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## **The West End: The Theatre Capital of the World**

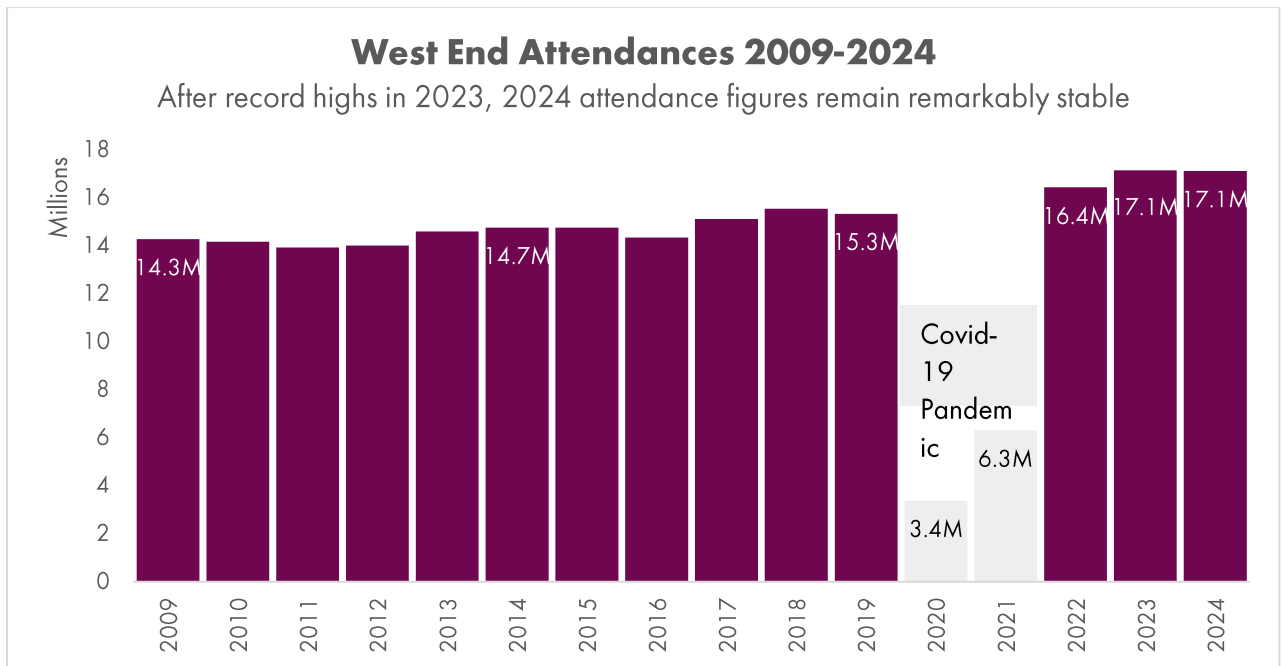
*"On any given night, the streets of the West End buzz with Londoners and visitors spilling out of theatres, animatedly exchanging their thoughts and reactions. Five years on from the pandemic, theatregoers have returned in record numbers, reaffirming the West End as the world's leading theatre destination."*

The UK is the world's leading destination for making and experiencing theatre, with London firmly established as the theatre capital of the world.

New box office figures from the Society of London Theatre for 2024 highlight the West End's extraordinary success:

- Over 17.1 million theatregoers attended performances.
- A total of 18,500 performances took place.
- Attendance has risen 11% above pre-pandemic levels.
- Nearly 5 million more people attended a West End show than a Broadway production.
- Nearly one in four international visitors to London saw a West End performance.

Following a record-breaking 2023, audience numbers have remained remarkably stable, proving that demand for live theatre is stronger than ever.



Theatre offers spectacle, raw emotion and shared experience like no other art form. At a time when many other players in the “experience” market are struggling, theatre stands apart:

- Cinema attendance has fallen by 28%.<sup>1</sup>
- Visitor attractions have seen an 8.8% decline.<sup>2</sup>
- The Premier League’s total attendance is 2.5 million lower than the West End’s, with growth of just 1%.<sup>3</sup>

The West End’s 11% growth in attendance since 2019 is unmatched in the experience economy.

This success extends beyond the theatres themselves. The West End is a vital driver of London’s economy:

- For every £1 spent on a West End theatre ticket, an additional £1.27 is spent in local businesses - hotels, restaurants, and shops.

Nationally, the theatre sector punches above its weight:

- Overall, the theatre ecosystem generates £2.39bn annually in GVA with a turnover of £4.44bn.<sup>4</sup>

<sup>1</sup> [Official BFI statistics for 2024 reveal £5.6 billion film and high-end television production spend in the UK | BFI](#)

<sup>2</sup> [ALVA | Association of Leading Visitor Attractions](#)

<sup>3</sup> [Premier League - Attendance figures | Transfermarkt](#)

<sup>4</sup> SOLT & UK Theatre, Economic Impact Assessment of UK Theatre Sector, 2023: [Economic-Impact-Assessment-of-UK-Theatre-Sector.pdf](#)

- The 230,000 full-time equivalent jobs it supports are highly skilled, with strong collective agreements ensuring generous terms and conditions across the industry.<sup>5</sup>

*"There is nothing quite like the experience of sitting in a theatre, surrounded by friends and strangers, collectively immersed in the ground-breaking, thought-provoking, exhilarating, and entertaining performances on offer in the West End and beyond. The numbers speak for themselves - despite a decade of rapidly expanding entertainment options, theatre remains as popular and vital as ever.*

*"This success is a testament to the creativity of our theatre makers and performers, the vision and bravery of producers who bring stories from page to stage, and the dedication of venue owners, managers, and staff who welcome audiences night after night. The higher rate of Theatre Tax Relief, introduced in 2021 and now made permanent, has been instrumental in the sector's swift recovery from the pandemic. It continues to empower theatre producers to expand productions, generate jobs, and attract investment from the UK and overseas.*

*"But we cannot take this for granted. Mounting world-class productions is becoming increasingly difficult, with rising costs outpacing inflation. SOLT & UK Theatre members are working harder than ever to ensure theatre remains both exceptional and accessible to as many people as possible.*

*"Just as every great production is a team effort, the future of our industry relies on collaboration - between theatre organisations, government, funders, and partners.*

*"Theatre has always been about imagination, resilience, and reinvention. Now, we must come together to protect and grow this vital art form - ensuring its magic continues to shine for generations to come."*

Claire Walker & Hannah Essex, Co-CEOs of Society of London Theatre & UK Theatre

## **How Do We Maintain and Sustain Our World-Leading Status?**

### **Challenges and Opportunities**

The West End remains a global beacon of theatrical excellence, but sustaining its success requires a collective effort. To ensure theatre continues to thrive, we must address key challenges while seizing opportunities for growth.

### **Costs and Funding**

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<sup>5</sup> [Economic Estimates: Employment in DCMS sectors, April 2023 to March 2024 - GOV.UK](#)

When the West End is thriving, it is an economic powerhouse with a heart - creating world-class theatre that is accessible to all, supporting the wider theatre ecosystem across the UK, and sharing British stories with the world. It has the power to make people laugh, cry, and experience moments they will never forget. Yet, this success is fragile.

Theatres are facing rising costs at a pace that outstrips the wider economy. Energy bills for some venues have surged by 120% compared to pre-pandemic levels, while production costs are escalating due to soaring raw material prices. Staffing costs, a major expenditure for any theatre or production company, are further impacted by rising employer National Insurance contributions.

Despite these pressures, SOLT & UK Theatre members have worked hard to shield audiences from rising costs - today, average ticket prices remain 5% lower in real terms than in 2019. However, this approach is becoming increasingly unsustainable. With many productions operating at capacity, financial pressures continue to mount, and upcoming tax changes are creating deep concern. These changes risk undermining the very incentives that make investing in the West End – and bold new work – so attractive.

Although the majority of West End productions operate without public funding, they do benefit from Theatre Tax Relief and depend on talent, creatives, and productions that originate from publicly funded theatres in London and beyond. Yet, since 2010, public funding has declined by up to 48% in real terms, leaving many organisations struggling with financial pressures, post-pandemic recovery, and urgent capital investment needs.

If we are to maintain and grow our world-leading status in theatre, we must invest in talent, creativity, and theatre infrastructure. The review of Arts Council England is a welcome step, and we hope it results in a long-term, strategic plan for public investment in the performing arts - one that ensures a strong pipeline of talent and stories to power our sector forward. Likewise, the devolved nations must adopt a strategic approach to funding that prioritises opportunity and access for all.

The upcoming Comprehensive Spending Review is a critical moment. The Government must recognise theatre not just as entertainment but as an economic powerhouse that fuels communities, businesses, and the wider creative industries.

### **Talent and Future Audiences**

Beyond financial challenges, the future of theatre depends on nurturing new talent and building diverse audiences. A key part of this is ensuring that young people - regardless of background - are exposed to theatre and aware of the many career opportunities within the industry.

The decline in arts and creative education over the past 15 years is deeply concerning. It is essential that the new Government follows through on its commitment to provide a creative education for every child, ensuring that theatre is an integral part of the curriculum.

To support this, SOLT & UK Theatre will pilot initiatives to guarantee that every child within selected areas has the chance to attend the theatre at least once before leaving school. Our ambition is to extend this opportunity to every child across the UK, helping to inspire the next generation of theatre audiences and professionals.

### **Infrastructure and Reputation**

Theatre is one of the key reasons both domestic and international visitors choose London. However, our sector thrives alongside the city's broader cultural and hospitality offering - including world-class museums, heritage institutions, visitor attractions, and a vibrant restaurant scene.

London's global reputation as a premier cultural destination depends on more than just the strength of its theatre industry. Factors such as cleanliness, transport connectivity, and security all play a role in making the city an attractive place to visit, live, and work.

We welcome commitments in the GLA's London Growth Plan to improving transport infrastructure and tackling crime and anti-social behaviour. SOLT will continue working with partners across the city to ensure a safe, welcoming, and thriving environment for both theatre audiences and industry professionals.

### **A Collective Effort**

At a time of great uncertainty, access to arts and culture is more vital than ever. By working together - as a sector, with Government, and with key partners - we can ensure that London remains the world's leading theatre capital: a place where creativity flourishes, talent is nurtured, and audiences continue to be captivated for generations to come.

### **About the Society of London Theatre & UK Theatre**

Society of London Theatre (SOLT) represents approximately 230 London-based producers, theatre owners and managers, including all the major subsidised theatrical organisations in London.

UK Theatre represents approximately 240 theatres, concert halls, dance companies, producers and arts centres throughout the UK. UK Theatre also operates as a professional association, supporting over 1,400 individuals working professionally in theatre and the performing arts in the UK