

A photograph of a person with voluminous, curly brown hair, seen from the back and side, sitting in a red theater seat. Their right arm is resting on the back of the seat in front of them. The background shows rows of similar red seats in a theater setting.

Raising the Curtain on Recovery

Tracking the recovery of the performing arts market
in the United Kingdom, 2018-24

Index

Executive Summary	2
Introduction	4
United Kingdom – entire cohort.....	5
The UK Cohort (all organisations)	6
The UK Large Presenting Cohort	12
The UK Large Producing Cohort.....	18
The UK Medium Presenting Cohort	24
The UK Medium Producing Cohort.....	30
The UK Concert Hall Cohort.....	36
The UK ‘Other’ Presenting Cohort.....	42
Methodology.....	48
Appendix 1: International Comparison	49
Appendix 2: COVID-19 Timeline UK.....	56

Executive Summary

This report assesses the state of different elements of the performing arts sector in the UK and make a comparison for the sector as a whole with data from the US, Canada, and the Republic of Ireland.

Capacity sold is often treated as a headline measure of success, and for good reason: it is a useful indicator of audience engagement. However, this metric alone does not give a full picture of sector health. High capacity can coincide with a reduced programme, lower ticket income, or a drop in the number of new or risk-taking productions.

This report takes a broader view, placing capacity sold alongside other key indicators - supply (number of performances), demand (tickets sold), and average ticket price achieved (as a proxy for yield and pricing dynamics). These three forces are interdependent, and sustainable recovery relies on maintaining a balance between them. Where they are out of sync - for example, strong occupancy but falling income - the sector may be vulnerable, even if surface indicators appear healthy.

By presenting these measures side by side, the aim is to support more nuanced interpretation and avoid reinforcing habits of relying on occupancy figures in isolation.

The overall picture in the UK is good with strong post-pandemic growth. However, the recovery of the performing arts sector has been uneven, with larger venues generally faring better than their smaller counterparts. Major presenting houses and concert halls have seen a stronger return in ticket sales and revenue, with some surpassing pre-pandemic levels. Smaller and mid-sized venues have faced a more difficult recovery.

Traffic Light System for Performance Indicators

This report uses a traffic light system in its bar charts to provide a clear and intuitive assessment of the performing arts sector's recovery. This approach categorises changes relative to pre-pandemic levels: green indicates growth of more than 5%, amber represents stability within a $\pm 5\%$ range, and red signals a decline of more than 5%.

This system allows for an at-a-glance understanding of where the sector is recovering, holding steady, or facing significant challenges.

The rationale behind this approach is to highlight trends without overcomplicating the data. A minor fluctuation within 5% of pre-pandemic levels suggests relative stability, while more substantial increases or declines warrant closer attention. This method ensures that areas of concern - such as declining ticket sales or reduced capacity - are immediately visible, while also recognising areas of strong recovery. It provides a balanced view of the sector's performance, helping stakeholders focus on where intervention or strategic adjustments may be most needed.



About TRG Arts

TRG Arts partners with arts and cultural organisations worldwide to grow revenue, build resilience, and deepen audience loyalty. With over 30 years of experience, they provide expert consultancy and data tools that optimise revenue and pricing strategies, strengthen teams, and embed audience loyalty best practices. Their data-driven frameworks fuel long-term financial success; supporting innovation, sustainability, and the communities these organisations serve.

Visit trgarts.com

DATA CULTURE CHANGE

About Data Culture Change

Data Culture Change (DCC) helps cultural organisations, practitioners, funders, and policymakers harness the power of data for a more resilient, inclusive and representative arts sector. Recognising that access to cultural opportunities is currently unequal, DCC believes that effective data use is a key tool to support meaningful change. By turning data into actionable insights, DCC supports organisations in becoming more reflective of the communities they serve.

Visit dataculturechange.com

Introduction

The performing arts sector operates at the intersection of three interdependent forces: **supply** (the number of performances), **demand** (ticket sales), and **price sensitivity** (as reflected in the average ticket price achieved). A healthy, sustainable sector requires a balance across all three. If supply is too low, there is insufficient product to meet demand. If demand is weak, revenue generation suffers, making programming riskier. If prices are set too cautiously, organisations fail to maximise earned income, limiting their ability to reinvest in artistic work.

This report uses a simple but effective model to assess the health of the performing arts across in the UK and compare it with aggregate data from the US, Canada, and Ireland. It tracks the recovery of the sector post-COVID, comparing key performance indicators for 2023 and 2024 against pre-pandemic benchmarks.

Data has been provided by 367 organisations (177 in the UK) that securely share their transactional box office with TRG Arts. Only organisations that have sold tickets during all seven years of the study period (2018 - 2024) have been included in the analysis. During this pandemic-impacted period, the participating organisations collectively sold more than 574 million tickets.

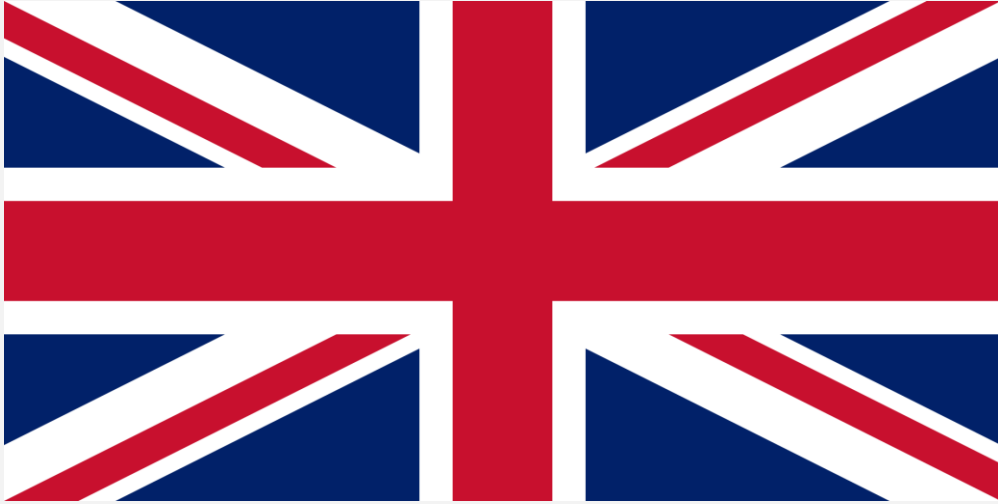
For the UK, the findings highlight both the successful recovery and encouraging growth of larger venues in the sector and the significant challenges being felt by mid- and smaller-scale venues in towns and small cities.

By evaluating these trends through the lens of supply, demand, and price sensitivity, this report provides a clearer picture of the sector's recovery and the challenges that remain. Crucially, it also raises questions about pricing strategy - historically, venues and producers have often undervalued their product based on perceptions rather than data.

Evidence from other analysis conducted by TRG Arts and Data Culture Change suggests that despite the cost-of-living crisis, price sensitivity is only being demonstrated by a small proportion of performing arts bookers. While performing arts organisations should ensure they offer a proportion of their inventory at truly affordable prices, an over-cautious approach to ticket pricing may be inhibiting recovery rather than aiding it.

Understanding these dynamics is essential for policymakers, funders, and arts organisations seeking to rebuild a sector that is not just operational but financially resilient and artistically ambitious.

This report has been produced by TRG Arts in partnership with Data Culture Change.



United Kingdom
Entire Cohort

The UK Cohort (all organisations)

- 177 organisations
- Ticket sales in 2024 ranged from under 1,000 to over 650,000.
- Box office revenue ranged from less than £5,000 to over £25,000,000.
- Average ticket price paid ranged from under £5 to over £40

This cohort represents a broad and diverse range of performing arts organisations across the UK, spanning theatre, music, dance, cinema, and multidisciplinary arts centres. It includes both large, nationally recognised institutions and smaller regional venues that play a vital role in their local communities.

Theatre is strongly represented, with a mix of producing houses, touring venues, and repertory companies, covering everything from classical productions to contemporary and experimental work. Several organisations focus on children’s and family theatre, while others are dedicated to new writing and artist development.

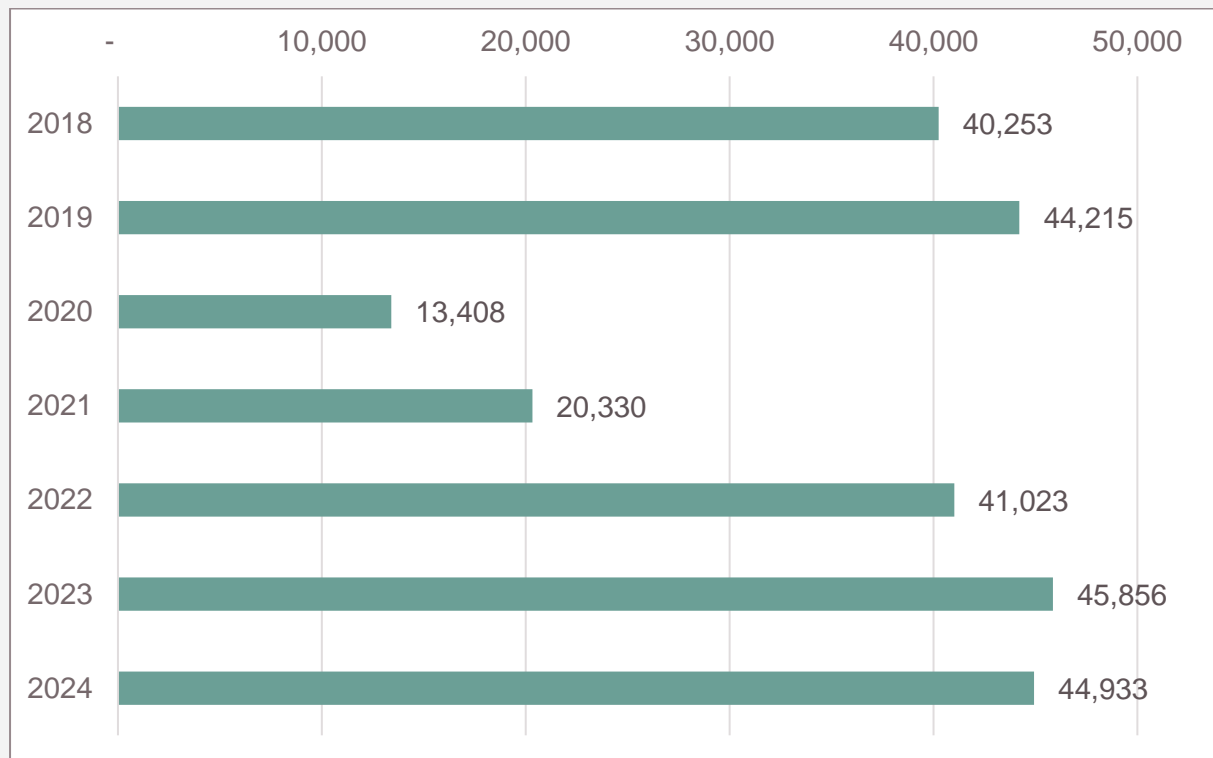
The group also includes concert halls, orchestras, and music venues, reflecting a strong presence of classical, choral, and contemporary music organisations. Dance is another key discipline, with dedicated dance venues and centres for choreography and movement-based performance.

Some organisations operate as arts centres or festivals, offering a wide range of programming beyond live performance, including cinema, visual arts, and community engagement activities.

Chart 1.0: UK Key metrics compared to pre-COVID baseline (2018-19 average)

UK - Summary	2023	2024
Performances	109%	106%
Ticket Sales	101%	104%
Capacity Sold	101%	106%
Ticket Revenue	102%	101%
Average ticket price paid	101%	97%

Chart 1.1: Number of performances in the UK



The number of performances across this cohort of UK arts organisations illustrates a significant pandemic-driven decline, followed by a strong but slightly uneven recovery.

Between 2018 and 2019, performance numbers increased from 40,253 to 44,215.

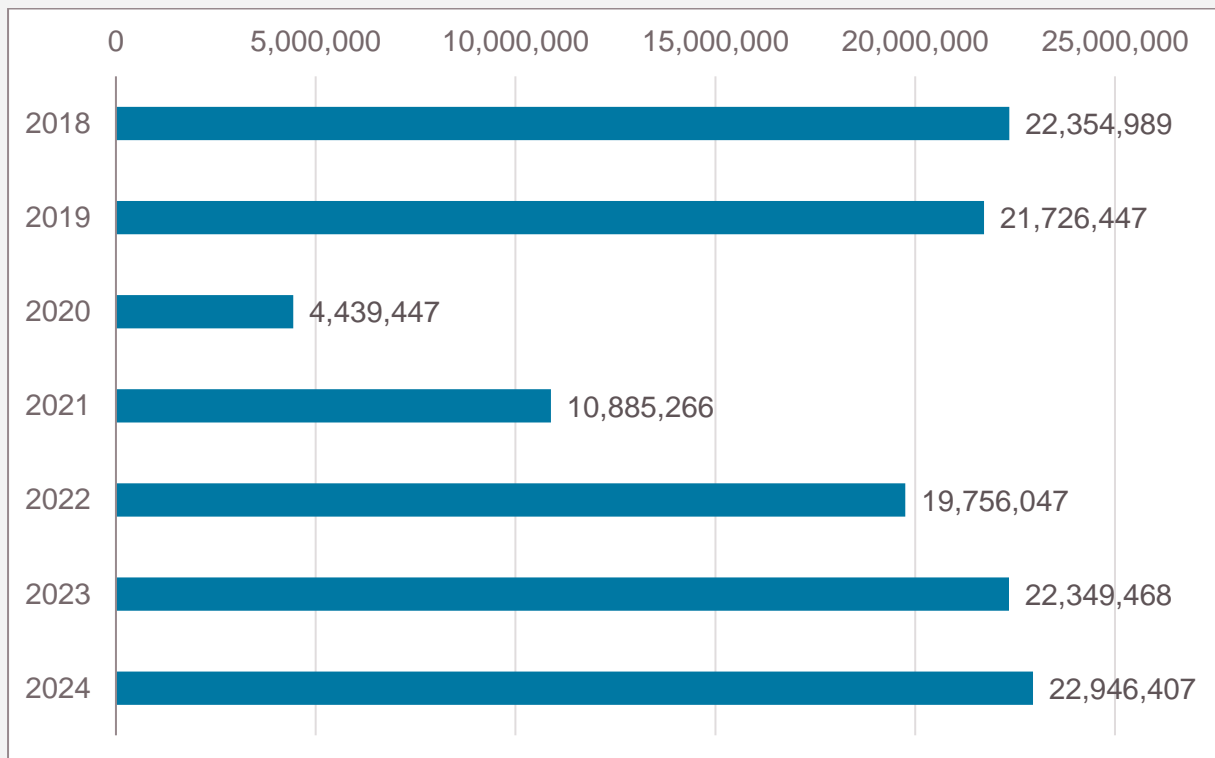
In 2020, performances dropped sharply to 13,408, reflecting the impact of widespread cancellations and venue closures due to COVID-19 restrictions. While 2021 saw an increase to 20,330 performances, this was still less than half of 2019 levels, due to venues operating at reduced capacity and/or with limited programming.

A major rebound occurred in 2022, with performances rising to 41,023, bringing the sector close to pre-pandemic levels. This upward trend continued into 2023, reaching 45,856 performances, surpassing 2019 figures.

In 2024, performances dipped slightly to 44,933, though they remained above 2019 levels. This suggests that while the sector has largely stabilised, some fluctuations remain.

Comparing 2018 to 2024 totals, 105 of the 177 organisations reported a rise in the number of performances, with 73 increasing by more than 20%. Of the 65 organisations that registered a fall in performances, 28 saw a decrease of more than 20%.

Chart 1.2: Annual ticket sales in the UK



The number of tickets sold across this cohort of UK arts organisations reflects a significant pandemic-driven decline, followed by a strong and sustained recovery.

In 2018 and 2019, ticket sales were relatively stable, with 22.35 million and 21.73 million tickets sold, respectively.

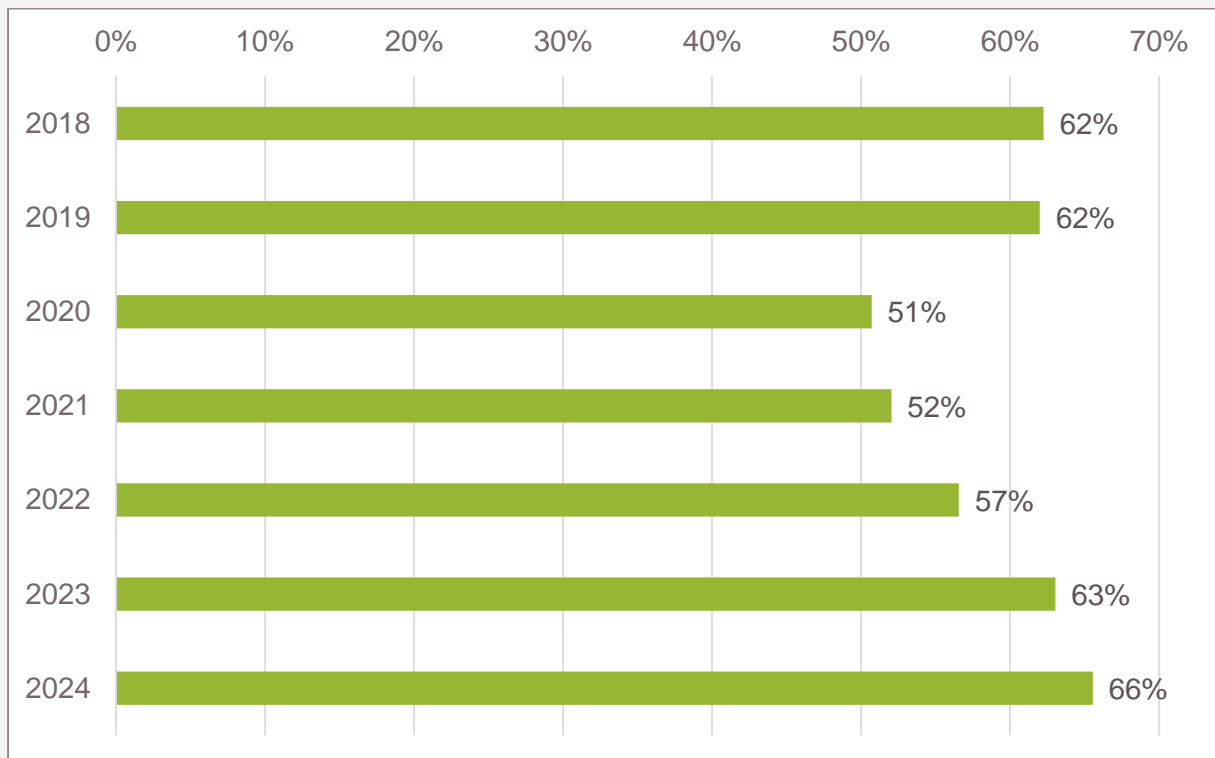
In 2020, the impact of COVID-19 was severe, with ticket sales dropping to just 4.44 million, an almost 80% decline as venues were forced to close and live performances were cancelled or restricted. A partial recovery followed in 2021, with sales rising to 10.89 million, reflecting the return of live events but still falling well below pre-pandemic levels.

By 2022, ticket sales rebounded significantly to 19.76 million, nearing 2019 figures, indicating that audiences were returning in large numbers. This upward trend continued into 2023, with 22.35 million tickets sold, fully recovering to 2018 levels.

In 2024, ticket sales reached 22.95 million, surpassing pre-pandemic figures for the first time.

Comparing 2018 to 2024 totals, 90 of the 177 organisations reported a rise in ticket sales, with 44 increasing by over 20%. Of the 87 organisations that registered a fall in sales, 48 saw sales decline by at least 20%.

Chart 1.3: Capacity sold in the UK



The capacity sold across this cohort of UK arts organisations highlights a steady recovery in audience attendance, with signs of growth beyond pre-pandemic levels.

In 2018 and 2019, venues operated at 62% capacity, indicating a consistent level of audience engagement relative to available seating.

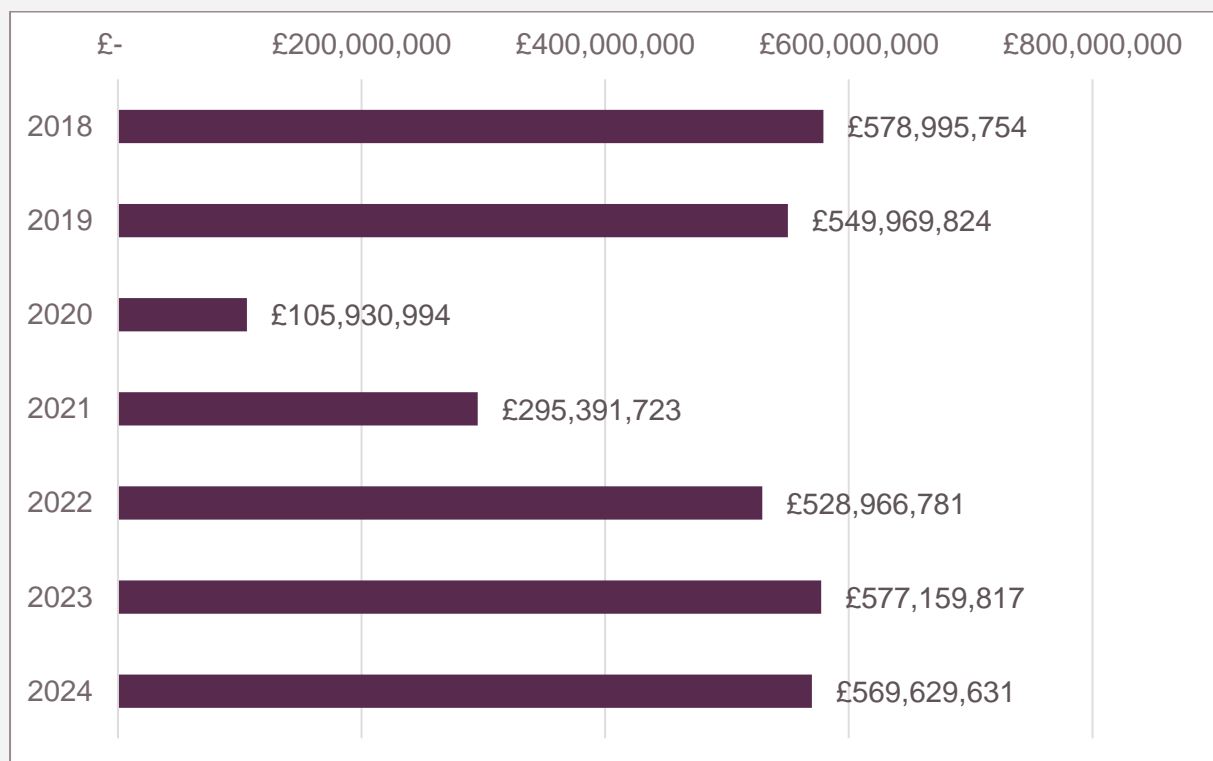
However, in 2020, capacity dropped to 51%, reflecting the impact of venue closures, social distancing measures, and audience hesitancy. In 2021, capacity remained low at 52%, suggesting that while performances had resumed, audience confidence and attendance levels were still recovering.

By 2022, capacity sold improved to 57%, marking a return to more typical audience engagement. In 2023, capacity reached 63%, surpassing pre-pandemic levels for the first time.

In 2024, capacity sold increased further to 66%, suggesting that audiences are returning in greater numbers relative to the available number of seats.

Comparing 2018 to 2024 average capacities, 99 of the 177 organisations reported a rise including 67 that recorded rises of more than five percentage points. Of the 72 organisations that registered a fall in capacity sold, 40 saw a decrease of more than five percentage points.

Chart 1.4: Annual ticket revenue in the UK (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, revenue reached £578.99 million and £549.97 million, respectively.

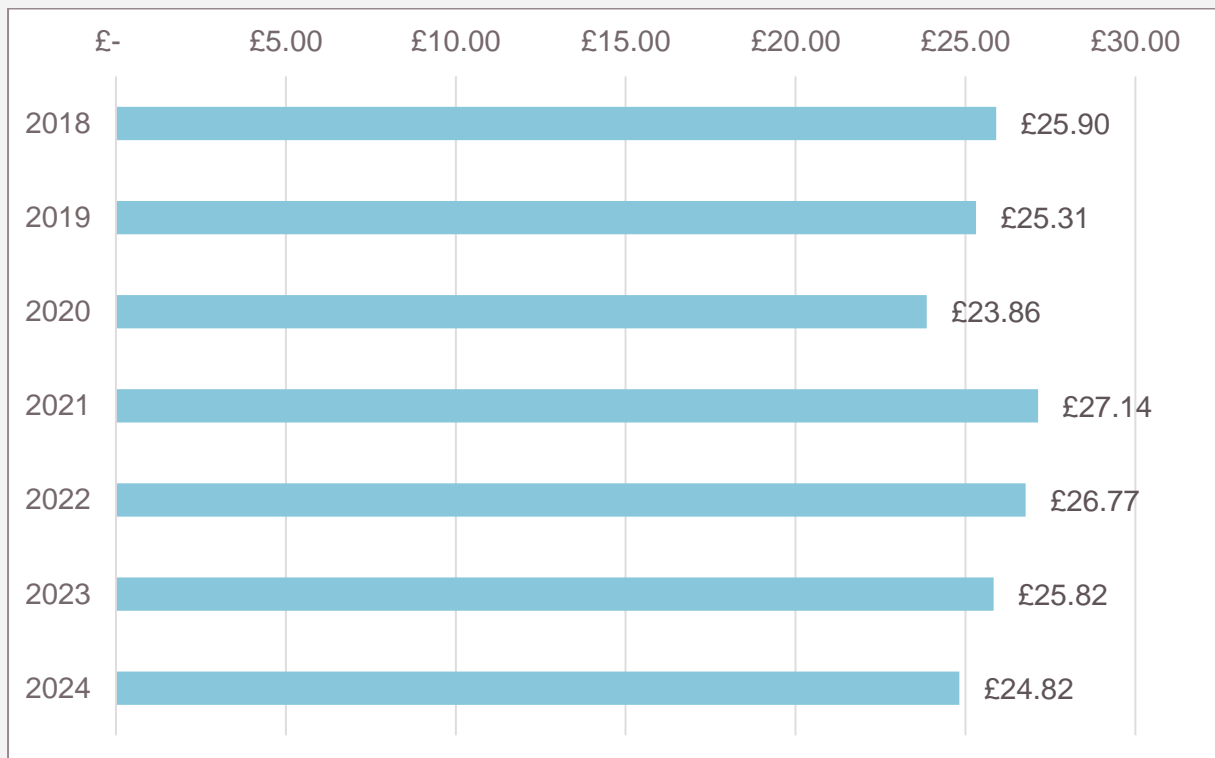
In 2020, revenue plummeted to just £105.93 million, an 81% decline due to widespread venue closures and performance cancellations. A partial rebound followed in 2021, with revenue rising to £295.39 million, reflecting the return of live events but still well below pre-pandemic levels.

By 2022, revenue had surged back to £528.97 million, nearing 2019 levels as audience confidence returned and more performances were staged. In 2023, revenue reached £577.16 million, essentially recovering to 2018 figures.

However, in 2024, revenue dipped slightly to £569.63 million, indicating that while the sector has broadly stabilised, fluctuations remain.

Comparing 2018 to 2024 totals (adjusted for inflation), 72 of the 177 organisations reported a rise in ticket revenue, with 37 increasing revenue by more than 20%. Of the 105 organisations that registered a fall in revenue, 52 recorded a fall of over 20%.

Chart 1.5: Average ticket price paid in the UK (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, ATP remained consistent at £25.90 and £25.31, respectively.

During the pandemic in 2020, ATP dropped to £23.86 but in 2021 it increased sharply to £27.14, the highest in this dataset.

By 2022, ATP settled at £26.77, aligning more closely with pre-pandemic levels. In 2023, it declined further to £25.82, and in 2024, it dropped again to £24.82, marking the lowest ATP since 2019.

Comparing the averages for 2018 to 2024 (adjusted for inflation), 56 of the 177 organisations reported a rise in average price paid per ticket, with 28 up over 10%. Of the 121 organisations that registered a fall in average price paid, 66 recorded a fall of over 10%.

The UK Large Presenting Cohort

- 25 organisations
- Ticket sales in 2024 ranged from under 34,000 to over 650,000.
- Box office revenue ranged from less than £470,000 to over £25,000,000.
- Average ticket price paid ranged from under £14 to over £38

This cohort of large UK theatres represents a mix of major regional venues, city theatres, and cultural hubs that serve broad and diverse audiences. Many of these venues are historic institutions with deep community ties, while others are more modern, multi-purpose arts centres. They are spread across major cities, regional centres, and coastal or tourist locations, reflecting their varied roles in the national theatre landscape.

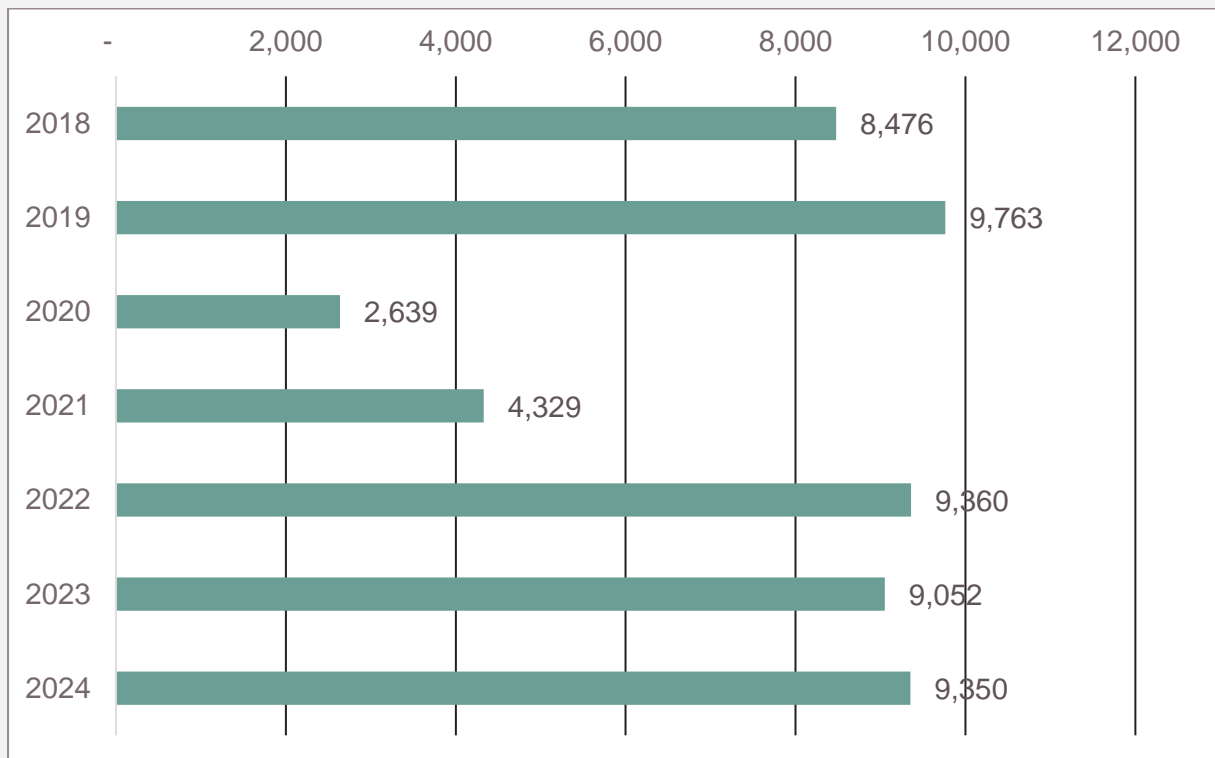
These theatres primarily function as receiving houses, hosting touring productions, large-scale musicals, drama, opera, dance, and live music, often featuring West End transfers, commercial productions, and major national and international tours. Several also programme community and educational initiatives, ensuring accessibility and engagement beyond their core audiences.

Collectively, this group represents the backbone of large-scale commercial and not-for-profit theatre in the UK, playing a crucial role in delivering high-profile productions, supporting touring companies, and maintaining regional access to world-class theatre experiences.

Chart 2.0: UK Large Presenting Key metrics compared to pre-COVID baseline (2018-19 average)

UK Large Presenting - Summary	2023	2024
Performances	99%	103%
Ticket Sales	113%	118%
Capacity Sold	103%	110%
Ticket Revenue	110%	109%
Average ticket price paid	97%	92%

Chart 2.1: Number of performances at UK Large Presenting



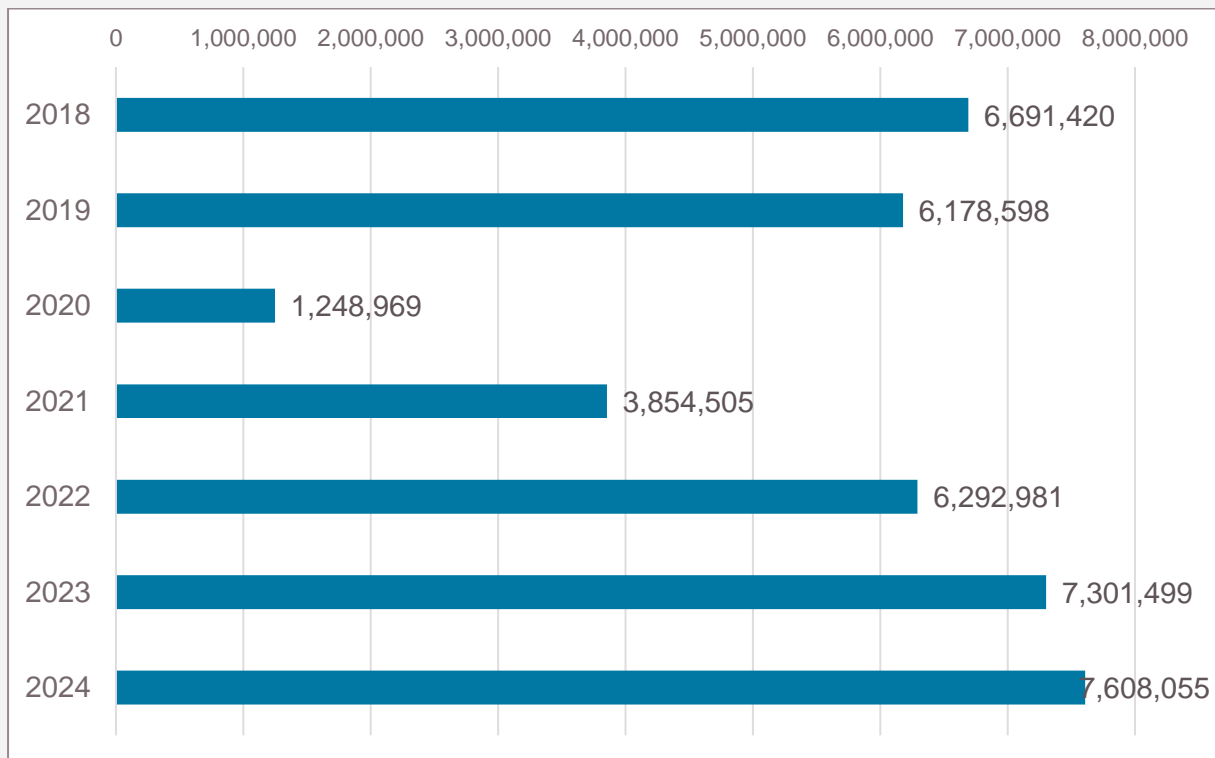
In 2018 and 2019, performance numbers increased from 8,476 to 9,763, reflecting growth in touring mix of large-scale touring productions, musicals, drama, opera, and live events.

However, in 2020, the impact of COVID-19 led to a dramatic drop to just 2,639 performances, as theatres closed and programming was either cancelled or significantly reduced. A slow recovery followed in 2021, with performances increasing to 4,329, though still well below pre-pandemic levels.

By 2022, the sector had largely rebounded, with 9,360 performances, nearly matching 2019 figures. However, 2023 saw a slight dip to 9,052. In 2024, performances rose again to 9,350, indicating a return to more stable programming levels.

Comparing 2018 to 2024 totals, 12 of the 25 large predominantly presenting houses reported a rise in the number of performances, with 11 increasing by more than 20%. Of the 13 organisations that registered a fall in performances, three saw a decrease of more than 20%.

Chart 2.2: Annual ticket sales at UK Large Presenting



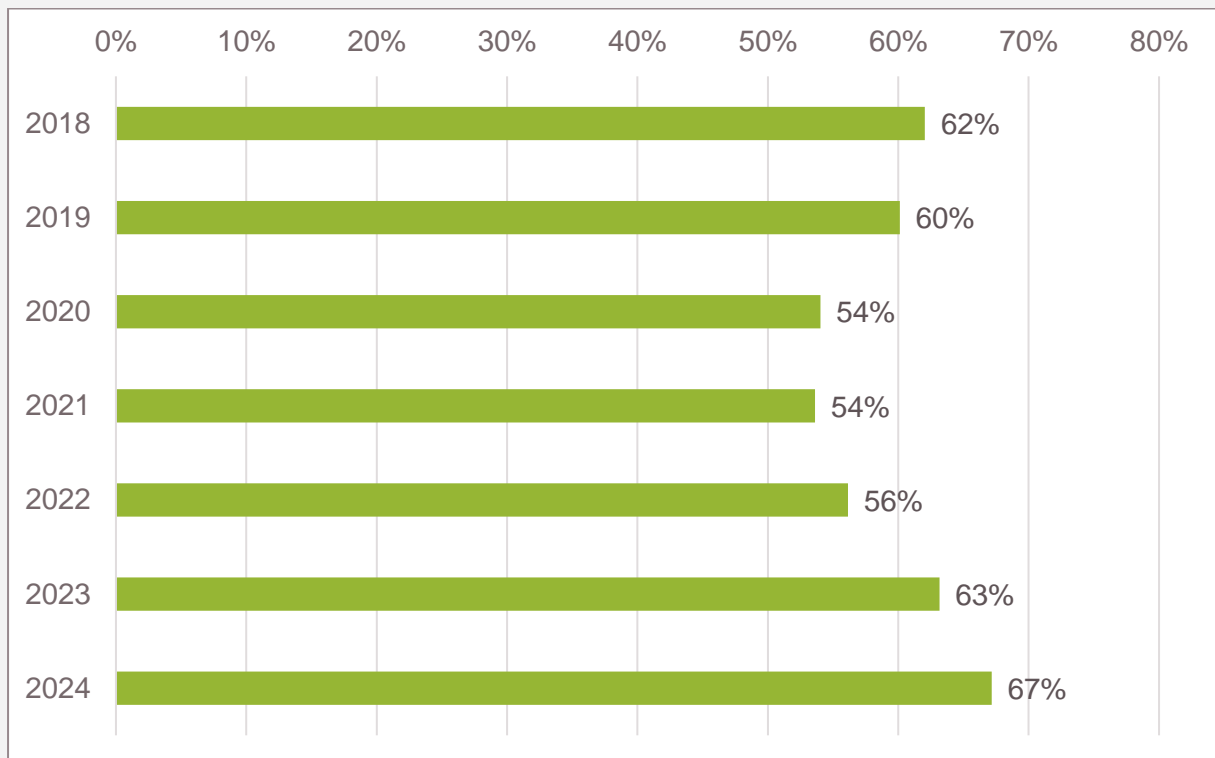
In 2018 and 2019, 6.69 million and 6.18 million tickets were sold, respectively.

The impact of COVID-19 in 2020 was severe, with ticket sales plummeting to 1.25 million, an 80% drop as venues were forced to close. A partial recovery followed in 2021, with sales rising to 3.85 million, reflecting the return of performances but with ongoing restrictions and audience hesitancy.

By 2022, ticket sales had almost fully rebounded to 6.29 million, closely aligning with 2019 levels. The momentum continued in 2023, with sales surging to 7.3 million, surpassing pre-pandemic numbers for the first time. This growth was maintained in 2024, with ticket sales reaching 7.61 million, the highest in this dataset.

Comparing 2018 to 2024 totals, 19 of the 25 large predominantly presenting houses reported a rise in ticket sales, with 12 increasing by over 20%. Of the six organisations that registered a fall in sales, three saw sales decline by at least 20%.

Chart 2.3: Capacity sold at UK Large Presenting



In 2018 and 2019, capacity levels were 62% and 60%.

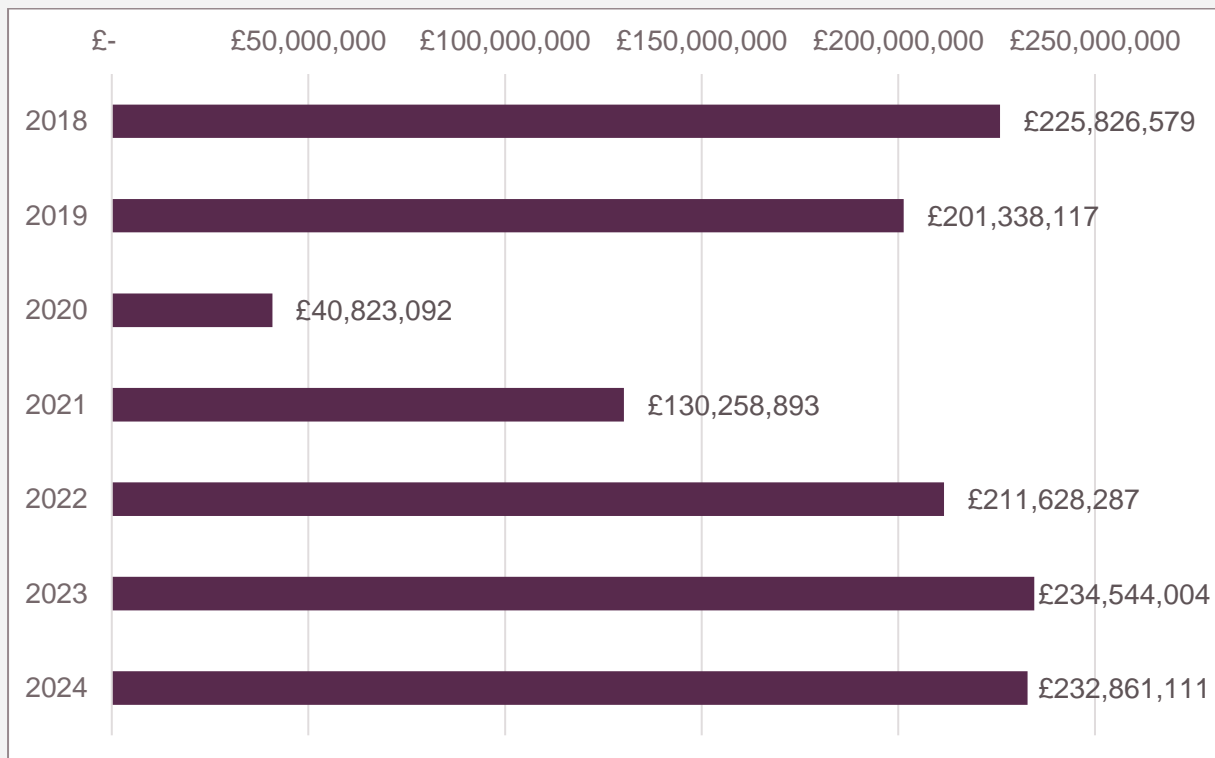
However, in 2020, the effects of COVID-19 led to a drop in capacity to 54%, as theatres operated under restrictions, and audience confidence remained low. 2021 saw no significant improvement, with capacity still at 54%, indicating that, while performances had resumed, attendance levels had not yet fully recovered.

By 2022, there were early signs of audience recovery, with capacity increasing to 56%, though still below pre-pandemic figures. A more substantial rebound followed in 2023, with capacity rising to 63%, marking the first time attendance levels had matched or exceeded those seen before 2020.

In 2024, capacity reached 67%, the highest in this dataset. This suggests a strong resurgence in audience demand, with venues filling more of their available seats than at any point in the past seven years.

Comparing 2018 to 2024 average capacities, 19 of the 25 theatres reported a rise including 14 that recorded rises of more than five percentage points. Of the six theatres that registered a fall in capacity sold, just one saw a decrease of more than five percentage points.

Chart 2.4: Annual ticket revenue UK Large Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

The ticket revenue data for this cohort of large UK presenting theatres highlights the financial impact of the pandemic, followed by a strong recovery, with revenue now exceeding pre-pandemic levels.

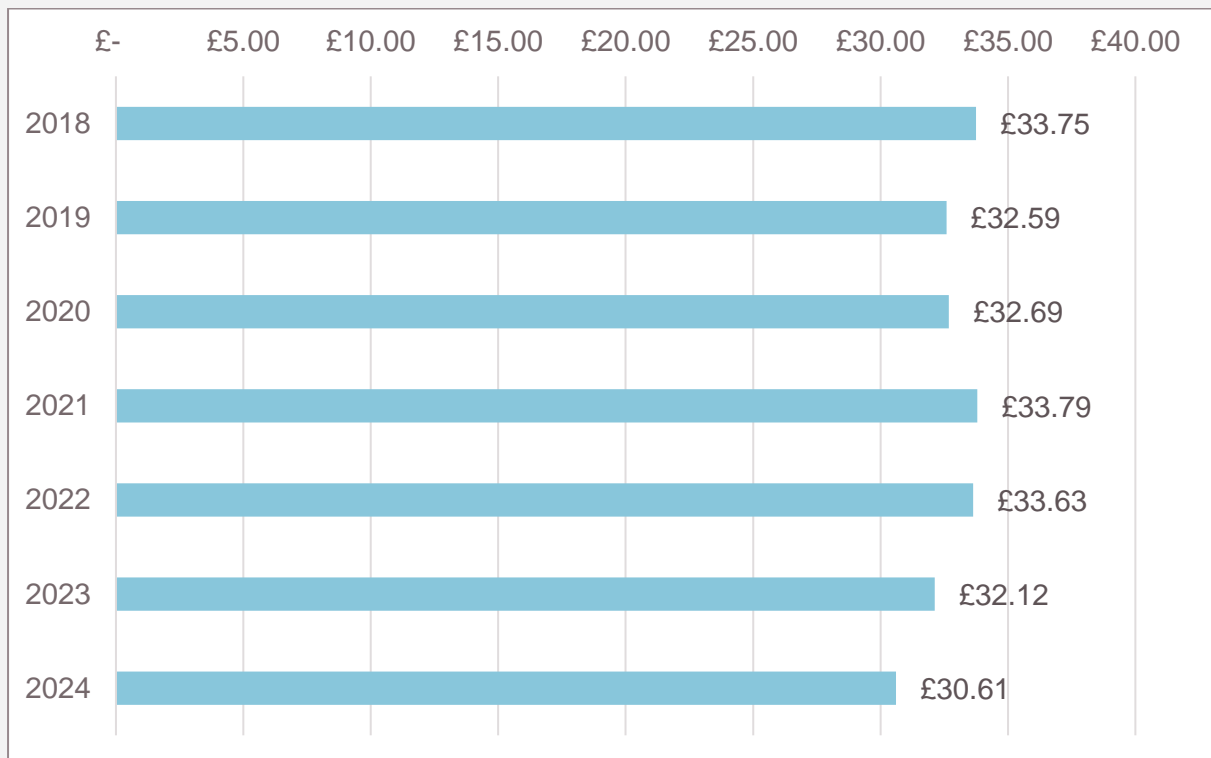
In 2018, total revenue stood at £225.83 million, before declining slightly to £201.34 million in 2019.

However, the impact of COVID-19 in 2020 was severe, with revenue plunging to just £40.82 million, an 80% drop due to widespread venue closures and performance cancellations. A partial rebound followed in 2021, with revenue increasing to £130.26 million, reflecting the return of live events but still well below pre-pandemic levels.

By 2022, revenue had almost fully recovered, reaching £211.63 million, just shy of 2018 figures. In 2023, revenue surged to £234.54 million, surpassing pre-pandemic levels for the first time. The 2024 figure of £232.86 million remains strong, indicating that the sector has largely stabilised, though with slight fluctuations.

Comparing 2018 to 2024 totals (adjusted for inflation), 16 of the 25 theatres reported a rise in ticket revenue, with eight increasing revenue by more than 20%. Of the nine organisations that registered a fall in revenue, four recorded a fall of over 20%.

Chart 2.5: Average ticket price paid at UK Large Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

The average ticket price (ATP) data for this cohort of large UK presenting theatres highlights a largely stable pricing strategy over time, with a downward trend in the most recent years.

In 2018 and 2019, ATP stood at £33.75 and £32.59.

In 2020, ATP remained steady at £32.69, despite the severe reduction in performances and ticket sales.

In 2021, ATP increased slightly to £33.79, its highest point in the dataset. This rise was likely driven by capacity restrictions, premium pricing for limited performances, or efforts to compensate for reduced ticket sales.

By 2022, ATP remained stable at £33.63, but in 2023, it declined to £32.12, and in 2024, it dropped further to £30.61, marking the lowest figure in the dataset.

Comparing the averages for 2018 to 2024 (adjusted for inflation), six of the 25 theatres reported a rise in average price paid per ticket, with a single theatre up over 10%. Of the 19 theatres that registered a fall in average price paid, 11 recorded a fall of over 10%.

The UK Large Producing Cohort

- 15 organisations
- Ticket sales in 2024 ranged from under 56,000 to over 550,000.
- Box office revenue ranged from less than £1,500,000 to over £22,000,000.
- Average ticket price paid ranged from under £20 to over £40

This group consists of major UK producing theatres and specialist performance venues and companies, many of which are recognised for their commitment to new writing, classical theatre, dance, and opera. Spanning regional playhouses, festival theatres, and internationally renowned institutions, these organisations play a key role in commissioning, developing, and staging original productions alongside hosting touring work.

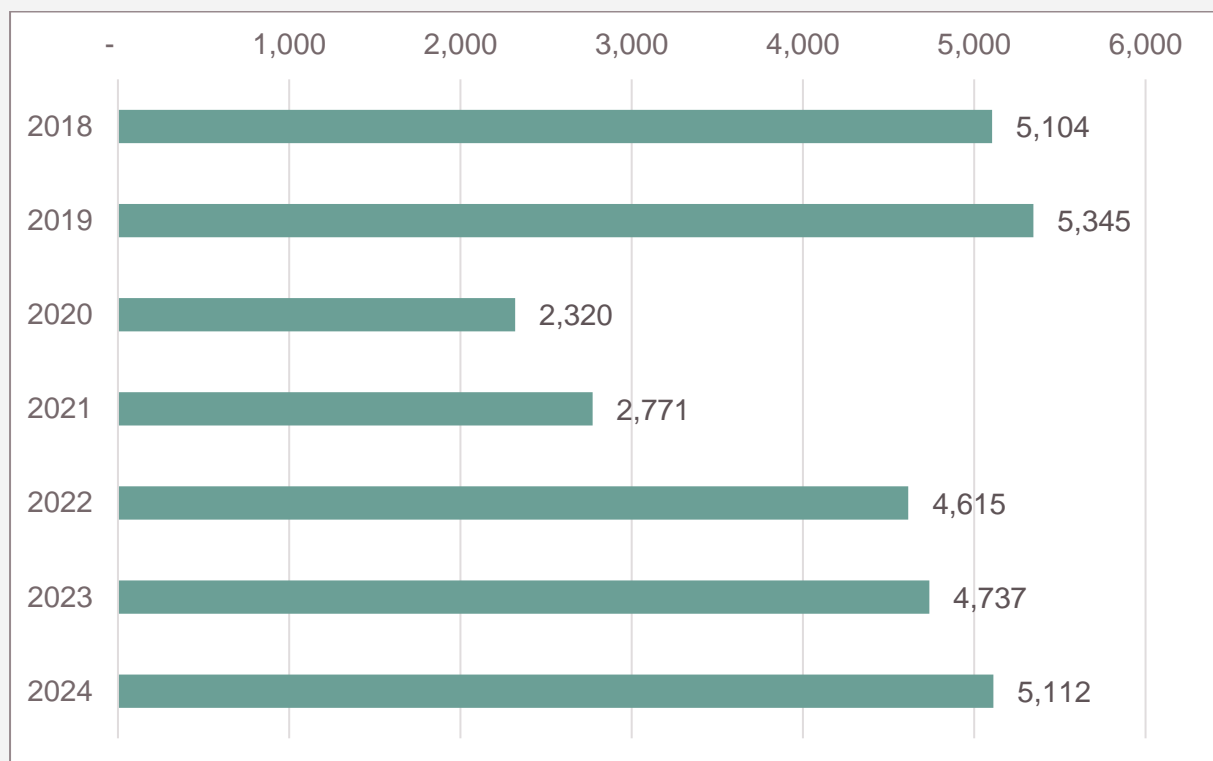
Several venues in this cohort are notable for their contributions to new writing, contemporary adaptations, and artist development, while others specialise in opera, dance, or festival programming. Collectively, they represent a broad geographic spread, with theatres based across England, Scotland, and Wales, serving both local communities and national audiences.

This cohort highlights the diversity of the UK's producing theatre landscape, encompassing organisations with strong artistic legacies, experimental programming, and an ongoing commitment to developing and showcasing high-quality live performance.

Chart 3.0: UK Large Producing Key metrics compared to pre-COVID baseline (2018-19 average)

UK Large Producing - Summary	2023	2024
Performances	91%	98%
Ticket Sales	97%	101%
Capacity Sold	102%	104%
Ticket Revenue	97%	96%
Average ticket price paid	100%	95%

Chart 3.1: Number of performances at UK Large Producing



The number of performances at this cohort of UK producing theatres reflects a period of stability before the pandemic, a significant drop in 2020–21, and a gradual but not yet fully consistent recovery.

In 2018 and 2019, performance numbers increased from 5,104 to 5,345.

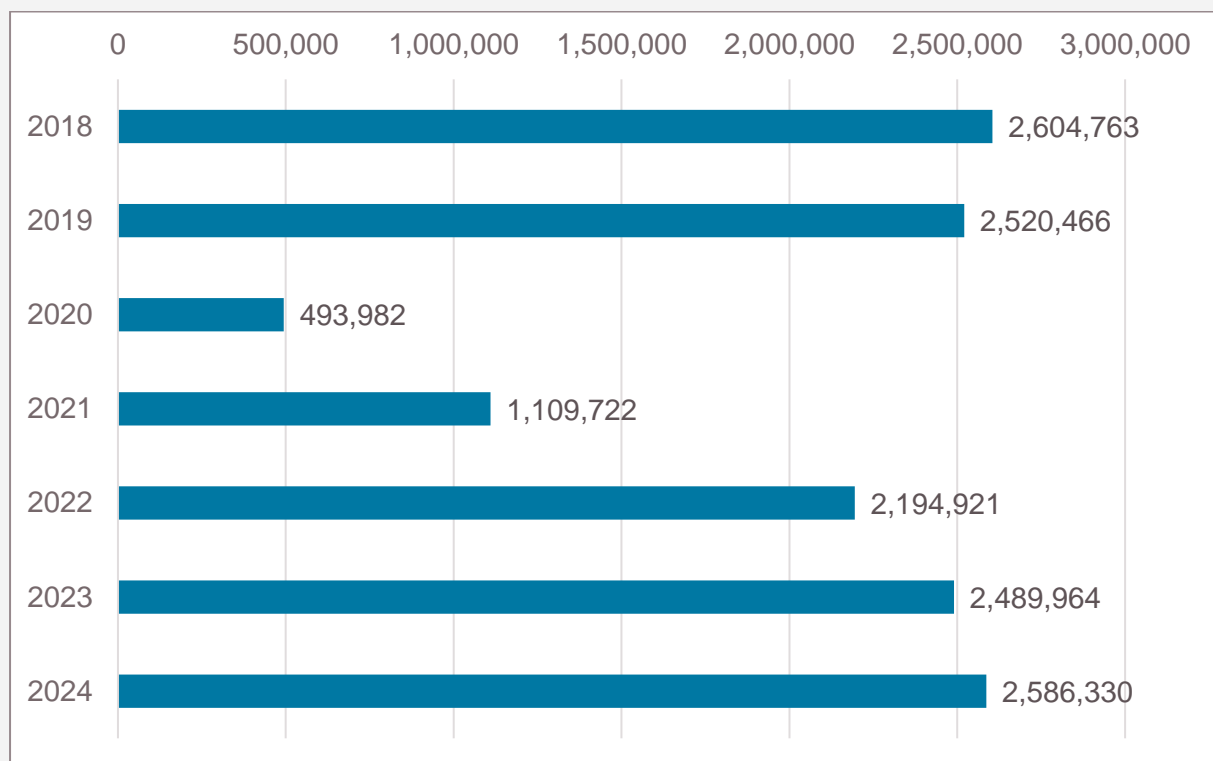
The onset of COVID-19 in 2020 led to a sharp decline, with performances falling to just 2,320, less than half of the previous year’s total, as theatres were forced to cancel productions and operate under severe restrictions. A modest recovery followed in 2021, with performances increasing to 2,771, but still well below pre-pandemic levels, reflecting the ongoing challenges of reopening.

By 2022, the sector saw a more substantial rebound, with performances rising to 4,615, indicating that theatres were resuming fuller programming schedules. However, 2023 saw only a modest increase to 4,737.

In 2024, performances returned to 5,112, reaching pre-pandemic levels for the first time since 2019.

Comparing 2018 to 2024 totals, eight of the 15 large predominantly producing houses reported a rise in the number of performances, with three increasing by more than 20%. Of the 7 organisations that registered a fall in performances, two saw a decrease of more than 20%.

Chart 3.2: Annual ticket sales at UK Large Producing



The number of tickets sold across this cohort of UK producing theatres highlights a dramatic pandemic-related decline, followed by a strong recovery.

In 2018 and 2019, ticket sales were relatively stable at 2.60 million and 2.52 million.

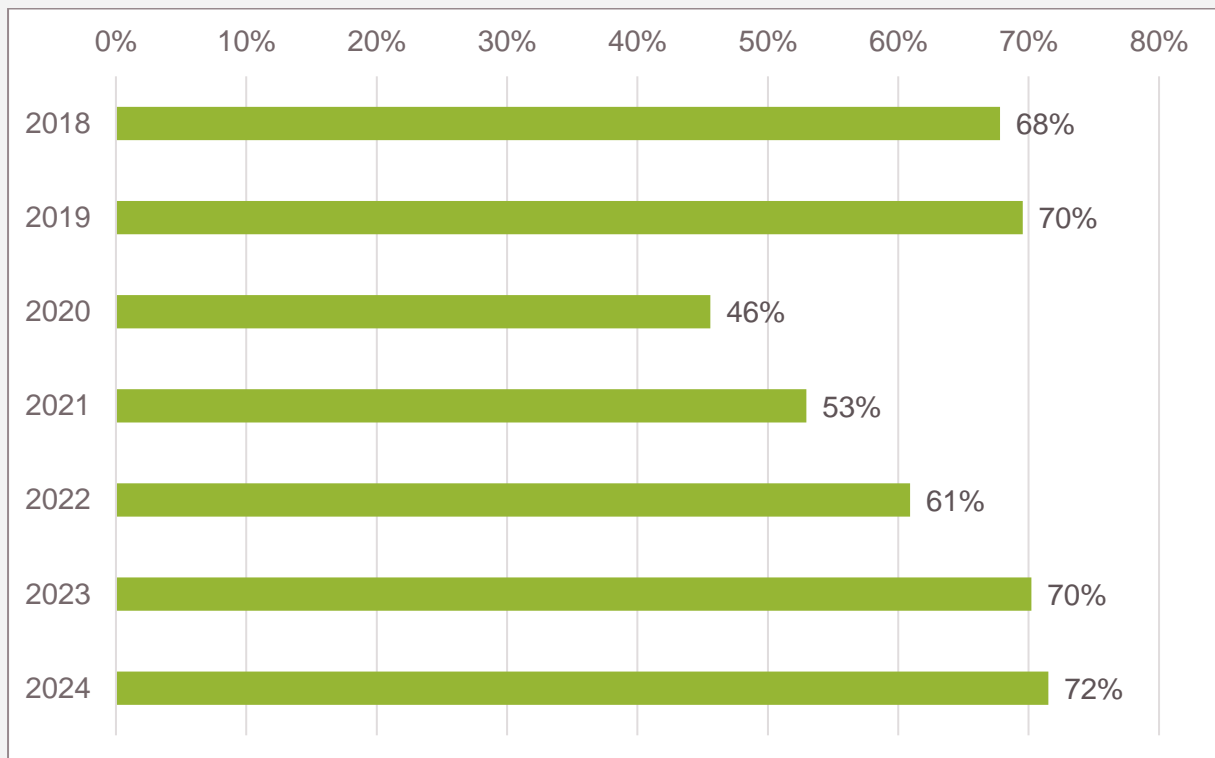
However, in 2020, sales fell sharply to just 493,982, an 80% decline, as theatres faced closures and widespread cancellations. A partial recovery followed in 2021, with ticket sales rising to 1.11 million, though this remained well below pre-pandemic levels, likely due to ongoing restrictions and audience hesitancy.

By 2022, ticket sales had almost fully rebounded to 2.19 million, suggesting that audiences were returning in strong numbers as theatres resumed regular programming. The upward trend continued in 2023, with 2.49 million tickets sold, approaching 2019 levels.

In 2024, ticket sales reached 2.59 million, marking the highest post-pandemic figure and nearly matching 2018 levels.

Comparing 2018 to 2024 totals, six of the 15 large predominantly producing houses reported a rise in ticket sales, with three increasing by over 20%. Of the nine organisations that registered a fall in sales, four saw sales decline by at least 20%.

Chart 3.3: Capacity sold at UK Large Producing



The capacity sold across this cohort of UK producing theatres highlights a gradual but steady return of audiences, with capacity sold now surpassing pre-pandemic figures, in the context of a slightly reduced volume of performances.

In 2018 and 2019, theatres operated at 68% and 70% capacity, respectively.

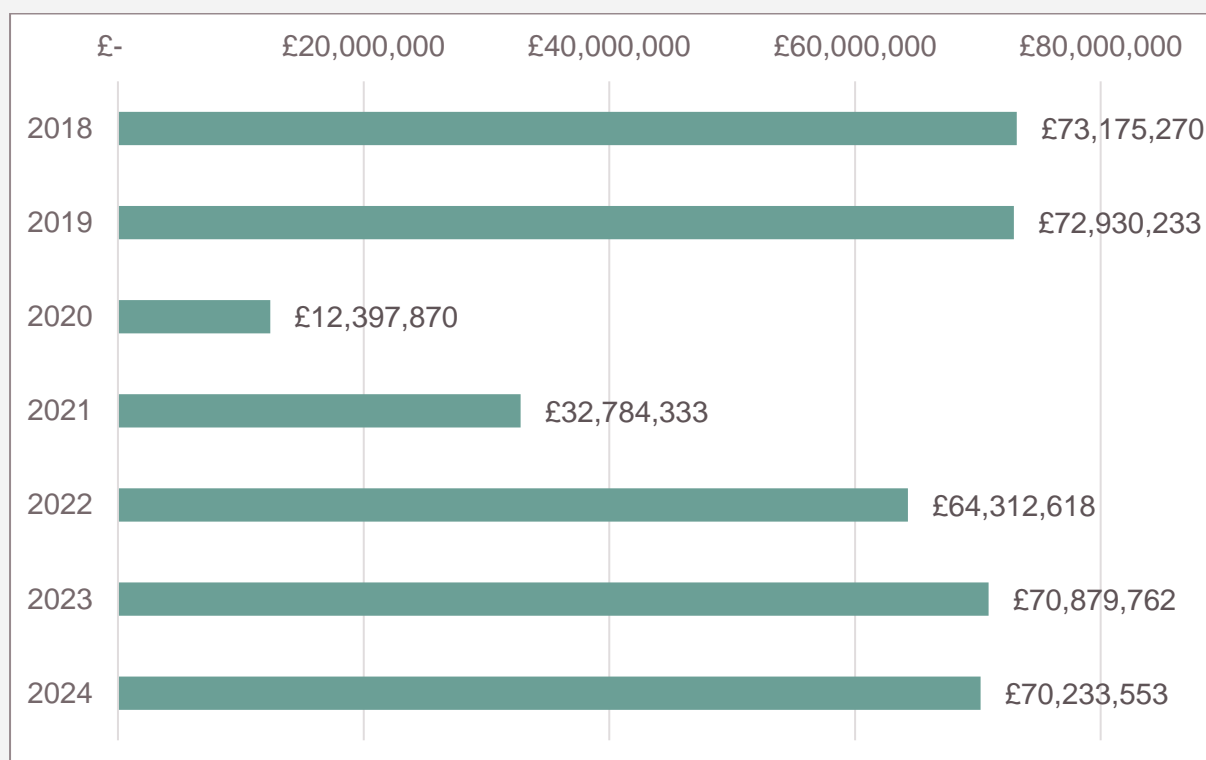
However, in 2020, capacity dropped to 46%, reflecting the severe impact of closures, limited programming, and audience hesitancy during the pandemic. As performances slowly resumed in 2021, capacity increased to 53%.

By 2022, capacity had improved to 61%. This positive trajectory continued in 2023, with capacity rising back to 70%, matching 2019 levels, even as the total number of ticket sales remained slightly below pre-pandemic figures.

In 2024, capacity reached 72%, its highest in this dataset. While the overall number of performances has not grown significantly, the productions that are staged are filling a greater proportion of available seats.

Comparing 2018 to 2024 average capacities, 10 of the 15 theatres reported a rise in capacity sold including seven that recorded rises of more than five percentage points. Of the five theatres that registered a fall in capacity sold, two saw a decrease of more than five percentage points.

Chart 3.4: Annual ticket revenue UK Large Producing (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

The ticket revenue data for this cohort of UK producing theatres highlights stable pre-pandemic performance, a severe downturn in 2020–21, and a recovery that remains slightly below pre-pandemic levels.

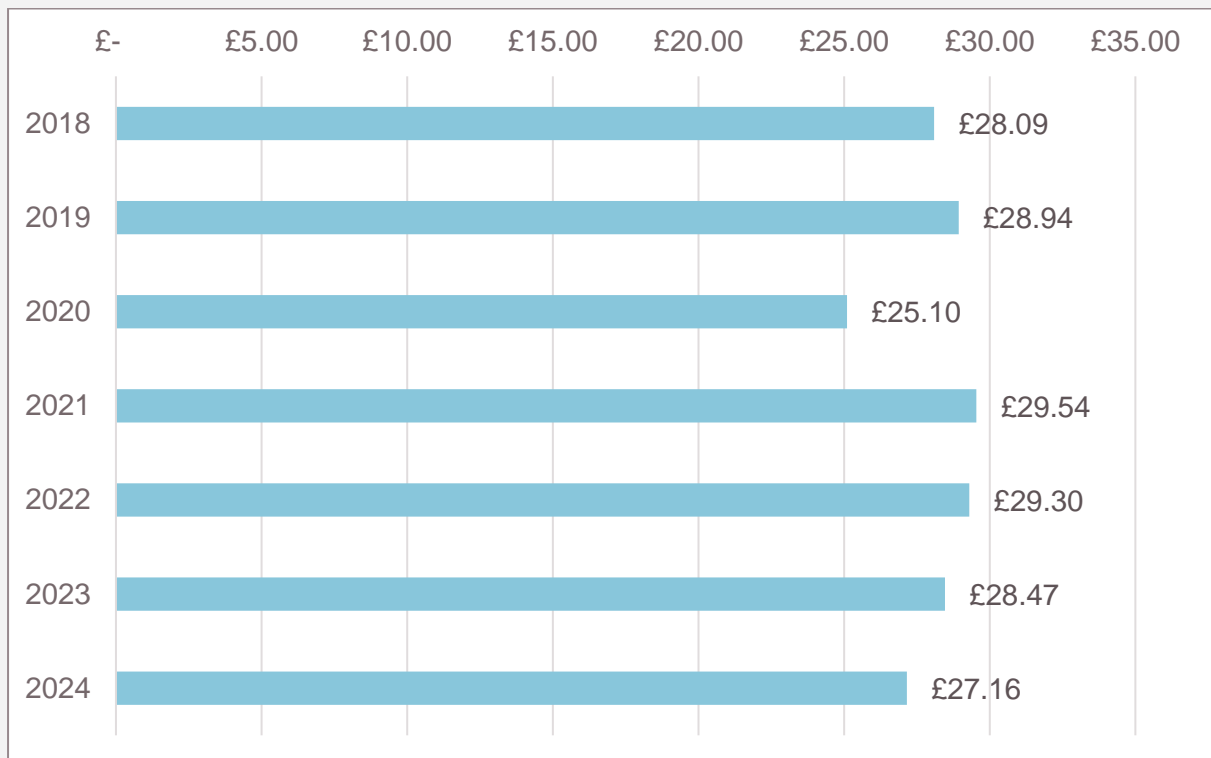
In 2018 and 2019, revenue was relatively stable at £73.18 million and £72.93 million.

In 2020, revenue fell dramatically to just £12.40 million, an 83% decline, as theatres were forced to cancel performances and operate under severe restrictions. In 2021, revenue rose to £32.78 million, indicating a partial recovery, but still less than half of pre-pandemic levels, as many theatres operated with reduced programming.

By 2022, revenue had rebounded to £64.31 million, aligning with the growth in ticket sales and capacity sold. This upward trend continued in 2023, with revenue reaching £70.88 million, just shy of pre-pandemic levels. In 2024, revenue slightly declined to £70.23 million, despite capacity sold reaching a new high of 72%.

Comparing 2018 to 2024 totals (adjusted for inflation), five of the 15 theatres reported a rise in ticket revenue, with two increasing revenue by more than 20%. Of the ten organisations that registered a fall in revenue, five recorded a reduction of over 20%.

Chart 3.5: Average ticket price paid at UK Large Producing (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, ATP was £28.09 and £28.94, respectively, reflecting a consistent pricing strategy in the pre-pandemic years.

During the pandemic in 2020, ATP fell to £25.10 in a highly disrupted market.

As theatres reopened in 2021, ATP rose to £29.54, the highest in this dataset, likely driven by limited-capacity events and a focus on higher-priced productions.

By 2022, ATP remained high at £29.30. However, in 2023, ATP declined to £28.47, and in 2024, it dropped further to £27.16, marking the lowest price point since 2018.

Comparing the averages for 2018 to 2024 (adjusted for inflation), five of the 15 theatres reported a rise in average price paid per ticket, with no organisation increasing by more than 10%. Of the ten theatres that registered a fall in average price paid, seven recorded a fall of over 10%.

The UK Medium Presenting Cohort

- 56 organisations
- Ticket sales in 2024 ranged from under 5,000 to over 250,000.
- Box office revenue ranged from less than £100,000 to over £7,000,000.
- Average ticket price paid ranged from under £10 to over £30

This group consists of medium-sized UK venues that primarily function as presenting theatres, hosting a wide range of touring productions, concerts, comedy, dance, and community events. Spread across towns, and smaller cities, these venues play a vital role in providing cultural access to local communities while also supporting national and international touring productions.

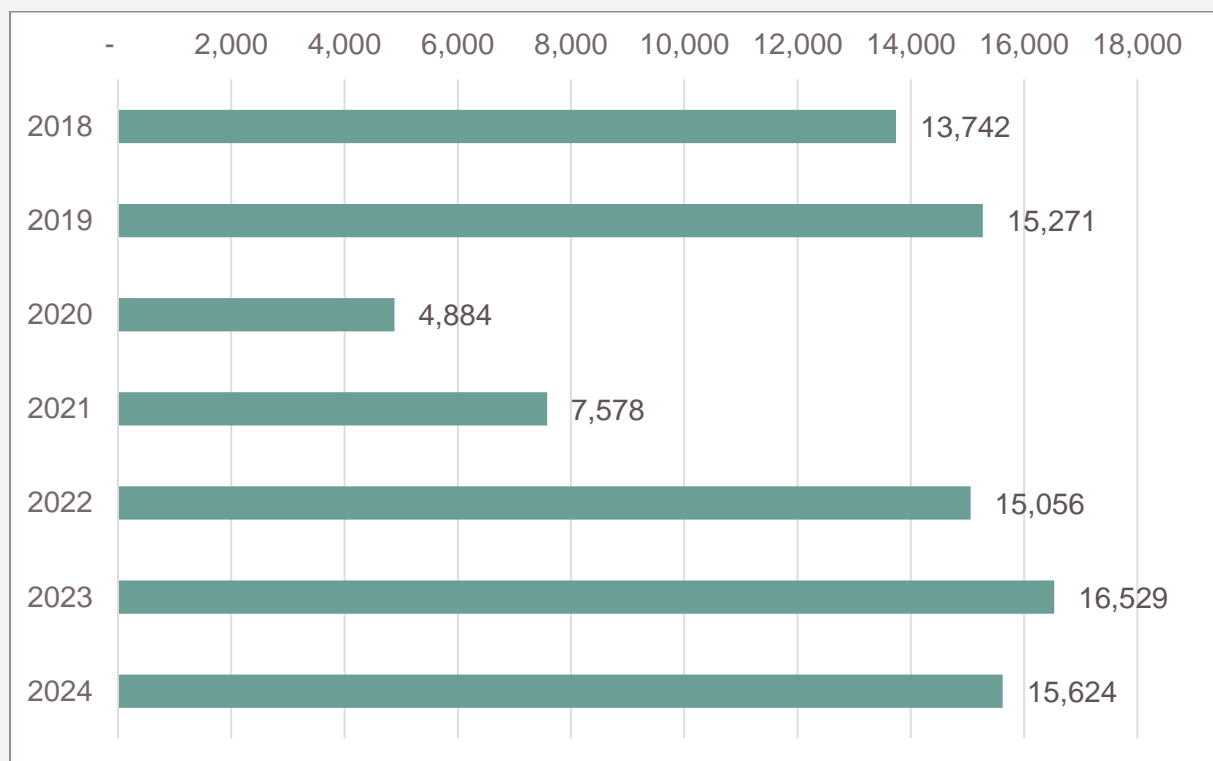
While many in this cohort are traditional proscenium-arch theatres, others operate as multi-purpose arts centres, festivals, and mixed-programme venues, often incorporating cinema, music, spoken word, and community-led events alongside their theatre programming. Several venues also have historical significance, while others are more contemporary in design, offering flexible performance spaces.

Collectively, this cohort reflects the diverse and adaptable nature of the UK's mid-scale performing arts sector, demonstrating a commitment to audience development, accessibility, and the sustainability of touring theatre and live performance.

Chart 4.0: UK Medium Presenting Key metrics compared to pre-COVID baseline (2018-19 average)

UK Medium Presenting - Summary	2023	2024
Performances	114%	108%
Ticket Sales	95%	95%
Capacity Sold	99%	100%
Ticket Revenue	96%	91%
Average ticket price paid	102%	97%

Chart 4.1: Number of performances at UK Medium Presenting



The number of performances at this cohort of medium-sized presenting venues highlights a strong pre-pandemic programme, a severe downturn in 2020–21, and a recovery that has largely stabilised but remains slightly inconsistent.

In 2018 and 2019, performance numbers were 13,742 and 15,271, respectively.

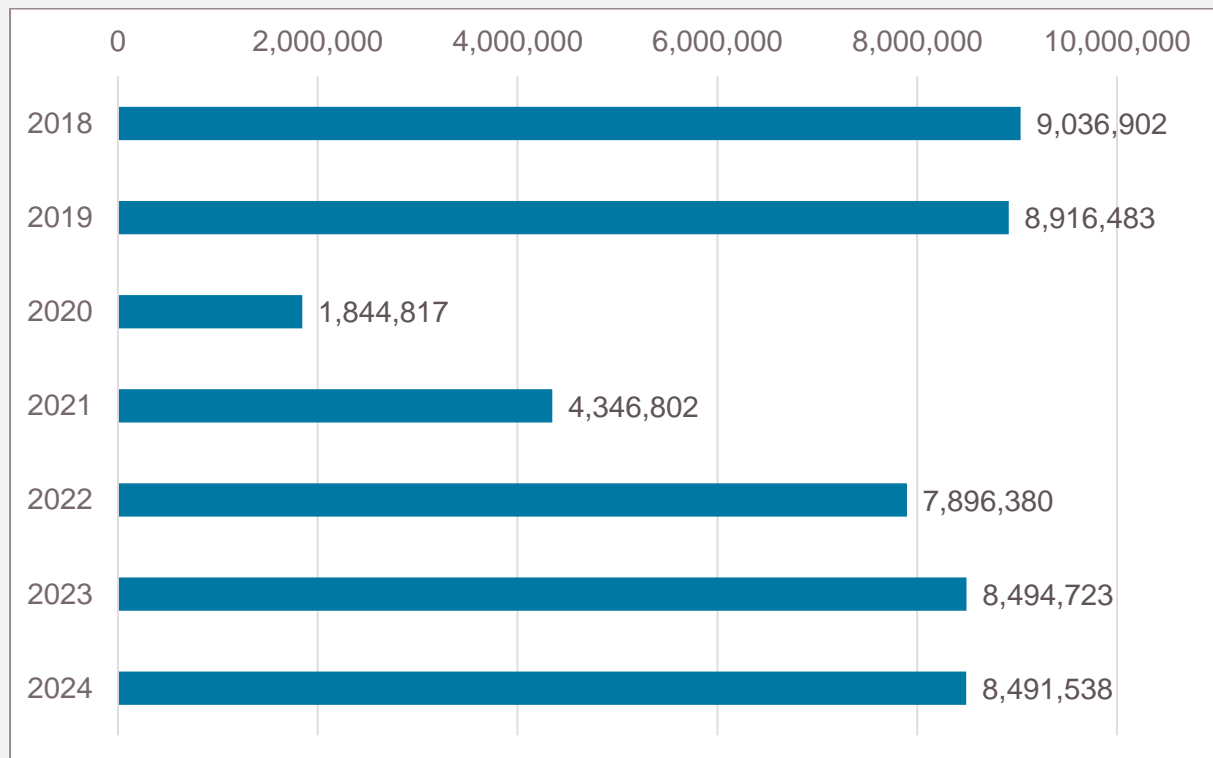
In 2020, performances fell sharply to 4,884, reflecting the impact of widespread closures and cancellations due to the pandemic. A partial recovery followed in 2021, with 7,578 performances, reflecting that while programming had resumed for many venues, it was still at a significantly reduced scale.

By 2022, venues were largely back to full operation, with performances increasing to 15,056, nearly matching pre-pandemic levels. 2023 saw further growth, reaching 16,529 performances, the highest in this dataset, indicating strong demand for touring productions and live events.

In 2024, the number of performances dipped by almost 1,000 to 15,624.

Comparing 2018 to 2024 totals, 33 of the 56 venues reported a rise in the number of performances, with 25 increasing by more than 20%. Of the 22 organisations that registered a fall in performances, ten saw a decrease of more than 20%.

Chart 4.2: Annual ticket sales at UK Medium Presenting



Ticket sales for this cohort of medium-sized presenting venues highlight a stable pre-pandemic period, a sharp decline in 2020–21, and a near-full recovery by 2023–24.

In 2018 and 2019, ticket sales were 9.04 million and 8.92 million tickets, respectively.

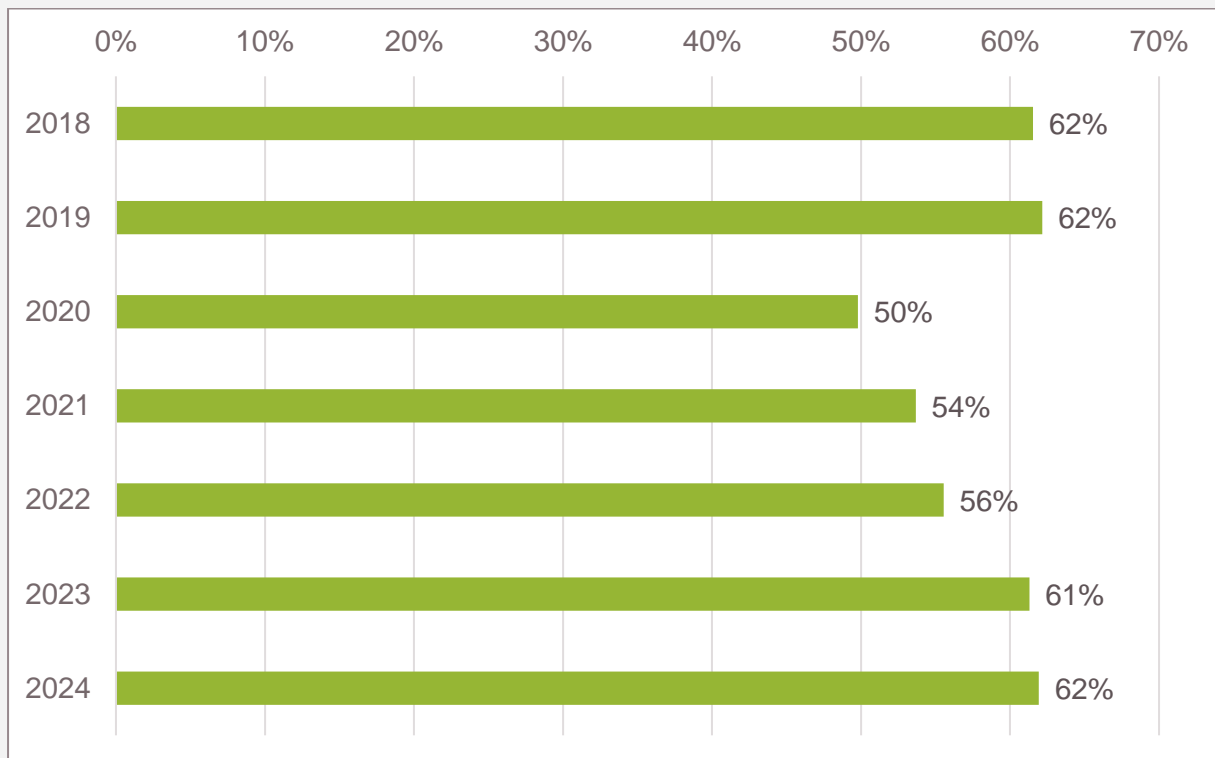
In 2020, ticket sales plummeted to just 1.84 million, reflecting the widespread closures and reduced audience capacity due to COVID-19 restrictions. 2021 saw a partial recovery, with 4.35 million tickets sold, but still well below pre-pandemic levels.

By 2022, sales had rebounded significantly to 7.90 million, aligning with the increase in performances and indicating a strong return of audiences. The upward trend continued in 2023, with ticket sales reaching 8.49 million, close to pre-pandemic figures.

In 2024, sales remained stable at 8.49 million, suggesting that audience demand has plateaued at a level below 2018–19 figures.

Comparing 2018 to 2024 totals, 42 of the 71 medium scale predominantly presenting houses reported a rise in ticket sales, with 16 increasing by over 20%. Of the 39 organisations that registered a fall in sales, 21 saw sales decline by at least 20%.

Chart 4.3: Capacity sold at UK Medium Presenting



The capacity sold at this cohort of medium-sized presenting venues highlights a strong pre-pandemic baseline, a sharp decline during COVID-19, and a gradual return to stability.

In 2018 and 2019, venues operated at a consistent 62% capacity.

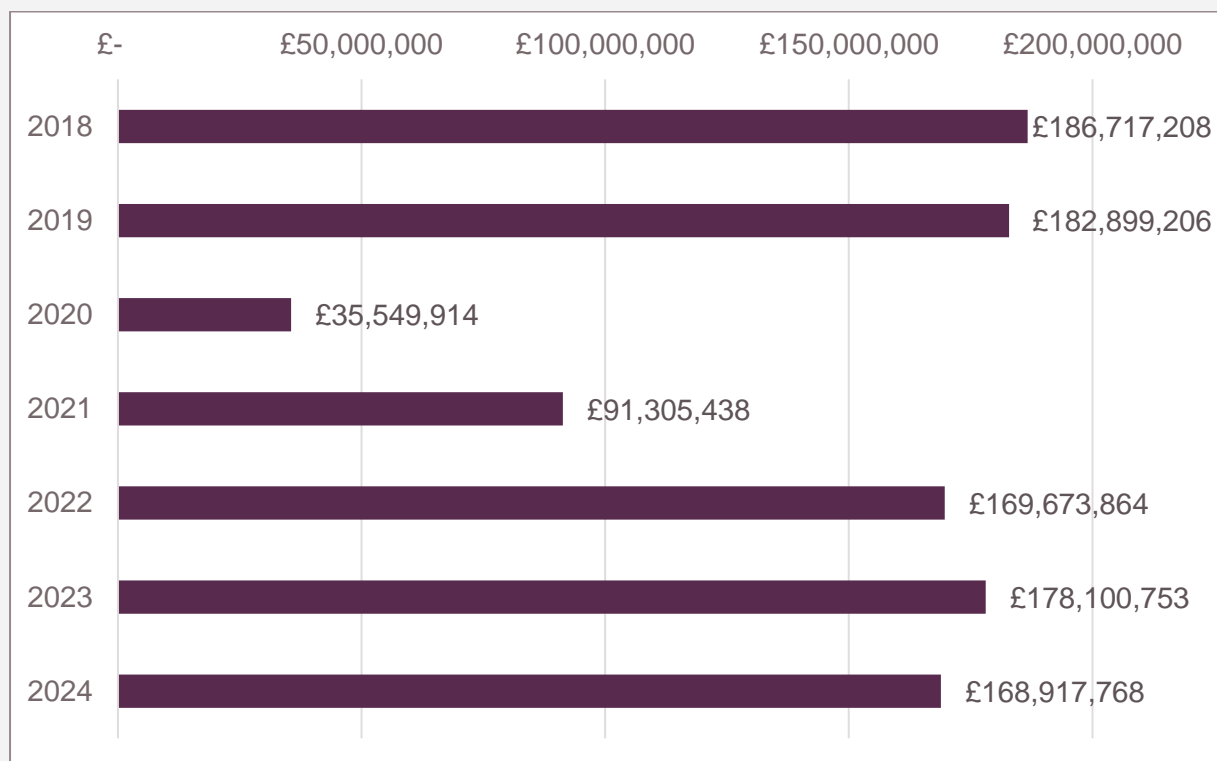
In 2020, capacity dropped to 50%, reflecting significant audience disruption due to venue closures and performance cancellations. In 2021, capacity increased slightly to 54%, as venues reopened but continued to face restrictions, audience hesitancy, and an evolving landscape of consumer behaviour.

By 2022, capacity levels had improved to 56%, indicating that while audiences were returning, they had not yet fully re-engaged at pre-pandemic levels. In 2023, capacity rose to 61%, showing renewed audience confidence as ticket sales continued to recover.

In 2024, capacity returned to 62%, matching pre-pandemic levels for the first time.

Comparing 2018 to 2024 average capacities, 29 of the 71 theatres reported a rise including 19 that recorded rises of more than five percentage points. Of the 25 theatres that registered a fall in capacity sold, 15 saw a decrease of more than five percentage points.

Chart 4.4: Annual ticket revenue UK Medium Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

The ticket revenue data for this cohort of medium-sized presenting venues highlights a steady pre-pandemic financial position, a severe downturn during COVID-19, and a recovery that remains below pre-pandemic levels.

In 2018 and 2019, revenue was £186.72 million and £182.90 million, respectively.

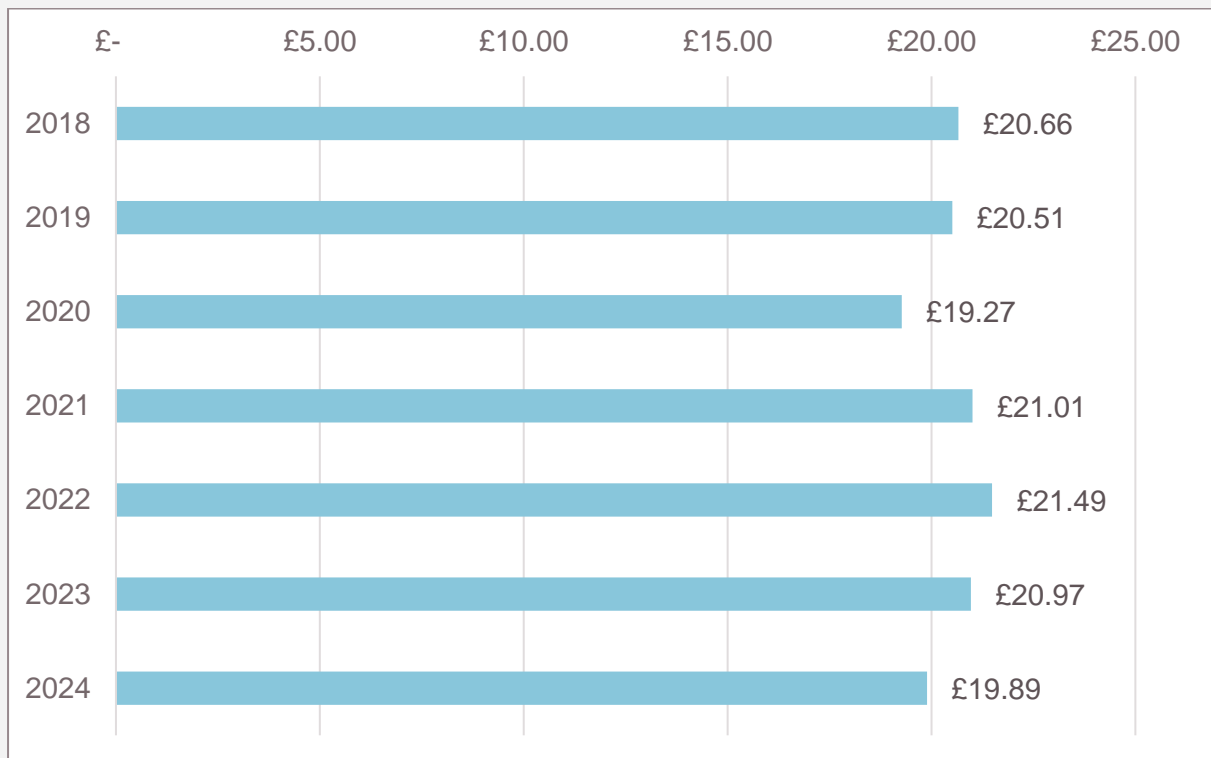
In 2020, the impact of the pandemic led to a dramatic decline, with revenue dropping to just £35.55 million, an 81% decrease, as theatres closed and performances were cancelled. A partial recovery followed in 2021, with revenue increasing to £91.31 million.

By 2022, revenue had rebounded to £169.67 million, marking a significant recovery. In 2023, revenue increased further to £178.10 million, indicating continued audience confidence and a return to more typical spending patterns.

However, in 2024, revenue dipped to £168.92 million, despite capacity sold returning to pre-pandemic levels (62%).

Comparing 2018 to 2024 totals (adjusted for inflation), 34 of the 81 theatres reported a rise in ticket revenue, with 15 increasing revenue by more than 20%. Of the 47 organisations that registered a fall in revenue, 24 recorded a reduction of over 20%.

Chart 4.5: Average ticket price paid at UK Medium Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, ATP remained stable at £20.66 and £20.51, respectively.

However, in 2020, ATP dropped to £19.27.

As performances resumed in 2021, ATP rose to £21.01, the highest point in this dataset. This increase likely resulted from capacity restrictions, premium pricing on limited events, or efforts to recover lost revenue.

By 2022, ATP continued to rise slightly to £21.49.

However, in 2023, ATP declined to £20.97, and in 2024, it dropped further to £19.89, marking the lowest level since 2020.

Comparing the averages for 2018 to 2024 (adjusted for inflation), 23 of the 81 theatres reported a rise in average price paid per ticket, with 12 organisations increasing by more than 10%. Of the 58 theatres that registered a fall in average price paid, 27 recorded a fall of over 10%.

The UK Medium Producing Cohort

- 24 organisations
- Ticket sales in 2024 ranged from under 5,000 to over 120,000.
- Box office revenue ranged from less than £25,000 to over £3,500,000.
- Average ticket price paid ranged from under £5 to over £28

This group consists of mid-sized predominantly producing theatres that play a key role in developing new work, supporting emerging artists, and engaging with local communities. Many are known for their commitment to new writing, experimental theatre, and distinctive programming, often working with regional, national, and international collaborators to develop and stage productions.

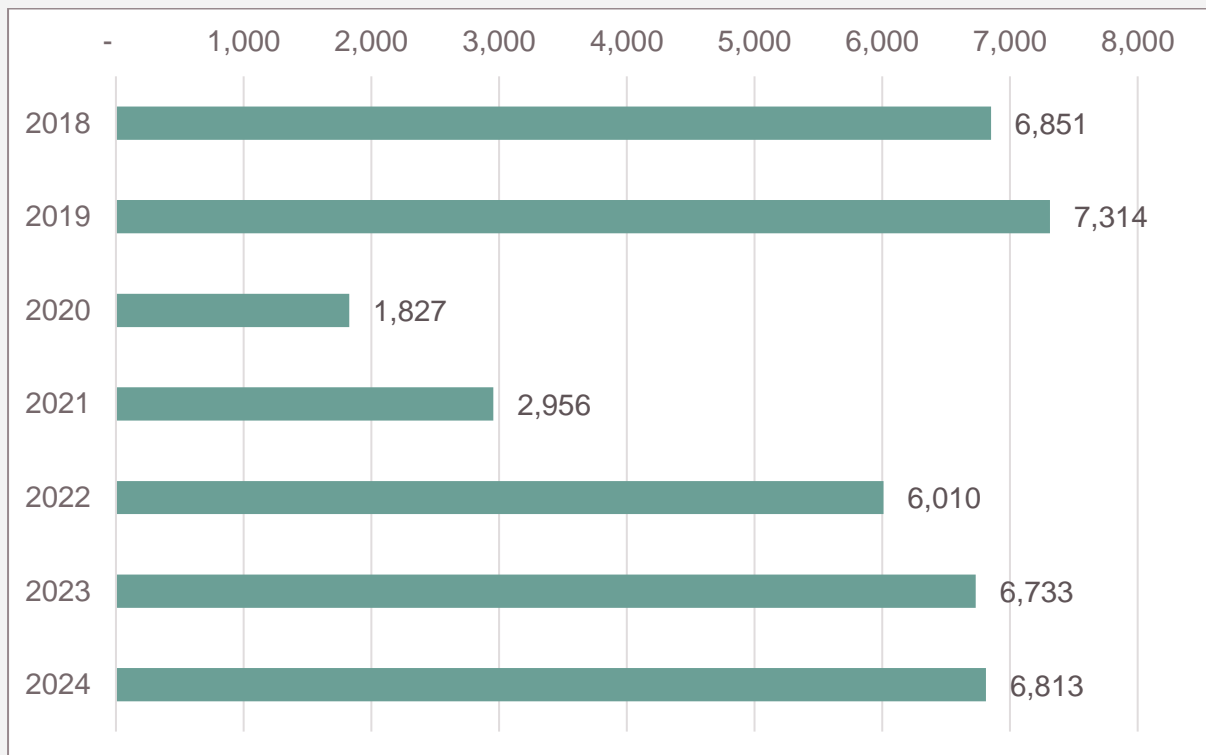
While some in this cohort have a strong focus on contemporary drama and new writing, others specialise in specific forms, such as theatre for young audiences or innovative staging techniques. Many are deeply embedded in their local cultural ecosystems, providing platforms for artist development, education initiatives, and community engagement.

These theatres are typically more intimate in scale compared to larger regional producing houses, allowing them to take creative risks and offer distinctive theatrical experiences. Their work contributes significantly to the UK's theatre landscape, ensuring a steady pipeline of new productions while fostering diverse artistic voices.

Chart 5.0: UK Medium Producing key metrics compared to pre-COVID baseline (2018-19 average)

UK Medium Producing - Summary	2023	2024
Performances	95%	96%
Ticket Sales	85%	86%
Capacity Sold	108%	110%
Ticket Revenue	96%	91%
Average ticket price paid	97%	95%

Chart 5.1: Number of performances at UK Medium Producing



In 2018 performance numbers were 6,851, increasing to 7,314 the following year.

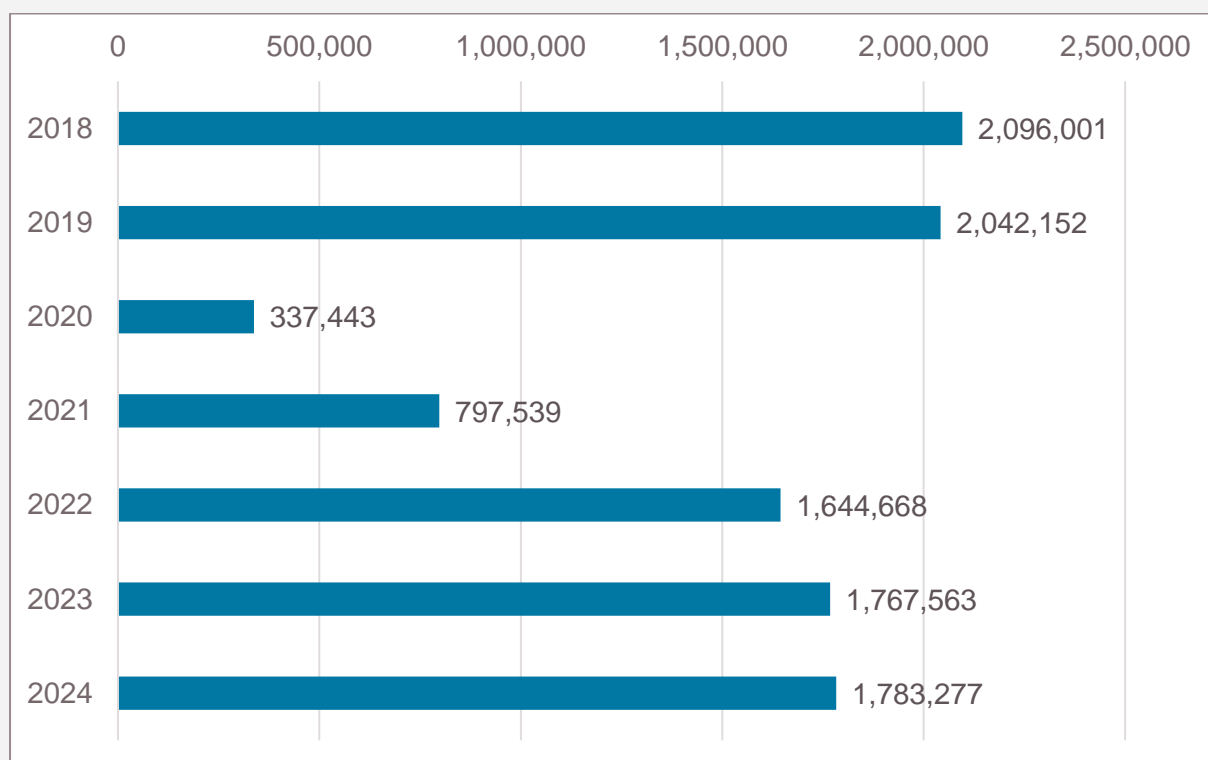
In 2020, performances fell sharply to 1,827, as these theatres faced widespread closures and major disruptions to production schedules. The limited increase to 2,956 performances in 2021 when theatres were still operating at reduced capacity.

By 2022, there was a significant recovery, with performances increasing to 6,010, indicating that many theatres had re-established full-scale programming. In 2023, performances continued to rise to 6,733, nearly reaching pre-pandemic levels.

In 2024, performances stood at 6,813, showing a stabilisation in programming output, still below the 2019 high.

Comparing 2018 to 2024 totals, 13 of the 24 venues reported a rise in the number of performances, with seven increasing by more than 20%. Of the 11 organisations that registered a fall in performances, six saw a decrease of more than 20%.

Chart 5.2: Annual ticket sales at UK Medium Producing



Ticket sales at this cohort of mid-sized producing theatres reflect a stable pre-pandemic audience base, a dramatic decline in 2020–21, and a steady recovery that remains slightly below pre-pandemic levels.

In 2018 and 2019, ticket sales were 2.10 million and 2.04 million, respectively.

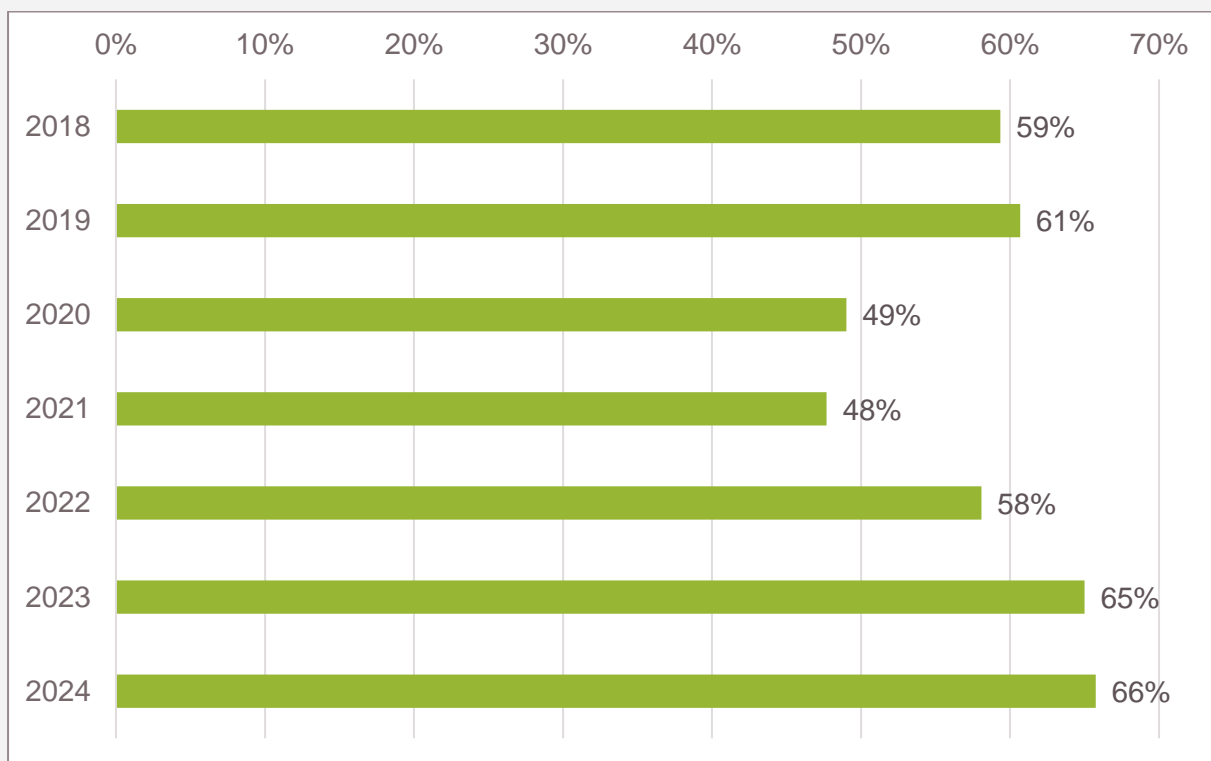
In 2020, ticket sales plummeted to just 337,443, an 84% drop, as theatres were forced to close due to COVID-19 restrictions. In 2021, as productions gradually returned, ticket sales rose to 797,539, though this remained far below pre-pandemic levels, reflecting ongoing audience hesitancy and reduced programming.

By 2022, ticket sales had rebounded to 1.64 million, more than doubling the previous year's total and indicating a strong return of audiences. This positive trajectory continued in 2023, with sales reaching 1.77 million, nearing pre-pandemic figures.

In 2024, ticket sales increased slightly to 1.78 million, though still falling short of 2018–19 levels.

Comparing 2018 to 2024 totals, 11 of the 24 medium scale predominantly producing houses reported a rise in ticket sales, with four increasing by over 20%. Of the 13 organisations that registered a fall in sales, eight saw sales decline by at least 20%.

Chart 5.3: Capacity sold at UK Medium Producing



The capacity sold at this cohort of mid-sized producing theatres highlights a gradual but steady audience recovery, with attendance levels now surpassing pre-pandemic figures.

In 2018 and 2019, theatres operated at 59% and 61% capacity, respectively.

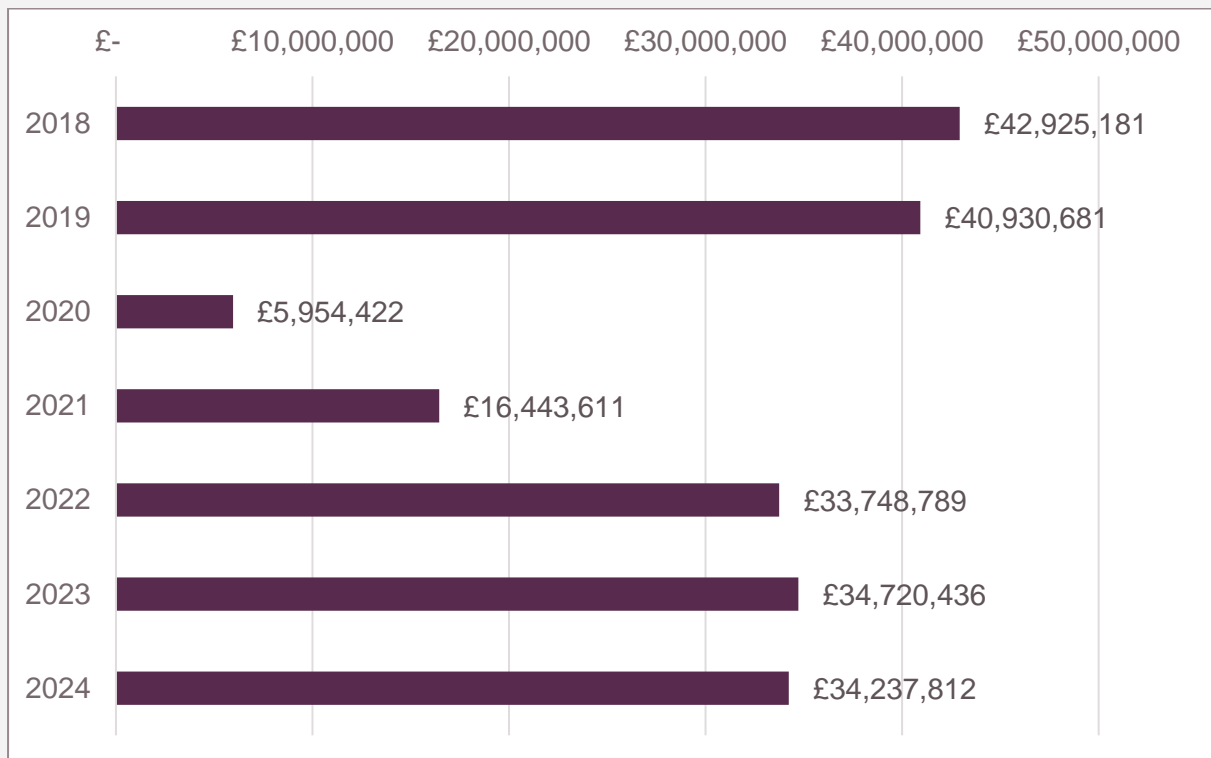
In 2020, capacity fell to 49%, reflecting the impact of widespread closures, reduced seating availability, and audience hesitancy due to the pandemic. This trend continued into 2021, with capacity dipping further to 48%, indicating that while theatres had reopened, many were still struggling to bring audiences back to pre-pandemic levels.

By 2022, capacity improved to 58%. In 2023, capacity rose significantly to 65%, surpassing 2019 figures and suggesting that venues had successfully re-engaged audiences.

In 2024, capacity sold reached 66%, marking the highest level in this dataset.

Comparing 2018 to 2024 average capacities, 13 of the 25 theatres reported a rise including ten that recorded rises of more than five percentage points. Of the 11 theatres that registered a fall in capacity sold, four saw a decrease of more than five percentage points.

Chart 5.4: Annual ticket revenue UK Medium Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, revenue was £42.93 million and £40.93 million, respectively.

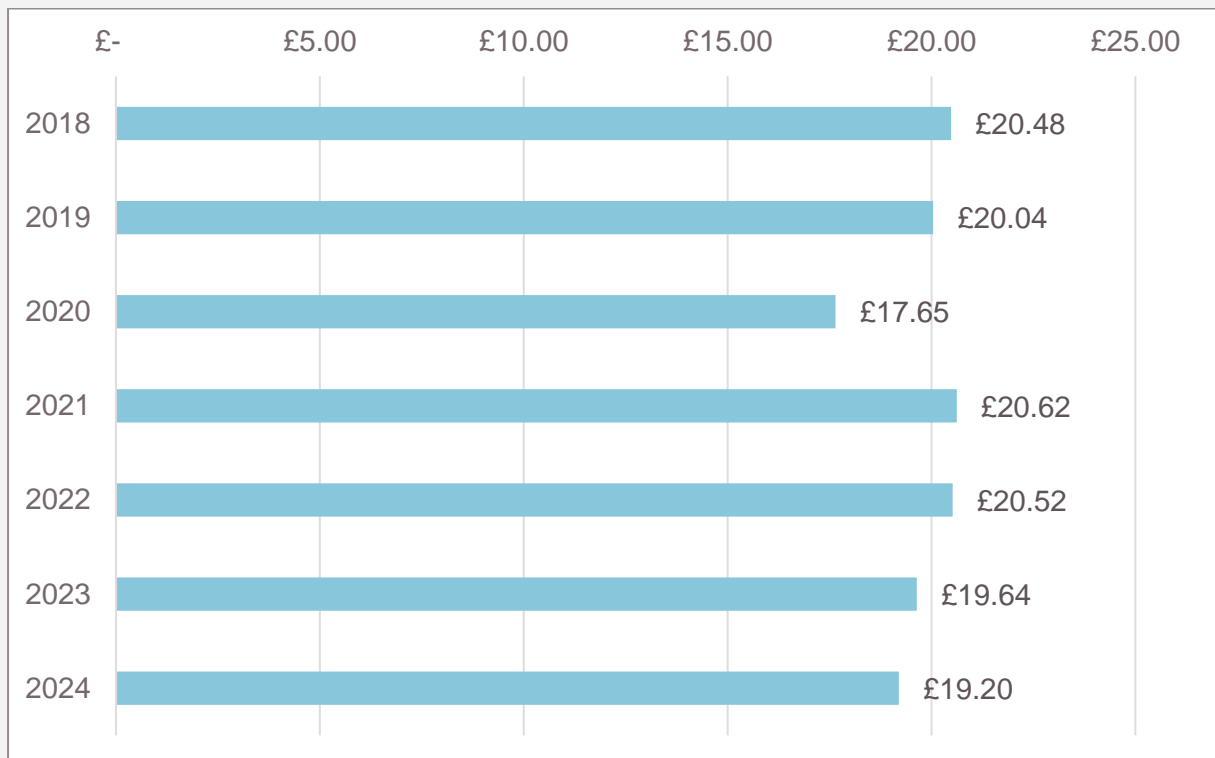
In 2020, revenue plummeted to just £5.95 million, an 85% decline, as venues closed and productions were cancelled due to COVID-19 restrictions. 2021 saw a partial recovery, with revenue increasing to £16.44 million, but still less than half of pre-pandemic levels, reflecting ongoing disruptions and cautious audience behaviour.

By 2022, revenue had rebounded to £33.75 million, reflecting stronger attendance and the return of fuller programming schedules. In 2023, revenue increased slightly to £34.72 million.

In 2024, revenue remained stable at £34.24 million, slightly below 2023 levels but still significantly lower than pre-pandemic figures.

Comparing 2018 to 2024 totals (adjusted for inflation), six of the 25 theatres reported a rise in ticket revenue, with four increasing revenue by more than 20%. Of the 19 organisations that registered a fall in revenue, 11 recorded a reduction of over 20%.

Chart 5.5: Average ticket price paid at UK Medium Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, ATP was £20.48 and £20.04, respectively.

In 2020, ATP dropped to £17.65, reflecting discounting, lower premium ticket sales, or altered audience demand during the period of severe disruption. As performances resumed in 2021, ATP rebounded to £20.62, the highest level in this dataset.

In 2022, ATP remained stable at £20.52. However, in 2023, ATP declined to £19.64, and in 2024, it dropped further to £19.20, marking the lowest level since 2019.

Comparing the averages for 2018 to 2024 (adjusted for inflation), six of the 25 theatres reported a rise in average price paid per ticket, with three organisations increasing by more than 10%. Of the 19 theatres that registered a fall in average price paid, 11 recorded a fall of over 10%.

The UK Concert Hall Cohort

- 8 organisations
- Ticket sales in 2024 ranged from under 70,000 to over 650,000.
- Box office revenue ranged from less than £1,500,000 to over £23,000,000.
- Average ticket price paid ranged from under £16 to over £35

This group consists of prominent concert halls and performing arts venues, many of which host a diverse programme of classical music, contemporary concerts, theatre, and other live performances. Several in this cohort operate both dedicated concert halls and major theatre spaces, allowing them to offer a broad range of artistic programming, from orchestral performances and touring musicians to large-scale theatre productions.

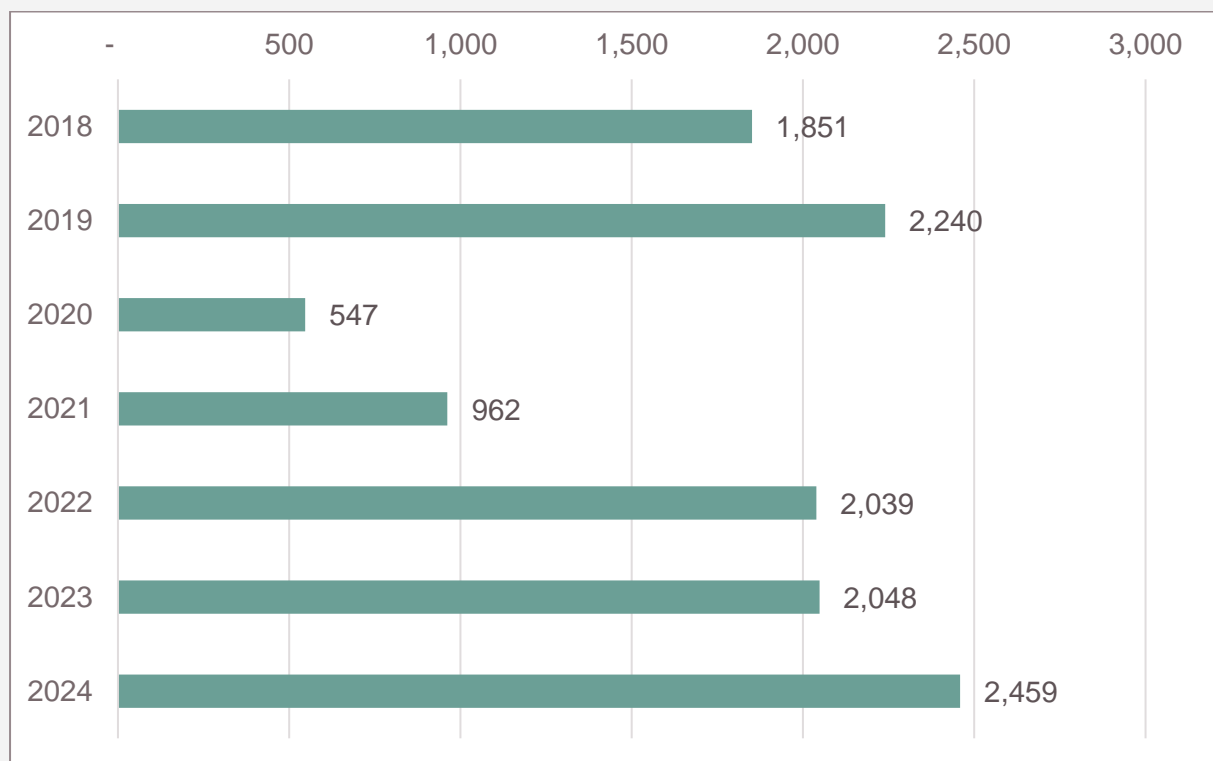
Some venues in this cohort are home to resident orchestras and major music festivals, while others serve as key touring destinations for national and international artists. Their programming often spans classical, jazz, folk, world music, pop, and rock concerts, alongside spoken word, comedy, and theatrical productions.

Many of these venues are architecturally and culturally significant, serving as regional hubs for the performing arts, with a strong commitment to community engagement, education, and artist development. Their ability to balance large-scale concerts with a mix of theatre and live events makes them an essential part of the UK's live performance landscape.

Chart 6.0: UK Concert Hall Key metrics compared to pre-COVID baseline (2018-19 average)

UK Concert Hall - Summary	2023	2024
Performances	100%	120%
Ticket Sales	112%	122%
Capacity Sold	95%	105%
Ticket Revenue	106%	113%
Average ticket price paid	95%	93%

Chart 6.1: Number of performances at UK Concert Halls



In 2018 and 2019, performance numbers increased from 1,851 to 2,240.

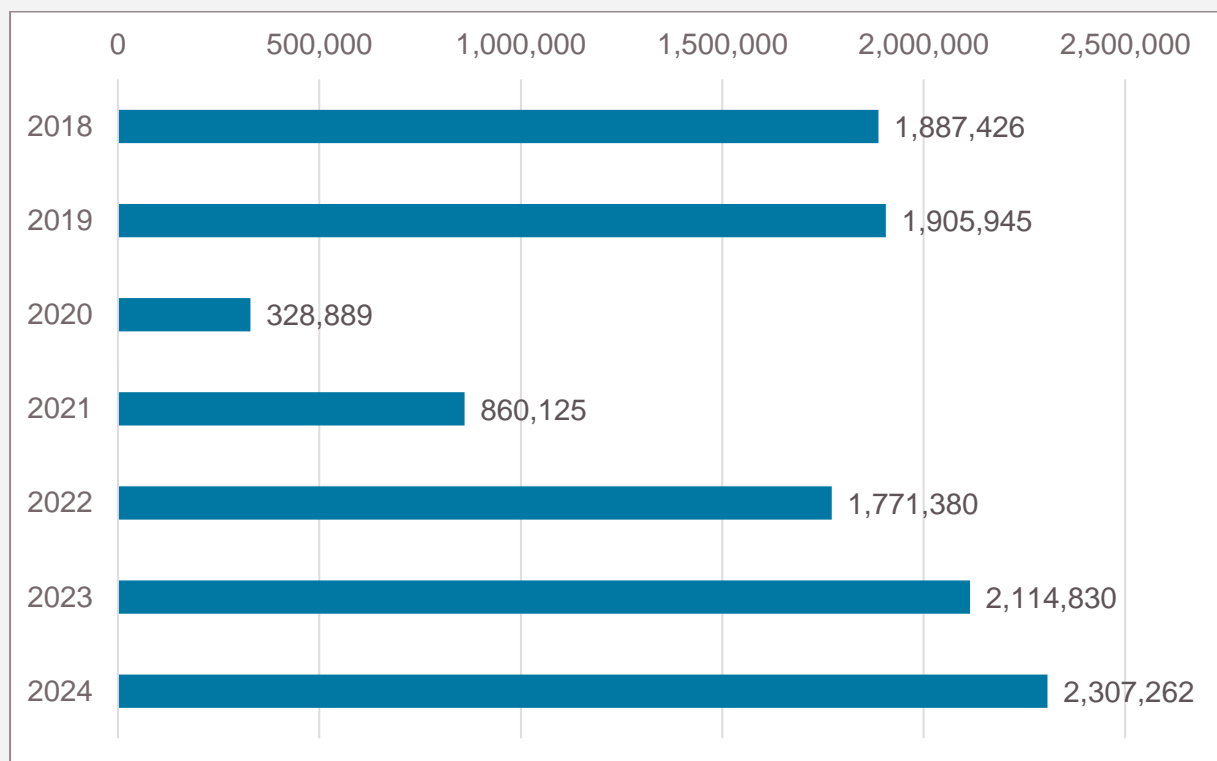
In 2020, performances dropped dramatically to 547, reflecting the widespread cancellations and restrictions that severely impacted live events. A modest increase in 2021, with 962 performances, indicates that while programming had resumed, many venues were still operating at a limited capacity or with reduced schedules.

By 2022, the number of performances rebounded to 2,039, signalling a strong recovery as audiences returned and programming resumed at near-full scale. The upward trend continued in 2023, with 2,048 performances, effectively reaching pre-pandemic levels.

In 2024, performance numbers rose to 2,459, marking the highest level in this dataset.

Comparing 2018 to 2024 totals, six of the eight organisations reported a rise in the number of performances, with four increasing by more than 20%. Of the two organisations that registered a fall in performances, none registered a decrease of more than 20%.

Chart 6.2: Annual ticket sales at UK Concert Halls



In 2018 and 2019, ticket sales were 1.89 million and 1.91 million, respectively.

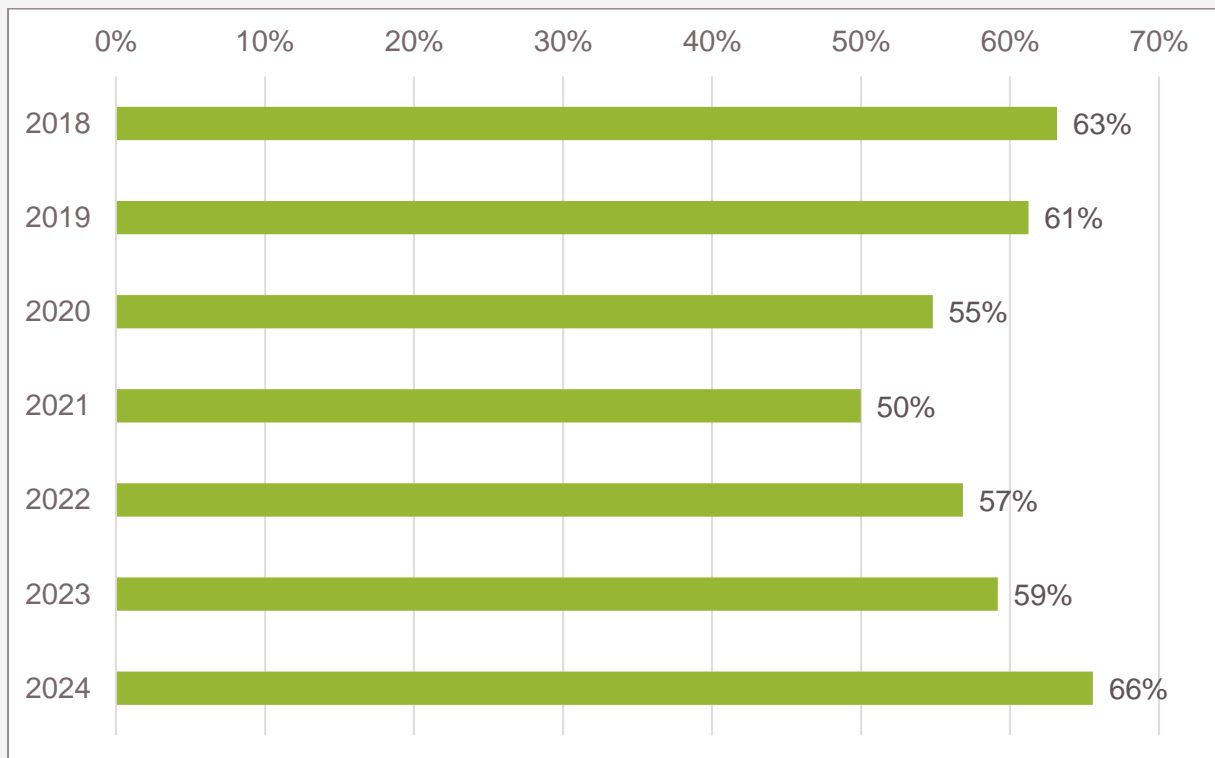
In 2020, ticket sales plummeted to 328,889, an 83% decline, as performances were cancelled or severely restricted. In 2021, sales rose to 860,125, reflecting a partial recovery as events resumed, but audience numbers remained significantly lower than pre-pandemic levels.

By 2022, ticket sales surged to 1.77 million, approaching pre-pandemic figures. This upward trajectory continued in 2023, with 2.11 million tickets sold, surpassing 2019 levels for the first time.

In 2024, ticket sales further increased to 2.31 million, marking the highest level in this dataset.

Comparing 2018 to 2024 totals, six of the eight organisations reported a rise in ticket sales, with two increasing by over 20%. Of the two organisations that registered a fall in sales, one saw sales decline by over 20%.

Chart 6.3: Capacity sold at UK Concert Halls



In 2018 and 2019, capacity was 63% and 61%, respectively.

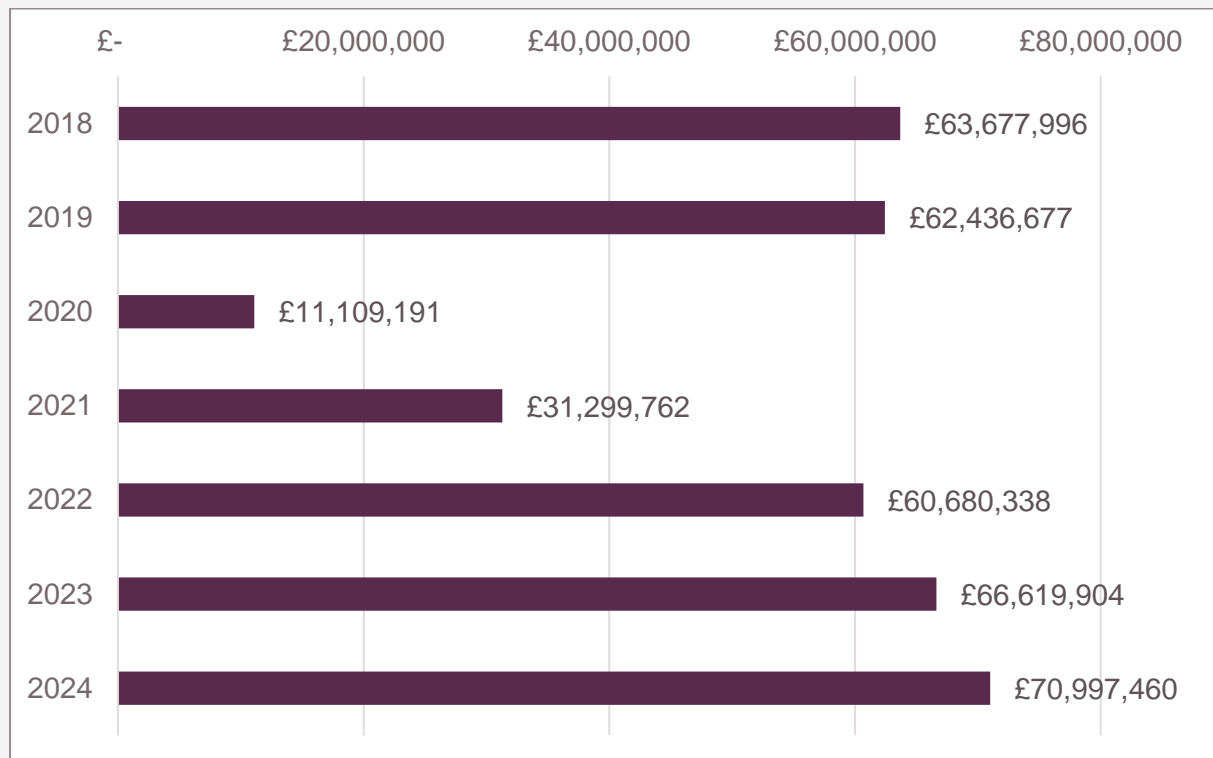
In 2020, capacity dropped to 55%, followed by a further decline to 50% in 2021, reflecting the impact of event cancellations, social distancing measures, and ongoing audience hesitancy.

By 2022, capacity improved to 57%. This trend continued in 2023, with capacity rising to 59%, though it still fell slightly short of pre-pandemic figures.

In 2024, capacity reached 66%, exceeding pre-pandemic levels for the first time.

Comparing 2018 to 2024 average capacities, seven of the eight organisations reported a rise including three that recorded rises of more than five percentage points. The one organisation that registered a fall in capacity sold decreased by less than five percentage points

Chart 6.4: Annual ticket revenue UK Concert Halls (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, revenue was stable at £63.68 million and £62.44 million, respectively.

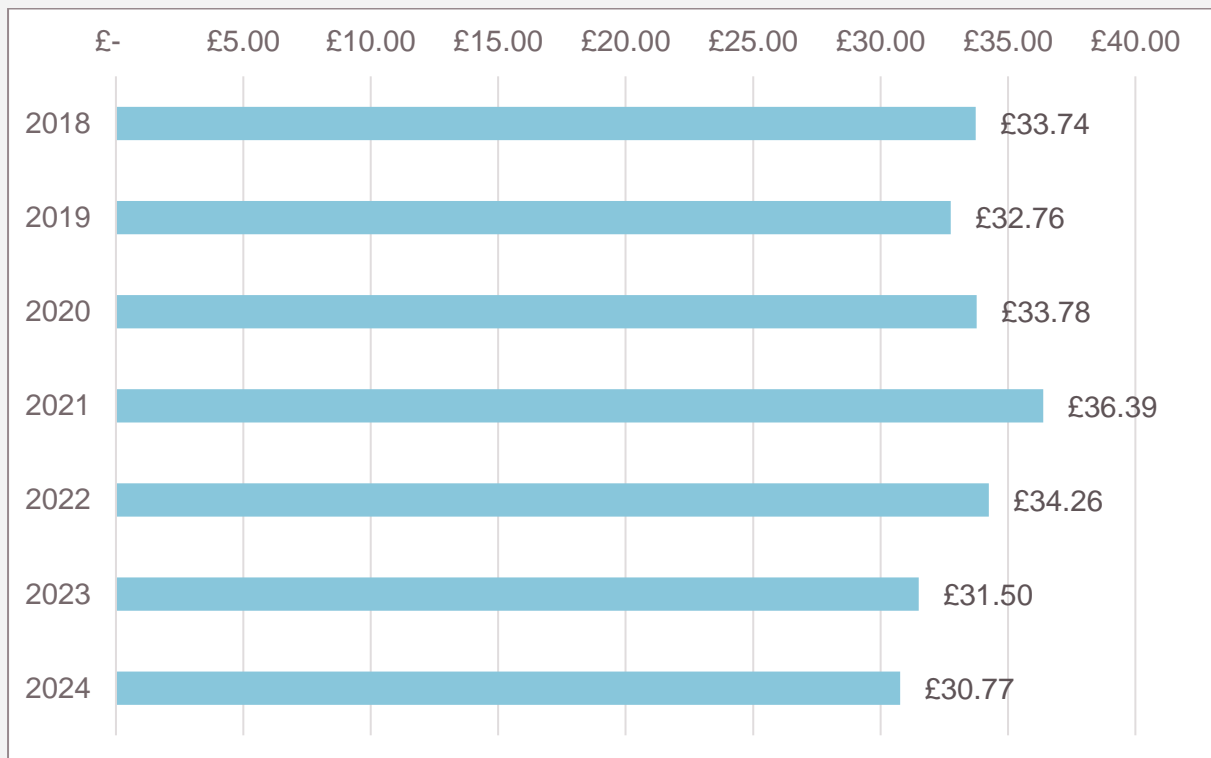
In 2020, revenue dropped dramatically to £11.11 million, an 82% decline, as events were cancelled or significantly restricted. 2021 saw a partial recovery, with revenue rising to £31.30 million, reflecting the return of performances but still operating well below pre-pandemic capacity.

By 2022, revenue had surged to £60.68 million, nearly reaching 2019 levels. This upward trend continued in 2023, with revenue increasing to £66.62 million, surpassing pre-pandemic figures for the first time.

In 2024, revenue further increased to £70.99 million, marking the highest level in this dataset.

Comparing 2018 to 2024 totals (adjusted for inflation), four of the eight organisations reported a rise in ticket revenue, with two increasing revenue by more than 20%. Of the four organisations that registered a fall in revenue, one recorded a reduction of over 20%.

Chart 6.5: Average ticket price paid at UK Concert Halls (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, ATP was £33.74 and £32.76, respectively.

In 2020, despite a sharp drop in ticket sales, ATP remained stable at £33.78, indicating that pricing was largely maintained for the limited events that did take place.

By 2021, ATP spiked to £36.39, the highest in the dataset.

In 2022, ATP decreased to £34.26, aligning more closely with pre-pandemic levels as more performances returned and pricing strategies normalised. However, 2023 saw a further decline to £31.50, and in 2024, ATP dropped again to £30.77, marking the lowest level in this dataset.

Comparing the averages for 2018 to 2024 (adjusted for inflation), three of the eight organisations reported a rise in average price paid per ticket, with one organisation increasing by more than 10%. Of the five organisations that registered a fall in average price paid, four recorded a fall of over 10%.

The UK 'Other' Presenting Cohort

- 41 organisations
- Ticket sales in 2024 ranged from under 10,000 to over 95,000.
- Box office revenue ranged from less than £60,000 to over £1,000,000.
- Average ticket price paid ranged from under £7 to over £25

This group consists of diverse arts centres, theatres, media centres and multi-purpose venues that primarily focus on presenting rather than producing work. They play a key role in bringing a wide range of performances to audiences across the UK, including touring theatre, live music, dance, comedy, spoken word, and community-led programming.

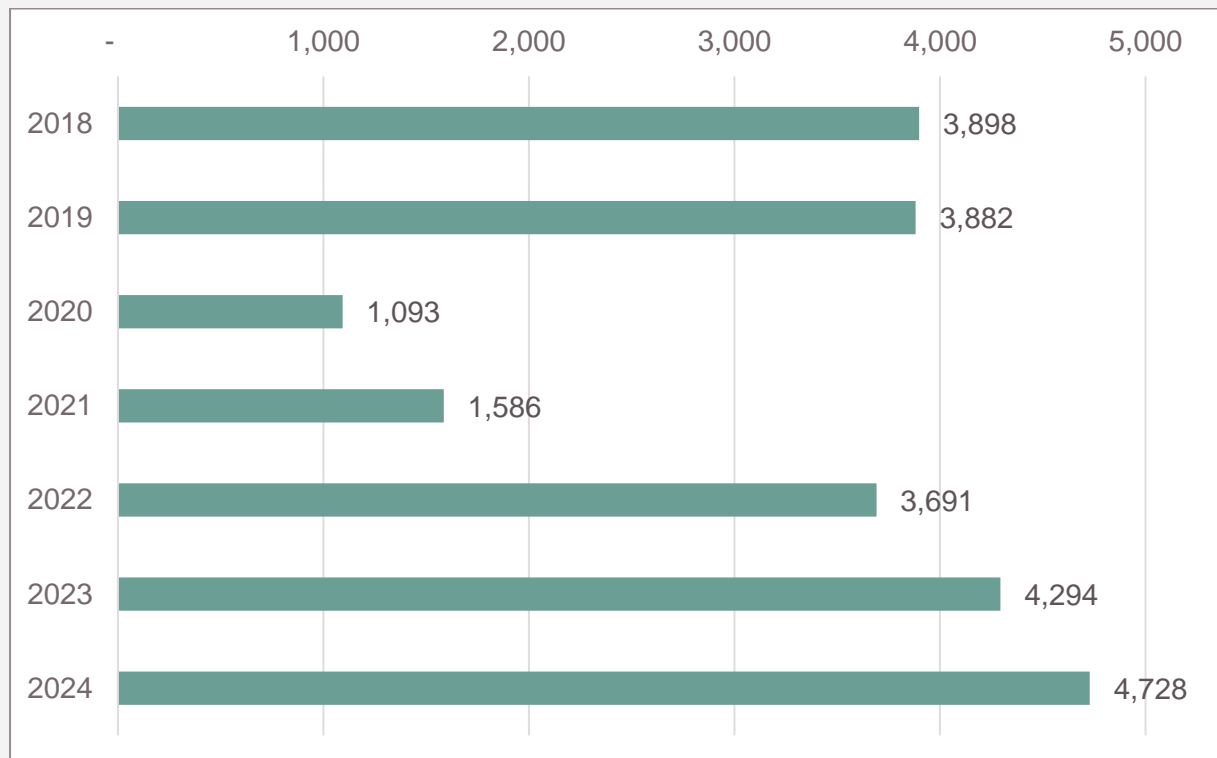
Many of these venues are deeply embedded in their local communities, offering arts engagement, educational initiatives, and artist development programmes alongside their core presenting activities. Some have a particular focus on specific art forms, such as dance, contemporary performance, or family programming, while others provide a broad mix of cultural events.

This cohort includes a mix of mid-sized and smaller venues, some operating as regional cultural hubs, while others serve more niche or specialist audiences. Their role in supporting touring companies, independent artists, and community-led initiatives is vital to ensuring a rich and diverse cultural offer across the UK.

Chart 7.0: UK Other Presenting Key metrics compared to pre-COVID baseline (2018-19 average)

UK Other Presenting - Summary	2023	2024
Performances	110%	122%
Ticket Sales	82%	84%
Capacity Sold	100%	104%
Ticket Revenue	82%	80%
Average ticket price paid	99%	95%

Chart 8.1: Number of performances at ‘Other’ UK Presenting



The number of performances at this cohort of presenting venues and multi-purpose arts organisations highlights a stable pre-pandemic period, a sharp decline in 2020–21, and a strong recovery that now surpasses pre-pandemic levels.

In 2018 and 2019, performance numbers were 3,898 and 3,882, respectively.

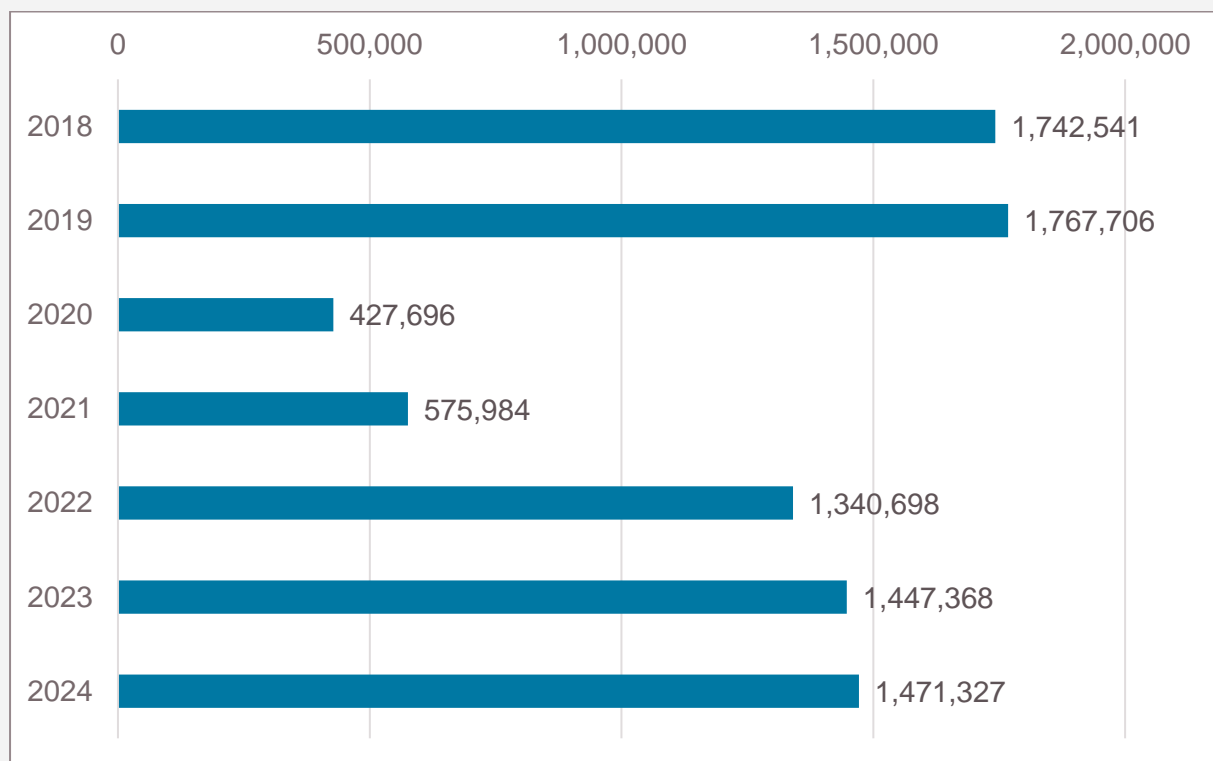
In 2020, the number of performances fell sharply to 1,093, a 72% decline, as venues faced widespread cancellations and severe operational restrictions. A modest increase in 2021, with 1,586 performances, reflects limited programming.

By 2022, performance numbers more than doubled to 3,691, signalling a strong return of programming as venues reopened and resumed regular activity. This growth continued in 2023, with 4,294 performances, surpassing pre-pandemic figures for the first time.

In 2024, the number of performances rose further to 4,728, the highest in this dataset.

Comparing 2018 to 2024 totals, 30 of the 41 organisations reported a rise in the number of performances, with 23 increasing by more than 20%. Of the ten organisations that registered a fall in performances, six registered a decrease of more than 20%.

Chart 8.2: Annual ticket sales at ‘Other’ UK Presenting



Ticket sales at this cohort of presenting venues and multi-purpose arts organisations reflect a stable pre-pandemic audience base, a severe drop in 2020–21, and a partial recovery that remains below pre-pandemic levels.

In 2018 and 2019, ticket sales were 1.74 million and 1.77 million, respectively.

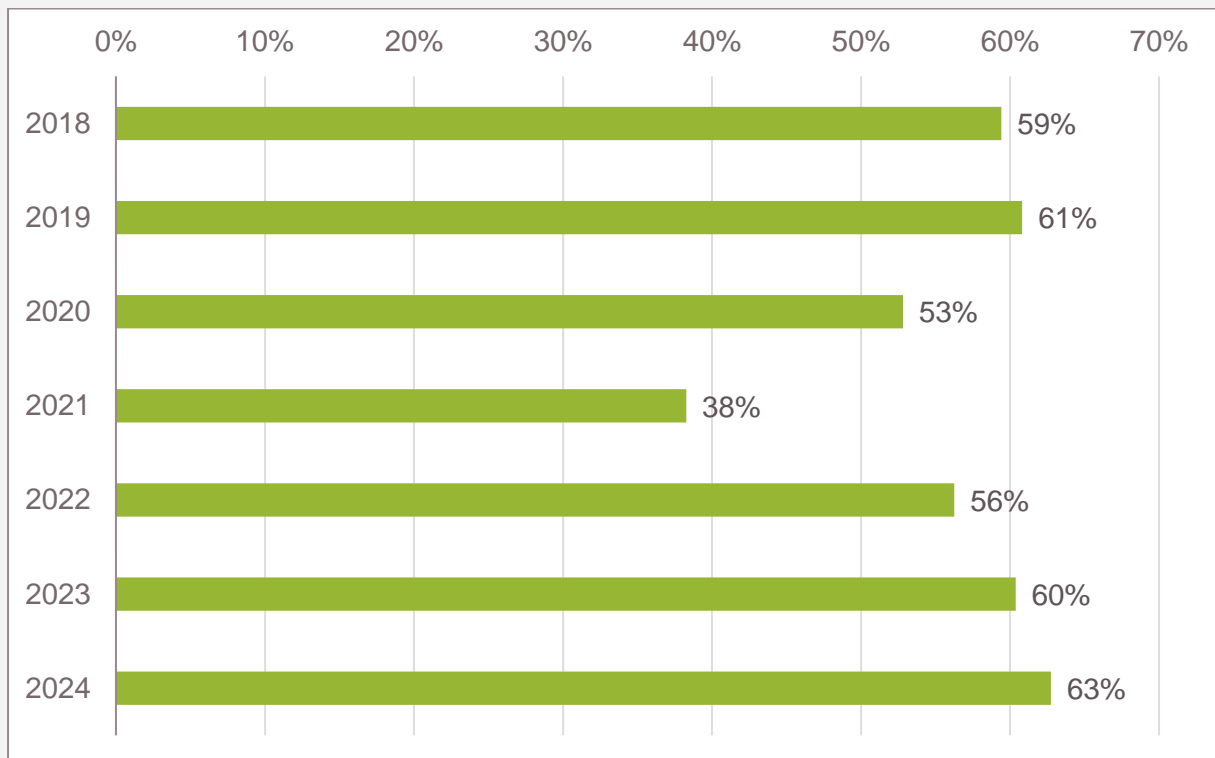
In 2020, ticket sales plummeted to 427,696, a 76% decline, as widespread cancellations and venue closures severely impacted attendance. In 2021, sales rose to 575,984, showing a modest recovery, but still far below pre-pandemic levels.

By 2022, ticket sales surged to 1.34 million, nearly doubling the previous year’s total, as audiences returned and programming was restored. In 2023, ticket sales increased further to 1.45 million, showing continued momentum but still falling short of 2019 figures.

In 2024, sales reached 1.47 million, maintaining modest growth but indicating a plateau below pre-pandemic levels.

Comparing 2018 to 2024 totals, 16 of the 41 organisations reported a rise in ticket sales, with ten increasing by over 20%. Of the 25 organisations that registered a fall in sales, 16 saw sales decline by over 20%.

Chart 8.3: Capacity sold at 'Other' UK Presenting



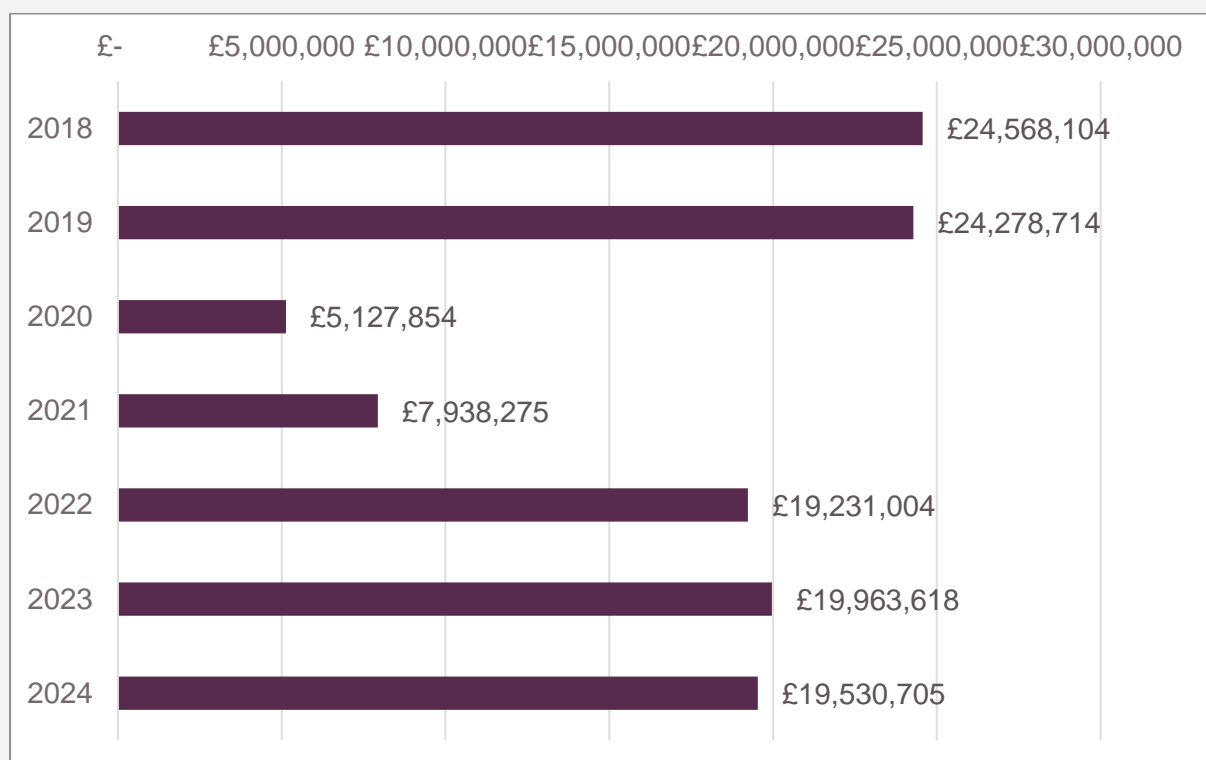
In 2018 and 2019, venues operated at 59% and 61% capacity, respectively.

However, in 2020, capacity dropped to 53%, and in 2021, it declined even further to just 38%, the lowest in this dataset.

By 2022, capacity sold rose to 56%, marking a clear improvement as programming expanded and audience confidence began to return. In 2023, capacity reached 60%, approaching pre-pandemic figures, and in 2024, it increased further to 63%, the highest level in this dataset.

Comparing 2018 to 2024 average capacities, 20 of the 41 organisations reported a rise including 13 that recorded rises of more than five percentage points. Of the 20 organisations that registered a fall in capacity sold, 13 saw a decrease of more than five percentage points.

Chart 8.4: Annual ticket revenue at ‘Other’ UK Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

Ticket revenue at this cohort of presenting venues and multi-purpose arts organisations reflects a stable pre-pandemic income, a sharp decline in 2020–21, and a partial but incomplete recovery.

In 2018 and 2019, revenue was £24.57 million and £24.28 million, respectively.

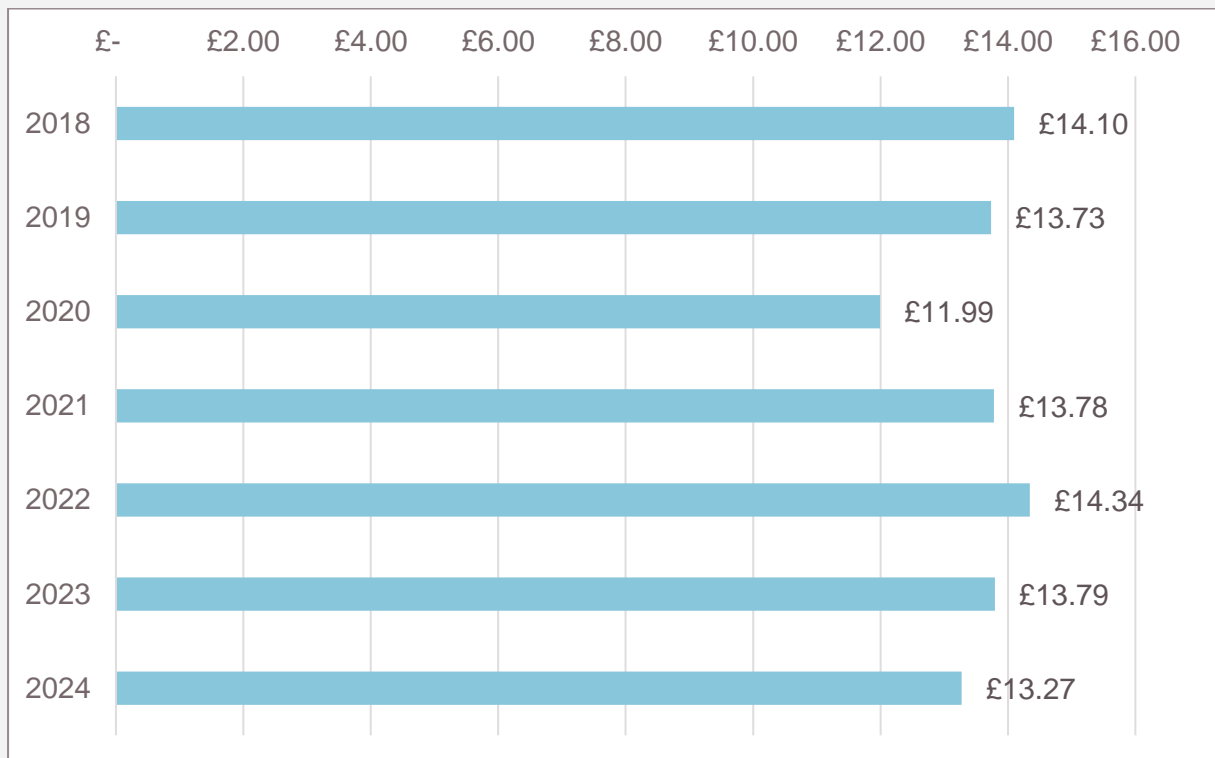
In 2020, revenue dropped dramatically to £5.13 million, a 79% decline, reflecting widespread cancellations and venue closures. In 2021, revenue rose to £7.94 million, marking a slight improvement but still just one-third of pre-pandemic levels.

By 2022, revenue surged to £19.23 million, representing a substantial recovery, as audiences returned in greater numbers and programming expanded. This upward trend continued in 2023, with revenue reaching £19.96 million, suggesting a stabilising financial recovery.

However, in 2024, revenue dipped slightly to £19.53 million.

Comparing 2018 to 2024 totals (adjusted for inflation), 12 of the 41 organisations reported a rise in ticket revenue, with nine increasing revenue by more than 20%. Of the 29 organisations that registered a fall in revenue, 14 recorded reductions of over 20%.

Chart 8.5: Average ticket price paid at 'Other' UK Presenting (real)



Figures from 2018 to 2023 have been adjusted to 2024 prices using the [Bank of England Inflation Calculator](#).

In 2018 and 2019, ATP was £14.10 and £13.73, respectively.

However, in 2020, ATP dropped to £11.99, reflecting significant disruption in programming during the first year of the pandemic.

By 2021, ATP rebounded to £13.78 and in 2022 ATP peaked at £14.34, the highest in this dataset.

However, in 2023, ATP dipped slightly to £13.79, followed by another decrease to £13.27 in 2024.

Comparing the averages for 2018 to 2024 (adjusted for inflation), 16 of the 41 organisations reported a rise in average price paid per ticket, with ten organisations increasing by more than 10%. Of the 25 organisations that registered a fall in average price paid, 14 recorded a reduction of over 10%.

Methodology

This report is based on data provided by 367 performing arts organisations that securely share their transactional box office data with TRG Arts. The analysis covers the seven-year period from 2018 to 2024, encompassing both pre-pandemic and post-pandemic performance.

To ensure consistency and reliability in year-on-year comparisons, only organisations that sold tickets in every year of the study period have been included in the analysis. This constant sample approach avoids distortions that can arise from changing cohort composition - such as new organisations joining or others exiting the dataset in certain years - which could misrepresent true trends in supply, demand, or revenue.

Across this period, participating organisations collectively sold more than 574 million tickets, providing a robust and representative dataset for identifying macro-level trends across four territories: the UK, US, Canada, and the Republic of Ireland.

Cultural organisations use their ticketing system to sell more than tickets for events. For calculations of performances in this study, efforts were made to remove event titles that included words and phrases such as 'parking', 'ice cream', 'programme' and 'dinner'.

Events that were clearly online due to their title were also removed ('on-demand', 'digital', 'online', etc.). To avoid counting performances that had been cancelled but remained on ticketing the system, a number of filters were applied including a minimum number of tickets sold (20) and minimum capacity sold (2%).

TRG Arts is still welcoming new organisations to join the free Sector Benchmark and would particularly like to welcome more organisations in Canada and the Republic of Ireland to grow the benchmarks in these nations. Sign up and receive a free dashboard to compare your organisation's performance with your peers.

Join the free Arts & Culture Benchmark

trgarts.com/benchmark



Appendix 1:
International Comparison

Appendix: International Comparison

This section presents headline performance indicators from three other territories where TRG Arts supports performing arts organisations: the United States, Canada, and the Republic of Ireland. These international benchmarks remain useful for understanding the UK's position in a global context.

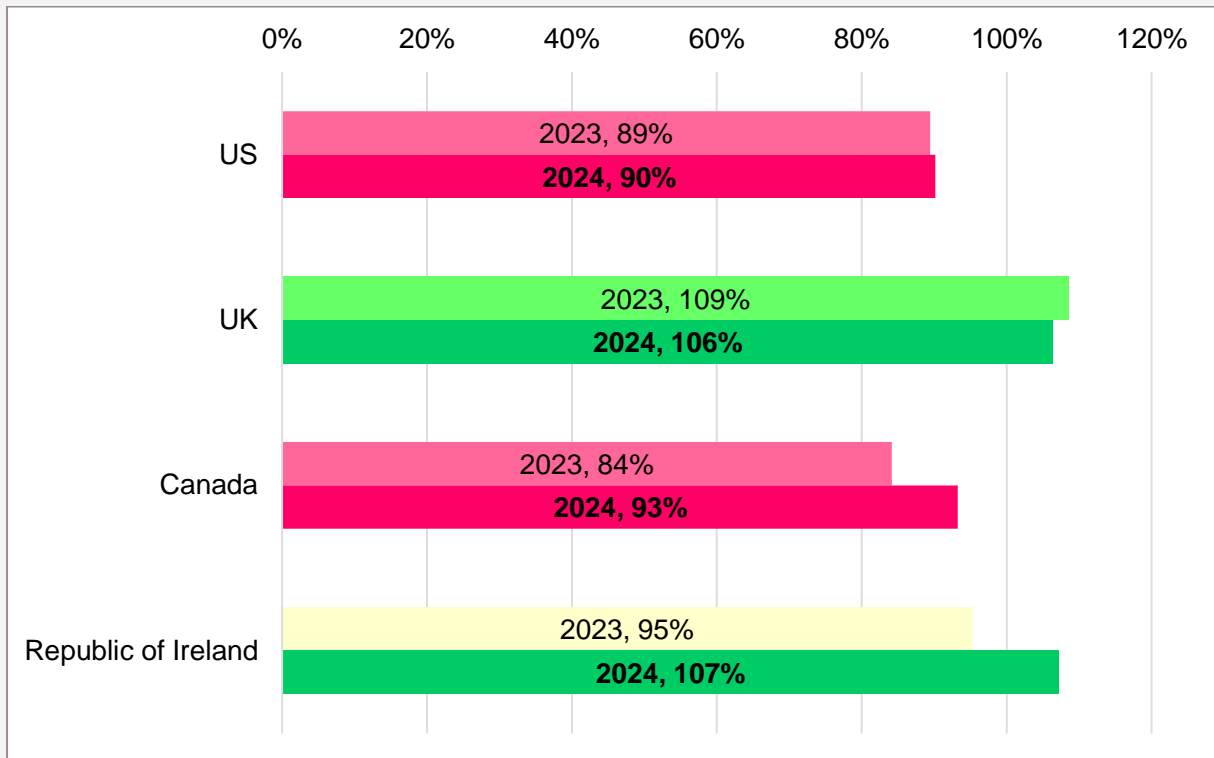
Data was contributed by 367 organisations in total, each of which securely shares box office transactions with TRG Arts. Only those that reported ticket sales every year from 2018 through 2024 were included in the analysis. This constant sample approach ensures comparability and avoids misrepresenting change by including organisations that entered or exited the dataset mid-period.

The international cohort includes:

- **United States:** 159 organisations
- **Canada:** 29 organisations
- **Republic of Ireland:** 8 organisations

These organisations vary widely in scale and artform, encompassing everything from major city-based symphony orchestras and theatres to regional presenting venues and multidisciplinary arts centres. This diversity means that no territory represents a uniform ecology—but taken together, the data provides a consistent, high-level benchmark against which to consider the UK's recovery and trajectory.

Chart x1.1 Number of Performances

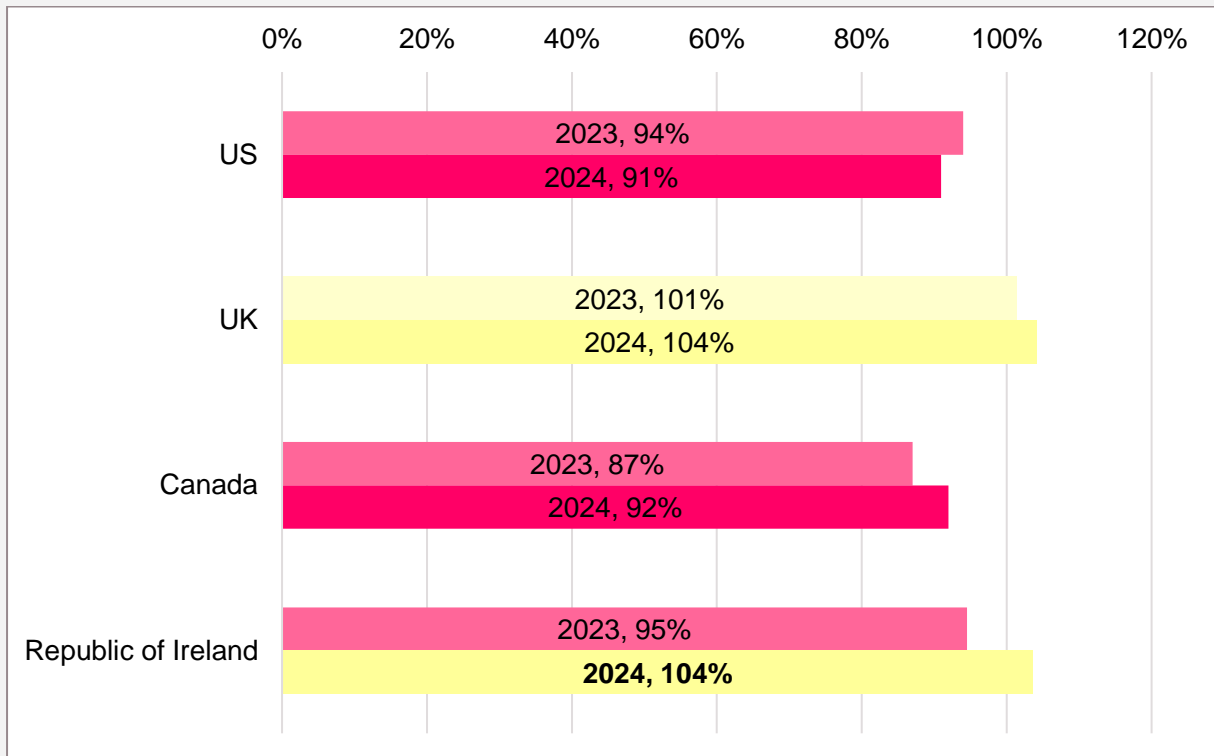


The chart compares 2023 and 2024 performance numbers across four territories against a pre-COVID baseline (2018-2019 average), highlighting recent trends in programming levels.

- **UK:** Slight decline from 109% in 2023 to 106% in 2024, but still above pre-pandemic levels.
- **Republic of Ireland:** Growth from 95% to 107%, surpassing pre-COVID levels in 2024.
- **US:** Minimal change, increasing marginally from 89% to 90%, still below pre-pandemic levels.
- **Canada:** Improvement from 84% to 93%, but remains under the baseline.

Short-term trend: Ireland and Canada saw stronger growth, while the UK dipped slightly but remained strong. The US showed little change.

Chart x1.2: Ticket Sales



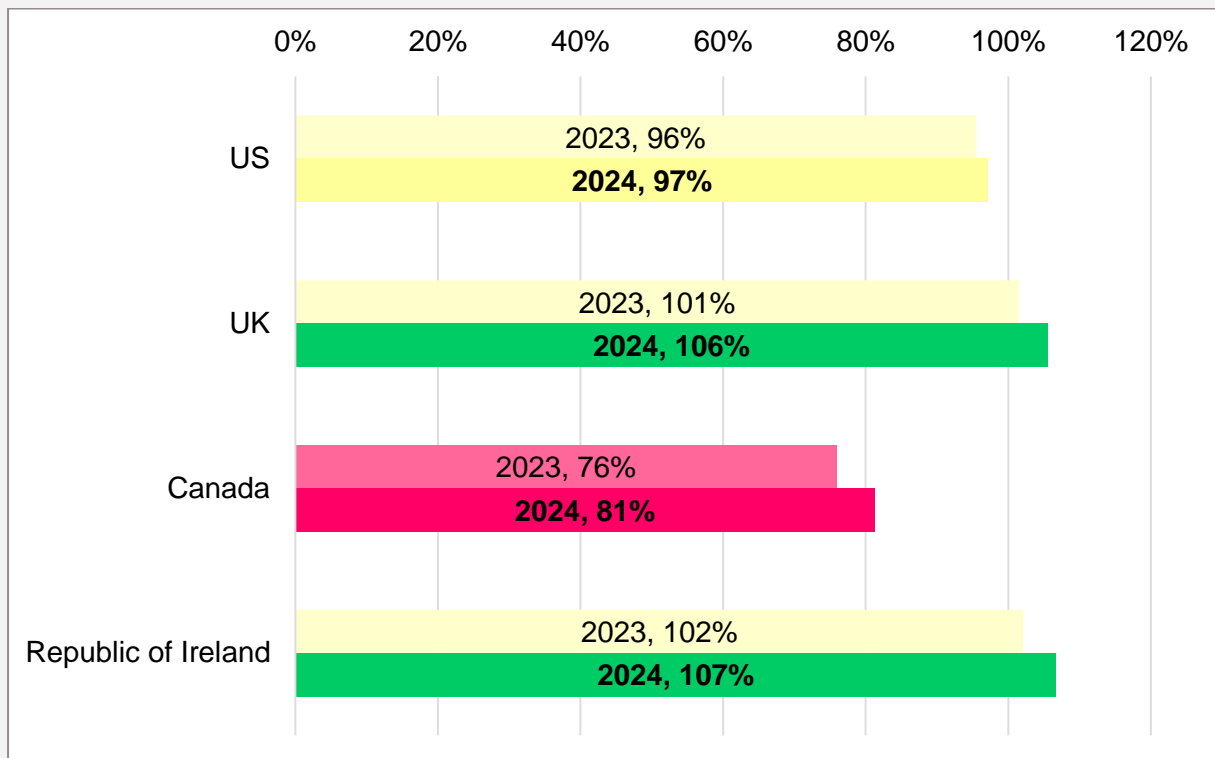
The chart compares ticket sales in 2023 and 2024 across four territories, relative to a pre-COVID baseline (2018-2019 average).

Key Trends (2023 → 2024):

- **UK:** 101% → 104% – Slight increase, remaining above pre-pandemic levels.
- **Republic of Ireland:** 95% → 104% – Strong growth, moving above the baseline.
- **US:** 94% → 91% – Decline, indicating weaker audience demand.
- **Canada:** 87% → 92% – Moderate recovery, still below pre-COVID levels.

Short-term trend: The UK and Ireland continue to strengthen, while Canada shows gradual improvement, and the US sees a slight decline.

Chart x1.3: Capacity Achieved



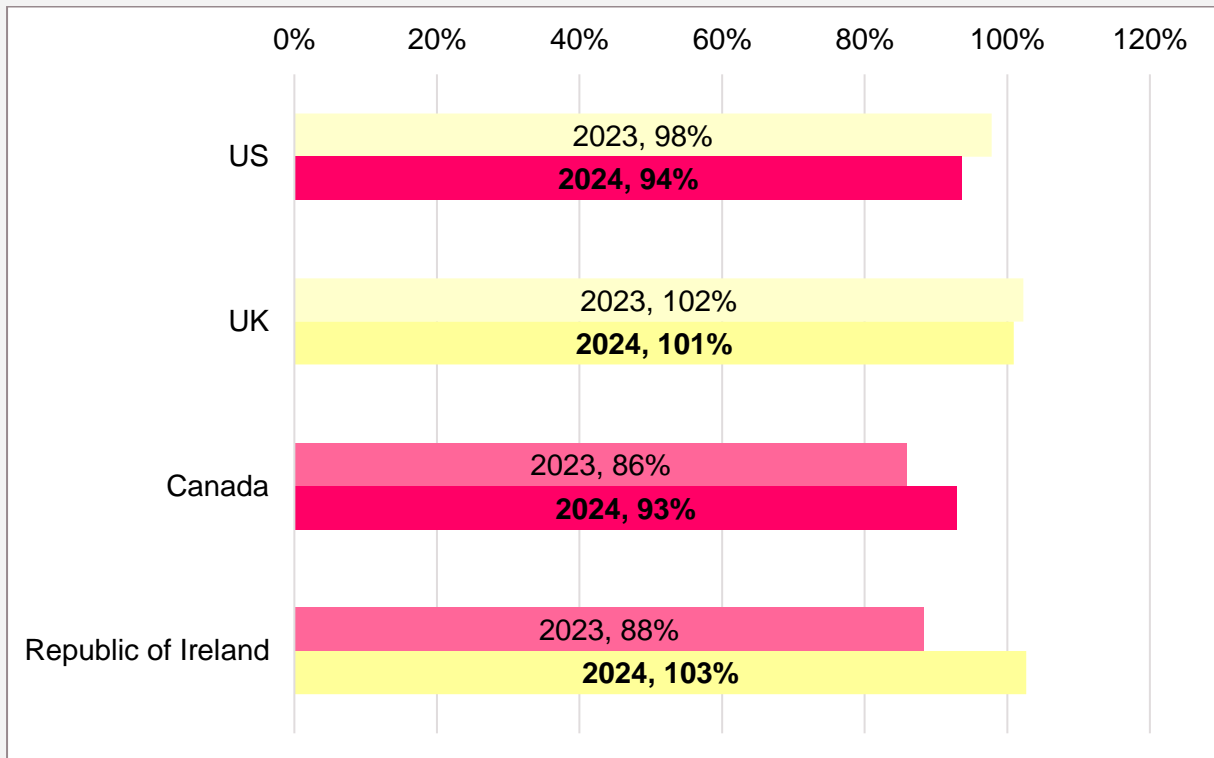
The chart compares capacity sold in 2023 and 2024 across four territories, relative to a pre-COVID baseline (2018-2019 average).

Key Trends (2023 → 2024):

- **UK:** 101% → 106% – Strongest growth, exceeding pre-pandemic levels.
- **Republic of Ireland:** 102% → 107% – Consistent increase, maintaining a high capacity fill rate.
- **US:** 96% → 97% – Minimal change, remaining slightly below pre-COVID levels.
- **Canada:** 76% → 81% – Lowest capacity recovery, but showing steady improvement.

Short-term trend: UK and Ireland strengthened their position, while Canada saw moderate improvement, and the US remained stable with minor gains.

Chart x1.4: Ticket Revenue



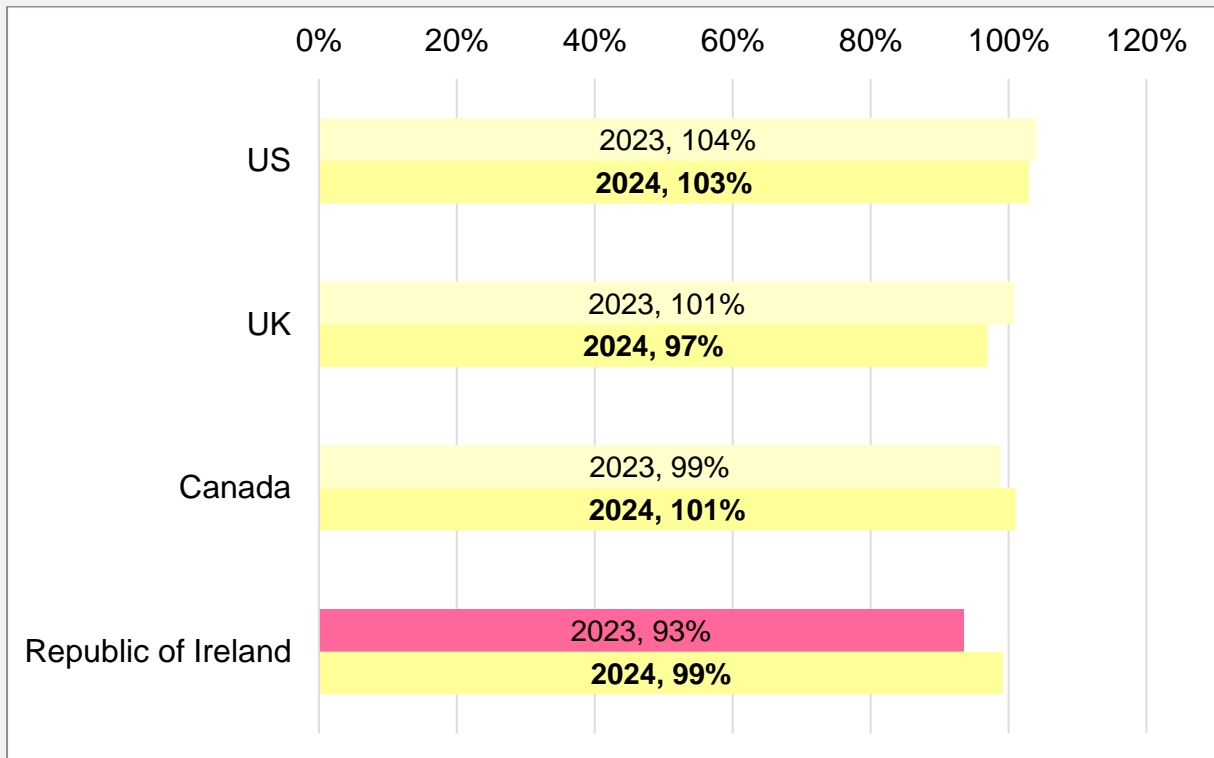
The chart compares inflation-adjusted ticket revenue in 2023 and 2024 across four territories, relative to a pre-COVID baseline (2018-2019 average).

Key Trends (2023 → 2024):

- **UK:** 102% → 101% – Stable, very similar to pre-pandemic levels.
- **Republic of Ireland:** 88% → 103% – Strong recovery, surpassing pre-COVID revenue.
- **US:** 98% → 94% – Decline, indicating weaker revenue performance.
- **Canada:** 86% → 93% – Moderate improvement, but still below 2018-19 levels.

Short-term trend: Ireland and Canada see revenue growth, while the UK remains stable, and the US experiences a decline.

Chart x1.5: Average Ticket Price paid



The chart compares inflation-adjusted average ticket price (ATP) in 2023 and 2024 across four territories, relative to a pre-COVID baseline (2018-2019 average).

Key Trends (2023 → 2024):

- **US:** 104% → 103% – Slight decline but remains above pre-pandemic levels.
- **UK:** 101% → 97% – Decrease, now below pre-COVID pricing.
- **Canada:** 99% → 101% – Slight increase, returning to pre-pandemic levels.
- **Republic of Ireland:** 93% → 99% – Recovery, but still just under pre-2020 prices.

Short-term trend: UK experiences a drop in ATP, while Canada and Ireland see slight increases. The US remains relatively stable.



Appendix 2:
COVID-19 Timeline UK

COVID-19 Timeline for Performing Arts Venues in the UK (2020–2022)

The reopening of performing arts venues in the UK varied significantly by nation, as policy and restrictions were determined by devolved governments. However, the following timeline captures key trends for England and major policy shifts affecting the sector across the UK.

2020: Widespread Closures and Limited Reopening

- **16 March 2020** – UK government advises people to avoid theatres and public venues, effectively shutting down the sector overnight.
- **20 March 2020** – Nationwide lockdown begins; theatres and concert halls formally ordered to close.
- **5 July 2020** – UK government announces a **£1.57 billion Culture Recovery Fund** to support the sector.
- **11 July 2020** – Outdoor performances permitted in England with social distancing.
- **15 August 2020** – Indoor performances allowed with restrictions, including **social distancing and reduced capacity**.
- **Autumn 2020** – Local and national lockdowns force many venues to remain closed or operate at very limited capacity.
- **5 November 2020** – Second national lockdown in England; performing arts venues must close again.
- **2 December 2020** – Venues in some lower-tier areas allowed to reopen with restrictions, but many remain closed due to strict rules in higher-tier regions.

2021: Gradual Reopening with Ongoing Restrictions

- **6 January 2021** – Third national lockdown in England; all performing arts venues closed again.
- **17 May 2021** – Theatres and concert halls allowed to reopen with **50% capacity limits or 1,000 attendees indoors** (whichever is lower).
- **19 July 2021 (England’s ‘Freedom Day’)** – **All remaining legal restrictions lifted in England**, including capacity limits and social distancing. However, mask-wearing is still recommended.
- **August–September 2021** – Theatres continue reopening, but many report slow audience return and production challenges.

- **Autumn 2021** – Vaccine certification introduced in Scotland and Wales for large venues, but not in England.

2022: Full Return to Normal Operation

- **January–February 2022** – Scotland and Wales lift remaining restrictions on venues and large events.
- **27 January 2022** – England removes remaining mask guidance and work-from-home recommendations, fully restoring normal theatre operations.
- **18 March 2022** – All remaining international travel restrictions lifted, supporting the return of touring productions and international artists.

By mid-2022, the UK's performing arts sector had returned to full operational capacity, though challenges remained in rebuilding audience confidence, addressing financial pressures, and overcoming disruptions in production schedules.