

UK Theatre and SOLT's Exiting the EU Impact Survey - Survey 4 Results (Collated July 2019)

Profile

- We will be repeating this survey every six months for five years
- The first two surveys were sent to the same 27 organisations each time - the last two surveys were distributed to UK Theatre / SOLT members
- 20 and 21 organisations completed the first and second surveys with results collated in November 2017 and July 2018 respectively. 80 organisations completed the third survey, collated in December 2018. (at least 1 in each country: 1 Wales; 1 NI; 1 Scotland; the rest - England)
- 40 organisations completed this latest survey. There were no respondents from Wales or the East Midlands, North East and South East regions
- They are made up of producers of international touring and venues (incl. producing houses, receiving houses/presenting houses)
- Annual turnovers range from £25,000 to over £100m
- These are from across the commercial and subsidised sectors from the West End, Greater London and the rest of UK

Workforce

EEA (non-UK) migrants in current workforce	Responses		Employees		Employees		Employees	
	UK		West End		Greater London			
					Responses	No.	Responses	No.
0	5	27.8%	0	0.0%	1	0	1	0
1-4	6	33.3%	17	4.7%	2	7	2	5
5-9	3	16.7%	16	4.4%	0	0	2	11
10-24	2	11.1%	30	8.3%	1	19	0	0
25-49	1	5.6%	43	11.8%	0	0	0	0
50-99	0	0.0%	0	0.0%	0	0	0	0
100-199	0	0.0%	0	0.0%	0	0	0	0
200-299	1	5.6%	257	70.8%	1	257	0	0
Don't know	0	0.0%	0	0.0%	0	0	0	0
Total	18	100.0%	363	100.0%	5	283	5	16

Average - 20

Average - 57

Average - 3

Workforce Changes

UK

Workforce Changes - past 6 months										
	Increased		Remained constant		Decreased		N/a		Total	
UK	27.8%	5	66.7%	12	0.0%	0	5.6%	1	100.0%	18
EEA (non-UK)	27.8%	5	50.0%	9	0.0%	0	22.2%	4	100.0%	18
International	16.7%	3	44.4%	8	5.6%	1	33.3%	6	100.0%	18

West End

Workforce Changes - past 6 months										
	Increased		Remained constant		Decreased		N/a		Total	
UK	20.0%	1	80.0%	4	0.0%	0	0.0%	0	100.0%	5
EEA (non-UK)	20.0%	1	60.0%	3	0.0%	0	20.0%	1	100.0%	5
International	0.0%	0	60.0%	3	0.0%	0	40.0%	2	100.0%	5

Greater London

Workforce Changes - past 6 months										
	Increased		Remained constant		Decreased		N/a		Total	
UK	20.0%	1	80.0%	4	0.0%	0	0.0%	0	100.0%	5
EEA (non-UK)	40.0%	2	60.0%	3	0.0%	0	0.0%	0	100.0%	5
International	20.0%	1	40.0%	2	20.0%	1	20.0%	1	100.0%	5

Expected Workforce Changes

UK

Expected Workforce Changes - next 12 months								
	Increase		Remain constant		Decrease		Total	
UK	23.5%	4	76.5%	13	0.0%	0	100.0%	17
EEA (non-UK)	11.8%	2	76.5%	13	11.8%	2	100.0%	17
International	11.8%	2	88.2%	15	0.0%	0	100.0%	17

West End

Expected Workforce Changes - next 12 months								
	Increase		Remain constant		Decrease		Total	
UK	40.0%	2	60.0%	3	0.0%	0	100.0%	5
EEA (non-UK)	20.0%	1	80.0%	4	0.0%	0	100.0%	5
International	20.0%	1	80.0%	4	0.0%	0	100.0%	5

Greater London

Expected Workforce Changes - next 12 months								
	Increase		Remain constant		Decrease		Total	
UK	20.0%	1	80.0%	4	0.0%	0	100.0%	5
EEA (non-UK)	20.0%	1	60.0%	3	20.0%	1	100.0%	5
International	20.0%	1	80.0%	4	0.0%	0	100.0%	5

Recruitment

Attempted to recruit staff over the past 6 months	Responses – UK		West End		Greater London	
Yes	83.3%	15	60.0%	3	100.0%	5
No	16.7%	3	40.0%	2	0.0%	0
Total	100.0%	18	100.0%	5	100.0%	5

Difficulties finding suitable staff for artistic roles	Responses - UK		West End		Greater London	
Yes	35.7%	5	0.0%	0	40.0%	2
No	64.3%	9	100.0%	2	60.0%	3
Total	100.0%	14	100.0%	2	100.0%	5

Difficulties finding suitable staff for non-artistic roles	Responses – UK		West End		Greater London	
Yes	60.0%	9	33.3%	1	60.0%	3
No	40.0%	6	66.7%	2	40.0%	2
Total	100.0%	15	100.0%	3	100.0%	5

Difficulties recruiting attributed to the proposed changes to immigration linked to leaving the EU	Responses - UK		West End		Greater London	
Yes	13.3%	2	0.0%	0	20.0%	1
No	53.3%	8	33.3%	1	60.0%	3
N/a	33.3%	5	66.7%	2	20.0%	1
Total	100.0%	15	100.0%	3	100.0%	5

Specific roles with difficulties:

- Catering - high turnover of staff and difficult to recruit into certain roles

EEA (non-UK) Recruitment

Organisations recruiting EEA (non-UK) staff in the past 6 months	Responses - UK		West End		Greater London	
Yes	46.7%	7	100.0%	3	40.0%	2
No	53.3%	8	0.0%	0	60.0%	3
Total	100.0%	15	100.0%	3	100.0%	5

How many EEA (non-UK) staff recruited in the past 6 months	Responses – UK		West End		Greater London	
Artistic roles	29	34.1%	21	29.2%	2	28.6%
Non-artistic roles	56	65.9%	51	70.8%	5	71.4%
Total	85	100.0%	72	100.0%	7	100.0%

Non-EEA Recruitment

Organisations recruiting non-EEA staff in the past 6 months	Responses – UK		West End		Greater London	
Yes	40.0%	6	100.0%	3	40.0%	2
No	60.0%	9	0.0%	0	60.0%	3
Total	100.0%	15	100.0%	3	100.0%	5

Non-EEA Recruitment -Tier 5 (Temporary Worker: creative and sporting)

Tier 5 Certificates of Sponsorship (excluding extensions) issued	Responses - UK		West End		Greater London	
Artistic roles	130	91.5%	24	96.0%	101	90.2%
Non-artistic roles	12	8.5%	1	4.0%	11	9.8%
Total	142	100.0%	25	100.0%	112	100.0%

Non-EEA Recruitment - Tier 2 (General)

No. Tier 2 Certificates of Sponsorship (excluding extensions) issued	Responses - UK		West End		Greater London	
Artistic roles	0	0.0%	0	0.0%	0	0.0%
Non-artistic roles	46	100.0%	46	100.0%	0	0.0%
Total	46	100.0%	46	100.0%	0	100.0%

No. Tier 2 Certificates of Sponsorship (excluding extensions) refused	Responses	
Artistic roles	0	0.0%
Non-artistic roles	0	0.0%
Total	0	100.0%

Non-EEA Recruitment - Tier 1 (Exceptional Talent)

No. individuals recruited with a Tier 1 visa	Responses - UK		West End		Greater London	
Artistic roles	8	100.0%	0	0.0%	1	50.0%
Non-artistic roles	0	0.0%	0	0.0%	1	50.0%
Total	8	100.0%	0	100.0%	2	100.0%

Non-EEA Recruitment - PPE (Permitted Paid Engagement) visitor route

No. staff recruited through the PPE route	Responses - UK		West End		Greater London	
Artistic roles	6	100.0%	3	50.0%	6	100.0%
Non-artistic roles	0	0.0%	3	50.0%	0	0.0%
Total	6	100.0%	6	100.0%	6	100.0%

No. visa applications refused in the past 6 months	Responses - UK		West End		Greater London	
Tier 5 (Creative and Sporting)	0	0.0%	0	0.0%	0	0.0%
Tier 2 (General)	0	0.0%	0	0.0%	0	0.0%
Tier 1	0	0.0%	0	0.0%	0	0.0%
PPE	0	0.0%	0	0.0%	0	0.0%
Other	0	0.0%	0	0.0%	0	0.0%
N/A	0	0.0%	0	0.0%	0	0.0%
Total	0	100.0%	0	100.0%	0	100.0%

No. visa extension applications refused in the past 6 months	Responses - UK		West End		Greater London	
Tier 5 (Creative and Sporting)	0	0.0%	0	0.0%	0	0.0%
Tier 2 (General)	0	0.0%	0	0.0%	0	0.0%
Total	0	100.0%	0	100.0%	0	100.0%

No. individuals having an extension application refused	Responses - UK	
Tier 5	0	0.0%
Tier 2 (General)	0	0.0%
Total	0	100.0%

Non-EEA Recruitment - Settlement (Indefinite Leave to Remain)

No. settlement applications ...	Responses - UK		West End		Greater London	
Refused	0	0.0%	0	0.0%	0	0.0%
Total	0	100.0%	0	100.0%	0	100.0%

Partnership Working

UK

Over the past 6 months ...								
	Increased		Remained constant		Decreased		Total	
Has your collaborative work with domestic partners ...	28.6%	6	66.7%	14	4.8%	1	100.0%	21
Has your collaborative work with EU partners ...	25.0%	5	70.0%	14	5.0%	1	100.0%	20
Has your collaborative work with international partners (non-EU)	30.0%	6	70.0%	14	0.0%	0	100.0%	20
...								

West End

Over the past 6 months ...								
	Increased		Remained constant		Decreased		Total	
Has your collaborative work with domestic partners ...	16.7%	1	83.3%	5	0.0%	0	100.0%	6
Has your collaborative work with EU partners ...	33.3%	2	66.7%	4	0.0%	0	100.0%	6
Has your collaborative work with international partners (non-EU)	50.0%	3	50.0%	3	0.0%	0	100.0%	6
...								

Greater London

Over the past 6 months ...								
	Increased		Remained constant		Decreased		Total	
Has your collaborative work with domestic partners ...	20.0%	1	80.0%	4	0.0%	0	100.0%	5
Has your collaborative work with EU partners ...	20.0%	1	80.0%	4	0.0%	0	100.0%	5
Has your collaborative work with international partners (non-EU)	20.0%	1	80.0%	4	0.0%	0	100.0%	5
...								

UK

Over the next 12 months ...								
	Increase		Remain constant		Decrease		Total	
Do you expect your collaborative work with domestic partners to ...	23.8%	5	76.2%	16	0.0%	0	100.0%	21
Do you expect your collaborative work with EU partners to ...	25.0%	5	55.0%	11	20.0%	4	100.0%	20
Do you expect your collaborative work with international partners (non-EU) to...	45.0%	9	45.0%	9	10.0%	2	100.0%	20

West End

Over the next 12 months ...								
	Increase		Remain constant		Decrease		Total	
Do you expect your collaborative work with domestic partners to ...	16.7%	1	83.3%	5	0.0%	0	100.0%	6
Do you expect your collaborative work with EU partners to ...	33.3%	2	66.7%	4	0.0%	0	100.0%	6
Do you expect your collaborative work with international partners (non-EU) to...	50.0%	3	50.0%	3	0.0%	0	100.0%	6

Greater London

Over the next 12 months ...								
	Increase		Remain constant		Decrease		Total	
Do you expect your collaborative work with domestic partners to ...	0.0%	0	100.0%	5	0.0%	0	100.0%	5
Do you expect your collaborative work with EU partners to ...	40.0%	2	40.0%	2	20.0%	1	100.0%	5
Do you expect your collaborative work with international partners (non-EU) to...	60.0%	3	40.0%	2	0.0%	0	100.0%	5

Costs

Over the next 6 months do you expect your operating costs to ...								
	Increase		Remain constant		Decrease		Total	
UK	60.0%	12	35.0%	7	5.0%	1	100.0%	20
West End	60.0%	3	40.0%	2	0.0%	0	100.0%	5
Greater London	60.0%	3	40.0%	2	0.0%	0	100.0%	5

Directly as a result of exiting the EU, is your business currently under pressure to raise prices as a result of the increased cost of the following:	Responses - UK		West End		Greater London	
Production costs	45.5%	5	40.0%	2	50.0%	1
Staffing costs	45.5%	5	40.0%	2	50.0%	1
Overhead costs	45.5%	5	40.0%	2	50.0%	1
Touring	54.6%	6	60.0%	3	100.0%	2

Selected quotes:

- Food and beverage

Over the past 6 months, for your business, has the time, effort and ease associated with importing and/or exporting work ...	Responses - UK		West End		Greater London	
Increased	11.1%	2	0.0%	0	40.0%	2
Remained constant	38.9%	7	60.0%	3	20.0%	1
Decreased	0.0%	0	0.0%	0	0.0%	0
N/A	50.0%	9	40.0%	2	40.0%	2
Total	100.0%	18	100.0%	5	100.0%	5

Business Concerns

Factors that are more of a concern due to changes in relationships and roles with the EU than 6 months ago	Responses - UK	West End	Greater London
Movement of people	64.7%	11	60.0%
Exchange rates	52.9%	9	100.0%
Inflation	35.3%	6	40.0%
Movement of equipment and materials	35.3%	6	60.0%
Ease of inward trade	29.4%	5	20.0%
Ease of outward trade	29.4%	5	20.0%
Movement of ideas	23.5%	4	20.0%
Intellectual Property (IP)	17.7%	3	20.0%
Digital dissemination	17.7%	3	20.0%

Quotes from two respondents:

- Climate Levy
- Collapse of Consumer Confidence creating a downward spiral of both sales and philanthropy.

To what extent do you agree or disagree with the following statement:														
"A 'no deal Brexit' will create high-risk cashflow problems for our / my business/organisation?"														
	Strongly agree		Agree		Neither agree nor disagree		Disagree		Strongly disagree		Don't know		Total	
UK	25.0%	4	25.0%	4	25.0%	4	6.3%	1	6.3%	1	12.5%	2	100.0%	16
West End	20.0%	1	20.0%	1	20.0%	1	20.0%	1	0.0%	0	20.0%	1	100.0%	5
Greater London	60.0%	3	20.0%	1	20.0%	1	0.0%	0	0.0%	0	0.0%	0	100.0%	5

To what extent do you agree or disagree with the following statement:														
"A 'no deal Brexit' will threaten my / our business model for 2019-20"														
	Strongly agree		Agree		Neither agree nor disagree		Disagree		Strongly disagree		Don't know		Total	
UK	35.3%	6	23.5%	4	23.5%	4	0.0%	0	11.8%	2	5.9%	1	100.0%	17
West End	40.0%	2	20.0%	1	20.0%	1	0.0%	0	0.0%	0	20.0%	1	100.0%	5
Greater London	60.0%	3	0.0%	0	40.0%	2	0.0%	0	0.0%	0	0.0%	0	100.0%	5

Decreasing sources of funding:

- Some significant philanthropists have left or are leaving the country
- Much more competition on trusts and foundations
- Less available via the LEP
- Local government funding

Emerging sources of funding:

- Co-productions internationally
- Production rentals internationally
- Private investment
- They exist only in my dreams!

Contingency Planning

Have you begun to contingency plan for any post-Brexit scenarios?	Responses - UK		West End		Greater London	
Yes	17.7%	3	40.0%	2	20.0%	1
No	82.4%	14	60.0%	3	80.0%	4
Total	100.0%	17	100.0%	5	100.0%	5

Quotes on contingency planning:

- Legal, financial & recruitment implications
- Preparing contingency plans for catastrophic collapse in income from all sources
- Theatrical adaptations with reduced cast numbers, touring staff quantities

UK

Over the next 12 months, do you believe ...	Increase		Remain the same		Decrease		N/a	Total		
Levels of national government funding available will ...	0.0%	0	11.8%	2	70.6%	12	17.7%	3	100.0%	17
Levels of European funding available will ...	0.0%	0	0.0%	0	76.5%	13	23.5%	4	100.0%	17
Levels of international funding available will ...	0.0%	0	29.4%	5	41.2%	7	29.4%	5	100.0%	17

West End

Over the next 12 months, do you believe ...	Increase		Remain the same		Decrease		N/a	Total		
Levels of national government funding available will ...	0.0%	0	0.0%	0	40.0%	2	60.0%	3	100.0%	5
Levels of European funding available will ...	0.0%	0	0.0%	0	40.0%	2	60.0%	3	100.0%	5
Levels of international funding available will ...	0.0%	0	20.0%	1	20.0%	1	60.0%	3	100.0%	5

Greater London

Over the next 12 months, do you believe ...	Increase		Remain the same		Decrease		N/a	Total		
Levels of national government funding available will ...	0.0%	0	20.0%	1	80.0%	4	0.0%	0	100.0%	5
Levels of European funding available will ...	0.0%	0	0.0%	0	100.0%	5	0.0%	0	100.0%	5
Levels of international funding available will ...	0.0%	0	40.0%	2	60.0%	3	0.0%	0	100.0%	5

Investment

UK

Over the next 12 months, do you believe ...	Increase		Remain constant		Decrease		N/A		Total	
Income from donations from charities, trusts and foundations will ...	5.9%	1	35.3%	6	35.3%	6	23.5%	4	100.0%	17
Levels of Higher Education partnership investment/support will ...	5.9%	1	35.3%	6	35.3%	6	23.5%	4	100.0%	17
Support from private and corporate sources will ...	5.9%	1	35.3%	6	47.1%	8	11.8%	2	100.0%	17

West End

Over the next 12 months, do you believe ...	Increase		Remain constant		Decrease		N/A		Total	
Income from donations from charities, trusts and foundations will ...	0.0%	0	20.0%	1	20.0%	1	60.0%	3	100.0%	5
Levels of Higher Education partnership investment/support will ...	20.0%	1	0.0%	0	20.0%	1	60.0%	3	100.0%	5
Support from private and corporate sources will ...	0.0%	0	40.0%	2	20.0%	1	40.0%	2	100.0%	5

Greater London

Over the next 12 months, do you believe ...	Increase		Remain constant		Decrease		N/A		Total	
Income from donations from charities, trusts and foundations will ...	0.0%	0	20.0%	1	60.0%	3	20.0%	1	100.0%	5
Levels of Higher Education partnership investment/support will ...	0.0%	0	40.0%	2	40.0%	2	20.0%	1	100.0%	5
Support from private and corporate sources will ...	20.0%	1	20.0%	1	60.0%	3	0.0%	0	100.0%	5

UK

Over the next 12 months, do you believe ...	Increase		Remain the same		Decrease		N/A		Total	
Levels of funding from arts organisations/funders in EU countries will ...	0.0%	0	11.8%	2	58.8%	10	29.4%	5	100.0%	17
Levels of funding from Arts Council England will ...	0.0%	0	23.5%	4	58.8%	10	17.7%	3	100.0%	17
Levels of funding from Creative Scotland will ...	0.0%	0	17.7%	3	23.5%	4	58.8%	10	100.0%	17
Levels of funding from Arts Council of Wales will ...	0.0%	0	5.9%	1	29.4%	5	64.7%	11	100.0%	17
Levels of funding from Arts Council of Northern Ireland will ...	0.0%	0	11.8%	2	29.4%	5	58.8%	10	100.0%	17

Touring

UK

Over the last 6 months has the interest in your business from	Increased		Remained constant		Decreased		N/A		Total	
EU organisations touring to the UK ...	0.0%	0	29.4%	5	17.7%	3	52.9%	9	100.0%	17
International organisations touring to the UK ...	5.9%	1	35.3%	6	11.8%	2	47.1%	8	100.0%	17

West End

Over the last 6 months has the interest in your business from	Increased		Remained constant		Decreased		N/A		Total	
EU organisations touring to the UK ...	0.0%	0	40.0%	2	0.0%	0	60.0%	3	100.0%	5
International organisations touring to the UK ...	20.0%	1	20.0%	1	0.0%	0	60.0%	3	100.0%	5

Greater London

Over the last 6 months has the interest in your business from	Increased		Remained constant		Decreased		N/A		Total	
EU organisations touring to the UK ...	0.0%	0	0.0%	0	60.0%	3	40.0%	2	100.0%	5
International organisations touring to the UK ...	0.0%	0	40.0%	2	40.0%	2	20.0%	1	100.0%	5

UK

Over the past 6 months has your business' interest / appetite to tour	Increased		Remained constant		Decreased		N/A		Total	
Domestic venues/festivals ...	23.5%	4	52.9%	9	0.0%	0	23.5%	4	100.0%	17
EU (non UK) venues/festivals ...	29.4%	5	17.7%	3	5.9%	1	47.1%	8	100.0%	17
International venues/festivals (non-EU) ...	29.4%	5	29.4%	5	0.0%	0	41.2%	7	100.0%	17

West End

Over the past 6 months has your business' interest / appetite to tour	Increased		Remained constant		Decreased		N/A		Total	
Domestic venues/festivals ...	40.0%	2	20.0%	1	0.0%	0	40.0%	2	100.0%	5
EU (non UK) venues/festivals ...	40.0%	2	20.0%	1	0.0%	0	40.0%	2	100.0%	5
International venues/festivals (non-EU) ...	40.0%	2	20.0%	1	0.0%	0	40.0%	2	100.0%	5

Greater London

Over the past 6 months has your business' interest / appetite to tour	Increased		Remained constant		Decreased		N/A		Total	
Domestic venues/festivals ...	20.0%	1	80.0%	4	0.0%	0	0.0%	0	100.0%	5
EU (non UK) venues/festivals ...	40.0%	2	20.0%	1	20.0%	1	20.0%	1	100.0%	5
International venues/festivals (non-EU) ...	60.0%	3	20.0%	1	0.0%	0	20.0%	1	100.0%	5

UK

Over the next 12 months do you expect the ...	Improve		Remain the same		Worsen		Total	
Ability to tour domestically to ...	12.5%	2	68.8%	11	18.8%	3	100.0%	16
Ability to tour in the EU to ...	0.0%	0	25.0%	4	75.0%	12	100.0%	16
Ability to tour internationally to ...	0.0%	0	56.3%	9	43.8%	7	100.0%	16

West End

Over the next 12 months do you expect the ...	Improve		Remain the same		Worsen		Total	
Ability to tour domestically to ...	0.0%	0	60.0%	3	40.0%	2	100.0%	5
Ability to tour in the EU to ...	0.0%	0	20.0%	1	80.0%	4	100.0%	5
Ability to tour internationally to ...	0.0%	0	40.0%	2	60.0%	3	100.0%	5

Greater London

Over the next 12 months do you expect the ...	Improve		Remain the same		Worsen		Total	
Ability to tour domestically to ...	40.0%	2	40.0%	2	20.0%	1	100.0%	5
Ability to tour in the EU to ...	0.0%	0	20.0%	1	80.0%	4	100.0%	5
Ability to tour internationally to ...	0.0%	0	40.0%	2	60.0%	3	100.0%	5

Calculating the cost of touring

UK

Have you started to calculate how much extra a tour might cost post-Brexit?	Responses - UK		West End		Greater London	
Yes	11.1%	2	20.0%	1	0.0%	0
No	88.9%	16	80.0%	4	100.0%	5
Total	100.0%	18	100.0%	5	100.0%	5

If yes, approximately how much extra?

- £52-56,000

Major issues that affect ability to tour

- Brexit! Including the additional cost of visas, the increase in administrative costs (in time and money), and the unknown tax repercussions for UK actors touring the EU
- Our major concern at this point is the potential for reduction in audiences due to financial uncertainty that will impact on us being able to balance our budget. At this stage it is too late to be able to reduce costs
- There may be some challenges relating to increased costs of touring, but we are not expecting to be majorly impacted.
- Money
- Internationally - exchange rate uncertainty
- Domestically - collapse in consumer confidence = reduced sales and less confidence in regional venues. Axing of last few grants from Local Authorities to receiving houses
- Physical production costs including transportation
- Exchange Rate
- Visas
- Work Permits
- Transport Restrictions
- Health and Safety Rules
- Insurance
- Potential Tax Cuts from European income

Making a Statement

UK

To what extent do you agree with the following statements?	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree		Total	
The UK is a collaborative participant in a vibrant European culture	0.0%	0	0.0%	0	18.8%	3	25.0%	4	56.3%	9	100.0%	16
Movement of talent in and out of the UK is “essential” for the performing arts	0.0%	0	6.3%	1	0.0%	0	18.8%	3	75.0%	12	100.0%	16
The Government’s approach to Brexit negotiations supports the theatre and performing arts sector	81.3%	13	6.3%	1	12.5%	2	0.0%	0	0.0%	0	100.0%	16
The UK is a global leader in culture	0.0%	0	6.3%	1	6.3%	1	18.8%	3	68.8%	11	100.0%	16
Theatre and performing arts in the UK play a role in developing community integration and cohesion	0.0%	0	0.0%	0	0.0%	0	37.5%	6	62.5%	10	100.0%	16
I am positive about the future of my business and its relevance to audiences	12.5%	2	0.0%	0	25.0%	4	31.3%	5	31.3%	5	100.0%	16

West End

To what extent do you agree with the following statements?	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree		Total	
The UK is a collaborative participant in a vibrant European culture	0.0%	0	0.0%	0	20.0%	1	20.0%	1	60.0%	3	100.0%	5
Movement of talent in and out of the UK is “essential” for the performing arts	0.0%	0	0.0%	0	0.0%	0	20.0%	1	80.0%	4	100.0%	5
The Government’s approach to Brexit negotiations supports the theatre and performing arts sector	40.0%	2	20.0%	1	40.0%	2	0.0%	0	0.0%	0	100.0%	5
The UK is a global leader in culture	0.0%	0	0.0%	0	20.0%	1	20.0%	1	60.0%	3	100.0%	5
Theatre and performing arts in the UK play a role in developing community integration and cohesion	0.0%	0	0.0%	0	0.0%	0	40.0%	2	60.0%	3	100.0%	5
I am positive about the future of my business and its relevance to audiences	0.0%	0	0.0%	0	40.0%	2	0.0%	0	60.0%	3	100.0%	5

Greater London

To what extent do you agree with the following statements?	Strongly disagree		Disagree		Neither agree nor disagree		Agree		Strongly agree		Total	
The UK is a collaborative participant in a vibrant European culture	0.0%	0	0.0%	0	25.0%	1	25.0%	1	50.0%	2	100.0%	4
Movement of talent in and out of the UK is “essential” for the performing arts	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	4	100.0%	4
The Government’s approach to Brexit negotiations supports the theatre and performing arts sector	100.0%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	4
The UK is a global leader in culture	0.0%	0	0.0%	0	0.0%	0	25.0%	1	75.0%	3	100.0%	4
Theatre and performing arts in the UK play a role in developing community integration and cohesion	0.0%	0	0.0%	0	0.0%	0	50.0%	2	50.0%	2	100.0%	4
I am positive about the future of my business and its relevance to audiences	25.0%	1	0.0%	0	0.0%	0	50.0%	2	25.0%	1	100.0%	4

Further comments on the impact of the UK’s exit from the EU

- Negative impact to all involved
- The lack of clarity and huge uncertainty have taken time away from discussing national issues
- We are particularly concerned about the impact of Brexit and especially a No Deal Brexit on our customers' livelihoods and ability to spend. Particularly in regions where we operate theatres, like the North East, where we have already seen negative impact on the local economy in Sunderland, at least partly as a consequence of Brexit (Nissan Plant part-closure).
- It will be catastrophic across the board.
- For us the direct impact is limited. Indeed, devaluation of the pound would make our overseas recruitment of students more competitive internationally. However, the medium term impact of leaving the EU might be a slowing of growth or even recession and this could impact on our domestic business which involves parents paying for some 'big ticket' items in the form of course fees for their children. So a general slowing down of the economy might affect us (as it would everyone else).

What is the most important issue for your business in the next 6 months?

- Stability
- Costs increasing and funding decreasing leading to a growing funding gap
- Sustaining our ambitious growth trajectory...
- Income generation
- Co² charges for vehicles on deliveries and coaches
- To be able to offer a wide range of engagement opportunities to individuals for EU touring productions which are financially attractive, safe and commercially viable to sustain across 9 months of touring.
- Funding
- General economic buoyancy