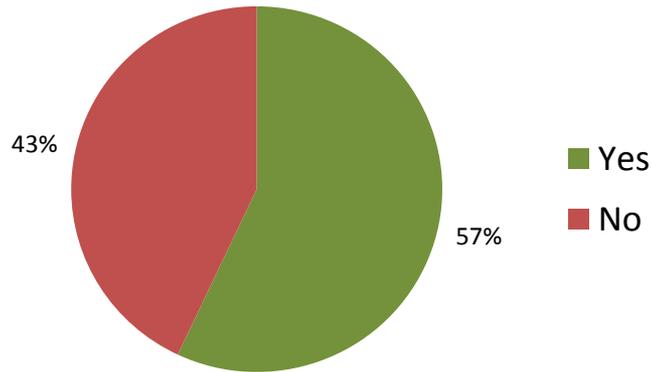


\*The [Localism Act 2011](#) requires local authorities to register assets of community value. Community groups have the right to bid for assets when they are sold.

# Shows and rehearsals

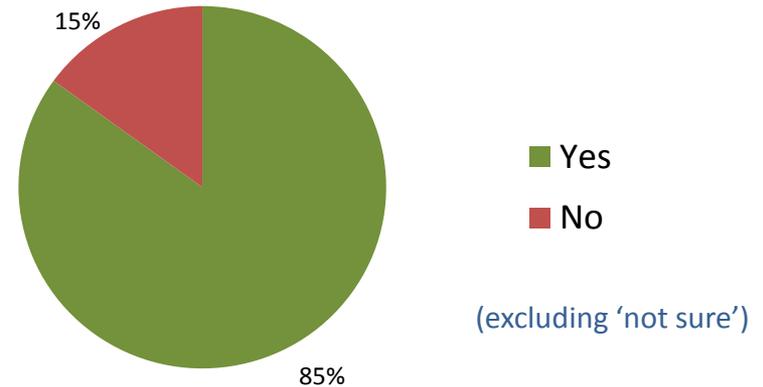
Small theatres often transfer shows to larger venues. Most would like to increase the number of shows they stage.

WOULD YOU LIKE TO INCREASE THE NUMBER OF SHOWS THE THEATRE STAGES?

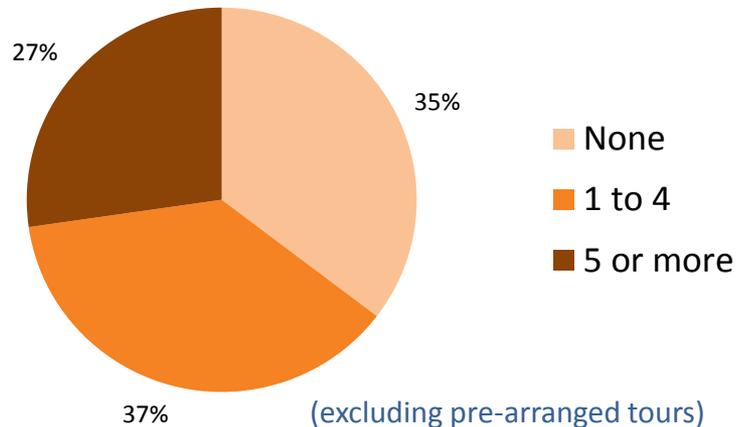


Rehearsal space is a problem for many small theatre productions, with difficulties finding affordable space.

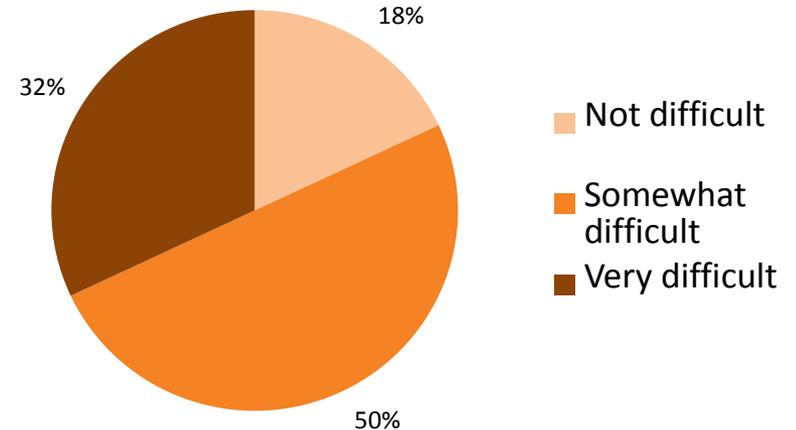
IS LACK OF REHEARSAL SPACE A PROBLEM FOR YOUR THEATRE?



HOW MANY SHOWS HAVE TRANSFERRED TO A LARGE VENUE IN PAST FIVE YEARS?



HOW DIFFICULT IS IT TO FIND AFFORDABLE REHEARSAL SPACE ELSEWHERE? (if attempted)



# Audience views: Awareness

**“They are swamped out of the media by big West End shows and big celebrities. Smaller theatre, smaller shows, local and amateur groups can't compete with the huge marketing budgets, but their shows are far more diverse, better quality sometimes and are an important part of the cultural diversity of the city.”**

**“I like to support local theatres, and am always interested to see what is new, but I know for most of my friends they are not aware of the theatres let alone what is on. I think there is a big job that needs to be done with making people aware of their local theatre and what it has to offer.”**

**“Many local residents remain unaware of theatre's on their doorstep and the quality of work being produced. These theatres need help to market their shows to local audiences and beyond.”**

**“It would be FANTASTIC if there was a central clearinghouse of information so I didn't have to subscribe to email lists of a million different small theatres.”**

**“It is rather down to luck, happenstance and serendipity if one becomes aware of a production before the run ends. So a single point of reference for listings (in advance of the commencement of a run) would be very helpful, as would more cooperation/support of other theatres in the same area so they advertise/promote each other's productions.”**

# Audience views: Facilities

More comfortable seating is the main thing. I've seen many a great show in small fringe theatres, but the enjoyment has quite often been dampened a bit by uncomfortable seating. A numb bum can pull your focus and concentration away from the shows.

I think generally my experiences have been good. Heating is sometimes an issue & uncomfortable seating, some fringe venues could be more comfortable. But they are usually very welcoming and I enjoy the intimate atmosphere.

I have stopped going to at least one of my local-ish theatres due to its grotty state / lack of fully working facilities. I don't expect anything shiny, but the place needs to be in basic repair.

If theatres had a bit of money invested in them, they could refurbish and redecorate to make them a much nicer environment outside of the theatre auditorium. This would draw people to visit them to hang out in the bar or something, and then they might see the show on a whim because they're there already.

Often the age of a venue can make it very tricky to sit in a seat for a long time. I know that if I was taking my gran access and actual seating is often a problem- as well as ventilation and heating, access, and availability of facilities such as toilets.

# Audience views: Visitor experience

Often I'm working at the same time shows are on which is a shame. I think a big part of the reason people don't attend is the convenience - its not like cinema where you can just turn up at any time and something will be on. I love seeing work live but I think that probably stops a lot of people attending. It can be difficult to make the start times on time if you have to get there from work.

Going to a small theatre, and sharing an experience with a limited audience, you feel like you're in a cosy, arty little club. And whatever a theatre can do to extend that experience will be to the good - somewhere to sit before or after the show, a community to be part of.

Many a performance I have attended has been spoilt for the audience by loud or live music from the bar, inadequate staffing at the bar, especially during intervals, and by a general attitude from bar staff that you are a nuisance for using their pub to go to the theatre.

Many small theatres have unreserved seating. I'd much prefer reserved seating and then we might stay for another drink in the bar rather than start queuing far to early to bag a good seat.

As an actress, I want to support small and local theatres as much as possible but the ticket prices are often so high that it's just not possible. More 'Pay What You Can' nights or ticket promotions would certainly help encourage me to visit smaller theatres more.