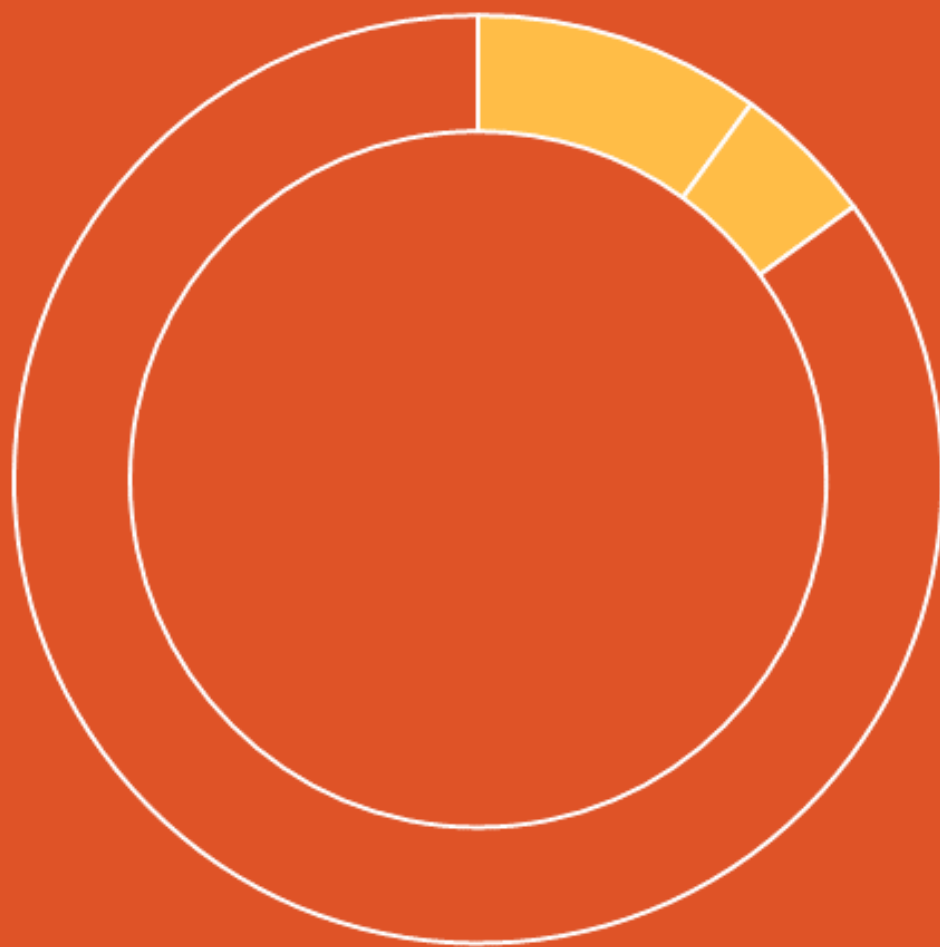


Disappearing Act?



A data-led review and recommendations for
urgent actions to safeguard a credible producing
theatre sector in Scotland

27 July 2023

A response from the Commissioners of this Report

We would like to thank Creative Scotland for funding this important work through the Recovery Fund for Cultural Organisations. This report was researched and written by Data Culture Change and, without Creative Scotland's support, it would not have been possible.

As executive leaders of Scotland's six independent producing theatres, we feel the stark challenges this report reveals around making theatre in this country now and in the future.

Confronting the consequences of decades of public funding reductions alongside rising costs is a daily reality for us. Whilst we recognise the strain on public resources, we also recognise that continuing to achieve more with less is not sustainable.

Greater collaboration is required as we face upcoming challenges and opportunities. That is why we find the proposal to adopt a common approach moving forward so compelling. Our collective diversity can serve as an asset for the people of Scotland, even as we maintain our individual focus and purpose.

By aligning on common goals whilst preserving that individuality, we can work smarter to the benefit of all our communities. A shared approach will capitalise on our collective strengths, encourage innovation, and promote the cultivation of new audiences.

We are committed to a bright future for Scotland's theatre sector. A sustainable producing theatre sector is fundamental to the future of the performing arts in this country, and we intend to contribute to a healthier and more vibrant cultural landscape.

We have the potential to expand the market for theatre made in Scotland domestically, throughout the wider UK, and internationally. This will increase the benefits to those working in the industry and boost the overall economy by bringing more visitors to Scotland and taking the best of Scottish talent to the world.

This report is explicit in its finding that change is necessary. We recognise that change is challenging. We are committed to responding with flexibility and optimism to the journey, and trust that funders, partners, and colleagues will be similarly supportive of our transformation for the people of Scotland.

Alex McGowan, Citizens Theatre

Liam Sinclair, Dundee Rep

Kris Bryce, Pitlochry Festival Theatre

Mike Griffiths, Royal Lyceum Theatre Edinburgh

Linda Crooks, Traverse Theatre

Patricia Stead, Tron Theatre



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2. Executive Summary

- 2.1.1. This report examines the supply of and demand for producing theatres in Scotland in the context of revenue funding reductions, recruitment challenges, increasing costs, low commercial exploitation, and the impact of the Covid-19 pandemic.
- 2.1.2. The study was commissioned by Scotland's six independent producing theatres and used data from interviews, workshops, and research from venues and audiences, as well as data provided to funders in Scotland and England.
- 2.1.3. The key findings reveal that almost four in ten Scottish households visited the theatre over a five-year study period, but less than 15% of the theatre they consumed was made in Scotland.
- 2.1.4. There are serious inequities in theatre consumption, with audiences in Scotland being more likely to be from higher social classes and education levels.
- 2.1.5. The theatre sector is financially dependent on a small number of frequent bookers who are not loyal to a single venue.
- 2.1.6. There is a significant minority of audiences interested in new models of investment and paying more for tickets to support Scottish theatre.
- 2.1.7. In the context of prolonged real term reductions in revenue funding from national and local government, it is not surprising that the Scottish producing theatres collectively posted a deficit in three of the four pre-Covid years.
- 2.1.8. The impact of the pandemic has been broad and deep. Some audiences have been slow to return and a sizable proportion of the 'core' frequent audience appears to have been lost.
- 2.1.9. Theatre Tax Relief has made a vital contribution to the finances of producing theatres during the last decade. The tapering down from current rates from 2025-26 will present significant additional challenges.
- 2.1.10. As well as reduced income, there are now enormous pressures on costs across the business, including major rises in the price of utilities.
- 2.1.11. Attracting and retaining skilled staff is proving a greater challenge than ever with wage expectations rising, reflecting increases in the cost of living.
- 2.1.12. Theatre leaders are committed to putting fair work first and becoming carbon neutral, but these goals will only be achieved with greater expenditure.
- 2.1.13. Reallocating limited resources to these areas will lead to less support for artist development, community and education work, and a reduction in the number and/or quality of productions.
- 2.1.14. To avoid the potential of venue closures and the very real possibility of the end to a credible producing theatre sector in Scotland, fundamental sustained action is urgently required.
- 2.1.15. The report provides several recommendations to address the challenges faced by Scotland's independent producing theatres by taking collaborative 'federal' approaches to production, marketing, learning and participation and the development of new income streams.



3. Background and Methodology

3.1. Background

- 3.1.1. This study was jointly commissioned in June 2022 by Scotland's six independent producing theatres:
- Citizens Theatre, Glasgow
 - Dundee Rep and Scottish Dance Theatre
 - Pitlochry Festival Theatre
 - Royal Lyceum Theatre Edinburgh
 - The Traverse, Edinburgh
 - Tron Theatre, Glasgow
- 3.1.2. The six organisations in this study operate with widely varying business models in different local, national and international markets. What unites them is their commitment to producing their own work that allows them to represent and explore their communities and the issues that face them on stage. It makes their work 'relevant'. They are civic spaces that give the opportunity for a plurality of voices to be heard.
- 3.1.3. The role of producing theatres in Scotland and the UK as a whole has become wider and more important in recent decades.
- 3.1.4. They are increasingly centres for artist development. There has been a huge increase in the number and range of companies and individuals benefiting from access to the stages and facilities of the theatres. Theatres themselves are taking a leadership role in pro-actively supporting the creative and professional development of a more diverse new generation of theatre makers.
- 3.1.5. As cuts and changes in national policy priorities have had an impact on the ability of children and young people to access high quality cultural experiences, theatres have responded not only by increasing the opportunities to access provision in their buildings but also have increased the amount of their direct delivery of arts education services in schools.
- 3.1.6. As local government has had to focus diminishing resources on increasing pressure in statutory services, theatres are playing a greater leadership role in helping to ensure all communities have access to quality cultural opportunities and that the cultural sector makes the maximum possible positive impact on the social, educational and economic development of our communities.
- 3.1.7. The purpose of this study is to examine the supply of and demand for producing theatres in Scotland in the context of the commissioning theatres' perception of:
- Prolonged real terms reductions in revenue funding from national and local government
 - Increasing challenges in the recruitment and retention of skilled staff
 - Increasing costs across the business
 - Perceived low levels of commercial exploitation
 - The impact of the Covid-19 pandemic
- 3.1.8. As well as interviews and workshops with leaders and staff of the participating venues, this report is informed by extensive analysis of data gathered in Scotland and England as



well as primary research from both the venues and their audiences. The demand-side analysis utilises both anonymised and pseudonymised data from Purple Seven/TRG Arts for the most comprehensive study ever into theatre-going by Scottish audiences.

- 3.1.9. The commissioning of a study of this size and complexity by the participating theatres is unusual and is testament to the scale of the challenges they are facing. Rather than seek statistics to advocate for the status quo, the commissioners sought robust evidence to question long-established operating models, their place in the overall market for theatre and the public's current perception of theatre being created in Scotland.
- 3.1.10. The six commissioning theatres are the only independent charities in Scotland that run venues that principally stage work that is made by the charity. They are not the only organisations that produce theatre in Scotland: there are local authority-controlled venues that produce work, other venues that produce or co-produce work for part of the year (particularly at Christmas) and of course Scottish touring companies including the National Theatre of Scotland.
- 3.1.11. Within the six commissioning venues there is a significant variety and diversity in size, location, programming policy, price of tickets, tenure of venue, level of annual public support and much more besides. Despite this diversity, they all recognise that they operate in the same ecology and are facing many of the same challenges.
- 3.1.12. The commissioning theatres requested that this study was robust and data led. The findings and recommendations are therefore largely driven from where the theatres are individually and collectively rich with data. This is true for finance and ticket purchasing. Data is currently far poorer for the scale and impact of the theatres' work in engagement and participation and in their support for the broader theatre ecology. The commissioning theatres have acknowledged the need to strengthen their evidence base in these primary areas of their work.
- 3.1.13. The Covid-19 pandemic has a profound effect on the final year of the study period (2020/21). Its shadow continues and can be seen in its ongoing impact on the behaviour of previously frequent bookers in the summer of 2022. This failure for the market to return to 'normal' coupled with increased costs magnifies the intensity of the crisis facing the six venues in this study and the future of theatre made in Scotland.

3.2. Methodology

- 3.2.1. There were eight elements to this study:
 - Analysis and aggregation and some further processing of data in annual returns submitted by the six producing theatres to Creative Scotland for the five years from 2016/17 to 2020/21.
 - Analysis and aggregation of environmental data submitted by the six producing theatres to Creative Scotland and then Creative Carbon Scotland for the five years from 2016/17 to 2020/21.
 - The establishment of a benchmarking group of ten English producing theatres that reflected the variety and diversity of the six Scottish theatres. Arts Council



England publishes the individual annual returns of its revenue funded organisations.

- A further survey of the participating theatres designed by Data Culture Change to capture supplementary information on aspects of the work of the venues in the same five-year period. This included capturing data that could be used to benchmark against the English cohort.
- A demand-side analysis of audience ticket purchasing behaviour covering most professional theatres in Scotland. This utilised anonymised customer data from Purple Seven/TRG Arts for the period from August 2017 to July 2022.
- A further, deeper analysis of ticket purchasing behaviour within and outside the six commissioning theatres using Purple Seven/TRG Arts pseudonymised audience data to track venue crossover and share of basket.
- Primary Research led by Charlotte Wilson Research Services surveying the audiences of the six commissioning theatres to ascertain their understanding of theatre operating models and the level of influence this has on their purchasing behaviour.
- Individual interviews and joint workshops with the six commissioning theatres.

3.2.2. Much of the data analysed for this study is secondary: it has been collated by other organisations for other purposes. Data Culture Change has endeavoured to ensure data is as clean and accurate as possible, including carrying out extensive checks to correct errors in individual Creative Scotland returns. Purple Seven/TRG Arts uses sophisticated deduplication processes to address different practices in different venues and varying standards in customer data management.

3.2.3. Despite these processes and checks, we remain reliant on the original data and are aware that there are variations in quality and gaps. We are confident that these do not have an impact on the overarching narrative of this study.



4. Key findings

4.1. A nation of theatre-goers, largely consuming imported theatre

- 4.1.1. Our analysis demonstrated that almost four in ten Scottish households had visited the theatre in the period from August 2017 to July 2022. We estimate that less than 15% of the theatre they consumed was made in Scotland.

4.2. Serious inequities remain in theatre consumption in Scotland

- 4.2.1. As we expected, as well as geographic inequities we found that audiences in Scotland were more likely to be from higher social classes and educated to a higher level. We also found that those who attended theatre more frequently were less representative of the population as a whole. This was also true for the audiences of the six independent producing theatres compared to the audiences at other venues largely presenting touring productions.

4.3. Dependence on a small number of frequent bookers

- 4.3.1. Both the theatre sector as a whole and the group of six independent producing theatres attract a comparatively small number of customers on a frequent basis. These customers (crucial for the financial sustainability of the venues) are not loyal as they are likely to be also attending more than one other theatre.
- 4.3.2. While a small number of customers account for the majority of theatre income, most customers in the study had attended only one venue during the five-year period, and most of these only made a single transaction.

4.4. A significant minority of audiences say they would do more to support Scottish theatre

- 4.4.1. A survey of current theatre attenders commissioned as part of this study demonstrated that while there were high levels of pride in Scottish Theatre, this had little impact on consumer choice.
- 4.4.2. A significant minority of respondents expressed interest in new models of social and personal investment in both their local venue and Scottish theatre as a whole.
- 4.4.3. A majority of respondents stated they would be happy to pay more for tickets to support Scottish theatre.

4.5. An unsustainable model

- 4.5.1. In the period before Covid, the six independent producing theatres were collectively staging an impressive number of productions and, on average, slightly more



performances than a cohort of similar English producing theatres. The Scottish organisations also invested a higher proportion of their income in their artistic activities.

4.5.2. They did not witness a commensurate return on that investment, with ticket sales and revenue substantially below the English benchmark.

4.5.3. With no growth in earned income and standstill government funding, the six venues collectively posted a deficit in three of the four pre-Covid years.

4.6. No change is not an option

4.6.1. If the collective picture for these venues was bleak before the pandemic, the negative impact of Covid has been broad and deep. Some audiences have been slow to return and a sizable proportion of the 'core' frequent audience appears to have been lost.

4.6.2. As well as reduced income, there are enormous pressures on costs across the business, including major rises in utility costs. Attracting and retaining skilled staff is proving a greater challenge than ever with wage expectations rising, reflecting increases in the cost of living. Theatre leaders are committed to putting fair work first and becoming carbon neutral, but these goals will only be achieved with greater expenditure.

4.6.3. Hopes for national government funding for arts and culture to at least rise at the pace of inflation have once again been dashed and some local authorities are countenancing major cuts.

4.6.4. The six independent producing theatres are facing a perfect storm. To reduce expenditure further, they can only reduce the work they are doing:

- less support for artist development,
- a reduction in community and education work and
- a reduction in the number and/or quality of productions.

4.6.5. The impact of these cuts would be to increase the inequity in the sector, reduce the talent pipeline and make return on investment in theatre made in Scotland still harder to achieve. It would be unsurprising to see audiences turn in even greater numbers to imported touring productions. With both increased costs and reduced income, the future of theatres would be at risk.

4.6.6. To avoid venue closures and the very real possibility of the end to a credible producing theatre sector in Scotland, fundamental sustained action is urgently required.



5. Recommendations

5.1. A 'federal' approach to working

- 5.1.1. The six independent producing theatres are united by a collective purpose to create. Simultaneously they all have different artistic and geographic focuses, from the local to the international. This diversity should be a creative strength for the nation.
- 5.1.2. Without the prospect of a return to historic levels of government funding, the sector will only be able to survive and thrive if organisations work smarter, together in creative new ways.
- 5.1.3. We recommend that the six venues commit to taking a federal approach to future working.
- 5.1.4. Each theatre would retain its autonomy and decision-making authority while also working towards shared goals and objectives. They will work more closely to share resources, exchange best practices, and collaborate on joint projects or initiatives.
- 5.1.5. A federal approach will allow each organisation to leverage their individual strengths and resources while also benefiting from the collective expertise and resources of their peers.
- 5.1.6. This notion of working federally underpins all our recommendations. If delivered effectively, it will strengthen the theatre sector in Scotland as a whole, foster collaboration and innovation, and support the development of new audiences and artistic talent.

5.2. Producing new Scottish work that will attract large audiences, nationally and internationally.

- 5.2.1. All six independent producing theatres want to produce successful work that will attract a large audience and have a life beyond an initial run in their venue that delivers a financial return on their investment. Sadly, this is currently a rare event.
- 5.2.2. To maximise the likelihood of developing a 'hit', promising productions need to be funded and supported with an expectation of success and guided by skilled and experienced commercial producers.
- 5.2.3. We recommend that the six independent producing theatres work together to create a new company that will support and co-produce popular shows that are expected to tour within Scotland and then go on for further commercial exploitation in other parts of the UK and internationally.
- 5.2.4. These 'popular' shows would be capitalised enough to ensure that every one has a 'wow' factor with strong titles, high production values and casting that helps sell tickets.
- 5.2.5. While not every production will return a profit, the expectation would be that across any year the company would generate a net profit that would result in a dividend for its shareholders: the six independent producing theatre companies.
- 5.2.6. The six independent theatres would also benefit from strong ticket sales and secondary revenue from the visit of the production to their venue.



- 5.2.7. Crucial to the success of the new company will be its ability to act nimbly and commercially. The six independent theatres would be shareholders and members of the company with voting rights. The Board would include a limited number of places for representatives of the shareholders, but principally comprise individuals with the skills and networks to support the sustainable development of a successful commercial venture.
- 5.2.8. The company would be led by an experienced commercial theatre producer who would make their recommendations of productions to be supported to the Board.
- 5.2.9. Rather than a rota of productions from the six theatres, each theatre would be able to pitch any number of ideas to the new company, as would other Scottish touring companies and independent producers.
- 5.2.10. Initially the target would be to create three new productions a year, two designed to play to medium to large scale houses and a third for smaller capacities. The smaller productions would still have the 'wow' factor. The aim would be to increase the annual number of productions over time, but without any decrease in the perceived quality and popularity of the productions.
- 5.2.11. Work will be commissioned on the expectation that it will have a life after a Scottish run within and beyond the six independent theatres. This might mean dates in mid-scale English venues as part of an initial run. It could mean a second scaled-up tour to larger commercial playhouses or to 'Number One' lyric venues for musicals.
- 5.2.12. The new company would be established with the expectation that it could act as the lead Producer of a production that transferred to the West End. As well as skills and experience in managing West End shows, the new company needs to establish a base of domestic and international 'Angels' who want to support a flourishing Scottish theatre sector.
- 5.2.13. While having the skills and capacity to provide leadership wherever necessary, the new company would also consider partnership and taking a secondary role whenever it is in the commercial interests of the company to do so.

5.3. Growing and diversifying audiences for theatre made in Scotland

- 5.3.1. Analysis of purchasing data demonstrated that while the audience for theatre in Scotland is substantial, the majority of bookers attend very rarely and when they do they largely buy tickets for 'imported' theatre.
- 5.3.2. Collective action is required by the six independent theatres to increase venue crossover, frequency of attendance and market share.
- 5.3.3. The notion of specific branding or a marque to signify their high-quality work should be explored along with the creation of an overarching Scottish Theatre membership scheme that would offer benefits at all six theatres as well as the 'home venue' of the Member.
- 5.3.4. We recommend that the commissioning venues explore a range of shared-service models that could reduce costs and increase return on marketing investment.



- 5.3.5. Inequities in cultural engagement are deeply rooted and not unique to Scotland. This study highlighted the lack of robust data across the six organisations on young people and adults who were engaging through participatory and learning activities. It is likely that the reach of these six venues is far broader than box office data suggests, but currently it is very hard to demonstrate this. Developing a collective approach to the systematic collection of learning and participation data is crucial.
- 5.3.6. While each venue has a unique catchment and a different offer, there will be some opportunities to increase and diversify engagement that would benefit from collective working. This could include a unified offer to young adults across all six venues.
- 5.3.7. By collectively taking a long-term approach to addressing people and places that are traditionally underserved by arts organisations and continuously sharing learning, the six organisations together have the critical mass to ensure that there is a measurable reduction in inequity over the next decade.

5.4. Collective Workforce Programme

- 5.4.1. Currently all six venues report significant problems in the recruitment and retention of trained staff, but they are not working collectively to address them. At the same time individual organisations lack the necessary in-house skills and capacity to address the challenges they face.
- 5.4.2. We recommend that the first step in developing a workforce programme should be to undertake an engagement survey of staff across the theatres. This will provide robust data to highlight priority areas for future focus and allow benchmarking between the six organisations and across similar sectors.
- 5.4.3. Standard practices and approaches should be introduced across the six organisations, including the tracking of staff demographics and churn.
- 5.4.4. Stronger data should underpin the development of a joint workforce strategy, informed and supported by the HE sector in Scotland, Creative and Cultural Skills and appropriate Scottish and UK trade associations.
- 5.4.5. Best practice should be shared across the six organisations with a single shared approach to annual appraisals and CPD plans.

5.5. Working groups to address major technical and legal issues

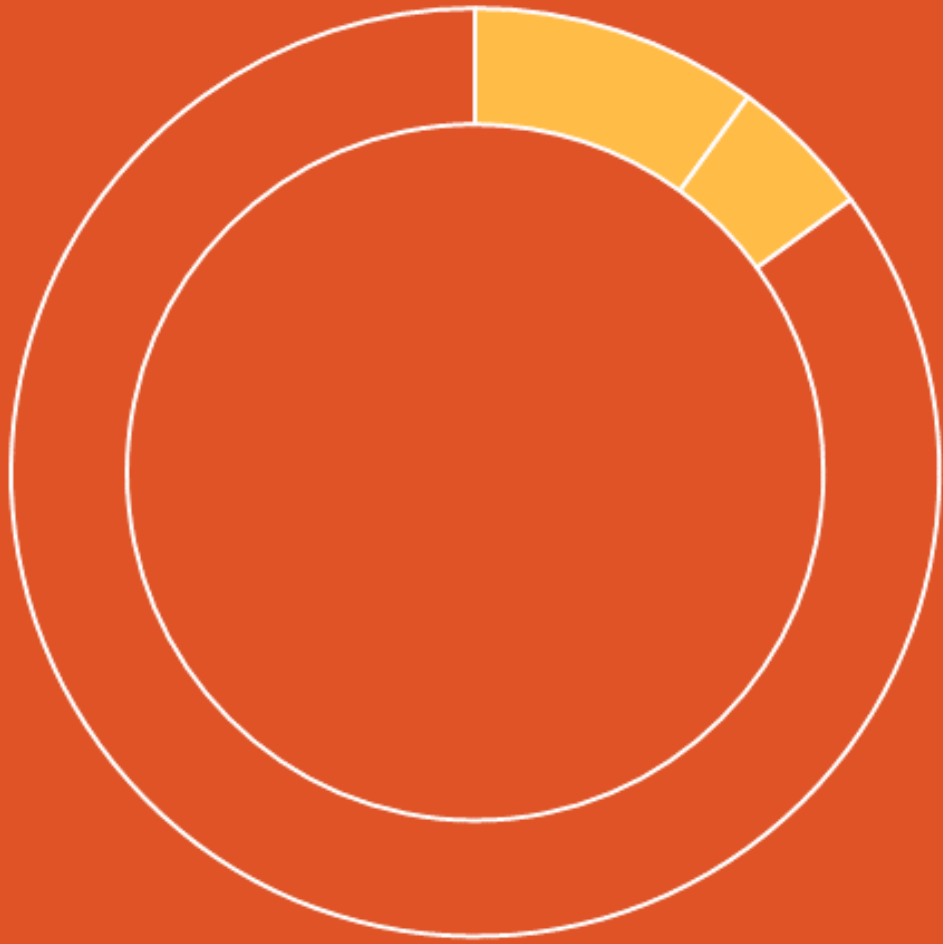
- 5.5.1. There is evident frustration within the leadership of the six commissioning theatres with barriers to the sector flourishing.
- 5.5.2. While there is a strong desire to advance the Net Zero agenda, several venues do not own the freehold of their theatres. This reduces their ability to plan for the long term and seek funds to invest in capital works.
- 5.5.3. There is also a wish to be fair and progressive employers, but some of the practices entrenched in UK-wide sector agreements have not moved on since the 1970s.



- 5.5.4. Currently no-one is benefiting from the confused and contradictory landscape of Intellectual Property across Scotland and the UK. Producing theatres feel it is not worth the effort to fully exploit their productions as they get little financial reward. Rights holders are let down by commissioners who don't see the success of their works maximised on stages in Scotland and beyond. Audiences don't get to see the volume of excellent Scottish-made theatre that they should. Usually, on the rare occasions that Scottish theatres create a 'hit', it is refinanced and remade outside the country providing little or no financial or reputational return on the original investment.
- 5.5.5. The six commissioning theatres want to address these key issues around buildings/tenure, employment relations and intellectual property, but they cannot do so alone. We recommend that Creative Scotland and the Scottish Government convene working groups of interested parties (including trade unions, trade associations and local government) to untangle these longstanding issues.



Part A



The producing theatre
model in Scotland

6. Part A – The producing theatre model in Scotland

6.1. Size and scale of the sector

- 6.1.1. Collectively the six commissioning theatres have significant scale and impact.
- 6.1.2. From 2017-2020, their average annual aggregate ticket sales totalled over 423,000 and their collective turnover topped £20 million¹.
- 6.1.3. Over the same period they collectively staged an average of 106 productions per annum, of which 80% were commissions and other new work². In the first four years of the study they collectively commissioned on average 86 new works a year².
- 6.1.4. 26% of performances staged were specifically designed for children and young people attracting on average 78,000 attendance a year pre-COVID². They collectively spent an annual average of £819,000 on educational activities prior to the pandemic².
- 6.1.5. Partnership working within and beyond the cohort has increased in recent years. 32% of productions prior to the pandemic were co-productions².
- 6.1.6. Prior to the pandemic they collectively employed on average 370 permanent staff and 389 contractual staff¹. During this period they earned over half of all income they received¹. Just under a third of income came from national government via Creative Scotland.
- 6.1.7. 60% of expenditure supported Artistic and Creative Programme¹.

6.2. Emerging challenges

- 6.2.1. As well as demonstrating the collective size and importance of the producing theatres in Scotland, initial analysis of aggregate data highlighted some of the challenges being faced by theatre managers.
- 6.2.2. The six theatres collectively posted an annual trading deficit in three of the five years of the study period¹. This was partially due to increasing aggregate annual building costs which reached over £610,000 in 2020/21¹.
- 6.2.3. At the same time as costs for the upkeep of buildings was growing, little was being invested in capital improvements. Less than £1.6 million was spent on capital in total during the five years across six venues¹.
- 6.2.4. To allow for trading for at least three months, a theatre would require a reserve of around 25% of unrestricted annual expenditure. Prior to the pandemic, the six venues held on average unrestricted undesignated funds of just 15% of unrestricted expenditure¹.
- 6.2.5. On first analysis, it appears that average yields pre-pandemic were low (£15.43) as were sales per performance (176)¹. This is examined further in the benchmarking analysis with English producing theatres.

¹ Creative Scotland Annual Returns

² Additional Submission to Data Culture Change



- 6.2.6. While the volume of co-productions was increasing during the study period, this was not reflected in increased revenue. Aggregate co-producing income for the six theatres was on average just £407,000 a year pre pandemic¹, supporting the commissioning theatres' perception of low commercial exploitation.
- 6.2.7. The theatres also perceived increasing challenges in the recruitment and retention of skilled staff. Their collective expenditure of just £14,000 per annum on staff training and CPD² suggests that some of this challenge is down to their own lack of investment.

6.3. The pandemic (part one)

- 6.3.1. The final year of our study period covers the first year of the Covid-19 pandemic.
- 6.3.2. The commissioned theatres pivoted quickly and welcomed a total of 110,000 attenders to screenings¹ during the year and over 20,000 non-educational learning and outreach participants (up 30% on the average for the previous four years)².
- 6.3.3. There were efforts to support the broader theatre freelance ecology including a major increase in the number of commissions.
- 6.3.4. The financial realities of cancelling performances led earned income to fall from over 50% to just 3% of revenue¹. At the end of the first pandemic financial year Balance Sheets had actually improved with higher combined Unrestricted and Undesignated Funds than the previous 4 years thanks to Government intervention¹. While crucial at the time, it is clear that the following two years trading have collectively left the six venues with more challenges than they were facing before the pandemic.

6.4. Examining trends

- 6.4.1. A previous study of 13 English producing theatres explored the substantial scale of change in their operating models across a five-year period³.
- 6.4.2. In this five-year study period for the Scottish theatres, there were fundamental changes in the final year due to Covid, but little else we could identify as a trend in the preceding four years.
- 6.4.3. There was very moderate annual growth in turnover between 2016 and 2020. During this period earned income was not growing as a share of revenue. National and local government funding flatlined as a proportion of turnover.
- 6.4.4. There was a sharp rise in ticket yield in 2017-18 but this was not sustained in the following two years and there was no positive trend overall.

³ Adaptation: A comparative study of the activities and impact of 13 regional producing theatres in England across five years – 2012/13 & 2017/18, Brownlee Consulting, 2020



6.4.5. The share of expenditure on different areas of the business was also steady in the first four years. Creative and artistic activities accounted for between 58% and 62% throughout. There appeared to be an upward trend in the proportion of expenditure on Buildings and Administration and a downward trend on Marketing across the first three years, but 2019/20 recorded a reversal for both.

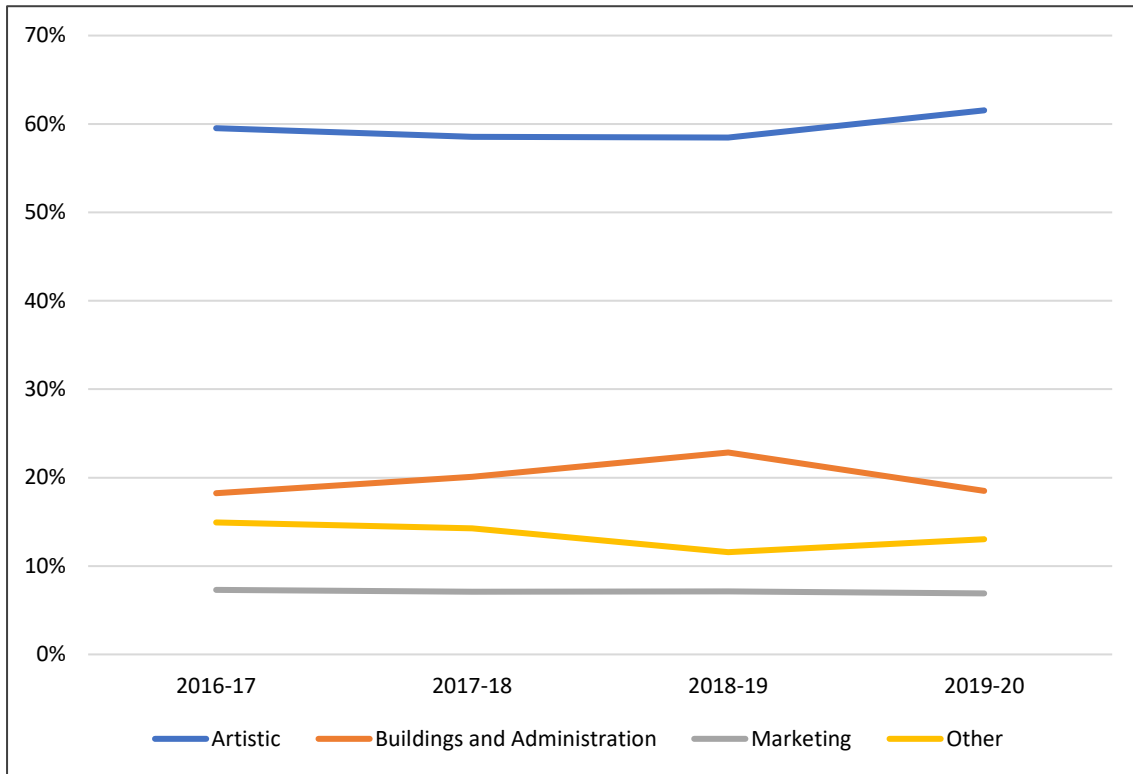


Chart 6.1: Proportion of aggregate expenditure by area, 2016-17 – 2019-20

6.4.6. From the data provided by the theatres to Creative Scotland and then Creative Carbon Scotland there appeared to be evidence of substantial progress in reducing carbon emissions in the first years of the study period. Data from 2019/20 onwards was inconsistent and incomplete.



6.5. Benchmarking

6.5.1. As noted previously, the six commissioning theatres have diverse operating models and contexts. We chose to compare them with ten equally diverse English producing theatres. Both the Scottish and English cohorts received on average close to £1 million each per annum from their national funder.

6.5.2. For this exercise we used the mean of the two most recent years of English data available (2017/18 and 2018/19) for each organisation to compare with the Scottish commissioning theatres.

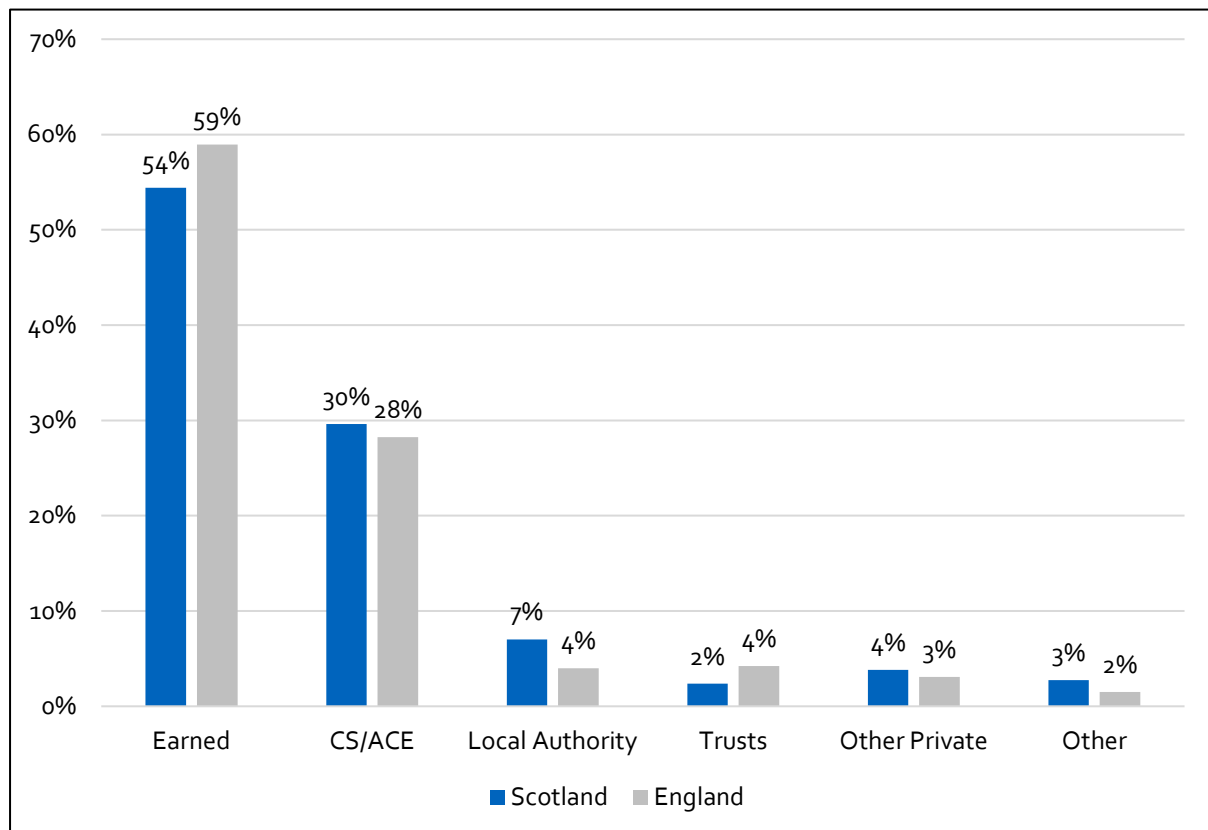


Chart 6.2: Proportion of aggregate income by source, Scotland 2017-18 and England mean of 2017/18 and 2018/19

6.5.3. On average 30% of the Scottish theatres' income came from Creative Scotland compared to 28% of income from Arts Council England. This 'average' figures masks the diversity within the cohorts, particularly as one of the Scottish cohort also runs a major touring dance theatre programme.

6.5.4. There was a greater gap in earned income (54% Scotland, 59% England).

6.5.5. Scottish theatres have not seen the same degree of reduction in Local Authority funding over the past decade as their English neighbours. When combined with national government funding, there is another 5% gap (Scotland 37%, England 32%).

6.5.6. These gaps can be explained by comparative performance in ticket sales and revenue. Comparing figures for 2016/17 (the final full year of operation at the Citizens before it closed for refurbishment), the English cohort on average sold 104,579 tickets per venue. The Scottish cohort sold just 81,353 tickets per venue.



6.5.7. The comparison in terms of revenue generated is still more stark. The English cohort on average generated over £1.8 million in ticket revenue. The Scottish cohort generated on average less than £1.1 million.

6.5.8. The average yield per ticket was £4.10 less in Scotland than England.

6.5.9. The two cohorts presented a very similar number of performances across the year: an average of 421 in England and 428 in Scotland. On average every performance in Scotland played to a house with 58 less ticket buyers (England 248, Scotland 190).

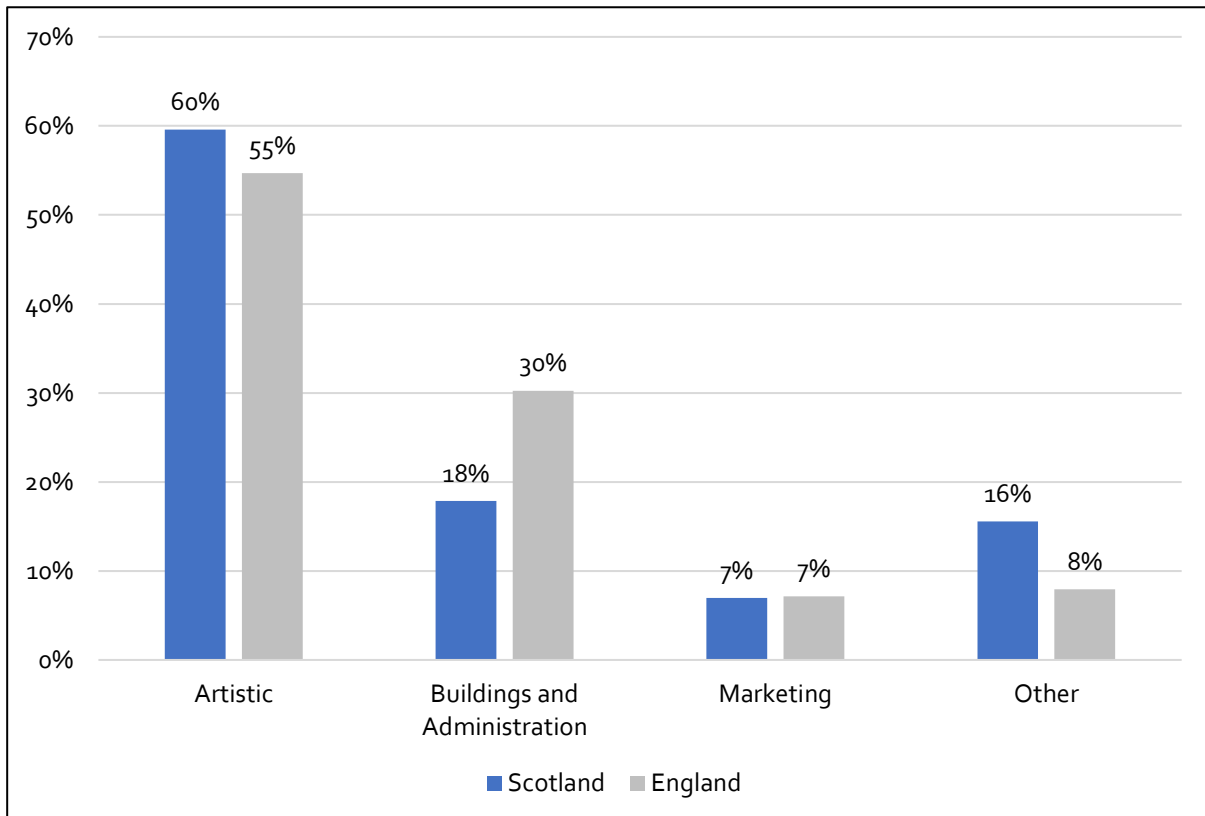


Chart 6.3: Proportion of aggregate expenditure by area, Scotland 2017-18 and England mean of 2017/18 and 2018/19

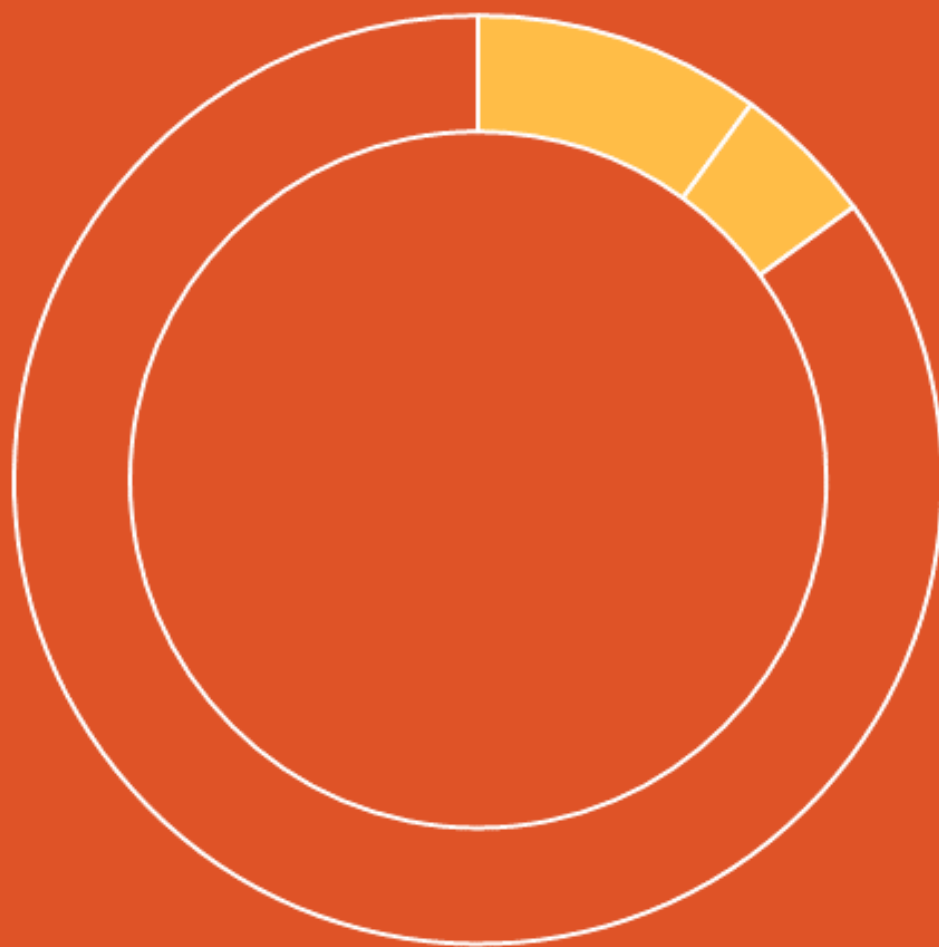
6.5.10. Scottish and English theatres are investing similar proportions of their available resources into marketing while the English cohort is attributing more to Buildings and Administration. Both nations' theatres are prioritising investment in artistic and creative activities, but the Scottish cohort is attributing 5% more.

6.5.11. With plenty of supply (both productions and performances), low ticket prices, significant investment in the creative product and substantial spend on marketing, one would expect sales for Scottish Producing Theatres to be strong, yet they were on average 22% less than their English comparators.

6.5.12. Is this simply due to the market being too small to support six producing theatres? Our analysis of overall theatre consumption in Scotland would suggest there is significant potential to grow audiences for producing theatres.



Part B



Theatre consumption
in Scotland

7. Part B – Theatre consumption in Scotland

7.1. Size and scale of the national market

- 7.1.1. Purple Seven/TRG Arts acts a data processor for 22 theatre operators in Scotland, including the six Independent Producing Theatres who commissioned this study. They conduct a secure daily extraction of ticketing data to allow organisations to analyse their own data and benchmark against other similar organisations.
- 7.1.2. The other 16 operators are a mixture of commercial and not-for-profit organisations including local authorities and charities. Some of the operators run multiple theatre venues using a single feed. There are also cases of operators using the same ticketing system for cinema screens or concert halls they run.
- 7.1.3. Scotland is unique in the UK as almost every major theatre uses Purple Seven as a data processor. This gives an unparalleled view of the market.
- 7.1.4. Only festival tickets sold through venues are included in this study. Feeds for concert halls and cinemas have been excluded where possible, but when an operator sells for a concert hall or cinema screen using the same feed, these transactions have been included.
- 7.1.5. Our study focuses only on Scottish bookers over the last 5 years (August 2017 to July 2022) where customer data was collected. This amounts to 76% of total tickets sold and 78% of total revenue.
- 7.1.6. Customers have been segmented into those who have just visited one or more of the six commissioning theatres ('Producing'), those who have just visited one or more of the other Scottish theatres ('Presenting'), and those who have visited at least one of each ('Both').
- 7.1.7. Purple Seven supplied de-duplicated anonymised data for each booker:
 - Segment type
 - Output Area
 - Transactions
 - Spend
 - Last booking date
 - Count of venues visited
- 7.1.8. Across the study period they recorded 930,590 bookers making 3.5 million transactions purchasing 9,847,281 tickets to the value of £250 million. This represents 39% of households in Scotland.
- 7.1.9. A substantial proportion of the population is booking tickets for theatre and a lot of theatre is being consumed. While these national statistics are impressive, they mask significant geographic inequities.



7.2. Geographic inequities - Penetration

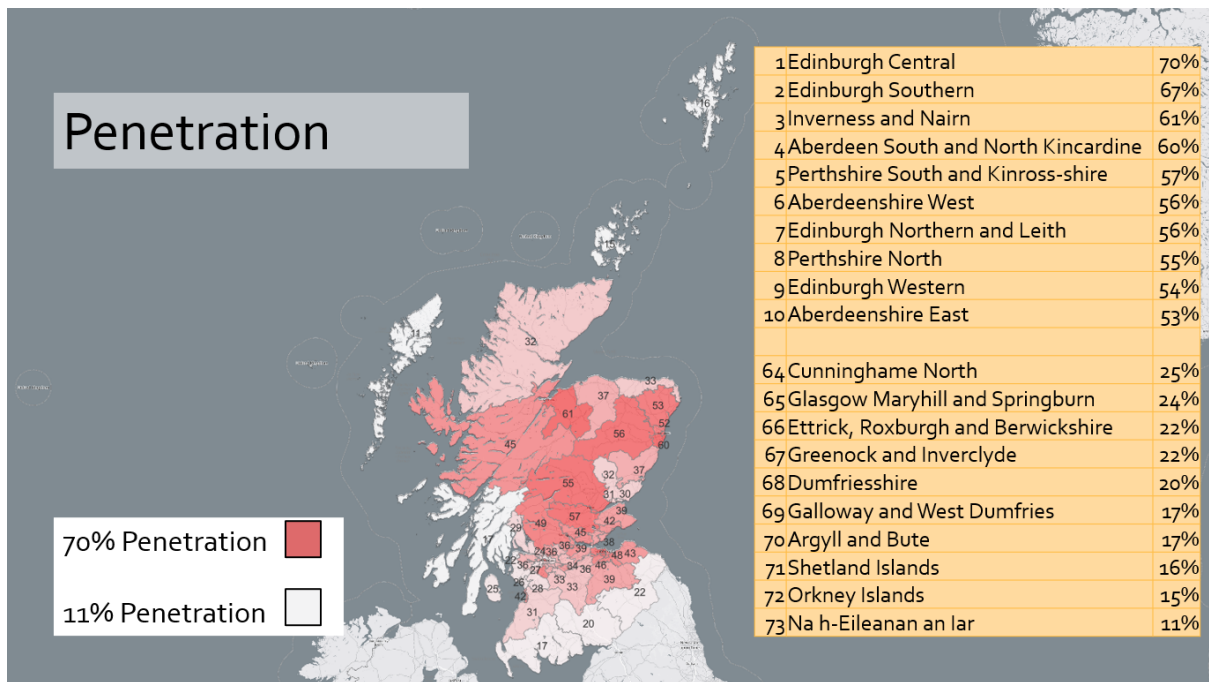


Chart 7.1: Penetration map and top ten and bottom ten Scottish Parliamentary Constituencies tables

- 7.2.1. Just under four in ten households in Scotland appear in our study. Each made at least one recorded transaction in the period from August 2017 to July 2022. The map and simplified chart above (a full data table by the 73 Scottish Parliamentary Constituencies is included in Appendix A) illustrate the inequity around the nation.
- 7.2.2. Penetration in the top constituency is more than six times that in the bottom.
- 7.2.3. Seven out of ten households in Edinburgh Central have transacted at least once and three other Edinburgh Constituencies appear in the top ten. The rest of the top ten covers Inverness, Aberdeen and Aberdeenshire and Perthshire.
- 7.2.4. The bottom ten Constituencies are largely in the Borders and Islands, but also include Constituencies in the Central Belt with comparatively easy access to an extensive range of theatre provision.



7.3. Venues visited

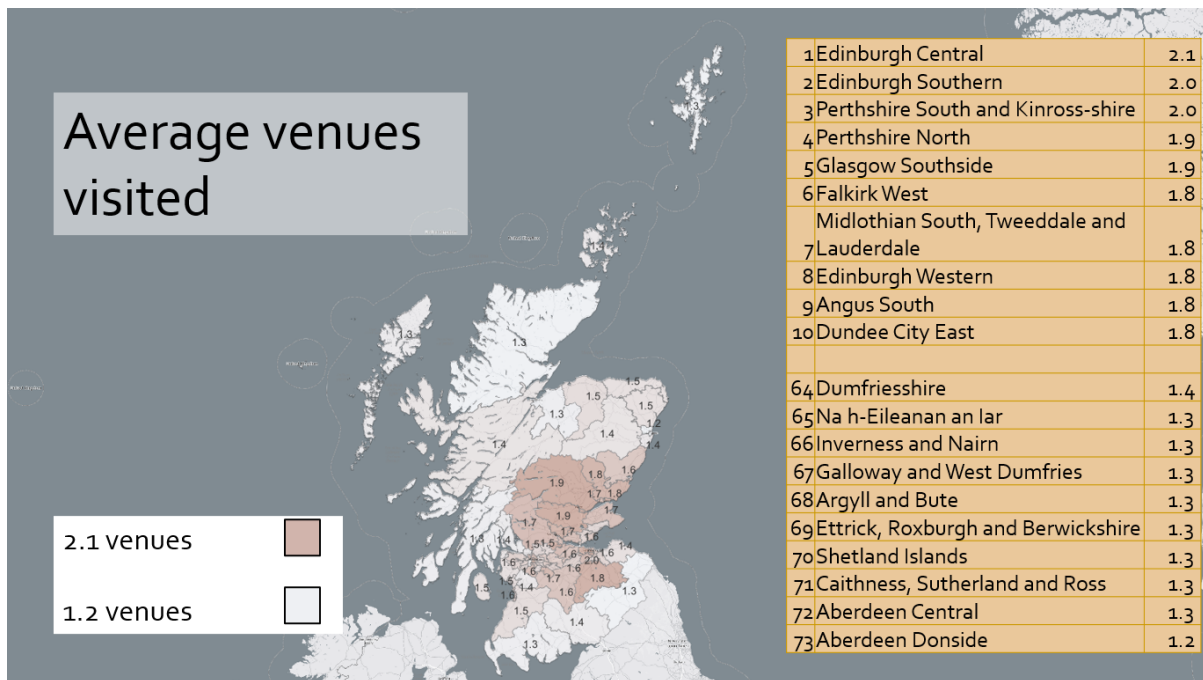


Chart 7.2: Average numbers of venues visited map and top ten and bottom ten Scottish Parliamentary Constituencies tables

- 7.3.1. Given bookers had the opportunity to transact at up to 22 organisations during the study period, it is perhaps surprising that the average visited was less than two.
- 7.3.2. Edinburgh again accounts for several of the top positions along with Perthshire.
- 7.3.3. The structure of the sector in specific geographies (e.g. operators running multiple theatres) may explain some of the Constituencies appearing in the bottom 10.



7.4. Tickets purchased

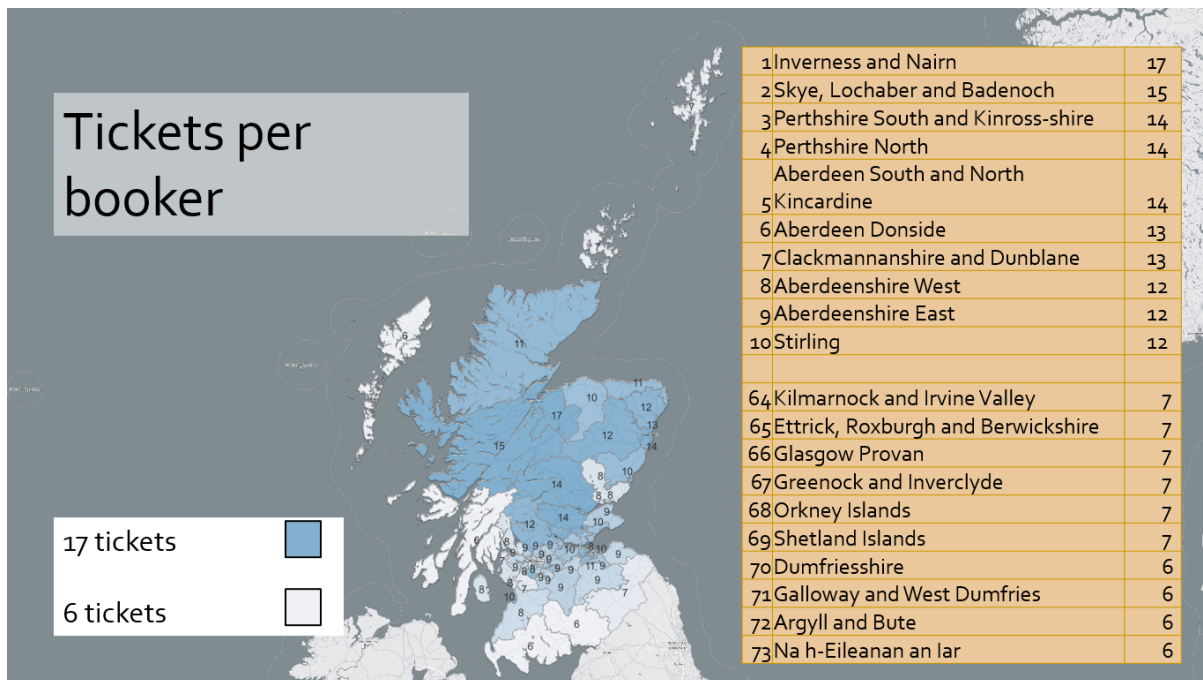


Chart 7.3: tickets per booker map and top ten and bottom ten Scottish Parliamentary Constituencies tables

- 7.4.1. Tickets per booker can be used as a proxy for frequency of attendance, although the caveat remains that some areas will over-report due to operators also running concert halls or cinemas as well as theatres.
- 7.4.2. Average tickets purchased across the study period in the top constituency is more than twice that in the bottom.
- 7.4.3. There is a higher proportion of Central Belt Constituencies in the bottom ten than the top ten.



7.5. Average Ticket Price Paid

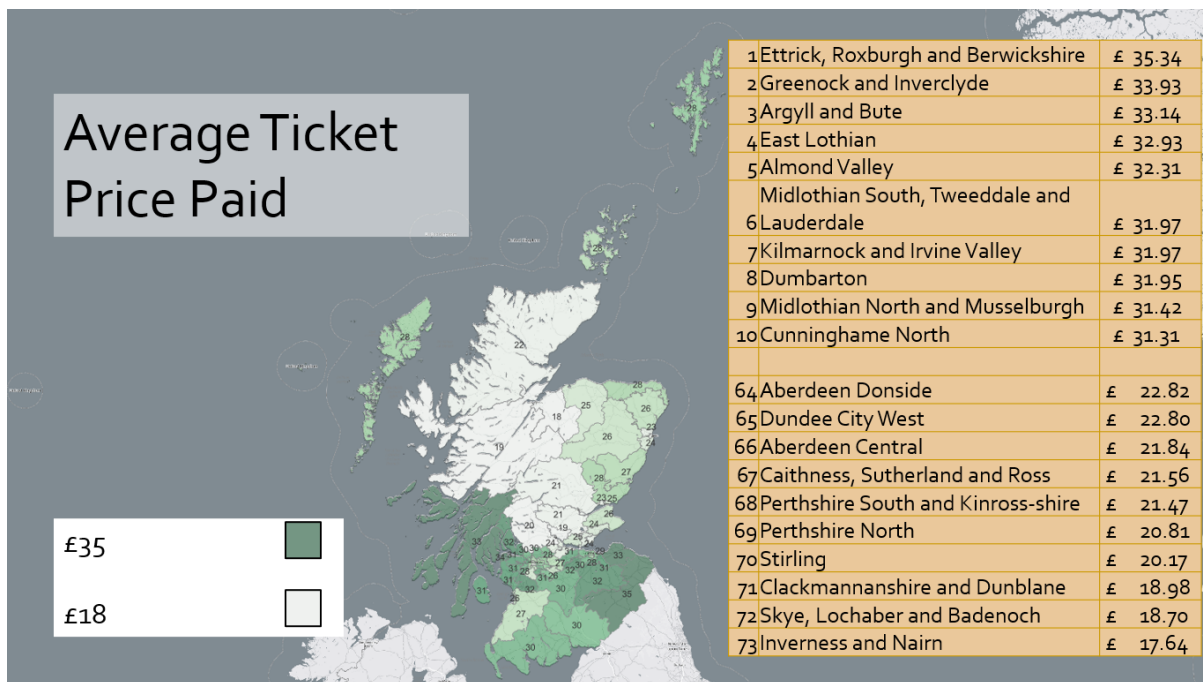


Chart 7.4: Average ticket price paid map and top ten and bottom ten Scottish Parliamentary Constituencies tables

- 7.5.1. Average Ticket Price Paid in the top constituency is twice that in the bottom.
- 7.5.2. There is a correlation between low levels of penetration and high average ticket price paid. This would suggest that when those in low-attendance areas do book, they are choosing well-known trusted product at a higher ticket price.
- 7.5.3. It seems likely that the inclusion of cinema tickets at some venues is reducing the Average Ticket Price paid in some constituencies.



7.6. Average spend by Booker

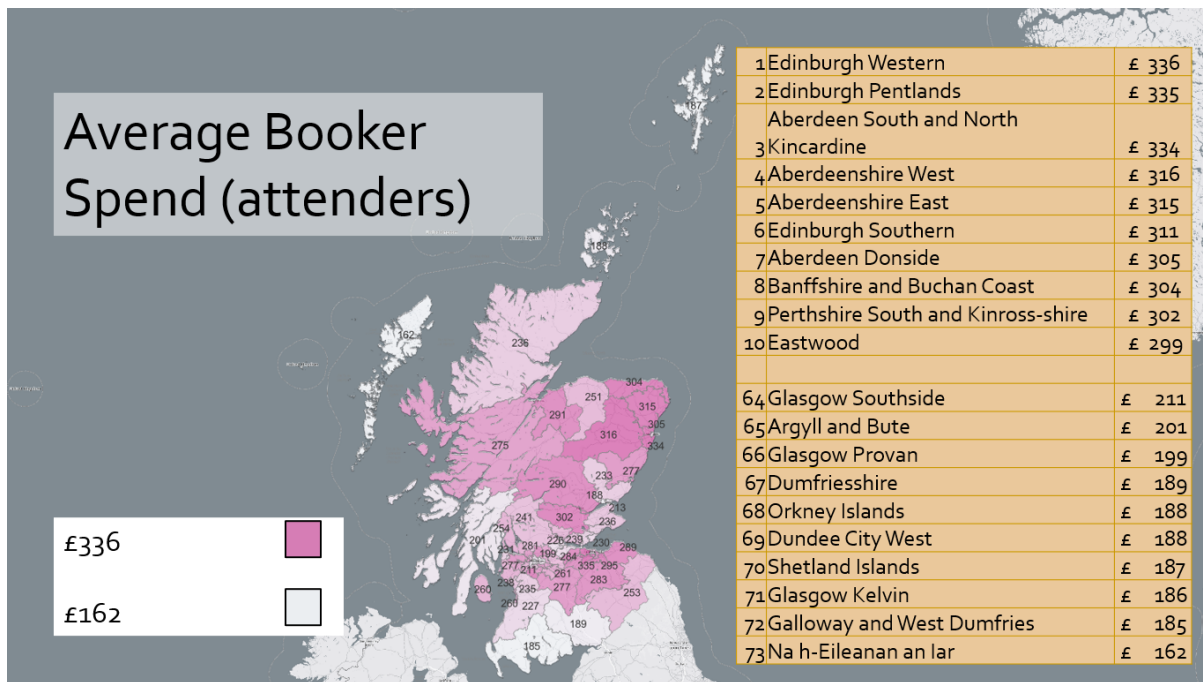


Chart 7.5: Average booker spend map and top ten and bottom ten Scottish Parliamentary Constituencies tables

- 7.6.1. To calculate average spend per booker we divide the spend in the constituency by the number of active bookers. Average Booker Spend in the top constituency is more than twice that in the bottom.
- 7.6.2. There are as many Aberdeen and Aberdeenshire constituencies in the top 10 as there are Edinburgh.
- 7.6.3. Urban areas join Constituencies in the Borders and Islands in the bottom ten.



7.7. Average Spend by Household

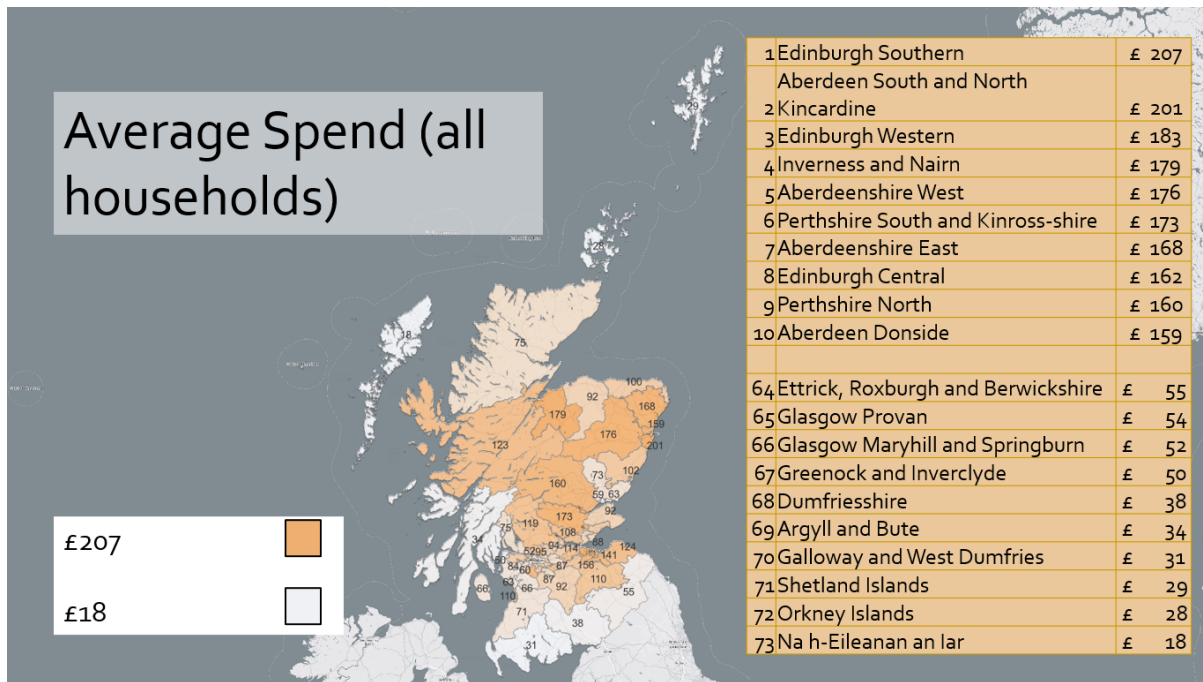


Chart 7.6: Average Household spend map and top ten and bottom ten Scottish Parliamentary Constituencies tables

- 7.7.1. To calculate average spend per household we divide the spend in the constituency by the number of households in the constituency. Average Household Spend in the top constituency is more than eleven times that in the bottom.
- 7.7.2. Again the top of the chart is dominated by Edinburgh, Aberdeen and Aberdeenshire, Inverness and Perthshire.
- 7.7.3. Glasgow and other Clyde-side constituencies join the Borders and Islands in the bottom ten.



7.8. Demographic Inequities

- 7.8.1. Using the anonymised box office data (postcodes) and 2011 census data (the most recent available in Scotland) at a small level geography (Output Area), we can see at a granular level the places theatres are reaching and the particular characteristics of the people who live there and how reflective they are of the Scottish population as a whole.
- 7.8.2. Output Areas are created by gathering together postcodes. In 2011, a single Output Area contained at least 50 people and 20 households. There were 46,351 Output Areas across Scotland. Different population densities mean the size and shape of Output Areas can vary greatly across Scotland. Output Areas form the building blocks for all other census geographies.
- 7.8.3. We ranked every Output Area in Scotland based on a range of demographic characteristics including mean age, qualifications achieved, multiple deprivation, social grade, population density and access to a car or van.
- 7.8.4. We then placed each Output Area in a percentile based on their ranking. We then multiplied each percentile by the number of bookers recorded in it. We then calculated the average percentile for the bookers with each characteristic. To reflect the average across Scotland, the average percentile would be 50. The further away from 50, the less the place being profiled reflects the average. If every booker was in the top percentile or bottom percentile, the difference would be 50.

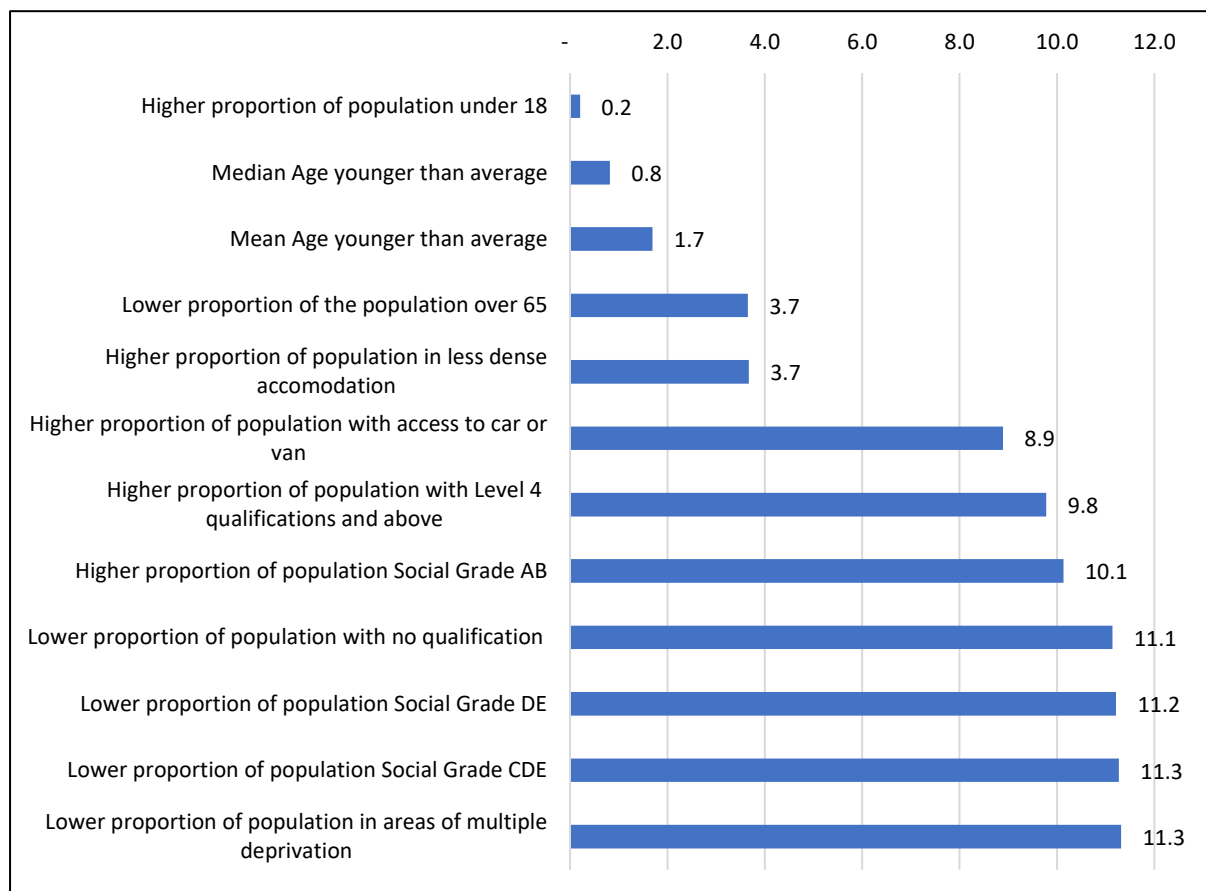


Chart 7.7: Divergence from mean Scottish percentile by characteristic at Output Area level, all bookers



- 7.8.5. The average age in areas reached by theatres is very close to the Scottish norm, although penetration was less in places with a higher proportion of over 65-year-olds. There was a similar level of divergence in housing density.
- 7.8.6. There was a more significant divergence in places where the population had greater access to their own personal transport ('car or van'), held a degree level qualification or higher, or were classified as social grade A or B.
- 7.8.7. The greatest divergence was in places where the population held no qualifications, were classified as social grade C or D or E, or were classified as having two or more dimensions of deprivation.

7.9. Inequities in levels of engagement

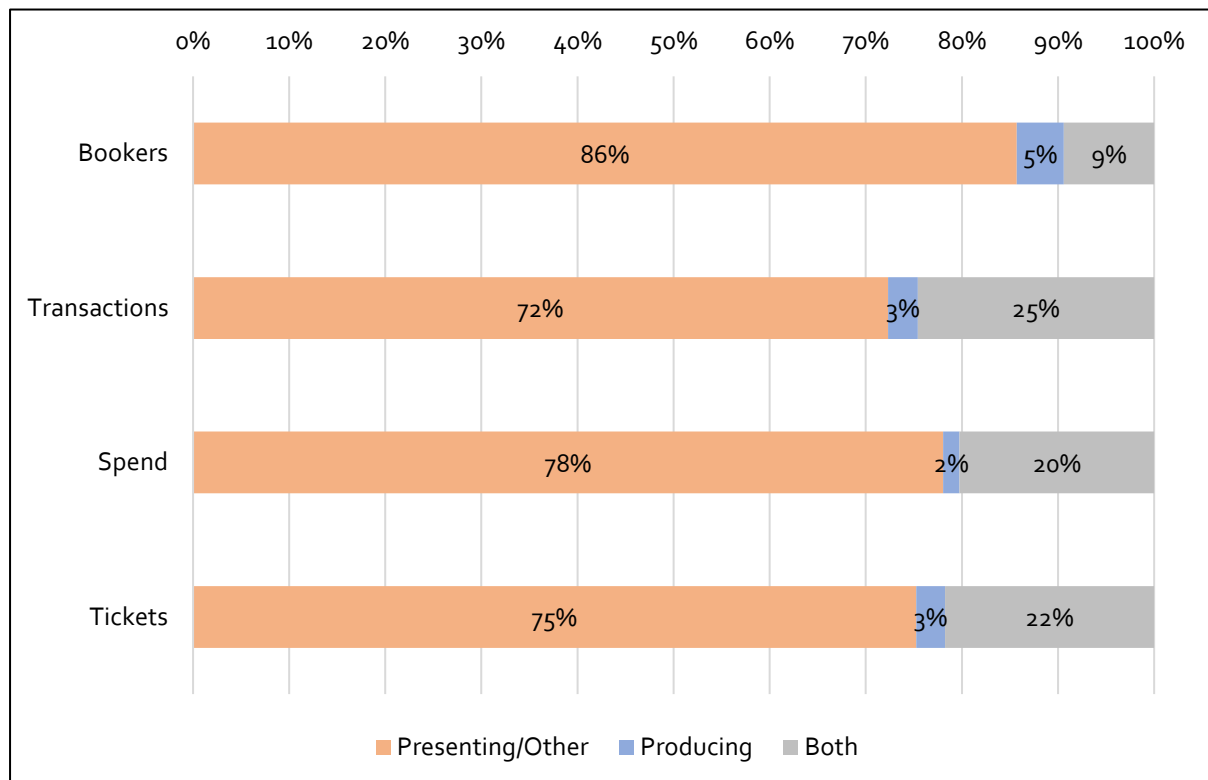


Chart 7.8: Proportion of bookers, transactions, spend and tickets by behavioural segment

- 7.9.1. Customers have been segmented into those who have just visited one or more of the six commissioning theatres ('Producing'), those who have just visited one or more of the other Scottish theatres ('Presenting'), and those who have visited at least one of each ('Both').
- 7.9.2. 86% of bookers only transacted with one of more of the 'Presenting' venues. While those who attended at least one of 'Both' only accounted for less than one in ten bookers, they made one in four transactions and accounted for £1 in every £5 at the box office.



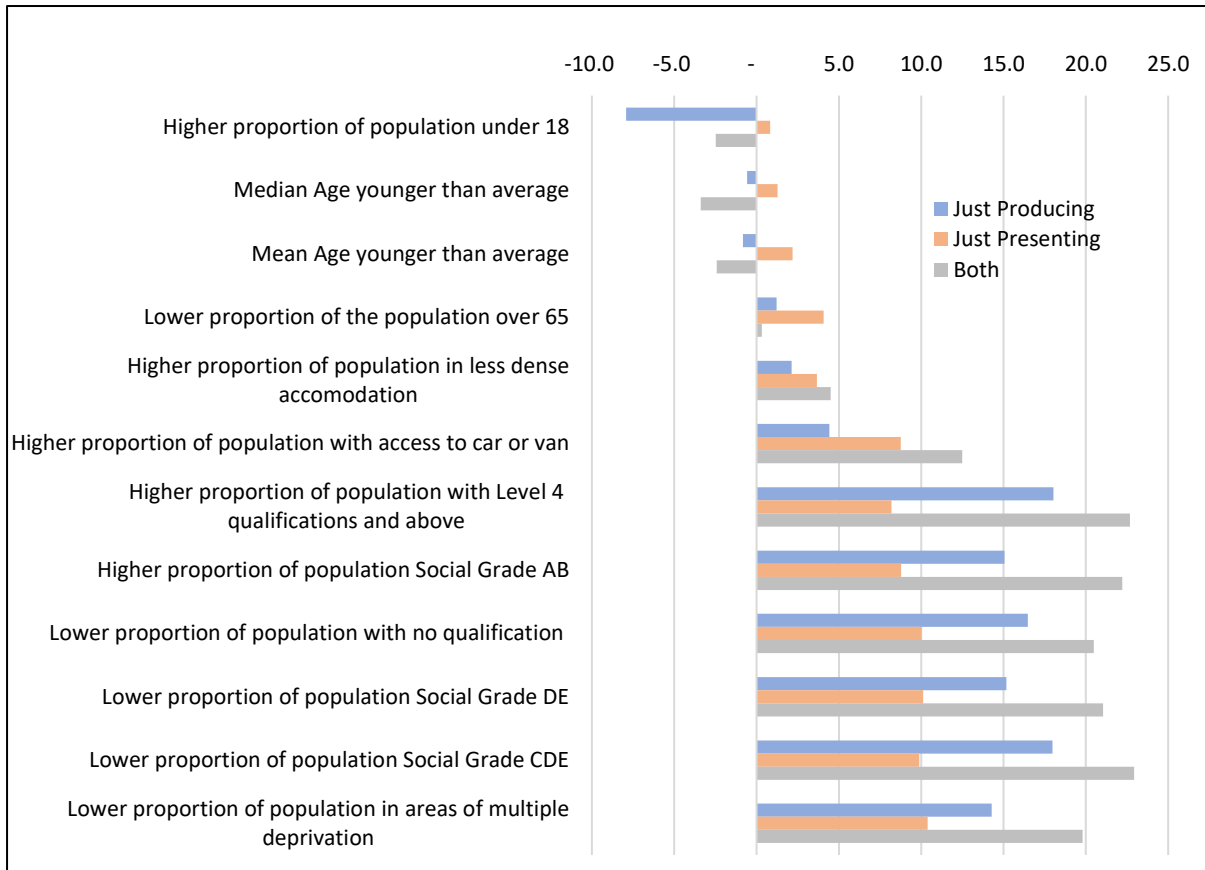


Chart 7.9: Divergence from mean Scottish percentile by characteristic at Output Area level, by behavioural segment

7.9.3. Chart 7.9 presents the data in Chart 7.7 broken down by the types of theatres audiences visit. The closest to the Scottish mean are audiences at ‘presenting’ houses. The most unrepresentative are those attending at least one or more ‘presenting’ and ‘producing’ venues.



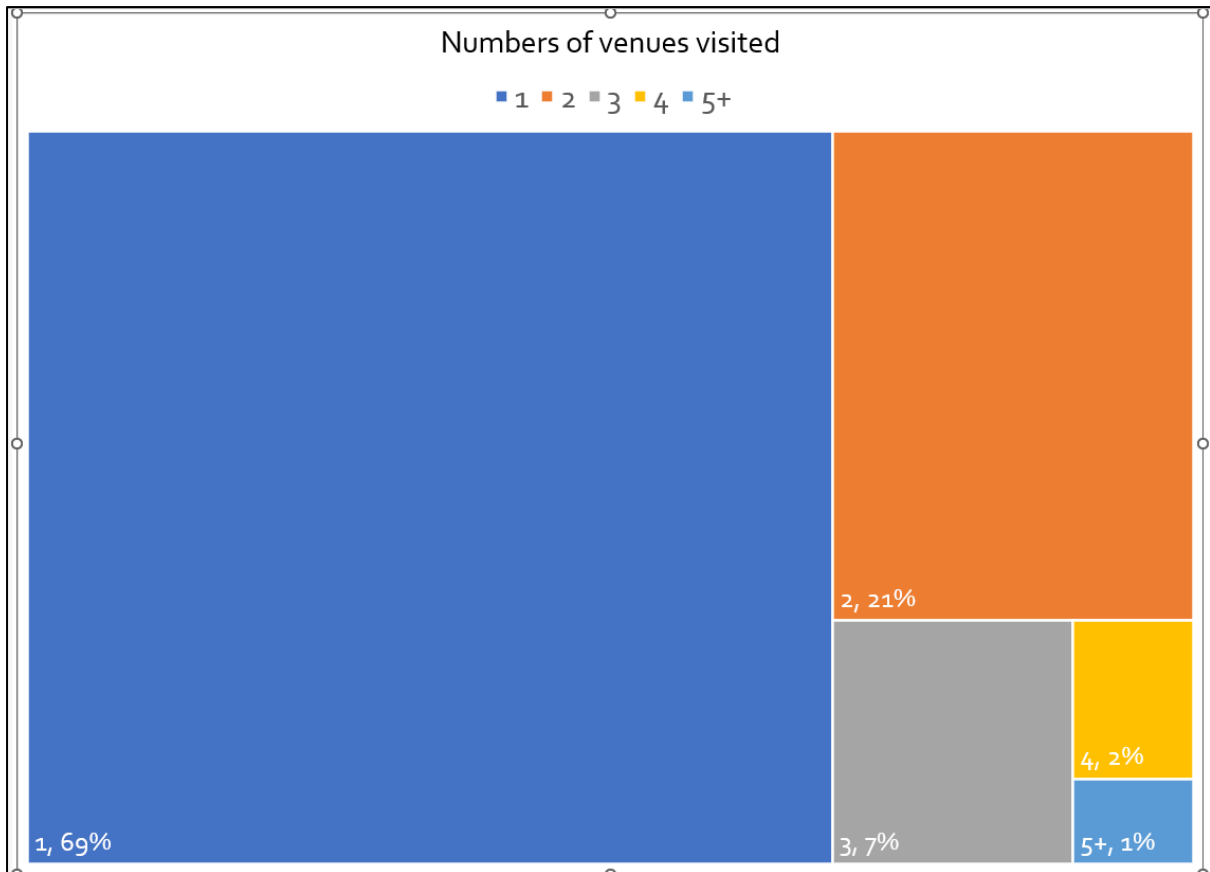


Chart 7.10: Numbers of venues visited (2017-22), all bookers

7.9.4. The low average number of venues visited is explained by the fact that over two-thirds of bookers have just booked for a single venue during the study period. Only 1% booked for five or more.

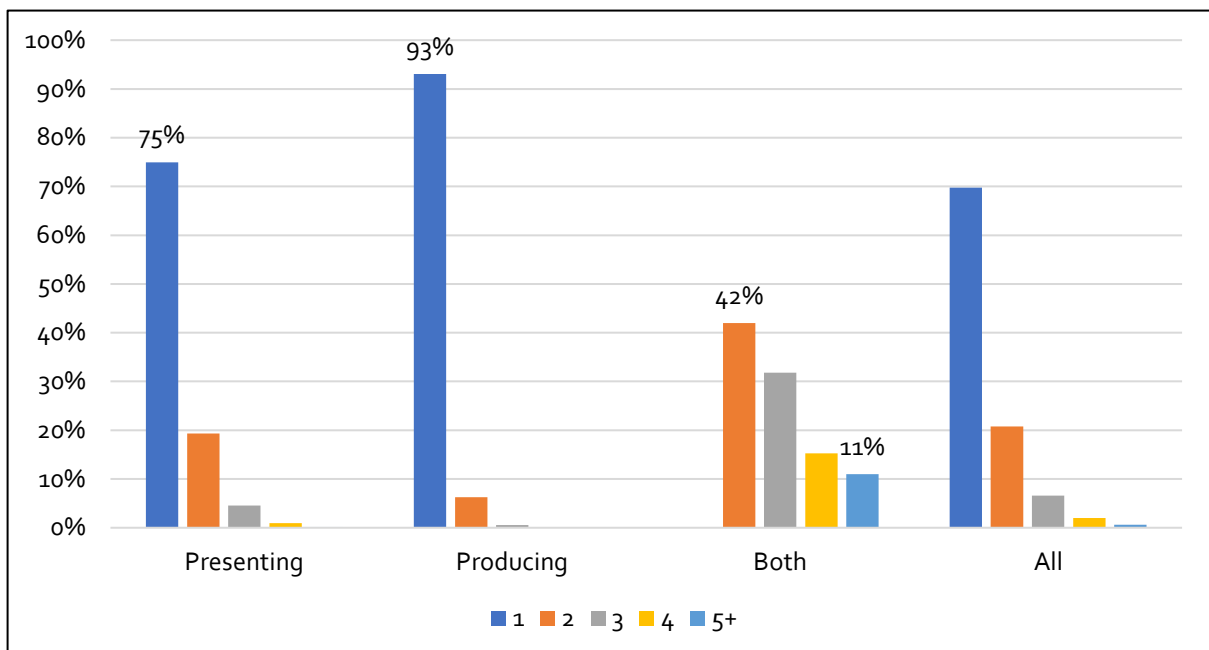


Chart 7.11: Numbers of venues visited (2017-22), by behavioural segment



7.9.5. When analysing bookers who have just visited only 'producing' or only 'presenting' venues, this figure rises to one in four for 'presenting' and over nine out of ten (94%) of 'producing' bookers.

7.9.6. Less than half (42%) of those who have attended 'Both' types of venue have just attended one of each. 11% have attended five or more venues during the study period.

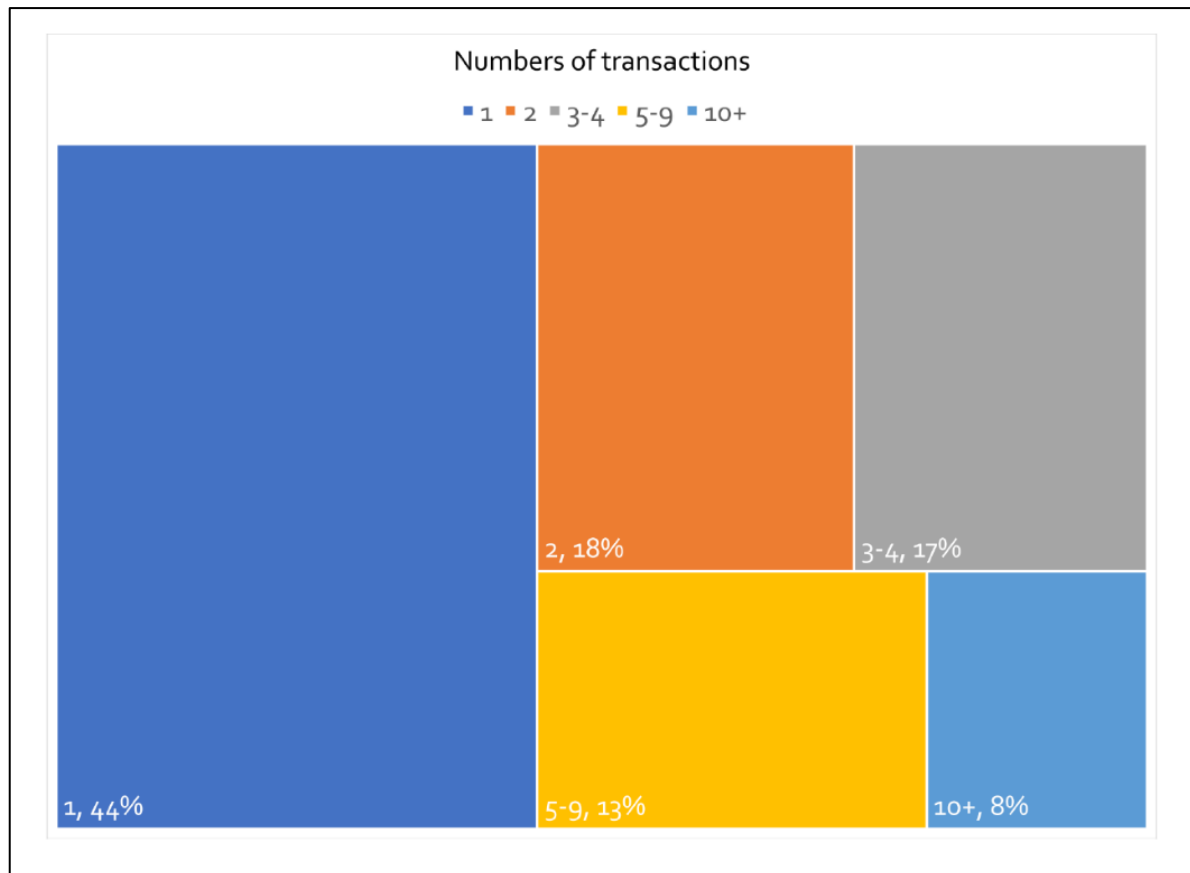


Chart 7.12: Numbers of transactions (2017-22), all bookers

7.9.7. 44% of Bookers only made a single transaction during the study period. Of bookers who just visited a single venue, 63% only made a single transaction.

7.9.8. Just 8% of bookers made on average at least two bookings per annum during the five (Covid-impacted) years.



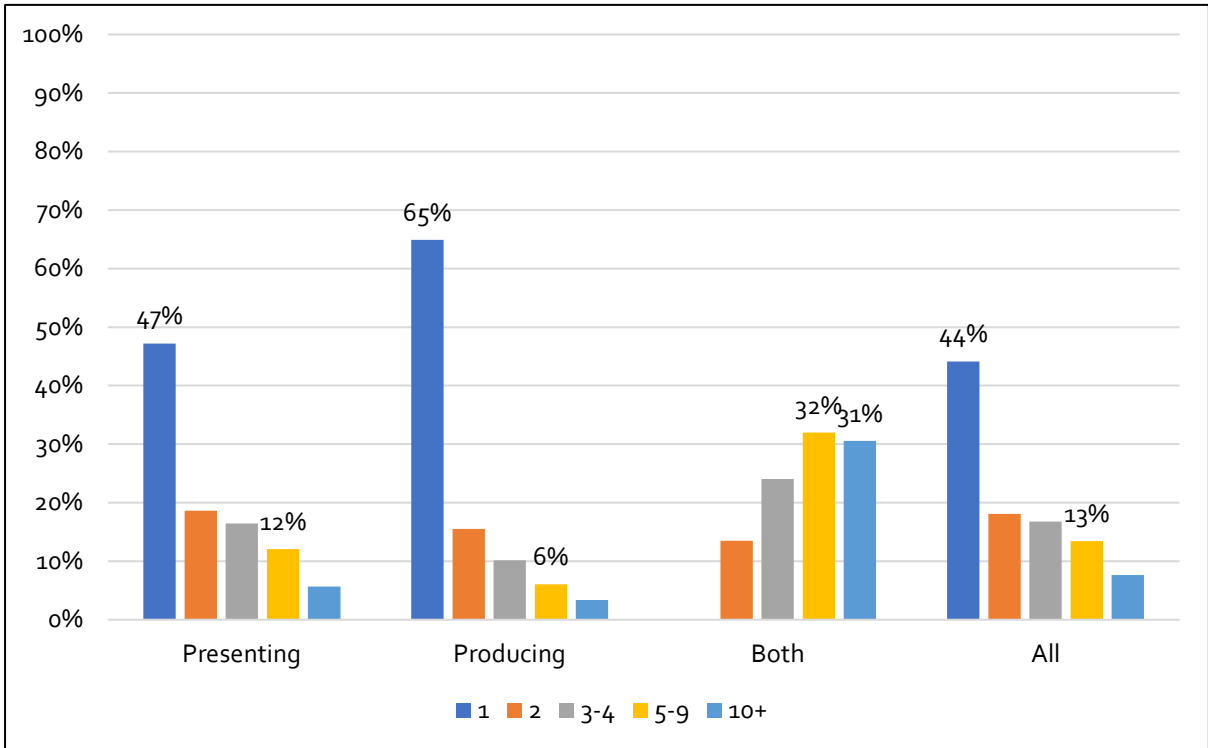


Chart 7.13: Numbers of venues visited (2017-22), by behavioural segment

7.9.9. Of those bookers who attended at least one of both a producing and presenting theatre, 63% made an average of one or more transactions a year.

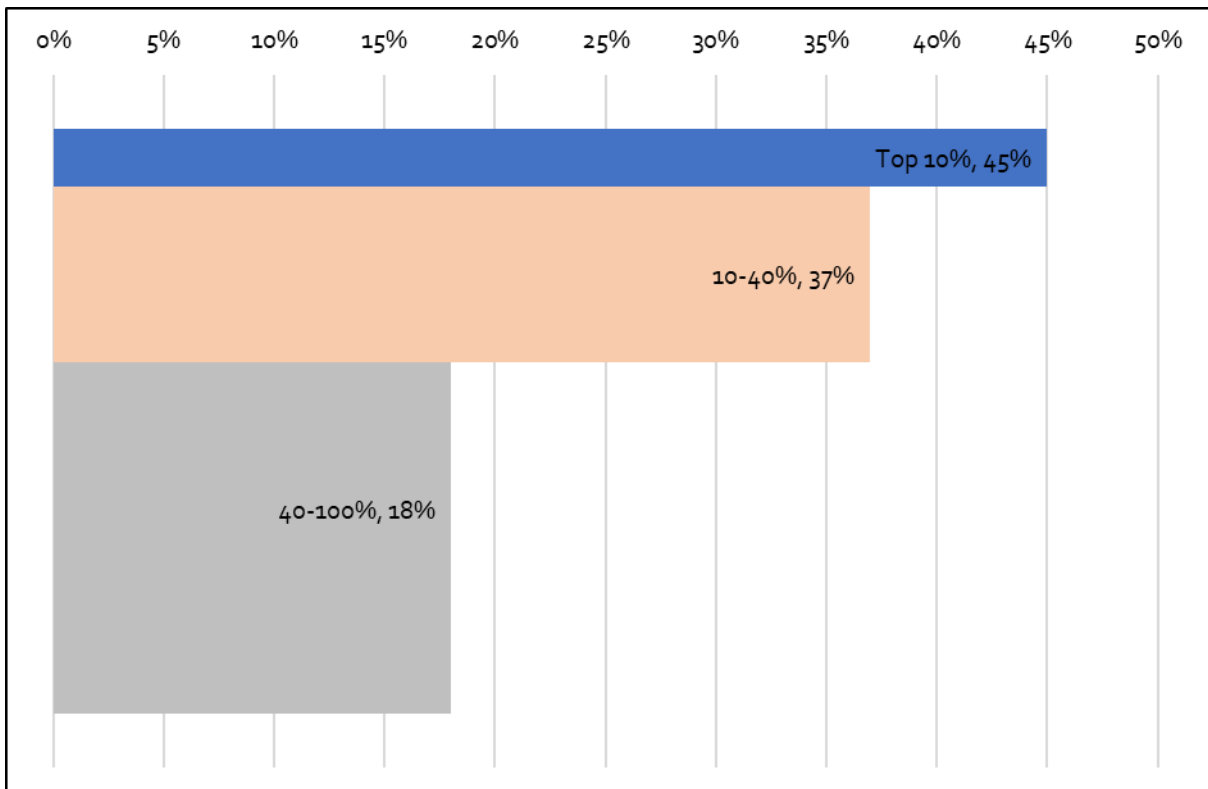


Chart 7.14: Proportion of revenue by ranking of booker spend, all theatre



7.9.10. When we rank all bookers (excluding where possible ticket agents and group bookers) by their spend over the five-year study period we find that 45% of the total revenue was generated by just 10% of bookers. Of the 919,000 bookers in the sample when group bookers and ticket agents are excluded, just 120,000 accounted for half the total box office revenue.

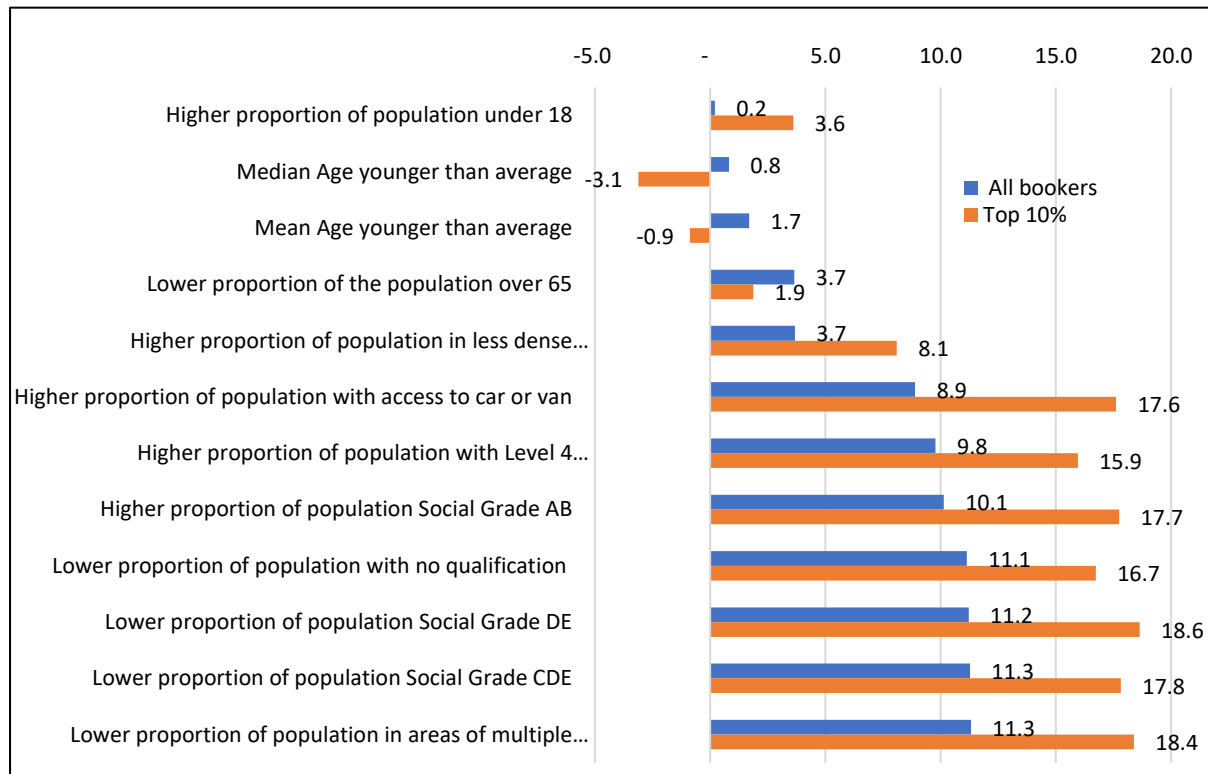


Chart 7.14: Proportion of revenue by ranking of booker spend

7.9.11. We used the same process to analyse the probable demographics of bookers based on their geographic location, to compare the 'top 10%' of bookers based on their total spend over the five-year period with all bookers.

7.9.12. Top 10% bookers were more likely to come from 'younger' areas. For all other demographic characteristics, Top 10% bookers echoed and further amplified the over- or under-representation identified across all theatre bookers.



7.10. Independent Producing Theatres' market share

7.10.1. Collectively the six independent producing theatres are responsible for most of the theatre produced (or made) in Scotland.

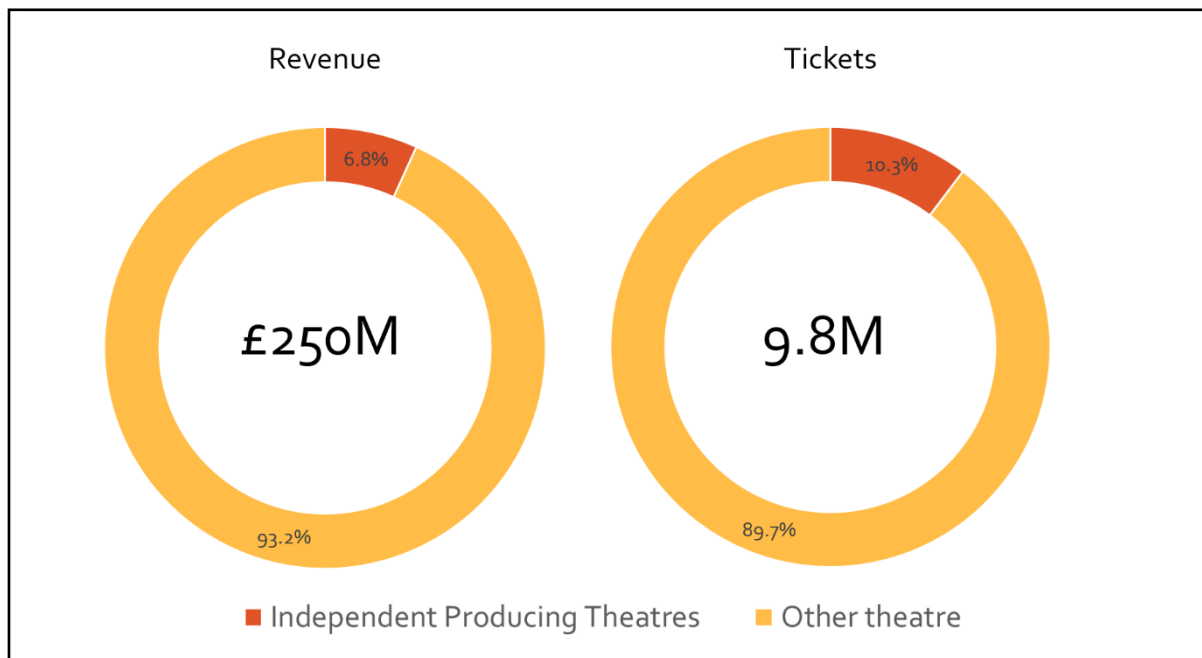


Chart 7.15: Proportion of revenue and tickets by type of venues

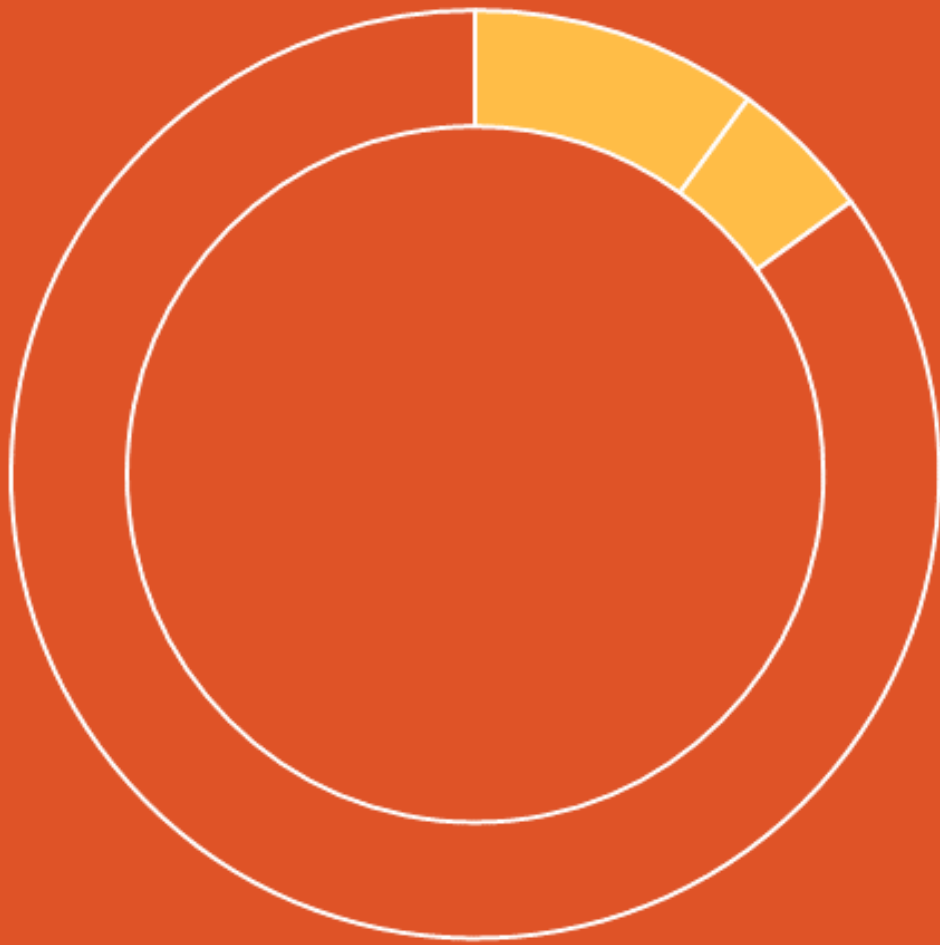
7.10.2. Across the five-year study period, the six theatres collectively accounted for just 10.3% of all theatre ticket sales and 6.8% of ticket revenue.

7.10.3. We are aware that not all theatre sales are included in this study and that a small proportion of content in 'presenting' houses will have originated in Scotland.

7.10.4. At the very most we believe that would account for a further 5% of ticket sales. That means that we estimate that at least 85% of theatre consumed in Scotland during this five-year period was imported.



Part C



Public attitude to
Scottish theatre

8. Part C – Public Attitude to Scottish Theatre

8.1. The Survey

8.1.1. This element of the project was led by Charlotte Wilson Research Services who worked with the six commissioning theatres on an on-line audience survey conducted in August and September 2022 after conducting a trial of the survey questions in July 2022.

8.1.2. There were 2,080 responses (a 9.9% response rate).

8.1.3. To minimise respondent bias, a cash prize was offered as an incentive to complete the survey. However respondents were more likely to be:

- Frequent attenders – 37% stated they attended on average at least seven times a year
- Central Belt residents – seven of the top ten Scottish Parliamentary Constituencies represented were in Edinburgh or Glasgow
- Lyceum bookers – 33% stated that the Lyceum was the venue they attended most regularly
- Female - 61% of respondents
- 55-74 year olds - 59%
- More than 50% of respondents stated they have visited one of the big presenting houses in Edinburgh in the last five years

8.1.4. The survey investigated:

- Motivations for attendance
- Understanding and perceptions of producing, presenting, commercial and subsidised theatre
- Associations, perceptions, awareness and perceived importance of Scottish theatre
- Awareness and perceptions of Scottish theatre funding
- Levels of membership of theatre and other organisations

8.2. Motivations for attendance

8.2.1. Respondents stated that the two biggest motivations for booking were 'Like the look of the production from the brochure or email' (72% important/very important) and 'Good reviews and recommendations' (69% important/very important).

8.2.2. 'The Company responsible for the production' (62%) was a greater motivation than the Cast (40%) and Director (31%). Just 24% stated that the 'Production was created in-house by the theatre' was important or very important.

8.3. Theatre Terminology and its influence on attendance

8.3.1. Theatre practitioners and funders are steeped in the nuanced lexicon of the genre. Through this survey we sought to understand what terms that are important within the industry mean to audiences and what influence they have on their behaviour.



- 8.3.2. Just 33% of the sample (which was biased towards a highly engaged theatre audience) stated they had a 'good understanding' of the terms 'producing' and 'presenting'. 27% stated the terms meant nothing to them. Only 7% of respondents stated that they had a major influence on their decision of what venues to attend while a further 52% said they had some influence.
- 8.3.3. The terms 'commercial' and 'subsidised' had greater recognition with 43% of respondents stating they had a 'good understanding' of the terms. Only 6% of respondents stated that they had a major influence on their decision of what venues to attend while a further 43% said they had some influence.

8.4. Sentiment and Scottish theatre

- 8.4.1. Respondents were asked to rate their levels of agreement to a number of statements related to Scottish theatre.
- 8.4.2. Agreement was strongest to the statement 'I am proud of the theatre made in Scotland' (77% agreed or strongly agreed). This was followed by 'It is important that a significant proportion of theatre productions at Scotland's theatres are made in Scotland (69%)'.
- 8.4.3. 66% of these (highly engaged) respondents stated they would be 'willing to pay more for a ticket for locally produced theatre in Scotland in order to sustain and support the organisation'.
- 8.4.4. 57% agreed that the National Theatre of Scotland has had a major impact on theatre in Scotland since its launch in 2006, and the same proportion of respondents believed that Scotland creates some of the best theatre in the world.
- 8.4.5. Around half (52%) agreed that 'It is important that a significant proportion of theatre productions at my local theatre are made by that theatre'
- 8.4.6. Less than half of respondents (45%) agreed that Scotland is internationally renowned for the quality of its theatre and a similar proportion (44%) agreed that the quality of theatre made in Scotland has improved in the last ten years.
- 8.4.7. Only 31% stated that they are more likely to book a ticket if 'I know the production has been made in Scotland'.

8.5. Touring Company Recognition and understanding of the business of theatre

- 8.5.1. Respondents were asked 'Which Scottish touring theatre companies have you seen in the last five years?'. Only 58% made any response, the majority of those who did stating they had not seen a touring company or could not recall a name.
- 8.5.2. Of those that did respond, 25% stated the National Theatre of Scotland, 6% Gridiron and Stella Quines and 5% Vanishing Point. Nine other companies were mentioned ten or more times in responses.



- 8.5.3. Respondents were given ten options to the question ‘when considering the current financial model of operations of theatres in Scotland that make their own productions, which of the following statements do you think is most accurate?’.
- 8.5.4. Only 5% of respondents correctly stated that most of their income is earned. More than a quarter (28%) stated they did not know.
- 8.5.5. 59% believed that theatres were reliant on a mixture of sources, none of which constituted a majority. Similar proportions thought funding from the Scottish Government via Creative Scotland was the largest element (23%) as earned income (25%).

8.6. Dealing with increasing costs

- 8.6.1. Respondents were asked, given the context of increasing costs to sustain their current work and reduce their carbon footprint, what do they believe as audience members should be done to balance the books. They were given seven options.

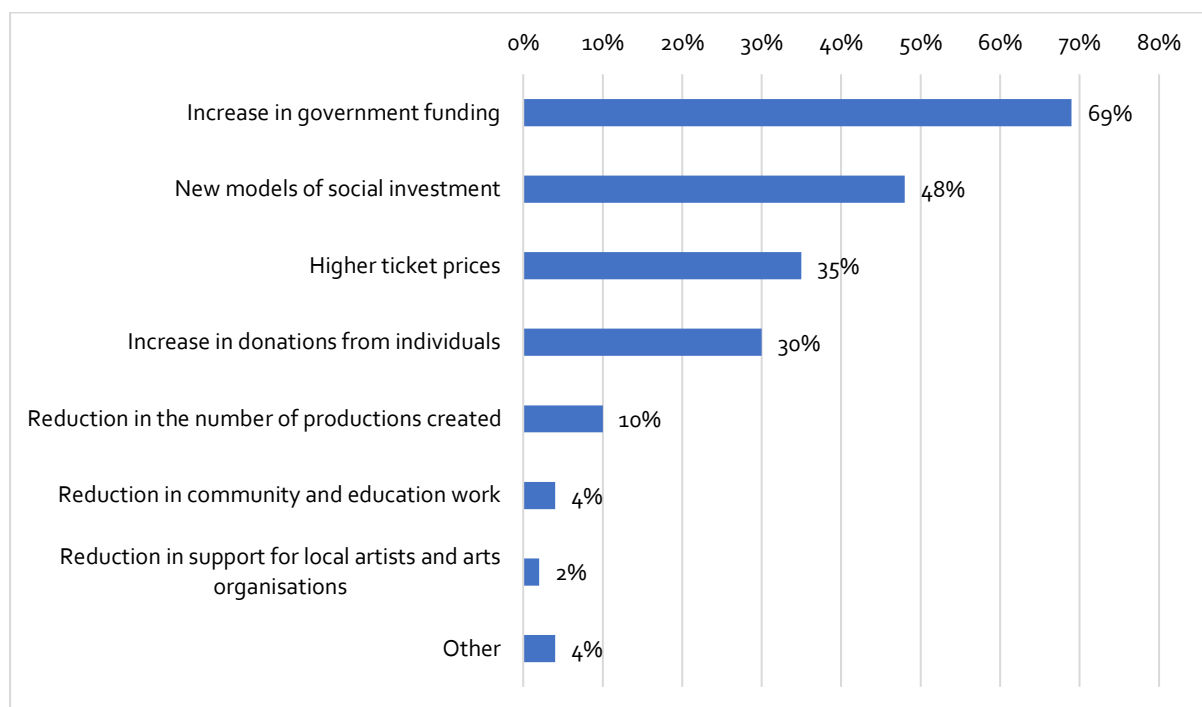


Chart 8.1: ‘Venues that make theatre in Scotland are facing significantly increased costs to sustain their current work and reduce their carbon footprint. Considering the following, what options would you say are the most appropriate and appealing to you as an audience member’

- 8.6.2. Options to increase income were significantly more popular than those to reduce the volume of work. While greater government support was perhaps unsurprisingly the most frequent response, almost half of respondents suggested exploring new models of social investment and around a third were not averse to higher ticket prices and increased philanthropy.

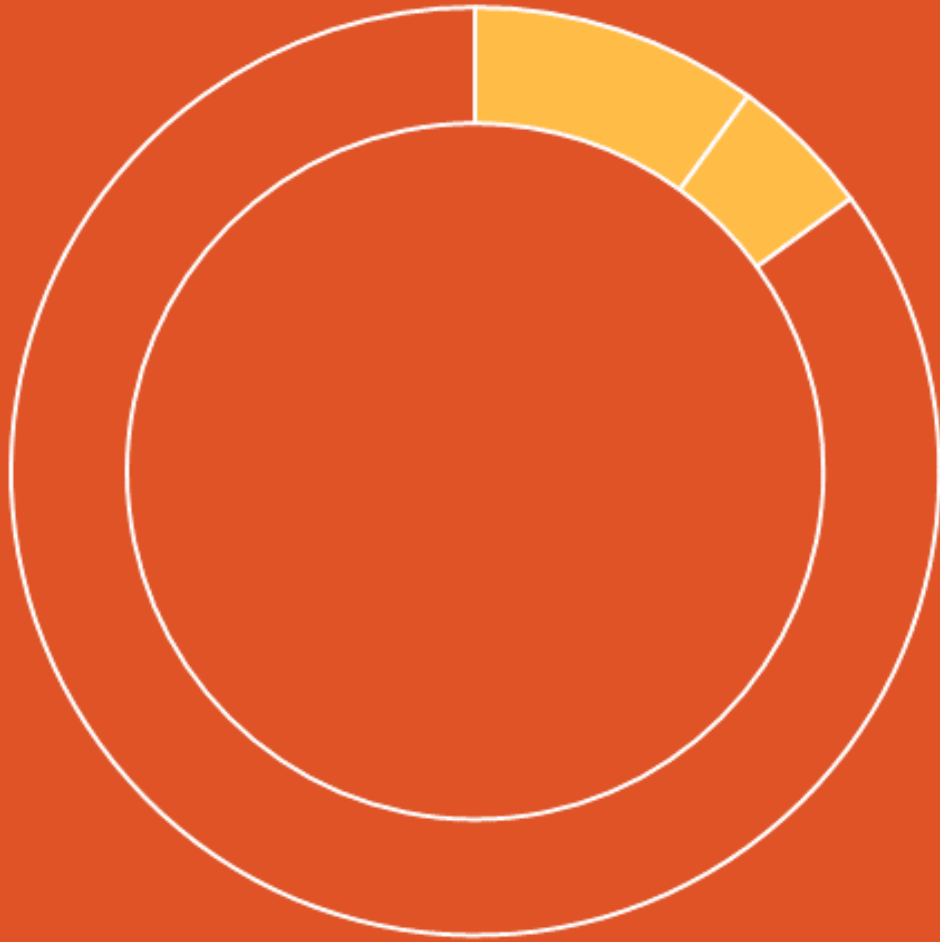


8.7. Willingness to do more

- 8.7.1. Despite frequent attendance and membership of other bodies, few respondents are currently members of theatres.
- 8.7.2. The majority are willing to pay more for tickets to support Scottish theatre.
- 8.7.3. While the majority of respondents were supportive of more government investment, a significant minority shows interest in new models of social investment and personal investment in local/Scottish theatre productions. This suggests it is worth exploring the notion of Scottish 'angels'.
- 8.7.4. An 'angel' is typically a wealthy individual or investor who provides financial backing for a theatrical production. Angels support theatre in the West End and on Broadway, as well as some regional theatres in North America.
- 8.7.5. Angels are often attracted to theatre productions because they enjoy the creative process and the opportunity to be involved in the production of a live performance. They may also see it as a potential investment opportunity, with the potential for financial return if the production is successful.
- 8.7.6. In exchange for their financial support, angels may receive a share of the profits from the production, as well as other perks such as complimentary tickets, invitations to opening night events, and recognition in the program or marketing materials.



Part D



The Executive
Directors' perspective

9. Part D – The Executive Directors’ perspective

- 9.1.1. Early on in the project, the author had one-to-one conversations with the six Executive Directors/CEOs of the commissioning theatres. These were not formally structured and were designed to allow the theatre managers to share whatever was on their mind. The conversations were detailed and wide-ranging, but many of the same issues were raised multiple times.
- 9.1.2. While this study focused on just a five-year period, the leaders universally referenced the context of decades of cuts in real terms funding. While cuts in funding had been partially mitigated by the introduction of Theatre Tax Relief, the challenges of running a sustainable organisation were increasing every year.
- 9.1.3. There was broad concern about the current capacity and morale of staff teams. The pandemic had a major impact on every individual in every theatre and now many individuals and teams were clearly in a fragile state.
- 9.1.4. At the same time many teams were smaller. As indoor venues were kept shut, filming for TV and film in Scotland boomed. Key staff members with transferable skills were lost to more lucrative roles.
- 9.1.5. After people, the next greatest concern was soaring costs. Utilities were top of the list of challenges, but every area of the business was witnessing extraordinary increases in prices.
- 9.1.6. There was an understanding that what was being witnessed in the cost-of-living crisis by the organisation was also being felt by staff teams. Given their already fragile state, there was a strong desire to reward loyal colleagues, but at the same time this was yet another pressure on organisations that were seeing costs rise uncontrollably.
- 9.1.7. There was a universal wish to be fair and progressive employers and there was a clear understanding of the value of trade unions. Some leaders believed it was better to renegotiate local agreements than continue to abide by UK-wide sector agreements that reflected good practice that was now over fifty years out of date. Others were deeply concerned about the capacity to sustain multiple local agreements given the limited capacity of individual organisations.
- 9.1.8. The tenure status of the six venues varies. Several do not own the freehold of their theatres. Several theatre managers find themselves custodians of heritage ‘assets’ that will require major redevelopment to make them fit for purpose. While there is a strong desire to advance the Net Zero agenda, it is hard to plan for the long term and seek funds to invest in capital works.
- 9.1.9. There was universal frustration that there was little incentive to fully exploit successful productions as the commissioning venue receives little financial reward. On the rare recent occasions that Scottish theatres have created a ‘hit’, it has been refinanced and remade outside the country, providing little or no financial or reputational return on the original investment.
- 9.1.10. The six theatres all understood the need for collective strategic working to address current and future challenges. They also repeatedly demonstrated a desire to share data

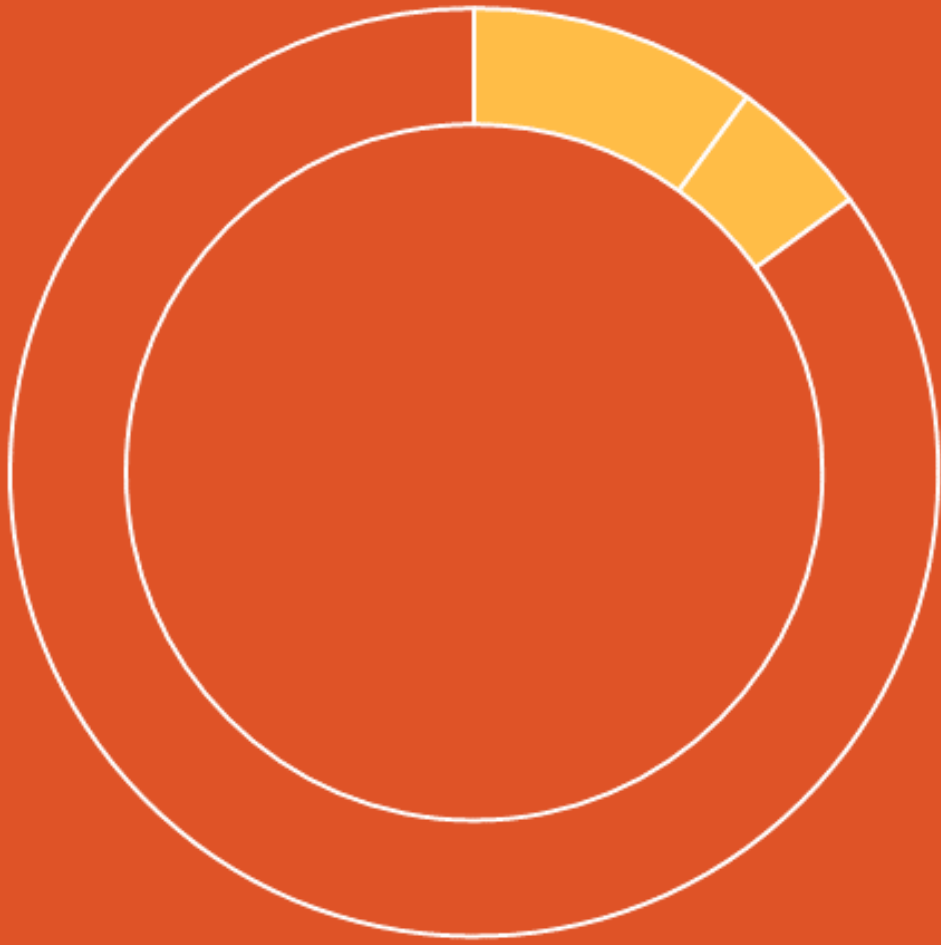


and work strategically with other major creators of theatre in Scotland which was not reciprocated.

- 9.1.11. There was also a desire to fully understand the current and emerging requirements of their national funder and the Scottish Government. Within the broader sector there appeared to be some confusion over whether the commissioning theatres were being funded primarily to create theatre for audiences or work for artists. It had been made clear to the theatres that their primary duty was to the public.
- 9.1.12. There was a universal understanding that for venues to survive (let alone thrive), the time for incremental change had passed. Fundamental step change was urgently required.
- 9.1.13. The only concern about change that was consistently voiced was the need to avoid homogenisation. The variety in artistic policy and approach of these six highly respected and valued organisations should be the catalyst to make Scotland a true world leader in the making of theatre.



Appendix A



Audience Data
Tables

10. Appendix A – Audience data tables

9.1 Household Penetration

Rank	Scottish Parliamentary Constituency	Penetration	Rank	Scottish Parliamentary Constituency	Penetration
1	Edinburgh Central	70%	38	Coatbridge and Chryston	36%
2	Edinburgh Southern	67%	39	Renfrewshire North and West	36%
3	Inverness and Nairn	61%	40	Glasgow Cathcart	36%
4	Aberdeen South and North Kincardine	60%	41	Almond Valley	36%
5	Perthshire South and Kinross-shire	57%	42	Cumbernauld and Kilsyth	36%
6	Aberdeenshire West	56%	43	Rutherglen	34%
7	Edinburgh Northern and Leith	56%	44	Airdrie and Shotts	34%
8	Perthshire North	55%	45	Glasgow Southside	33%
9	Edinburgh Western	54%	46	Clydesdale	33%
10	Aberdeenshire East	53%	47	Hamilton, Larkhall and Stonehouse	33%
11	Aberdeen Central	52%	48	Banffshire and Buchan Coast	33%
12	Aberdeen Donside	52%	49	Clydebank and Milngavie	33%
13	Eastwood	51%	50	Caithness, Sutherland and Ross	32%
14	Glasgow Kelvin	50%	51	Renfrewshire South	32%
15	Stirling	49%	52	Angus South	32%
16	Edinburgh Eastern	49%	53	Dundee City West	31%
17	Midlothian North and Musselburgh	48%	54	Carrick, Cumnock and Doon Valley	31%
18	Edinburgh Pentlands	46%	55	Glasgow Anniesland	30%
19	Clackmannanshire and Dunblane	45%	56	Dundee City East	30%
20	Dunfermline	45%	57	Dumbarton	29%
21	Skye, Lochaber and Badenoch	45%	58	Glasgow Shettleston	29%
22	Falkirk East	44%	59	Paisley	29%
23	East Lothian	43%	60	Kilmarnock and Irvine Valley	28%
24	Ayr	42%	61	Glasgow Pollok	27%
25	Mid Fife and Glenrothes	42%	62	Glasgow Provan	27%
26	Falkirk West	40%	63	Cunninghame South	26%
27	Strathkelvin and Bearsden	40%	64	Cunninghame North	25%
28	Motherwell and Wishaw	39%	65	Glasgow Maryhill and Springburn	24%
29	North East Fife	39%	66	Ettrick, Roxburgh and Berwickshire	22%
30	Midlothian South, Tweeddale and Lauderdale	39%	67	Greenock and Inverclyde	22%
31	Linlithgow	39%	68	Dumfriesshire	20%
32	Cowdenbeath	39%	69	Galloway and West Dumfries	17%
33	Kirkcaldy	38%	70	Argyll and Bute	17%
34	East Kilbride	37%	71	Shetland Islands	16%
35	Angus North and Mearns	37%	72	Orkney Islands	15%
36	Moray	37%	73	Na h-Eileanan an Iar	11%
37	Uddingston and Bellshill	36%			



9.2 Number of Venues Visited

Rank	Scottish Parliamentary Constituency	Count	Rank	Scottish Parliamentary Constituency	Count
1	Edinburgh Central	2.1	38	Motherwell and Wishaw	1.6
2	Edinburgh Southern	2.0	39	Cowdenbeath	1.6
3	Perthshire South and Kinross-shire	2.0	40	Midlothian North and Musselburgh	1.6
4	Perthshire North	1.9	41	Renfrewshire South	1.6
5	Glasgow Southside	1.9	42	Rutherglen	1.5
6	Falkirk West	1.8	43	Cumbernauld and Kilsyth	1.5
7	Midlothian South, Tweeddale and Lauderdale	1.8	44	East Kilbride	1.5
8	Edinburgh Western	1.8	45	Glasgow Provan	1.5
9	Angus South	1.8	46	Mid Fife and Glenrothes	1.5
10	Dundee City East	1.8	47	Strathkelvin and Bearsden	1.5
11	Clackmannanshire and Dunblane	1.8	48	Carrick, Cumnock and Doon Valley	1.5
12	Glasgow Kelvin	1.7	49	Cunninghame South	1.5
13	Hamilton, Larkhall and Stonehouse	1.7	50	Moray	1.5
14	Edinburgh Pentlands	1.7	51	Aberdeenshire East	1.5
15	Falkirk East	1.7	52	Banffshire and Buchan Coast	1.5
16	Stirling	1.7	53	Cunninghame North	1.5
17	Dundee City West	1.7	54	East Lothian	1.5
18	Eastwood	1.7	55	Skye, Lochaber and Badenoch	1.4
19	Glasgow Anniesland	1.7	56	Aberdeenshire West	1.4
20	Dunfermline	1.7	57	Greenock and Inverclyde	1.4
21	North East Fife	1.7	58	Aberdeen South and North Kincardine	1.4
22	Glasgow Maryhill and Springburn	1.7	59	Clydebank and Milngavie	1.4
23	Clydesdale	1.7	60	Kilmarnock and Irvine Valley	1.4
24	Glasgow Cathcart	1.7	61	Glasgow Pollok	1.4
25	Linlithgow	1.7	62	Orkney Islands	1.4
26	Angus North and Mearns	1.6	63	Dumbarton	1.4
27	Edinburgh Northern and Leith	1.6	64	Dumfriesshire	1.4
28	Kirkcaldy	1.6	65	Na h-Eileanan an Iar	1.3
29	Ayr	1.6	66	Argyll and Bute	1.3
30	Coatbridge and Chryston	1.6	67	Galloway and West Dumfries	1.3
31	Uddingston and Bellshill	1.6	68	Inverness and Nairn	1.3
32	Airdrie and Shotts	1.6	69	Etrick, Roxburgh and Berwickshire	1.3
33	Edinburgh Eastern	1.6	70	Shetland Islands	1.3
34	Almond Valley	1.6	71	Caithness, Sutherland and Ross	1.3
35	Glasgow Shettleston	1.6	72	Aberdeen Central	1.3
36	Paisley	1.6	73	Aberdeen Donside	1.2
37	Renfrewshire North and West	1.6			



9.3 Average Tickets Purchased by Booker

Rank	Scottish Parliamentary Constituency	Count	Rank	Scottish Parliamentary Constituency	Count
1	Inverness and Nairn	17	38	Glasgow Cathcart	9
2	Skye, Lochaber and Badenoch	15	39	Clydebank and Milngavie	9
3	Perthshire South and Kinross-shire	14	40	Cumbernauld and Kilsyth	9
4	Perthshire North	14	41	Glasgow Southside	9
5	Aberdeen South and North Kincardine	14	42	East Kilbride	9
6	Aberdeen Donside	13	43	Renfrewshire North and West	9
7	Clackmannanshire and Dunblane	13	44	Hamilton, Larkhall and Stonehouse	9
8	Aberdeenshire West	12	45	Midlothian South, Tweeddale and Lauderdale	9
9	Aberdeenshire East	12	46	Almond Valley	9
10	Stirling	12	47	East Lothian	9
11	Eastwood	12	48	Renfrewshire South	9
12	Edinburgh Western	11	49	Paisley	8
13	Edinburgh Southern	11	50	Carrick, Cumnock and Doon Valley	8
14	Edinburgh Pentlands	11	51	Dundee City East	8
15	Caithness, Sutherland and Ross	11	52	Glasgow Anniesland	8
16	Banffshire and Buchan Coast	11	53	Edinburgh Northern and Leith	8
17	Aberdeen Central	11	54	Angus South	8
18	Angus North and Mearns	10	55	Cunninghame North	8
19	Motherwell and Wishaw	10	56	Edinburgh Central	8
20	Ayr	10	57	Dundee City West	8
21	Kirkcaldy	10	58	Dumbarton	8
22	Moray	10	59	Glasgow Maryhill and Springburn	8
23	Mid Fife and Glenrothes	10	60	Glasgow Pollok	8
24	Cowdenbeath	10	61	Cunninghame South	8
25	Edinburgh Eastern	10	62	Glasgow Shettleston	8
26	Falkirk East	10	63	Glasgow Kelvin	8
27	Linlithgow	10	64	Kilmarnock and Irvine Valley	7
28	Dunfermline	9	65	Etrick, Roxburgh and Berwickshire	7
29	Falkirk West	9	66	Glasgow Provan	7
30	Midlothian North and Musselburgh	9	67	Greenock and Inverclyde	7
31	Airdrie and Shotts	9	68	Orkney Islands	7
32	Strathkelvin and Bearsden	9	69	Shetland Islands	7
33	Coatbridge and Chryston	9	70	Dumfriesshire	6
34	Uddingston and Bellshill	9	71	Galloway and West Dumfries	6
35	Rutherglen	9	72	Argyll and Bute	6
36	North East Fife	9	73	Na h-Eileanan an Iar	6
37	Clydesdale	9			



9.4 Average Ticket Price Paid

Rank	Scottish Parliamentary Constituency	ATP	Rank	Scottish Parliamentary Constituency	ATP
1	Etrick, Roxburgh and Berwickshire	£ 35.34	38	Banffshire and Buchan Coast	£ 27.88
2	Greenock and Inverclyde	£ 33.93	39	Edinburgh Central	£ 27.78
3	Argyll and Bute	£ 33.14	40	Edinburgh Southern	£ 27.62
4	East Lothian	£ 32.93	41	Orkney Islands	£ 27.61
5	Almond Valley	£ 32.31	42	Airdrie and Shotts	£ 27.45
6	Kilmarnock and Irvine Valley	£ 31.97	43	Glasgow Maryhill and Springburn	£ 27.27
7	Midlothian South, Tweeddale and Lauderdale	£ 31.97	44	Angus North and Mearns	£ 26.97
8	Dumbarton	£ 31.95	45	Carrick, Cumnock and Doon Valley	£ 26.76
9	Midlothian North and Musselburgh	£ 31.42	46	Glasgow Cathcart	£ 26.45
10	Cunninghame North	£ 31.31	47	Aberdeenshire East	£ 26.19
11	Renfrewshire North and West	£ 31.21	48	North East Fife	£ 25.81
12	East Kilbride	£ 30.78	49	Ayr	£ 25.80
13	Linlithgow	£ 30.74	50	Aberdeenshire West	£ 25.66
14	Renfrewshire South	£ 30.57	51	Motherwell and Wishaw	£ 25.63
15	Cunninghame South	£ 30.50	52	Eastwood	£ 25.43
16	Strathkelvin and Bearsden	£ 30.34	53	Dunfermline	£ 25.35
17	Clydesdale	£ 30.31	54	Moray	£ 25.32
18	Paisley	£ 30.22	55	Dundee City East	£ 25.11
19	Edinburgh Pentlands	£ 29.90	56	Glasgow Kelvin	£ 24.73
20	Galloway and West Dumfries	£ 29.87	57	Aberdeen South and North Kincardine	£ 24.29
21	Edinburgh Western	£ 29.78	58	Mid Fife and Glenrothes	£ 24.08
22	Clydebank and Milngavie	£ 29.69	59	Falkirk West	£ 23.96
23	Dumfriesshire	£ 29.68	60	Cowdenbeath	£ 23.95
24	Hamilton, Larkhall and Stonehouse	£ 29.60	61	Falkirk East	£ 23.67
25	Cumbernauld and Kilsyth	£ 29.43	62	Glasgow Southside	£ 23.66
26	Rutherglen	£ 29.01	63	Kirkcaldy	£ 22.89
27	Glasgow Shettleston	£ 28.69	64	Aberdeen Donside	£ 22.82
28	Edinburgh Eastern	£ 28.68	65	Dundee City West	£ 22.80
29	Glasgow Anniesland	£ 28.62	66	Aberdeen Central	£ 21.84
30	Uddingston and Bellshill	£ 28.51	67	Caithness, Sutherland and Ross	£ 21.56
31	Coatbridge and Chryston	£ 28.42	68	Perthshire South and Kinross-shire	£ 21.47
32	Shetland Islands	£ 28.35	69	Perthshire North	£ 20.81
33	Edinburgh Northern and Leith	£ 28.32	70	Stirling	£ 20.17
34	Na h-Eileanan an Iar	£ 28.28	71	Clackmannanshire and Dunblane	£ 18.98
35	Glasgow Provan	£ 28.01	72	Skye, Lochaber and Badenoch	£ 18.70
36	Glasgow Pollok	£ 28.00	73	Inverness and Nairn	£ 17.64
37	Angus South	£ 27.99			



9.5 Average Spend by Booker

Rank	Scottish Parliamentary Constituency	Spend	Rank	Scottish Parliamentary Constituency	Spend
1	Edinburgh Western	£ 336	38	Ettrick, Roxburgh and Berwickshire	£ 253
2	Edinburgh Pentlands	£ 335	39	Moray	£ 251
3	Aberdeen South and North Kincardine	£ 334	40	Clackmannanshire and Dunblane	£ 248
4	Aberdeenshire West	£ 316	41	Stirling	£ 241
5	Aberdeenshire East	£ 315	42	Glasgow Cathcart	£ 240
6	Edinburgh Southern	£ 311	43	Glasgow Anniesland	£ 239
7	Aberdeen Donside	£ 305	44	Dunfermline	£ 239
8	Banffshire and Buchan Coast	£ 304	45	Cunninghame South	£ 238
9	Perthshire South and Kinross-shire	£ 302	46	Edinburgh Northern and Leith	£ 237
10	Eastwood	£ 299	47	North East Fife	£ 236
11	Midlothian North and Musselburgh	£ 295	48	Caithness, Sutherland and Ross	£ 236
12	Linlithgow	£ 295	49	Mid Fife and Glenrothes	£ 236
13	Inverness and Nairn	£ 291	50	Kilmarnock and Irvine Valley	£ 235
14	Perthshire North	£ 290	51	Angus South	£ 233
15	East Lothian	£ 289	52	Cowdenbeath	£ 232
16	Almond Valley	£ 284	53	Aberdeen Central	£ 232
17	Midlothian South, Tweeddale and Lauderdale	£ 283	54	Greenock and Inverclyde	£ 231
18	Strathkelvin and Bearsden	£ 281	55	Edinburgh Central	£ 231
19	Edinburgh Eastern	£ 278	56	Kirkcaldy	£ 230
20	Angus North and Mearns	£ 277	57	Falkirk East	£ 227
21	Clydesdale	£ 277	58	Carrick, Cumnock and Doon Valley	£ 227
22	Renfrewshire North and West	£ 277	59	Falkirk West	£ 226
23	Skye, Lochaber and Badenoch	£ 275	60	Glasgow Pollok	£ 221
24	East Kilbride	£ 273	61	Glasgow Shettleston	£ 219
25	Clydebank and Milngavie	£ 268	62	Glasgow Maryhill and Springburn	£ 216
26	Rutherglen	£ 267	63	Dundee City East	£ 213
27	Cumbernauld and Kilsyth	£ 264	64	Glasgow Southside	£ 211
28	Renfrewshire South	£ 264	65	Argyll and Bute	£ 201
29	Uddingston and Bellshill	£ 263	66	Glasgow Provan	£ 199
30	Coatbridge and Chryston	£ 262	67	Dumfriesshire	£ 189
31	Hamilton, Larkhall and Stonehouse	£ 262	68	Orkney Islands	£ 188
32	Motherwell and Wishaw	£ 261	69	Dundee City West	£ 188
33	Ayr	£ 260	70	Shetland Islands	£ 187
34	Cunninghame North	£ 260	71	Glasgow Kelvin	£ 186
35	Paisley	£ 257	72	Galloway and West Dumfries	£ 185
36	Dumbarton	£ 254	73	Na h-Eileanan an Iar	£ 162
37	Airdrie and Shotts	£ 254			



9.6 Average Spend per Household

Rank	Scottish Parliamentary Constituency	Spend	Rank	Scottish Parliamentary Constituency	Spend
1	Edinburgh Southern	£ 207	38	Clydesdale	£ 92
2	Aberdeen South and North Kincardine	£ 201	39	North East Fife	£ 92
3	Edinburgh Western	£ 183	40	Moray	£ 92
4	Inverness and Nairn	£ 179	41	Rutherglen	£ 92
5	Aberdeenshire West	£ 176	42	Falkirk West	£ 91
6	Perthshire South and Kinross-shire	£ 173	43	Cowdenbeath	£ 89
7	Aberdeenshire East	£ 168	44	Kirkcaldy	£ 88
8	Edinburgh Central	£ 162	45	Clydebank and Milngavie	£ 88
9	Perthshire North	£ 160	46	Hamilton, Larkhall and Stonehouse	£ 87
10	Aberdeen Donside	£ 159	47	Airdrie and Shotts	£ 87
11	Edinburgh Pentlands	£ 156	48	Glasgow Cathcart	£ 87
12	Eastwood	£ 153	49	Renfrewshire South	£ 84
13	Midlothian North and Musselburgh	£ 141	50	Caithness, Sutherland and Ross	£ 75
14	Edinburgh Eastern	£ 136	51	Dumbarton	£ 75
15	Edinburgh Northern and Leith	£ 131	52	Paisley	£ 73
16	East Lothian	£ 124	53	Angus South	£ 73
17	Skye, Lochaber and Badenoch	£ 123	54	Glasgow Anniesland	£ 72
18	Aberdeen Central	£ 121	55	Carrick, Cumnock and Doon Valley	£ 71
19	Stirling	£ 119	56	Glasgow Southside	£ 71
20	Linlithgow	£ 114	57	Cunninghame North	£ 66
21	Strathkelvin and Bearsden	£ 113	58	Kilmarnock and Irvine Valley	£ 66
22	Clackmannanshire and Dunblane	£ 112	59	Dundee City East	£ 63
23	Ayr	£ 110	60	Glasgow Shettleston	£ 63
24	Midlothian South, Tweeddale and Lauderdale	£ 110	61	Cunninghame South	£ 63
25	Dunfermline	£ 108	62	Glasgow Pollok	£ 60
26	Motherwell and Wishaw	£ 103	63	Dundee City West	£ 59
27	Angus North and Mearns	£ 102	64	Ettrick, Roxburgh and Berwickshire	£ 55
28	Almond Valley	£ 102	65	Glasgow Provan	£ 54
29	East Kilbride	£ 101	66	Glasgow Maryhill and Springburn	£ 52
30	Falkirk East	£ 100	67	Greenock and Inverclyde	£ 50
31	Renfrewshire North and West	£ 100	68	Dumfriesshire	£ 38
32	Mid Fife and Glenrothes	£ 100	69	Argyll and Bute	£ 34
33	Banffshire and Buchan Coast	£ 100	70	Galloway and West Dumfries	£ 31
34	Uddingston and Bellshill	£ 96	71	Shetland Islands	£ 29
35	Coatbridge and Chryston	£ 95	72	Orkney Islands	£ 28
36	Cumbernauld and Kilsyth	£ 94	73	Na h-Eileanan an Iar	£ 18
37	Glasgow Kelvin	£ 94			

David Brownlee for dataculturechange.com. 27 July 2023.

