

Engine of Recovery

Culture on the South Bank and Waterloo

Southbank Centre
National Theatre
The Old Vic
Young Vic
Rambert



A report commissioned by the London Borough of Lambeth and South Bank BID in partnership with National Theatre, Rambert, Southbank Centre, The Old Vic and Young Vic. Research partner: Hatch.

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Foreword



Aerial view showing the site of the Festival of Britain, South Bank, 1951. Lambeth Archives

Foreword

The Festival of Britain in 1951 marked the turning point when joy started to emerge from the austerity that the country had faced in the aftermath of the Second World War. The nation celebrated arts, culture, science and technology, with displays, exhibitions and new public spaces. Its centrepiece was London’s South Bank.

On this 70th anniversary, when the COVID-19 pandemic has devastated lives and livelihoods throughout the country, not least in the cultural sector, it is fitting to consider the contribution to British life of the South Bank and Waterloo creative cluster. We may all have been vaguely aware of the valuable role of this arts hub, but, as so often in life, we only really appreciate it when it’s no longer available.

This report throws into stark relief not only how important the five institutions are as centres of artistic excellence and social inclusion, but also as major employers, magnets for tourism and contributors to the national economy. Although it paints a somewhat gloomy picture about the havoc that the pandemic has wrought, the good news is that the cluster has so far been resilient. Through determination and inventiveness – as well as vital Government support through the Cultural Recovery Fund – it has continued to give succour to people when society has been at its lowest ebb for generations, a beacon in the darkness.

Looking to the future, the creative sector has huge potential to stimulate London’s recovery from COVID-19. Any investment comes with risks, but we are fortunate that here in Lambeth, in the heart of London, we have one of the world’s most dynamic creative clusters. Together, we now stand ready to once more create new jobs, attract national and international visitors, and reanimate the public spaces that have been so desolate this last year.

We are calling for a renewed confidence in culture. Then, just as the Festival of Britain did seven decades ago, today’s cultural hub at the South Bank and Waterloo can once again be able to reinvigorate the nation with a spirit of openness, inclusivity and excitement.

Methodology

The consultancy Hatch undertook the research for this report.

Economic and social value have been assessed by drawing on the frameworks used by the Arts Council and Department for Digital, Culture, Media and Sport (DCMS).

The assessment is informed by:

Data collection from each of the five cultural institutions, such as income, expenditure, direct employment and visitor statistics.

Consultations with representatives of each institution.

Analysis and modelling of the economic impacts of the cultural cluster on the UK.

Case study material provided by the organisations on their social engagement.

Inputs were collected between September and December 2020. Although there have been changes since then, including an extension to the furlough scheme, this report is based on assumptions made at that time.

The British Film Institute (BFI), another centre of cultural and economic excellence, was excluded since it was not possible to separate BFI Southbank’s local impact from its wider virtual and international activities.

Executive summary

The National Theatre, Rambert, Southbank Centre, The Old Vic and Young Vic comprise a world class cultural cluster generating work that is celebrated and enjoyed across the globe. For the first time, we have researched the economic and social contribution made by this cluster, whilst also documenting the pandemic’s effect.

All located on or near to the River Thames, within the London Borough of Lambeth, the institutions normally draw over 4 million visitors a year who collectively make about 5.6 million visits. Characterised by their commitment to inclusivity and creative excellence, people from across the UK and internationally come to enjoy these unique creative centres.

But COVID-19 changed all that. All five organisations had to close their doors to visitors for the majority of the 2020/21 financial year. Unprecedented challenges were faced.

So what is the economic and social contribution of this world leading cluster in normal times? How did the pandemic change this? And what does the future hold?

A remarkable economic contribution is generated in normal times...

Using data from 2018/19 (the latest complete financial year unaffected by the pandemic), we find that collectively, the five organisations' contribution includes:

£510million

in GVA (Gross Value Added) in the UK

5.6million

visits

£81 million

Spend on external suppliers

For every direct job within the five institutions, a further 2.5 are supported in the national economy.

Each visitor (many national and international) spends an average of £90 on businesses such as hotels, bars and restaurants, shops and transport. They account for about £1 in every £25 of spend by all leisure visitors in London.

8,100

FTE jobs

But the economic impact of COVID has been stark...

We estimate that as a result of closure due to the pandemic during the 2020/21 financial year:

Loss of £330million

GVA for the UK economy

5,500

job losses
in the UK

normally generated by the cluster

Visits dropped from

5.6million to 50,000

The cluster secured £35.8m of emergency funding through the Government's Culture Recovery Fund – £30.6m in the form of government loans.

Seven in eight of all staff (1,170 FTE) were furloughed

As a proportion of all visits, those from overseas accounted for

only 1% compared to 43% pre-COVID

The institutions lost over half their usual income – some

£130million

A resolute commitment to society

The impact of the five institutions goes beyond jobs and GVA. They:

Enhance quality of life, pioneer artistic innovation, and provide life-affirming moments

Boost health and wellbeing through creative projects in the local community, reducing social isolation.

Provide education and skills development through schools and talent programmes, inspiring long term interest in the arts.

Stimulate regeneration, acting as a magnet for other businesses and investment, bringing growth and renewal.

Play a major role in London’s attractiveness as a place to visit, work and live.

Support enterprise, developing partnerships with freelancers, smaller organisations and fostering emerging talent.

Widen access and participation for all ages and ethnicities, giving a platform for people to express themselves and engage with arts and culture.

In the face of the pandemic, the cluster has sought to sustain much of this. Despite major job losses and the extensive furlough of staff, the organisations have continued their outreach work. Through inventive use of online platforms and even the postal system, they have brought the arts to people throughout the country, from schoolchildren to the elderly, lifting community spirits and providing relief from loneliness and worry.

The Future

The South Bank and Waterloo cluster has the potential to play a significant role in the recovery of central London and the UK as lockdown restrictions recede. With a combination of private and public investment, this unique part of London can provide the tonic that Britain needs to bring it out of post-pandemic convalescence into good cultural and economic health, full of the creative energy for which this country is rightly known.



London Eye. Photo credit: Marks Barfield Architect



Engine of Recovery

Overview

The five institutions

1

Culture on the South Bank and Waterloo

Overview

Southbank Centre
National Theatre
The Old Vic
Young Vic
Rambert

The Famous Five

South Bank and Waterloo contain many of London’s most important artistic institutions. Together, National Theatre, Rambert, Southbank Centre, The Old Vic and Young Vic draw over 5.6 million visits a year and have consistently offered outstanding cultural experiences for generations. They are at the forefront of global artistic excellence and creative innovation.



Arial view of the South Bank. Photo credit: Will Caddy

Southbank Centre



Southbank Centre's Festival of Love. Photo credit: Belinda Lawley

Southbank Centre

Founded in 1951, the Southbank Centre is the UK’s largest arts centre. It is one of the UK’s top visitor attractions with 2.4 million visits in a normal year.

Situated by the River Thames and Waterloo Bridge, the Centre comprises several performance spaces.



Southbank Centre Inside Out – The Cinematic Orchestra. Photo credit: Dan Medhurst

Southbank Centre
works with over
100,000 artists and
creatives every year
and hosted **3,400**
events, half of which
were free to attend.



Southbank Centre

The Royal Festival Hall, opened in 1951 as part of the Festival of Britain, is a 2,700-seat classical music venue. It is home to four Resident Orchestras and four Associate Orchestras; the Clore Ballroom, which is used for dance events and classes; and the Southbank Centre Archives, which offers access for special interest or research purposes to collections that contributed to the 20th century’s finest art, architecture and performances.



Royal Festival Hall lights, Southbank Centre Winter Market. Photo credit: India Roper-Evans

The Hayward Gallery, opened in 1968, is a world-renowned contemporary art gallery. Hayward Gallery Touring organises contemporary art exhibitions to galleries, museums and other publicly funded venues throughout Britain, allowing smaller spaces to benefit from access to prestigious exhibitions. In collaboration with artists, independent curators, writers and partner institutions. Hayward Gallery Touring develops imaginative exhibitions that are normally seen by up to half a million people in over 45 cities and towns each year.

Southbank Centre



The Hayward Gallery Building, Southbank Centre. Photo credit: Morley von Sternberg

The Queen Elizabeth Hall, opened in 1967, is a 916-seat concert hall, hosting different types of music, gigs and performance events. The roof garden which opened in 2011 is maintained by Grounded EcoTherapy – a group of volunteers who have experienced homelessness, addiction and mental health problems.



Installation view of Matthew Barney: Redoubt at Hayward Gallery, 2021. Matthew Barney, 2021. Photo: Mark Blower

Southbank Centre

The Purcell Room is a smaller performance hall (295-seats), which opened alongside the Queen Elizabeth Hall in 1967. It is used for literature, performance, classical, jazz and electronic performances.



111 (Unlimited 2021). Photo credit: Susan Hay

The National Poetry Library, originally founded by the Arts Council in 1953, moved to the Southbank Centre in 1988. With free membership, it is the largest public collection of modern poetry in the world, boasting over 200,000 items.



Southbank Centre Inside Out – Chineke! Orchestra, pre-record 12 October 2020. Photo credit: Mark Allan, Southbank Centre

The Chic guitarist has taken great care to ensure that his nine-day festival wraps its arms around as many ages, genders, sexualities and continents as it can

Damien Morris, The Observer



Nile Rodgers and dancers from A Night of STUDIO 54 celebrate the opening of Nile Rodgers' Melttdown, 03/08/2019. Photo credit: Victor Frankowski

Southbank Centre

Every year, Southbank Centre works with over 100,000 artists and creatives every year and hosts around 3,400 events, almost half of which are free to attend. Programmes such as Voicelab and Composers Collective nurture new talent, engaging with thousands of singers nationally and internationally and providing a platform for composers and artists to work together. Street entertainers are selected to perform in the Queen’s Walk area, which usually sees 29m visits per year.

The Centre hosts a range of activities and programmes for all ages.

As an Artsmark Partner, it normally offers specialised workshops and year-round activities for schools, with 40,000 children attending creative learning events. 288 schools took part in Southbank Centre programmes in 2018/19. Courses and workshops are provided for people aged 15–30 to develop skills in visual arts, dance, music, literature and poetry. *Violet Nights* is a monthly ‘real-life forum’ to exchange ideas. Late-night gigs include the electronic music series *Concrete Lates*. *(B)old* activities, designed for older people, people with dementia and others who are socially isolated, include free monthly social Tea Dances at the Royal Festival Hall.

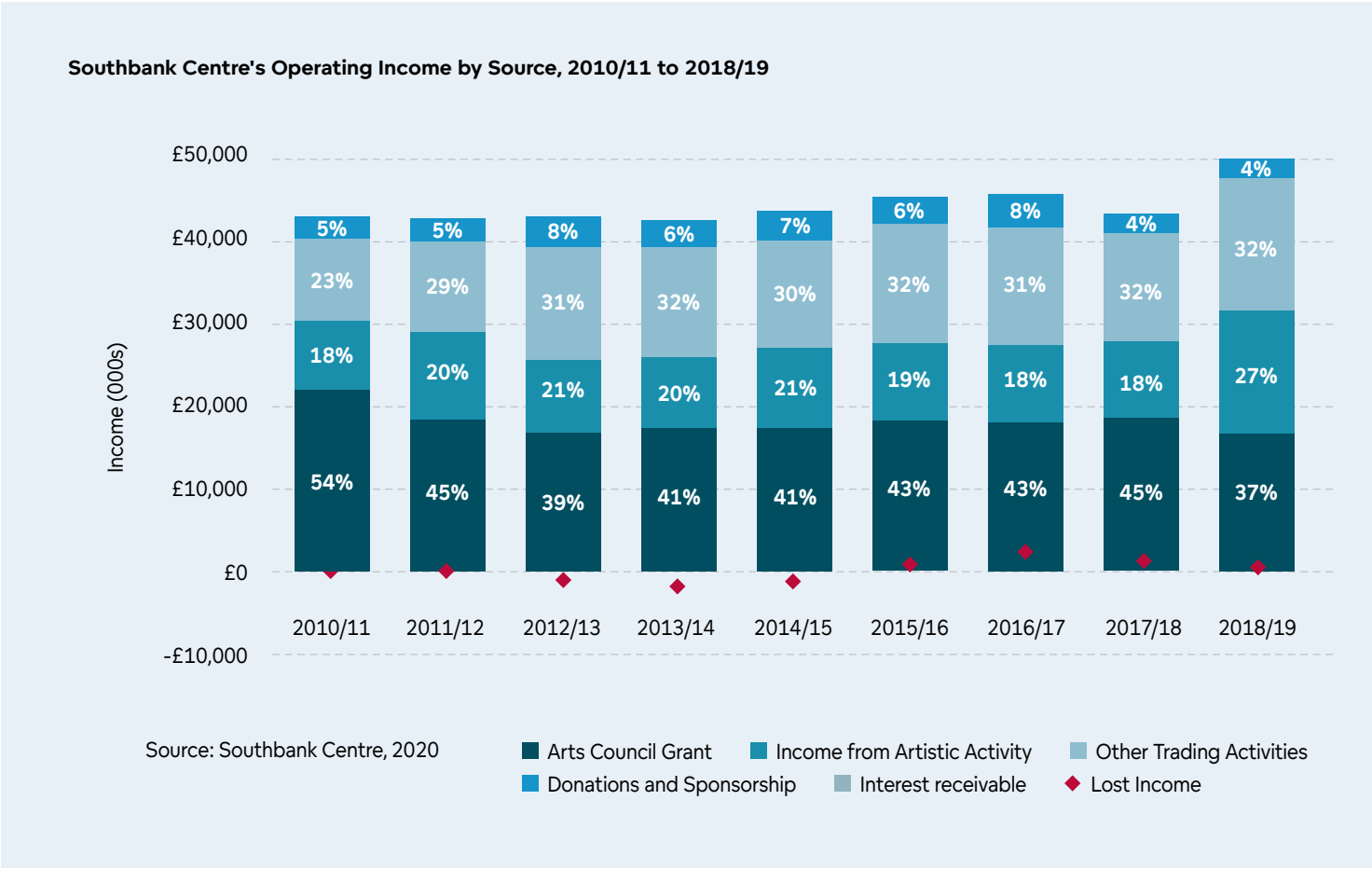


Concrete Lates: Hayward x Boiler Room with Pan Daijing. Photo credit: Cesare De Gigli

Southbank Centre

The Southbank Centre is a popular venue for graduations and corporate events. It is home to a range of independent restaurants, cafés, bars and pop-ups, as well as the larger Skylon restaurant, which provides spectacular views of the river Thames and London skyline.

Arts Council England (ACE) is the Centre’s principal funder, but while it provided more than half (54%) of operating income in 2010/11, this fell to just over a third (37%) by 2018/19. Despite this fall, the institution reported consecutive annual unrestricted operational surpluses between 2015/16 and 2018/19. In place of the reduced public grants, the Southbank Centre has had great success in increasing its operating income from artistic and other trading activities, which have grown since the start of the decade.



Street entertainers
are selected to
perform in the
Queen's Walk area,
which usually sees
29m visits per year.



NT River Stage – The Glory. Photo credit: Stephanie Claire

National Theatre



NT Entrance, February 2015. Photo credit: Philip Vile

National Theatre

Founded in 1963, the National Theatre company was resident at The Old Vic before moving into the National Theatre building in 1976. Since then, the company has produced well over 800 plays in one of the building's three theatres – the Olivier, the Lyttelton and the Dorfman. Today, the National Theatre works to create and share unforgettable stories with audiences across the UK and around the world – on its own stages, on tour, in schools, on cinema screens and streaming at home.

The National Theatre building is open to the public, with three restaurants and a variety of bars and cafes, as well as spaces for learning and engagement activity.



Rafe Spall, Hazel Holder taken in rehearsals for Death of England. Photo credit: Helen Murray

National Theatre

The NT employs hundreds of craftspeople at its building on the South Bank to create its productions – it is often referred to as the largest factory in central London. The on-site production departments include scenic art and construction, costume and prop making, and an armoury, as well as housing large technical, rehearsal and development spaces.



Scenic construction workshop. Photo credit: Kerry Harrison

National Theatre

The National Theatre’s mission is to make world-class theatre for everyone, and strives to be accessible, inclusive and sustainable. The NT's work stretches beyond theatre production, delivering an ambitious programme of work with theatre-makers, communities, young people and audiences across the UK and beyond. Their major programmes include:

New Work development – which engages over 1,000 writers and creatives each year to make new world-leading work. It invests in talent development and new ideas through commissions, workshops and attachments. The NT's Generate programme means a third of its resource is committed to developing ideas with a wide range of theatre companies, destined for theatres across the UK.

Learning and Participation – engaging schools and tens of thousands of young people aged 4-21 years nationwide. Aiming to ignite the creativity of the next generation, they provide opportunities for watching, creating, and taking part in theatre, as well as offering training and digital resources to teachers and schools worldwide.



Secondary School pupils taking part in Creative Choices at the National Theatre. Photo credit: Emma Hare



NT Public Acts cast in Pericles at National Theatre. Photo Credit: James Bellorini

Public Acts – the NT works in long-term partnerships with theatres and community organisations to create ambitious works of participatory theatre, and local workshops that use theatre practice to increase confidence, community and wellbeing.

Theatre Nation Partnerships – aimed at growing and sustaining live theatre audiences in England through touring, engagement and developing skills and strategies with theatres in six key areas of the country.

Digital distribution – streaming and broadcasting that shares the NT’s productions across the world. This includes NT Live, which broadcasts to cinemas in 65 countries; the NT Collection for schools, universities and libraries; and the new streaming platform NT at Home, developed in response to the pandemic, which brings unforgettable British theatre to a global audience.



Leah Harvey and C.J. Beckford in Small Island. Photo credit: Brinkhoff Moegenburg

National Theatre

In 2018/19 alone, the NT engaged with **7.2 million** people around the world, created 23 productions for its South Bank theatres, toured 38 UK towns and cities, and transferred 10 productions to London's West End and New York.



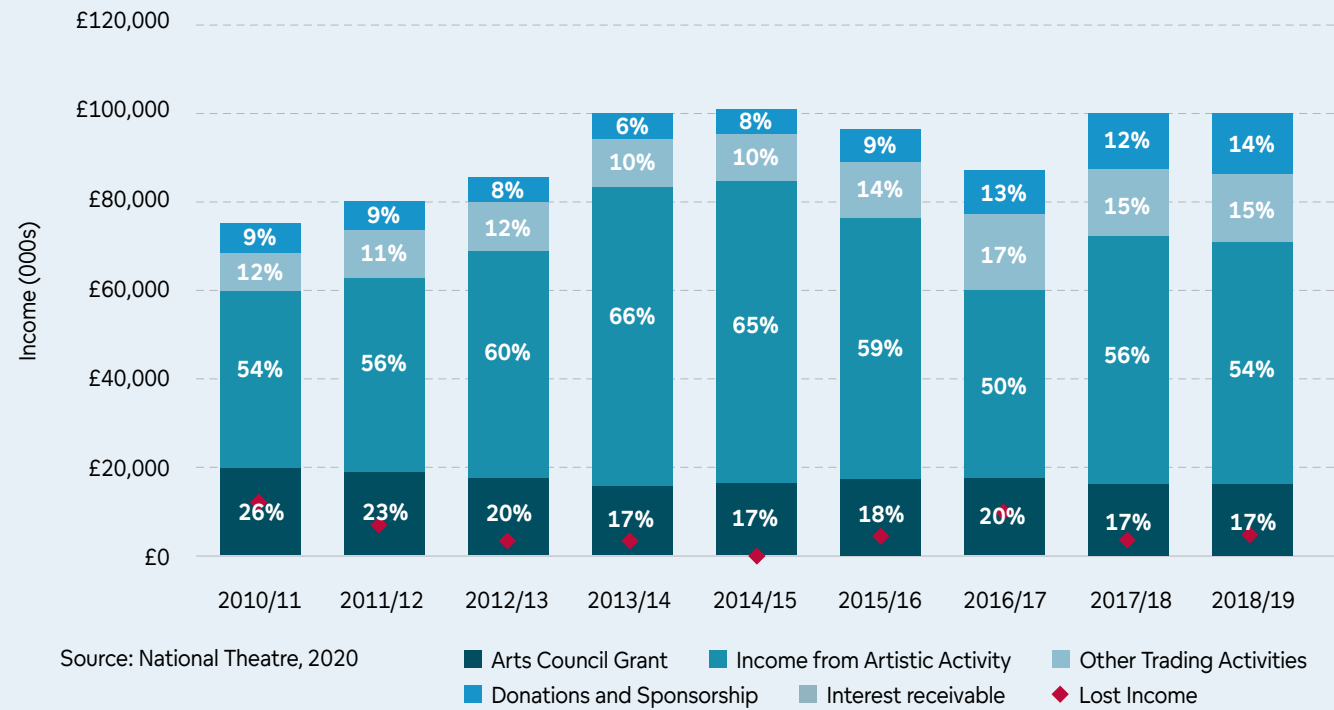
National Theatre, War Horse UK Tour 2017/2019. Photo credit: Brinkhoff-Moegenburg

National Theatre

The NT’s income in 2018/19 was £100m. At the start of the decade, more than a quarter of this income came from the Arts Council, but this now accounts for only about one-sixth (17%).

In its place, the National Theatre has significantly increased its income from artistic and other trading activities, while donations and sponsorships more than doubled. Total income grew by one-third or £24m.

National Theatre's Total Income by Source, 2010/11 to 2018/19



The Old Vic



Bicentenary Birthday. 11 May 2018. Photo credit: Manuel Harlan

The Old Vic

The oldest of the five South Bank institutions, The Old Vic, established in 1818, is an independent, 1,000-seat not-for-profit theatre located just south-east of Waterloo Station. In its rich 200-year history, The Old Vic has been home to many of the largest cultural organisations we know today, including the National Theatre, English National Opera and Sadler’s Wells.



Beverley Knight and Witney White in Sylvia. Photo credit: Manuel Harlan

The Old Vic

The Old Vic is an artistic powerhouse with a strong social mission. It produces and presents up to seven diverse productions every season, enhanced by a vibrant programme of One Voice monologues, Voices Off talks, Lates and day-time events for families. Off stage it engages with over 10,000 people a year through award-winning education, employability and community work. Projects include:

Take the Lead – a free employability programme for students aged 15-18, made up of workshops and theatre techniques to develop the core skills of communication, self-management, self- belief, teamwork and problem solving.

Education Hub – a digital resource accessible to teachers, students, parents, young creatives and anyone interested in theatre to learn new skills. The Hub hosts digital insights, how-to guides and workshop highlighting topics such as careers advice, practical skills in theatre, theatre techniques and wellbeing.

Front Line – offers paid placements to young people aged 16–25 within the Front-of-house team. Participants shadow various roles over a two-week period, receiving training in teamwork, communication and an introduction to customer service, a CV skills workshop and free tickets to an Old Vic production.

Front Line Lambeth – developed in partnership with Lambeth Council and ELEVATE, this programme enables 30 young people from Lambeth currently underrepresented across the creative industries to experience paid placements in six different cultural organisations across the Borough.



Front Line. Photo credit: Ben Carpenter

The Old Vic engages with **over 10,000 people** a year through award-winning education, employability and social mobility programmes.

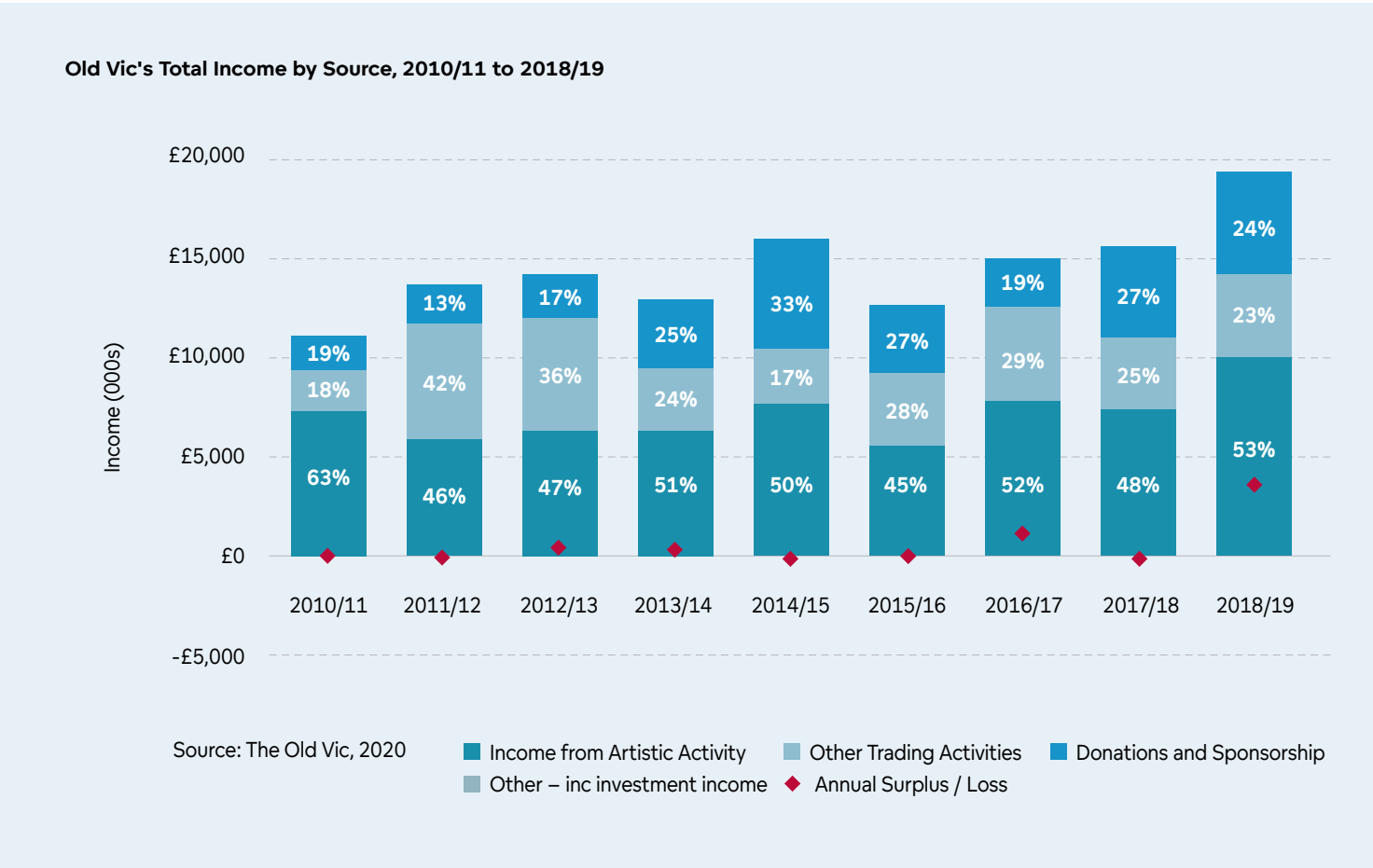


Front Line. Photo credit: Ben Carpenter

The Old Vic

The Old Vic is a not-for-profit theatre operating a break-even budget in a historic, Grade II* listed building. Unlike the other institutions in this study, it does not receive regular grants from the Arts Council and instead relies on its own revenue generation.

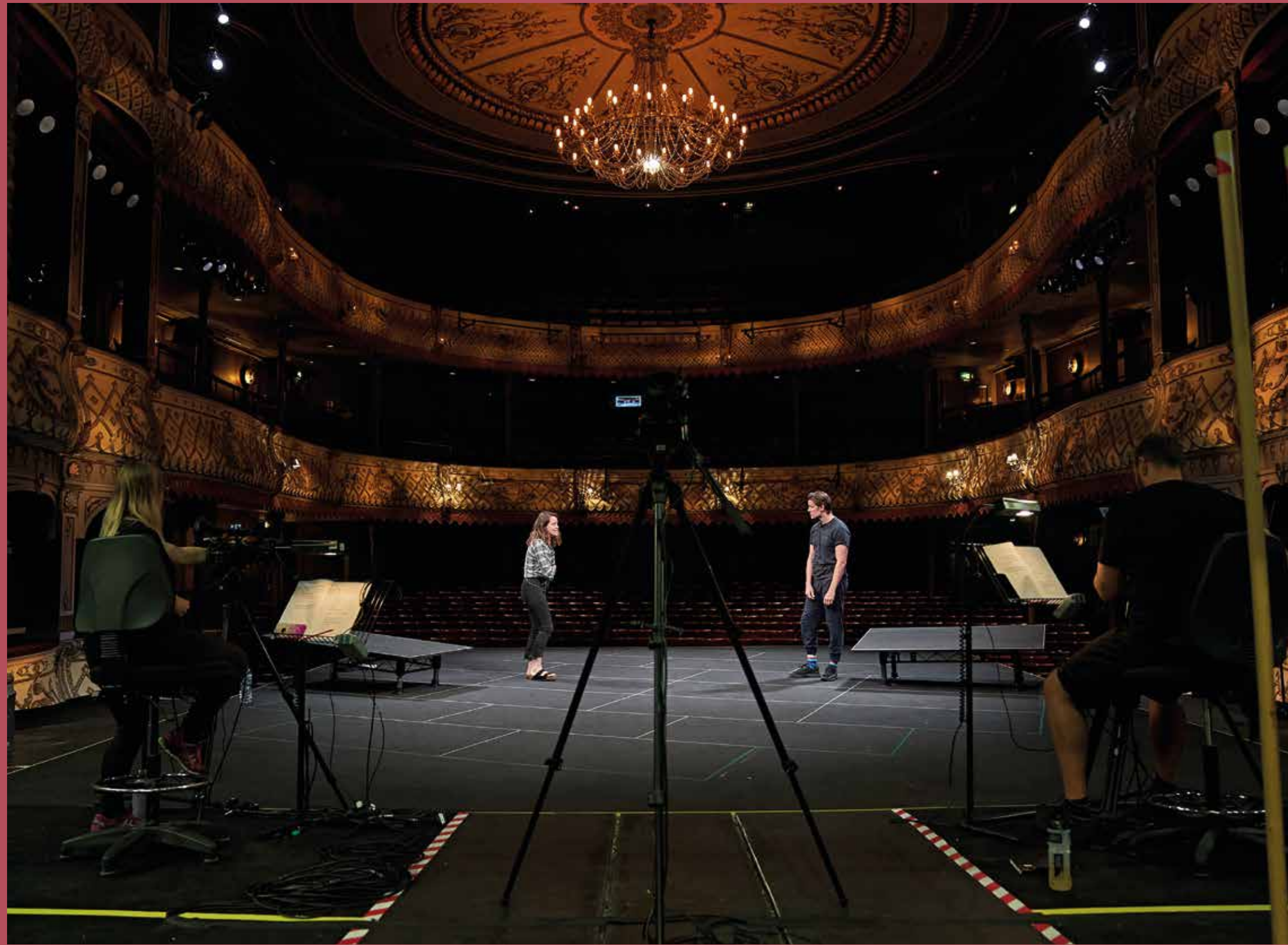
The Old Vic's income grew from just under £11m in 2010/11 to just over £19m in 2018/19 (including fundraising for capital projects). More than half comes from artistic activities and this proportion has remained stable over that period.



Indira Varma and Andrew Scott in Present Laughter. Photo credit: Manuel Harlan

The thing I love most about this theatre, and the policy of the theatre, is that it's a community theatre and there's a definite sense of energy in here that is different.

Andrew Lincoln, Actor, taken from the film:
One Year On | The Old Vic in Lockdown



Claire Foy and Matt Smith in Old Vic In Camera – Lungs. Photo credit: Manuel Harlan.

Young Vic



Cush Jumbo stars in Hamlet by William Shakespeare and Directed by Greg Hersov. Delayed due to the pandemic, the show will be opening at the Young Vic in September 2021. Photo credit: Dean Chalkley, concept Emilie Chen

Young Vic

Formed as an offshoot of The Old Vic, under the National Theatre arm, the Young Vic Company was formed to develop and perform plays for a younger audience. It was not until 1970 that the Young Vic moved to its current location, a former butcher shop and Second World War bomb site, down the road from The Old Vic.

In 1974, the company became a body independent of the NT. Since then, reflecting its growth in stature in the UK and cultural industry, the theatre has undergone a transformation. Alongside its main auditorium, with a capacity of 420, sit two smaller theatre spaces, the Maria and the Clare, seating 150 and 70 respectively. Beyond its audience members, The Cut bar and restaurant, located within the theatre, has proven to be a big attraction and an asset to Lambeth’s night-time economy.



The Unforgotten. Photo credit: Aaron Imuere

The Young Vic is a civic centre and a home-away-from-home for our community.

It is a space for us to hear extraordinary stories told by the world's finest artists that help us see the world through someone else's eyes.

Kwame Kwei-Armah, Artistic Director



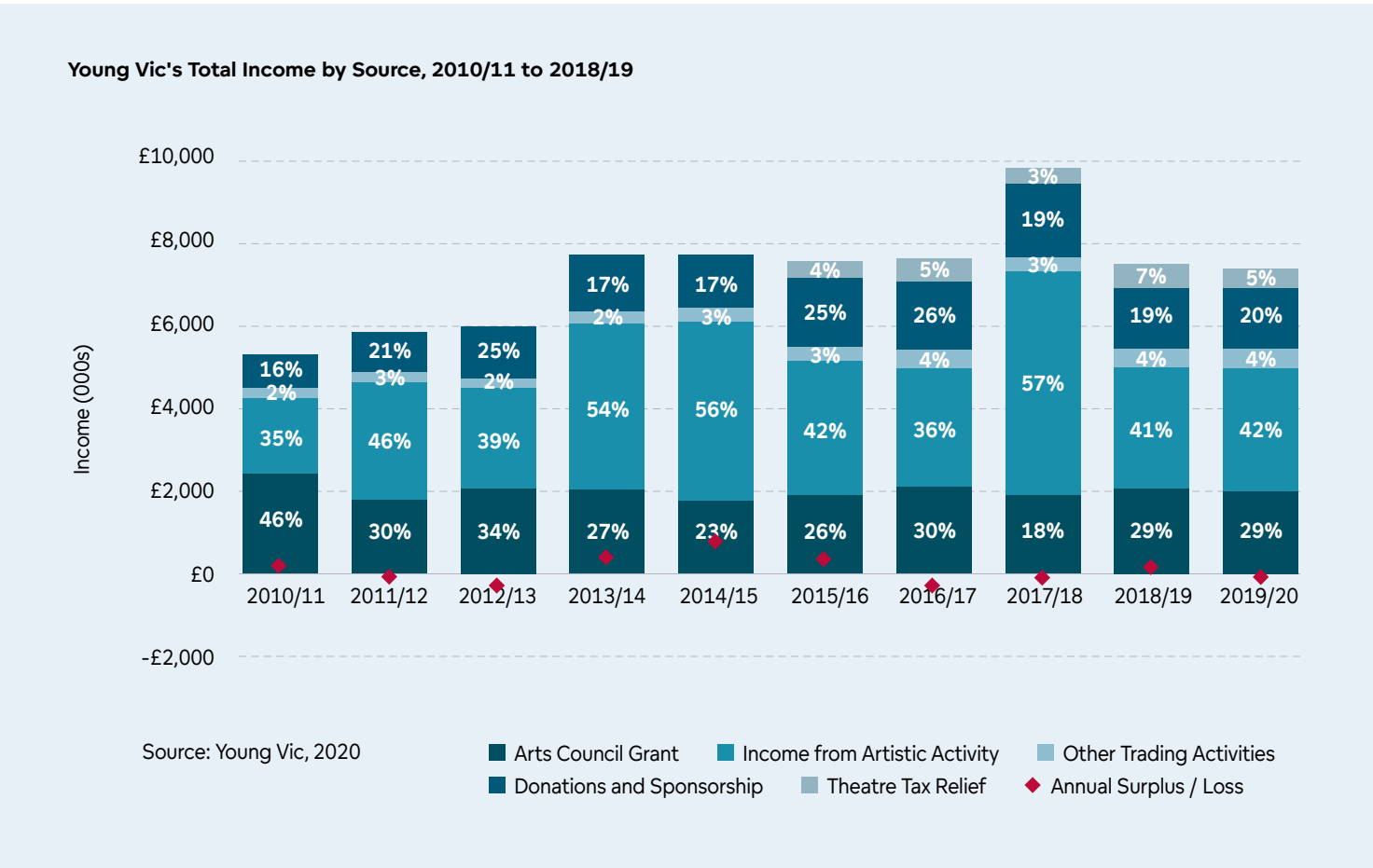
Adjoa Andoh in *The New Tomorrow* at the Young Vic (2020) Photo credit: Marc Brenner

Young Vic

Community programmes run by the Young Vic include:

Taking Part – their creative engagement department delivering an ambitious programme to thousands of participants each year, collaborating with the UK’s leading theatre artists to create work for and with the local community, including developing creative skills, workshops and free tickets.

Director’s Programme – the only scheme of its kind, helping thousands of early-career directors, designers, artists and producers develop their craft through workshops, paid opportunities and networking events.



Young Vic

The Young Vic generated £1.9m more income in 2018/19 than in 2010/11. Over the same period, the Arts Council’s contribution fell from 46% of the institution’s total income to 29%. Meanwhile, income from artistic activities and from donations and sponsorships grew by about 60%, while income from other trading activities rose by 136%.



Twelfth Night at the Young Vic. Photo credit: Johan Persson

Rambert



Rambert dancers. Photo credit: Mariano Vivanco

Rambert believes that to give brilliant and daring people the chance to inspire others, is to give them the power to move the world forward.

Britain's oldest dance company is also one of the world's most diverse and forward looking. Rambert transforms everyday spaces by making dance that is awe-inspiring, adventurous, dynamic and relevant. As a touring company, from its home on the South Bank, Rambert contributes to local arts ecologies across the UK.



Rambert dancers in Aisha and Abhaya © 2020, ROH and Rambert. Photographed by Foteini Christofilopoulou.

The recent hiatus
was the longest
Rambert had been
off stage in its
94 year history.



Rambert2 dancers in Sharon Eyal's Killer Pig. Photographed by Deborah Jaffe

Rambert

The recent hiatus was the longest Rambert had been off stage in its 94 year history and they – now joined by early career ensemble Rambert2 – continue to set ambitious goals, trying new things and finding new ways to give people inspiration, ambition and belief.

In 2013, with the help of Coin Street Community Builders, Rambert built its permanent home on the South Bank with a building that boasts five dance studios (three full size and two smaller practice studios) treatment and body conditioning rooms and the ICAP reading room used for workshops, meetings and the Rambert archive.



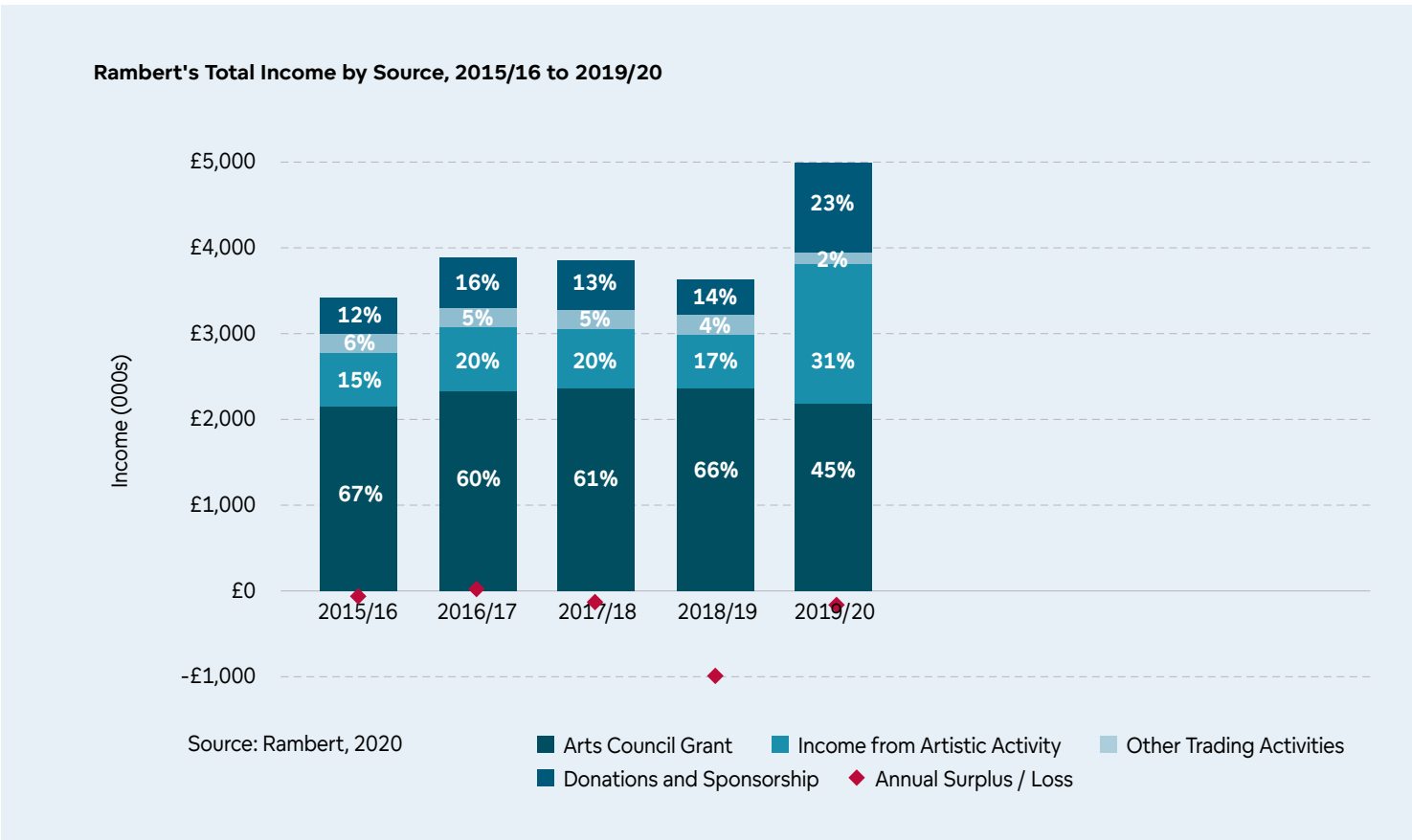
Rambert's Liam Francis during a River Stage workshop

Rambert

As well as performing nationally and internationally Rambert offers dance and wellness classes and courses for people of all ages and abilities, and local participation and community initiatives. As part of its partnership with Coin Street, people living in the area can book classes at a reduced rate.

Launched during the pandemic Rambert Home Studio is Rambert's online home which also offers hundreds of online classes filmed in the South Bank Studios alongside livestream broadcasts, behind the scenes footage, and inspiring interviews and content from their South Bank home.

Before the pandemic in 2019/20 under new leadership, Rambert's total income was £4.9m – an increase in income of 32% on the previous year.





Engine of Recovery

Baseline economic contributions

Value to our economy

2

Culture on the South Bank and Waterloo

Baseline Economic Contribution

The five cultural institutions are each economic generators within the local, London and wider UK economy.

They create direct economic effects through the income they generate and the jobs for people they employ. In turn, they generate indirect effects through their expenditure with their suppliers and then through the amounts that these suppliers spend on their suppliers, and so on throughout the supply chain — the so-called multiplier effect.

The spending by the institutions’ staff and their suppliers’ staff on food and drink, clothing, transport etc and the onward effects of all this represent another so-called induced effect. These are known as core economic effects. On top of this, by attracting people to the area, they generate tourism impacts.



The Green Room. Photo credit: Goya Photography

Assessing Economic Impact — what’s covered?

Tourism Impact

Performances
Events
Exhibitions
Conferences
Festivals

}

Ticketed visitors
Third party ticketed visitors
Free admission visitors

Direct Impact

Direct Staff
Contracted Staff
Employees in food
markets / pop ups

Induced Impact

}

Employees &
Supplier Wages

Indirect Impact

}

OPEX & CAPEX
External Event
Management

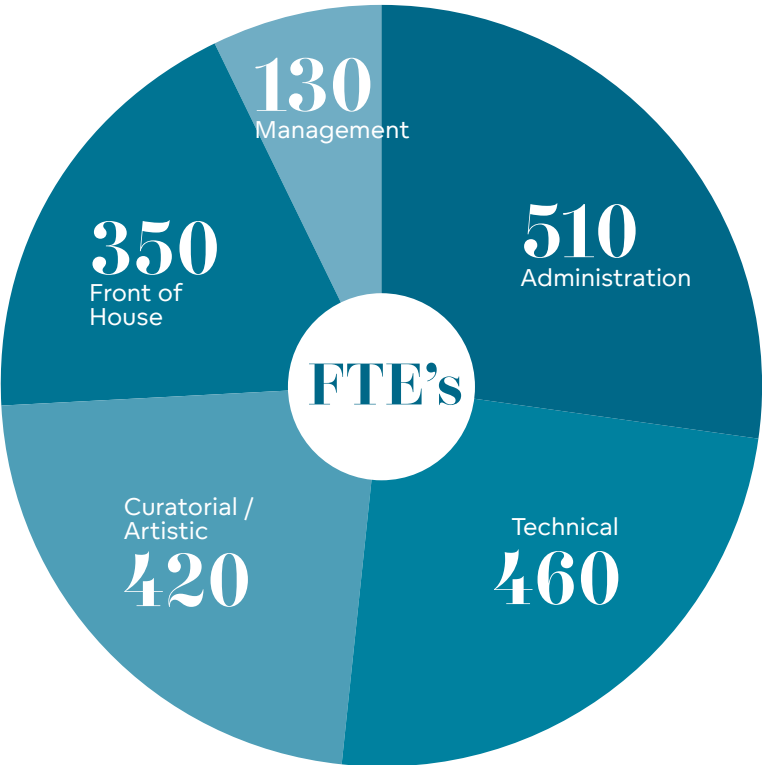
Direct Effects

In 2018/19 — the final full year unaffected by the pandemic — the five cultural institutions directly employed almost 3,400 permanent and temporary staff collectively, equivalent to around 1,850 Full Time Equivalent (FTE) jobs. These were across a broad range of roles including front-of-house, management, administration and central services, technical occupations as well as teaching, curatorial and artistic jobs to support exhibitions and shows, and the general functioning of each facility.

Engine of Recovery

Culture on the South Bank and Waterloo

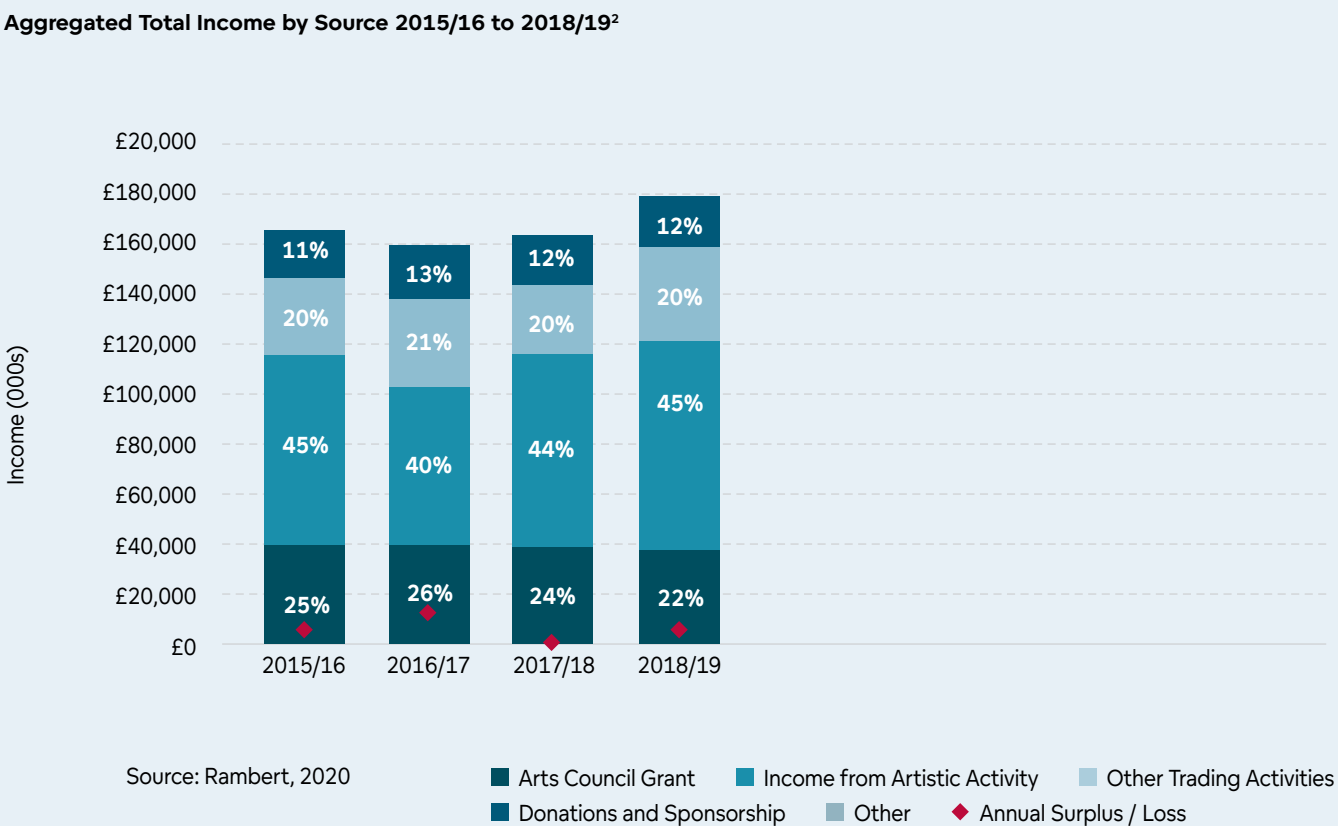
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Direct Effects

In 2018/19, the institutions generated nearly £180m in total income, 8% higher than 2015/16. The majority of that income came from artistic activity, which accounted for nearly half (45%) of the total.

Another useful measure is Gross Value Added (GVA) – the direct value that the institutions contribute to the economy. For the South Bank in 2018/19, GVA was £110 million¹.



Indirect Effects

The cluster provides huge opportunities for individual freelancers and companies. In 2018/19 the five cultural institutions spent around £81 million across the UK on external suppliers.

This supply chain effect represents £67 million in GVA and 1,500 FTE jobs across the UK

For every direct
job across the five
cultural institutions,
a further **2.5 jobs**
are created in the
wider economy.

Right: Costume detail work. Photo credit: Kerry Harrison



Induced Effects

The majority of staff employed by the cluster live in London — **four in five are residents of the Greater London area**. The induced economic effects they create are estimated at a further £82 million in GVA and 1,000 FTE jobs across the UK.

Core Economic Contribution

In total, the joint core economic impact (i.e. direct, indirect and induced effects) is estimated at around 4,300 FTE jobs and £255m in GVA across the UK.

This implies that for every direct job across the five cultural institutions, a further 2.5 jobs are created in the wider regional and national economy.



Rambert dancers. Photo credit: Mariano Vivanco

Tourism Effects

The institutions welcomed over 4 million visitors, who between them made 5.6 million separate visits³ (as some people come more than once).

Around **1 in every 6 Londoners** visited one of these cultural institutions in 2018/19...

...and around **1 in every 28 people in the UK also visited**.

Looking at overseas visits, around **1 in 8 of London’s international visits and 2 in 5 of London’s international visits for culture** involved a visit to one of the five institutions.

We estimate that visitors spent approximately £780 million in London, excluding the amount they spent within the institutions themselves. International visitors have a particularly strong impact — they account for about two visits in five, but £4 in every £5 spent.

Some of the visitors to the institutions would have been in London already for other purposes, but we estimate that nevertheless approximately three-fifths of their expenditure can be attributed to the presence of the five institutions and would not have happened without them.

It is therefore estimated that the five institutions together brought in around **£500m of additional income to London** through the amount visitors spent on a variety of businesses such as hotels, bars and restaurants, shops and transport companies. This is equivalent to around **£90 per visitor, and £1 in every £25 of spend by all leisure visitors in London**.

Tourism Effects

Taking account of multiplier effects, we estimate that this expenditure supported a net additional **4,700 FTE jobs and £300m of GVA in London**. This implies that just under **1 in every 17 jobs in London’s cultural tourism sector** is supported by the five institutions. For the UK, this additional expenditure supported 3,800 net additional FTE jobs and £250m in GVA.

Total Economic Contribution

In total, taking account of core and tourism effects, the institutions contributed 8,100 FTE jobs and £510 million in GVA in the UK.

Total Economic Contribution to the UK in the Baseline Year

	UK	
	GVA (m)	FTE Jobs
Core economic (direct, indirect and induced)	£255	4,300
Visitor-related	£250	3,800
Total	£510	8,100

Source: Hatch, 2020
Note: Figures have been rounded

In total, taking account of core and tourism effects, the institutions contributed 8,100 FTE jobs and £510 million in GVA in the UK

In 2018/19

the five institutions employed

3,400 staff

including

1,850 full time jobs

These included front-of-house, management, administration and central services, technical occupations, teaching, curatorial and artistic jobs

£180million
total income

45% from artistic activity

And in 2020/21

the five institutions furloughed

1,170

full time staff

equivalent to 7 out of 8 staff

–£130million
total income

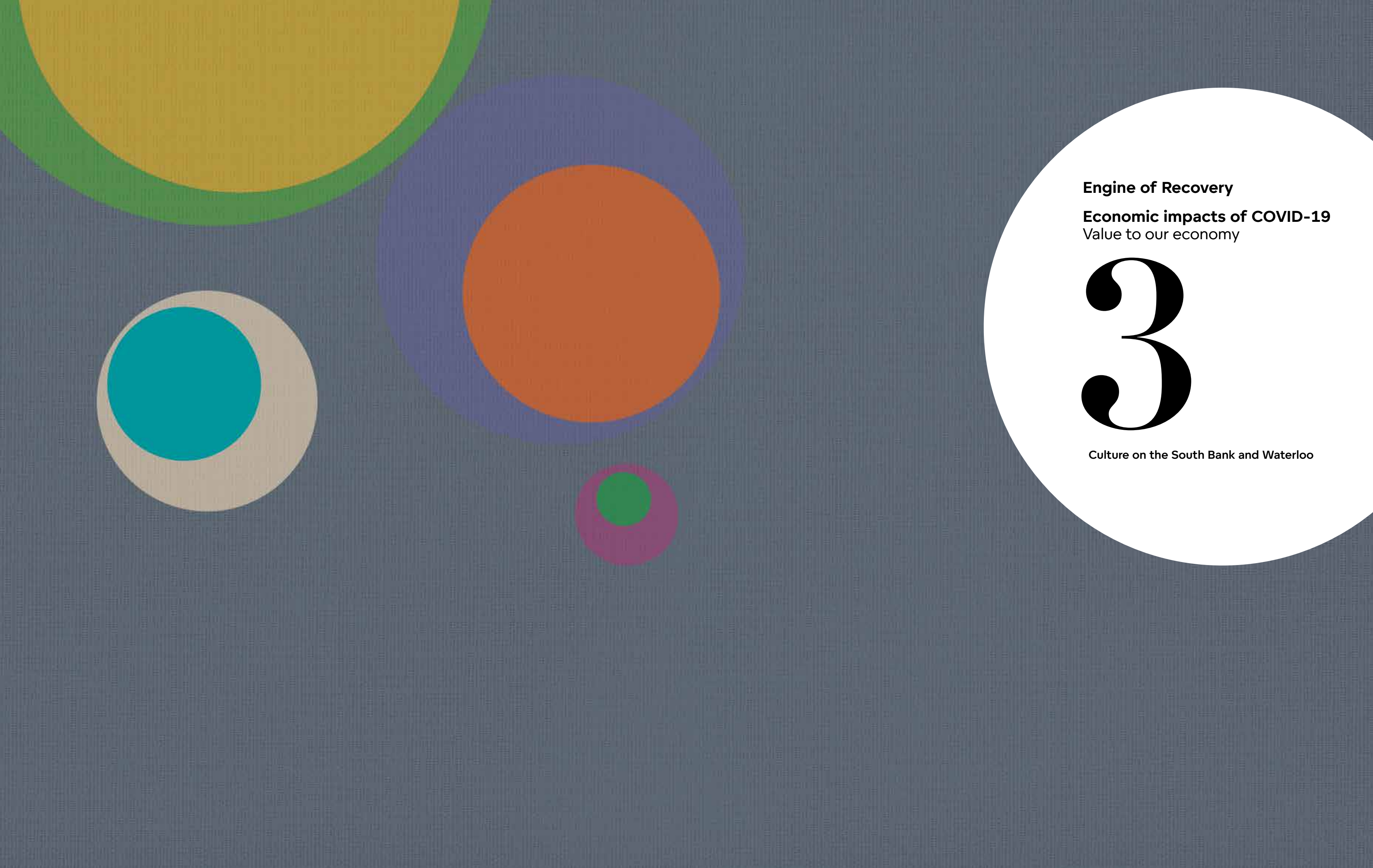
lost from the five institutions. More than half their income.

£35.8million

in Arts Council England
COVID-19 response funding

£30.6million

of this is in the form of loans



Engine of Recovery

Economic impacts of COVID-19
Value to our economy

3

Culture on the South Bank and Waterloo

Income

The national lockdown forced all five cultural institutions to close in March. All on-site activities halted, including performances, on-site retail and catering, community events and casual visits.



NT Exterior. Photo credit: Cameron Slater Photography

Income loss

For the Southbank Centre this meant the immediate cancellation of seven exhibitions and around 500 artistic events, including Discover Music: Beethoven and the European Poetry Festival.

At the National Theatre, three shows running at the time were immediately cancelled along with the production and rehearsal of several future shows at its South Bank home, one show in the West End, one show on Broadway and an international tour of *War Horse*.

For others, like The Old Vic and Rambert, major productions were cancelled, including sold out performances and tours for *4,000 miles* and *Local Hero*, and an *Achilles* tour.

As the long-term impacts of COVID became more apparent, and in response to the Government’s COVID-19 restrictions, all five institutions had to close their doors to visitors for the majority of the 2020/21 financial year.

Collectively, the five institutions will have lost at least £130m in income when comparing the full 2020/21 financial year with a normal operating year, equivalent to a more than half their income⁴.

Sharing our work online and on television over the last year has enabled us to reach millions of people and continue to keep culture alive

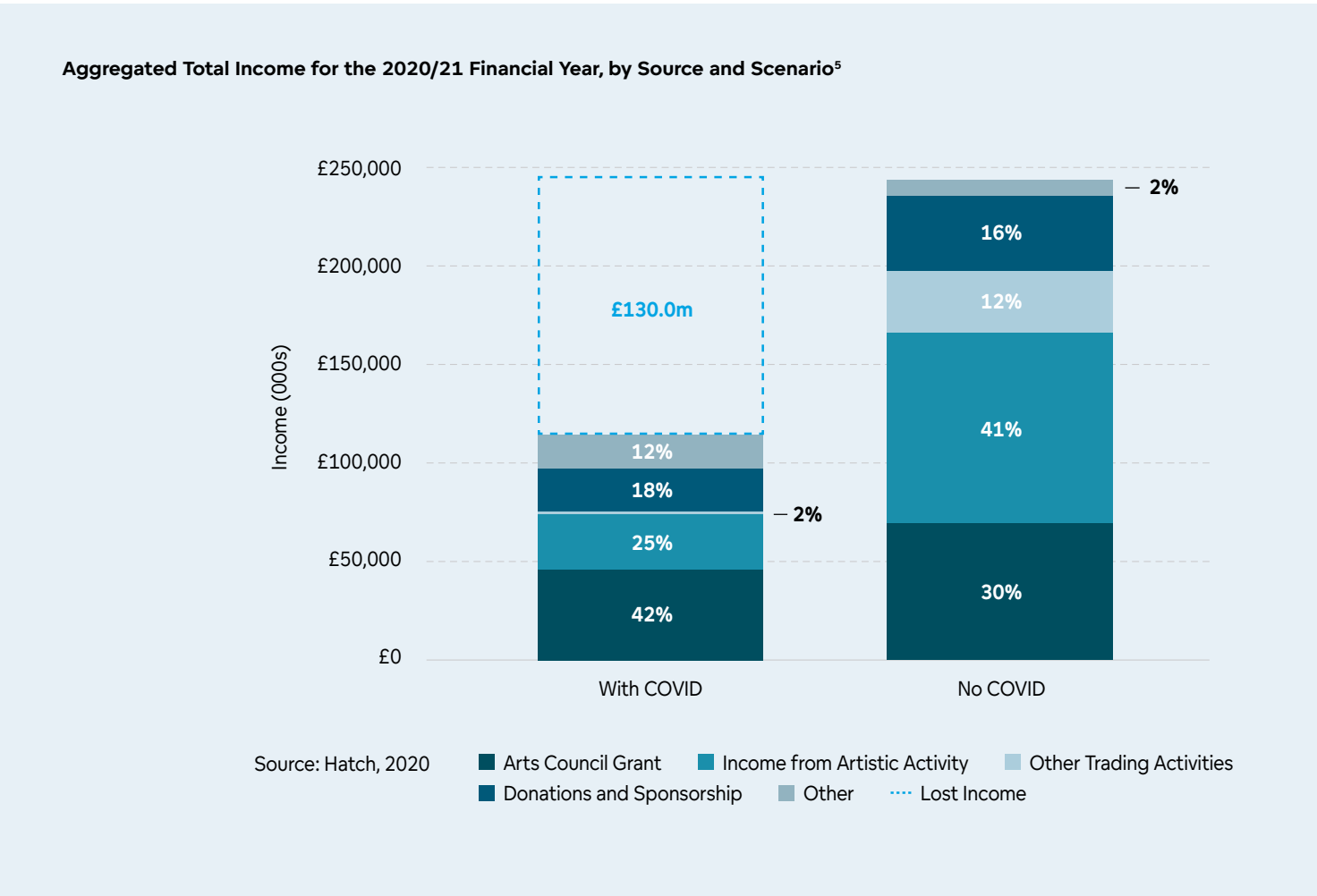
Rufus Norris, Artistic Director of the National Theatre, from the Olivier and Dorfman Theatres reopening announcement, 25 March 2021



National Theatre Public Acts performance. Photo credit: James Bellorini

Income

To compensate partially, the institutions secured an additional £35.8m in funding from the Government's Cultural Recovery Fund representing 42% of their total income this year. Of this, £30.6m is in the form of loans.

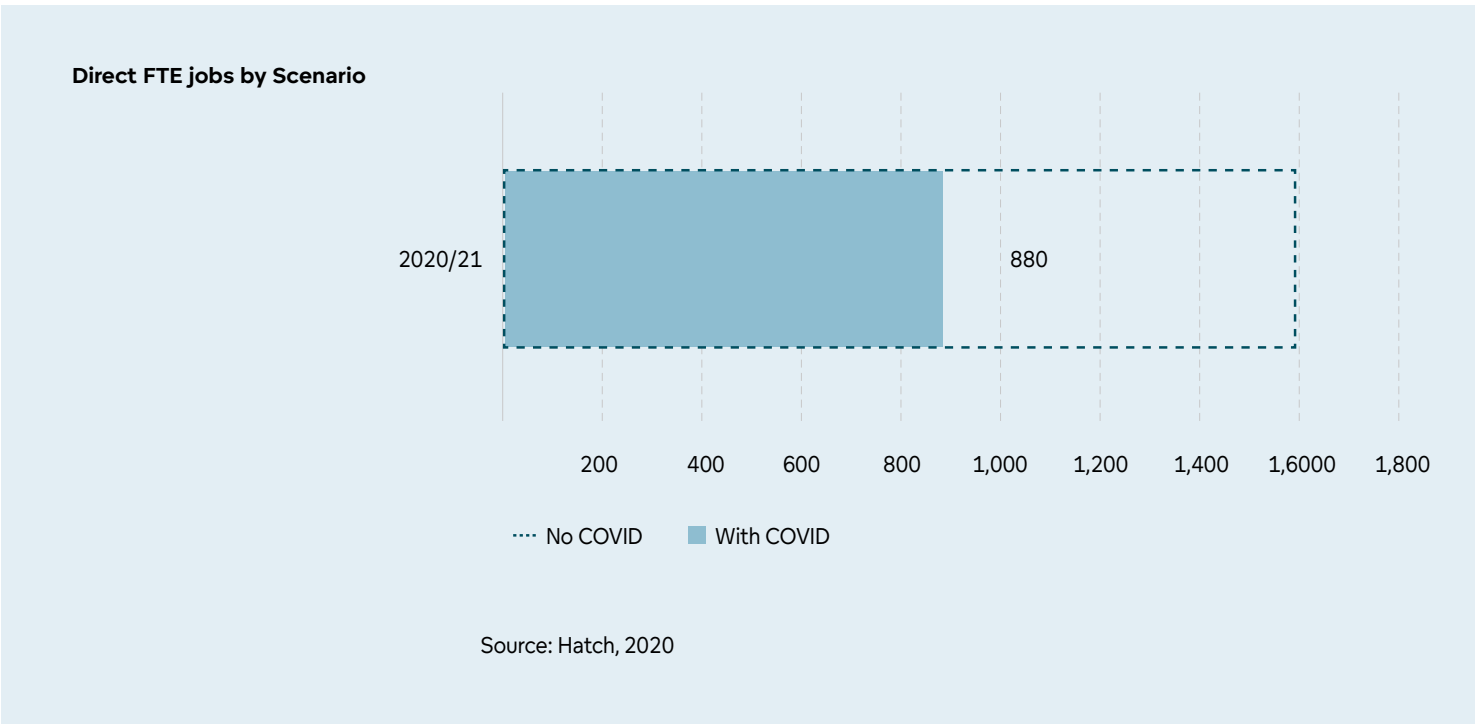


Direct Employment

All the institutions made use of the Government’s furlough scheme. In July 2020, a total of 1,170 FTE staff were furloughed, equivalent to seven out of eight staff. A skeleton staff continued to operate, to look after critical functions and ensure continuity of management and administration.

In November 2020, the Government announced an extension to the furlough scheme to the end of March 2021. The institutions see redundancies as their last option. For example, The NT, The Old Vic and Young Vic have cut wages and introduced tapering schemes to keep as many staff as possible.

Having been forced to close their doors in March 2020 but then permitted to re-open at certain times during the year, two institutions – Young Vic and Rambert – found it impossible to open their buildings amidst restrictions, having modelled different operating scenarios to manage and maximise seating and visitor arrangements with social distancing. The Old Vic did not reopen to audiences but the stage was open for work during the pandemic, following Artistic Director Matthew Warchus devising a new live-streamed series of productions called IN CAMERA.



Visitors

However, the Southbank Centre held the short exhibition *Among the Trees* in the Hayward Gallery; and the National Theatre opened two shows, *Death of England: Delroy in October* and *Dick Whittington* in December. As a result of changing COVID restrictions, both plays were forced to close within one week of opening.

In adapting their business models, and to maintain visitor engagement, all the institutions expanded their digital library of live and previously recorded performances for public viewing. These included replays of *Jekyll & Hyde* at The Old Vic; the Young Vic’s *A Streetcar Named Desire*; *Draw from Within* by Rambert; and *One Man Two Guvners* from the National Theatre. Voluntary donations were requested.

The NT recently released a new streaming service [NT at Home](#), where visitors can pay a monthly subscription fee for unlimited access or a one-off charge per show. The Southbank Centre



Claire Foy and Matt Smith in Old Vic in Camera – Lungs. Director Matthew Warchus. Photo credit: Manuel Harlan.

Visitors

presented over 100 events online as part of its *Inside Out* season, including literature events and orchestral performances by its resident and associate orchestras. The Southbank Centre also committed to continuing to fulfil its social mission of bringing arts and creativity to people’s everyday lives, even while its buildings have been closed. It presented free outdoor exhibitions, including *Everyday Heroes*, the first exhibition in Europe to celebrate the role of key workers; and *Winter Light*, which featured 15 artworks and new commissions and was designed to animate the site during the darker months. It has also innovated by moving events – and, in the case of *Unlimited*, an entire festival – online.

As part of a rapid response to the crisis, The Old Vic devised IN CAMERA, a creative experiment and fundraiser to support themselves through closure. This series of socially distanced performances and play readings, beginning with Duncan Macmillan’s *Lungs* with Claire Foy and Matt Smith and followed by a world premiere of a new play by Stephen Beresford, *Three Kings* with Andrew Scott, Brian Friel’s *Faith Healer*, starring Michael Sheen, Indira Varma and David Threlfall, a fully-staged version of *A Christmas Carol* with Andrew Lincoln, and a family story-telling version of Dr Seuss’s *The Lorax* with Jamael Westman, all streamed live from the iconic Old Vic stage with the empty auditorium as a backdrop.

Visitors

This innovation provided an excellent model to employ staff and freelancers, generate income for The Old Vic, and reach many more people. Since the IN CAMERA series was conceptualised, The Old Vic has staged five productions, with a further two announced at the time of writing, and reached over 100,000 households from 93 different countries.

IN CAMERA provided the platform to give back at a period of heightened loneliness. The Old Vic offered all care homes around the UK the opportunity to stream *A Christmas Carol* free of charge. 2,542 care homes and 123 local schools accessed the production and over £490,000 was raised for food poverty charity Food Cycle through audience donations and a match fund from author Jack Thorne. Over 1,600 schools signed up to receive free access to *The Lorax*.



NT River Stage – Super Duper Fly. Photo credit: Stephanie Claire

Overall Economic Impacts

Two new IN CAMERA productions are scheduled during summer 2022: The Dumb Waiter with Daniel Mays and David Thewlis and Bagdad Cafe from Emma Rice's Wise Children Company.

At the time of writing, the institutions were projecting total on-site visits for the financial year to be less than 50,000. This would represent nearly a 100% fall on pre-COVID assumptions, or 5.53m fewer visits.

What is more, the mix of UK and overseas visitors will have changed dramatically, largely due to Government restrictions on travel during the pandemic year. We estimate that in 2020/21, the proportion of overseas visits fell to 1% and those from the rest of the UK to 39%. This has important consequences for economic impact because of the higher level of spending by international visitors.



Cafe del Marsh. Photo credit: Jason Ellis

Overall Economic Impacts

The economic impacts of the pandemic on the institutions have been massive. We estimate that:

The cumulative economic losses in 2020/21 will amount to £330m of GVA for the UK, equivalent to a drop of about two-thirds respectively on pre-COVID expectations. Our data implies that over £30 million in GVA has been lost per month just within London as a result of the pandemic and the associated restrictions on the institutions.

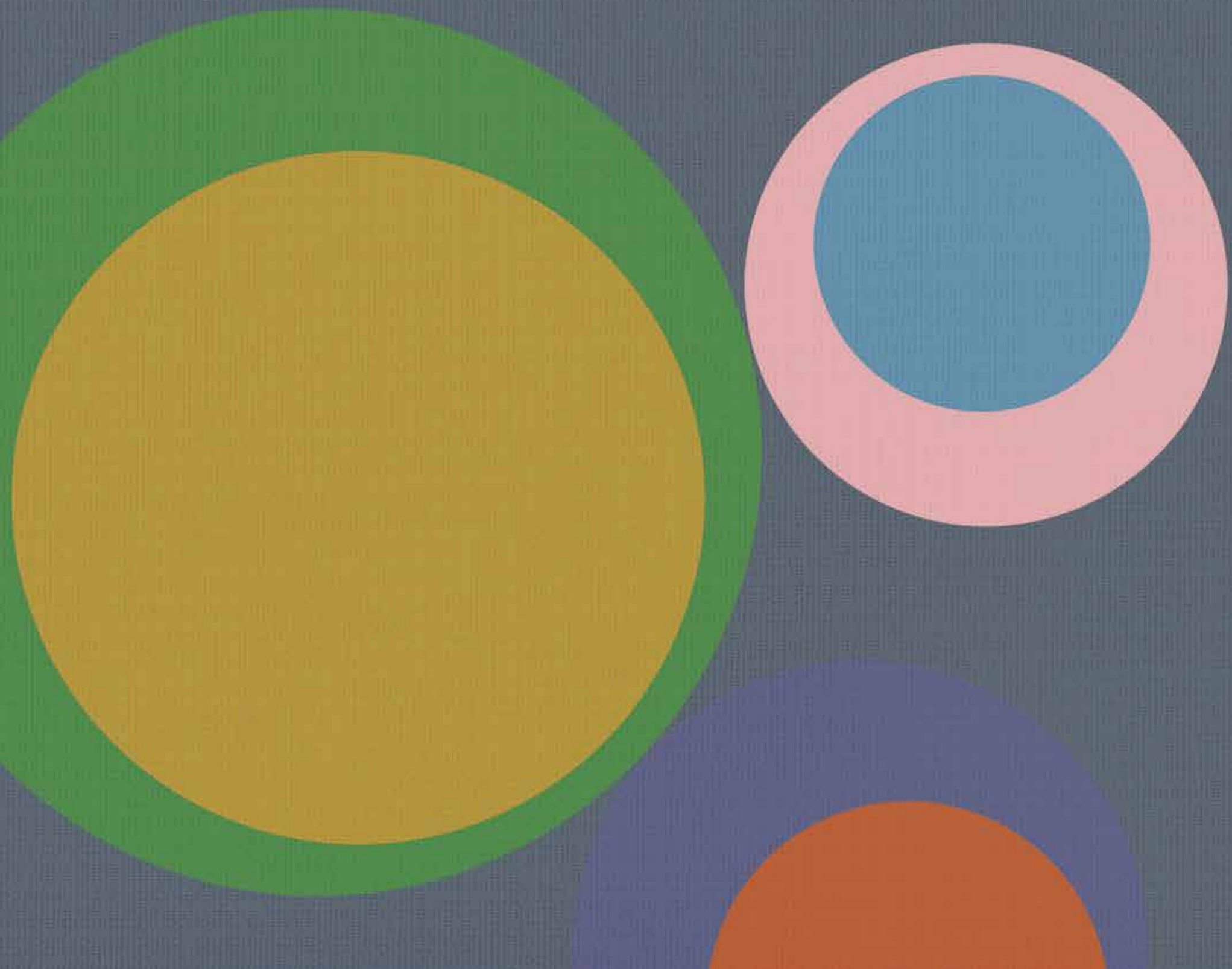
The effect on employment is estimated to be FTE job losses of 6,100 in London and 5,500 job losses in the UK. Were it not for the Coronavirus Job Retention Scheme, these job losses would have been even higher.

Visitor-related impacts account for the lion's share of these falls. In London, they will have been responsible for about three job losses in four and for about four pounds in every five of decline in GVA.

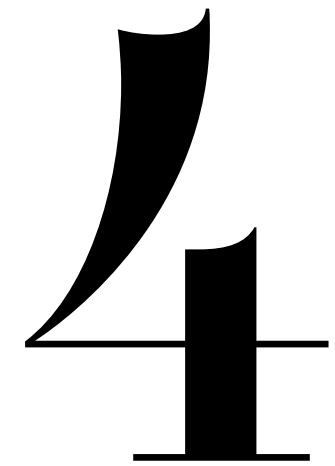
Cumulative Economic losses, 2020/21 (compared to non-COVID Counterfactual) (GVA stated in 2020/21 prices, £m)

	UK	
	GVA (m)	FTE Jobs
Core economic (direct, indirect and induced)	£91 (-34%)	1,900 (-44%)
Visitor-related	£240 (-100%)	3,600 (-100%)
Total	£330 (-65%)	5,500 (-70%)

Source: Hatch, 2020
Note: Figures have been rounded



Engine of Recovery
Social Value Benefits



Culture on the South Bank and Waterloo

Social Value Benefits

On top of their economic contribution, the five South Bank institutions enrich people’s lives in a wide variety of ways. They contribute to the quality of life, support enterprise, help with regeneration, provide education and skill development, work to widen access and participation and boost health and wellbeing.

In the face of the pandemic, they have managed to sustain much of this.

Quality of Life

The arts enrich our quality of life. The UK arts scene and performing artists are world renowned – from stand-up comedy and theatre to opera and musicians – and tour internationally. The South Bank and Waterloo cultural cluster is responsible for an important part of this, working with a huge range of artists who every day develop new creative ideas and provide new forms of arts experiences to people at home and throughout the world.

Artistic and cultural activities are viewed as a cornerstone of the British Council's mission to create a friendly understanding and connection between people of the UK and the wider world. The UK was ranked second on the Soft Power Index in 2019, reflecting its strengths in culture and education.



NT Public Acts Pericles Rehearsal 14.7.18. Photo credit: James Bellorini

This summer the Southbank Centre, after a very long dark year, will take up the public service role it was born for.

As in 1951, when the Royal Festival Hall was built as a “tonic for the nation” after the end of a long brutal war, we will throw open the doors to our great halls, foyers and riverside terraces for everyone to reunite and rejuvenate

Elaine Bedell, from Evening Standard Article, 24 March 2021.



Southbank Centre food market. Photo credit: India Roper-Evans

Engine of Recovery	Culture on the South Bank and Waterloo	Social value benefits
Supporting Enterprise	<p>The cultural cluster supports enterprise. Through programmes such as New Work at the National Theatre and The Old Vic 12, the institutions foster emerging talent and work in partnership with smaller organisations, sharing contacts, expertise and collections.</p>	
New Work Department, National Theatre	<p>The <u>New Work Department</u> at the <u>National Theatre</u> aims to support artists to unleash the full potential of their creative ambition. Partnering with a range of UK and international theatre companies, the department reads over 1,000 open-submission scripts per year, as well as scouting for talent at over 400 productions.</p> <p>The New Work Department makes a substantial contribution to making UK theatre world leading. In addition, the UK's world-famous creative industries – including theatre, TV and film – are driven forward by artists and makers whose careers are forged, supported and developed in theatre. For instance, the debut play <i>Nine Night</i> by Natasha Gordon was developed with dramaturgical support, readings and workshops. After playing at the NT it became the first play by a Black British woman to be staged in the West End. Natasha Gordon won Most Promising Playwright at the Evening Standard Theatre Awards. <i>Home, I'm Darling</i> by Laura Wade was co-commissioned and developed by the NT and Theatr Clwyd. It was rehearsed at the NT with dramaturgical support, readings and workshops provided. After opening at Theatr Clwyd, it went on tour in the UK and West End and won an Oliver Award for Best New Comedy.</p>	

Engine of Recovery	Culture on the South Bank and Waterloo	Social value benefits
<p>The Old Vic FRONT LINE</p>		<p><u>Running since 2015, The Old Vic’s flagship employability programme FRONT LINE</u> was commissioned to tackle the lack of diversity in the creative sector by increasing visibility of career pathways and opportunities available to those currently underrepresented.</p> <p>Participants are welcomed into Front of House operations, undertaking four shifts over a two-week period, receiving training in teamwork, communication and an introduction to customer service, a CV skills workshop and free tickets to an Old Vic production. FRONT LINE FACILITATORS is an accompanying creative practitioner training programme to further support young people in employability and social mobility. 100% FL participants rated the induction and CV workshop as ‘excellent’ or ‘good’, 85% felt it had increased their confidence, and 100% of the FACILITATORS participants rated the programme content and delivery, range of experience and support offered, together with the group dynamic, as ‘excellent’ or ‘good’.</p> <p>Due to the success of FRONT LINE this project has been rolled out by The Old Vic to six other cultural organisations in Lambeth including Southbank Centre and the Garden Museum. This is just one of the ways The Old Vic champions creative approaches to social mobility, diversity, education and engagement, seeking to support young people to be the best they can be through delivering our award-winning, dynamic, life-enhancing projects that provide stimulating opportunities for people of all abilities and backgrounds.</p>

Studies show that children from low-income families who take part in arts activities are three times more likely to get a Higher Education degree



The Old Vic Bicentenary Birthday 11 May 2018. Photo credit: Manuel Harlan

Regeneration

Arts and cultural institutions can play an important civic role to revitalise spaces. The presence of the five institutions attracts creative businesses to cluster and accumulate over time, creating a range of employment opportunities. The cafes, restaurants, shops and hotels that open to accommodate the increased flow of visitors and workers help to make London’s South Bank an attractive and thriving neighbourhood.

Lambeth’s recent Creative and Digital Industries Strategy for Growth⁶ sets out a vision for the area to continue to build on the creative assets in place, with new productive clusters of collaboration and innovation. At the core of the strategy is a recognition of the strong relationships between organisations, business and residents across the Borough – a unique ecosystem in which each of the five cultural institutions plays a pivotal role, both individually and collectively.



Southbank Place in construction. Photo credit: Jason Ellis

Education and Skills Development

The UK arts and cultural sector makes a valuable contribution to the national economy by inspiring innovation, improving productivity, providing educational opportunities and boosting long term learning. Studies show that children from low-income families who take part in arts activities are three times more likely to get a Higher Education degree, promoting higher skilled employment opportunities in later life.

The engagement of the five cultural institutions with schools in Lambeth and Southwark is particularly important in helping to overcome the lower levels of social mobility in the locality, where around one in four children are eligible for free school meals. The institutions view this as highly important work, giving young people meaningful opportunities for self-expression and developing imagination and creativity. Through persistent investment in this area, Lambeth is one of England’s strongest performing local authority areas in closing the attainment gap between disadvantaged and other pupils⁷. More than half (55%) of disadvantaged secondary school students in Lambeth go on to Higher Education level study, compared with just over two-fifths (43%) of disadvantaged students across England.

Southbank Centre’s Schools Programme engages primary, secondary and special educational needs (SEN) schools and reaches thousands of children every year. The Schools Programme supports the creative curriculum, using the core art forms of music, literature, visual arts and performance, including the Centre’s festival programme and onsite collections, to run activities tailored to children’s ages. These range from music workshops to Hayward takeover days, from National Poetry Library workshops to heritage and archive workshops and tours. Southbank Centre also offers teachers’ evenings and inset day training.

Education and Skills Development	<p>The National Theatre concentrates its educational outreach on high-priority schools based on socio-economic factors, student population and local patterns of engagement in the arts. In 2019 alone, the Young Vic had 183 school bookings, totalling nearly 4,000 school tickets. <i>The Town That Trees Built</i> was a performance piece for children with Special Educational Needs and Disability, focusing particularly on children with autism. Rambert’s Learning and Participation team works with Coin Street’s Youth and Community team to offer a range of activities to 10 local schools. These classes help young people explore their creativity in a nurturing environment.</p> <p>To reach even more primary and secondary schools across London each year, the National Theatre, BFI Southbank, Rambert and A New Direction have created strong strategic partnerships. They have developed a primary school module for the London Curriculum with the GLA, and a programme of work focused on careers in the creative industries for Lambeth Council's ELEVATE project.</p>
Curtain Up, The Old Vic	<p>The Old Vic gave 14 London primary schools and community groups the opportunity to see a show at The Old Vic (<i>A Christmas Carol</i>) and to take part in a 90-minute pre-show workshop for free. This enabled participants, aged from 7 upwards, to develop their confidence and skills in communication, self-expression, physicality and teamwork. The production was full of singing, live music, immersive theatre elements and effects, offering a creatively rich introduction to the work of The Old Vic. 453 people took part and five out of six had never visited The Old Vic before.</p>

Widening Access and Participation	<p>People from poorer backgrounds and people of Black, Asian and Multi Ethnic heritage are less likely than others to engage with the arts. If you are disabled, come from a lower socio-economic group, don’t own your own home or don’t have higher level qualifications, you are less likely to have participated in the arts. London has lower levels of engagement with the arts than other regions in England⁸.</p> <p>The five institutions are all committed to widening access to the arts for their audiences, local communities and wider stakeholder groups. The Southbank Centre makes free tickets available for at least two-fifths of its programmes each year, with schemes such as free introductory tickets for under 30s. The initiatives have been effective, with ticket sales to over 65s nearly doubling, and sales to Black, Asian and Multi Ethnic groups up by nearly a quarter. Nearly a quarter (24%) of Southbank Centre visits were made by Black, Asian and Multi Ethnic people in 2018/19, which is particularly high when compared with 15% at other venues in London run by the Association of Leading Visitor Attractions (ALVA). Diversity and Inclusion (D&I) workplace programmes, have resulted in a 51% increase in Black, Asian and Multi Ethnic employees between 2013 and 2017.</p>
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The Sweetness of a Sting by Chinonyerem Odimba, performed by Haggerston School as part of the NT’s Connections youth theatre festival
Photo credit: The Other Richard

Widening Access
and Participation

The National Theatre is committed to making its performances accessible. In addition to ensuring 30% of its tickets are available at £20 or less, the NT actively seeks to grow representation on its stages and within its audience. Nearly one in four (22%) of its writers, 35% of its performers and 12% of its audience came from a Black, Asian and Multi Ethnic background in 2019/20.

Each year around 10% of The Old Vic’s total ticket inventory is offered at free or heavily discounted rates. These are offered to local community groups, alumni of The Old Vic’s education and community programmes, education and academic institutions and to support other charities in their fundraising efforts. This contribution is worth £1.23m annually. Since 2015, Old Vic’s PwC £10 Previous scheme has made 17,500 tickets a year available for £10 – with 60% of guests visiting for the first time. In 2019, Matinee Idols was launched to provide free access to anyone over the age of 60.

Likewise, The Young Vic gives 10% of its tickets free to those who experience the biggest barriers to accessing the arts, schools and early-career artists, irrespective of box office demand. The Young Vic is committed to keeping ticket prices low, with £5 first previews across the entire house for every Main House show, and tickets starting at just £10 for all performances. Captioned, audio described and relaxed performances are offered for every Main House show, alongside a discounted access rate. The Young Vic’s performance broadcasts replicate its commitment to access, with captions, audio description and BSL available for every stream and a percentage of tickets offered free to community members, artists and education groups.

Diversity and inclusion
workplace programmes
have resulted in a 51%
increase in Black,
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Ethnic employees
between 2013 and 2017

Taking Part, Young Vic

As part of their Taking Part programme, the Young Vic engages with communities in Lambeth and Southwark who experience the biggest barriers to accessing art. Groups such as full-time carers, refugees and people who experience homelessness or are in prison are invited to become deeply involved in the theatre, including making work for the main stage. Taking Part provides access to the arts including helping them to develop their creative skills, build meaningful relationships and connections, and tell compelling stories about the world we live in, and the Young Vic stage provides a platform for their voices to be heard.

Rambert & Coin Street Partnership

As part of a partnership with Coin Street since 2014, Rambert offers special rates to local residents for weekly classes, which range from yoga and body conditioning to contemporary dance and hip-hop for all ages. This includes affordable dance and fitness classes led by Rambert dancers or amateurs in the Rambert studios and places on Summer at Rambert courses.

Rambert and Coin Street work together to inspire residents to get involved in dance programmes and come to watch performances. Members of the local area are invited to watch Rambert perform at London venues.



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Health and Wellbeing

Arts and culture can help boost health and wellbeing. The creative sector is making great strides⁹ in helping to keep people well, aid recovery and support ‘longer lives, better lived’ across the UK.

Music therapy, for example, has been found to reduce agitation and the need for medication in 67% of people with dementia, whilst an arts-on-prescription project has seen a 37% drop in GP consultation rates and a 27% reduction in hospital admissions. A study conducted within deprived communities in London found that, of those people who engaged with the arts, 79% ate more healthily, 77% engaged in more physical activity and 82% enjoyed greater wellbeing. Central Government analysis of arts participation rates in England estimates that NHS cost savings due to reductions in GP visits as a result of these wellbeing benefits is in the region of £168 million per year.

Grounded EcoTherapy, Southbank Centre

The Southbank Centre works with Providence Row Housing Association to help people who have experienced homelessness, addiction and mental health problems. Through the Grounded Ecotherapy programme, they built the Queen Elizabeth Hall Roof Garden and continue to maintain it, transforming it into one of London’s best loved public spaces. The project gives the participants practical horticultural skills and builds their confidence in communication, teamwork and public interaction. The programme has 10 regular participants. Giving them a new focus, it has helped them improve their wellbeing and turn their lives around.

12 Choirs of Christmas, The Old Vic

The Old Vic’s 12 Choirs of Christmas Project works with primary school children and older citizen groups to combat isolation and loneliness and promote intergenerational community contact. 259 primary schools and 121 older community members took part in the 2018 pilot.

Progress despite COVID

While the pandemic cut the economic contribution of the five South Bank institutions massively, they worked hard to sustain their social value during this period. To try to reduce the social isolation that COVID could cause, they provided the local and wider community with new ways of learning and engaging with the arts online and often free. Through its COVID-19 Response Economic Resilience Fund, Lambeth provided grant funding to support continued community engagement.

Art by Post, Southbank Centre

The Southbank Centre’s Art by Post scheme delivers a series of free drawing, poetry and craft activity booklets through the post across the UK. The project began in lockdown, and for Phase 1, which ran from May-July 2020, there were over 1,700 participants. There are now over 4,500 participants taking part from Aberdeen to Truro and Bangor to Dover, aged between 18 and 103. The 11th booklet will be sent out in April 2021 and will mark the end of the current series of Art by Post. The Southbank Centre will then move onto an evaluation of Art by Post and will continue with its ongoing commitment to connect with those at risk of isolation via similar projects.

The project aims to reach people most isolated by social distancing measures, with a particular emphasis on reaching older adults living with dementia and other chronic health conditions who are isolating for long periods of time.

People can choose to sign up to Art by Post themselves, or to refer someone they know and take part alongside them in a supportive role. Participants are invited to share their artworks via Freepost and these will form a special exhibition when the Southbank Centre reopens.

The activity booklets are inspired by the Southbank Centre’s visual art, literature, poetry and archive collections, and are designed to keep minds active, help individuals feel connected to others and improve their mental health and wellbeing.

It has made a difference to my morale and made me feel like I can do something. Lovely things happen at Southbank Centre... I feel involved and connected.

Participant

It’s wonderful to have something sent to you – something you don’t have to dream up for yourself! – that gets you talking and thinking.

Supporter



Art by Post participant. Photo credit: Kate Elliott



Participants from community partner Certitude in rehearsal for TWENTY TWENTY at the Young Vic. Photo credit: Anthony Lee

Rambert and Coin Street

In December 2020, Rambert and Coin Street posted dance activity resources to hundreds of residents in the local area. Each activity pack was aimed at different age groups.

Rambert also offered free online dance classes to local residents through the Rambert Home Studio. Classes are designed for a range of abilities and ages with special workout playlists and podcasts such as Super Humans, which featured inspiring guests such as Thandiwe Newton

TWENTY TWENTY, Young Vic

In November 2019, as part of the Taking Part programme, Young Vic began a year-long collaboration called TWENTY TWENTY with Blackfriars Settlement, Certitude and Thames Reach – all organisations working in Lambeth and Southwark with some of the most marginalised and socially isolated members of the community.

Each of the groups began working with a professional director and writer to enhance people’s creative skills and build a community company. The groups started to develop three new plays which were set to be performed at Young Vic at the end of 2020.

The Young Vic team worked hard to ensure this programme was able to continue throughout the year, despite the challenges of the pandemic. The community met online weekly, with over 150 hours of workshops happening on Zoom. They filmed videos to enable people to warm up and practise dance routines at home, and shared scripts and ideas through post, email and text messages. The plays were turned into short films, shot in socially distanced conditions, and premiered online in January 2021.

The National Theatre's Learning Programmes

In response to school closures caused by the pandemic, the National Theatre quickly adapted its programmes for schools and young people to digital delivery.

The educational streaming platform [National Theatre Collection](#) was made accessible from home, for free, to students in UK state-funded schools and further education colleges. Over two-thirds of UK state secondary schools signed up.

[Let's Play](#) provided primary schools teachers with a toolkit to create short performances in classrooms. Schools are given nine new scripts for students to perform, including musical scores and backing tracks for original songs. Creative learning toolkits accompany each play with an aim to support creativity across the curriculum.

New Views supported students aged 14–18 to write their own 30-minute plays. 80 schools received online mentorship from professional playwrights.

Connections brought a festival of new plays for young people aged 13–19 to schools and youth theatres. 276 teachers and youth theatre leaders took part in a digital Directors’ Weekend of online workshops, masterclasses and tutorials.

The NT's annual Drama Teacher Conference moved online; 500 drama teachers from across the UK attended professional development sessions with leading theatre-makers and education professionals.

That Black Theatre Podcast helped to open up the National Theatre's Black Plays Archive via 12 curated episodes, discussing the leaders of Black British theatre and the political and social events of the 20th and 21st Century that influenced their work.

Young People aged 14–21 were able to benefit from free online courses on writing, producing, and technical theatre developed during lockdown.

Madame Kalamazoo, a free storytelling adventure in which the child reader turned out to be a main character, was made available to families across the country.

Education & Community

The Old Vic's response to the crisis had its beneficiaries at heart. As the situation developed and it became clear that theatres would be unable to offer performances for a significant period, the theatre therefore focused on shorter-term activities) continuing to engage beneficiaries through Your Old Vic programme of broadcast and live streamed artistic content (much of which provided free of charge) and pivoting education and community projects to the digital context through our Education Hub. The Old Vic did not furlough its education team during the crisis, but spent time evolving existing projects and resources to support those whom we recognise are most in need at this time.



NT Connections Flesh Production. Photo credit: The Other Richard

I am so impressed and proud of what the children and staff have achieved through the medium of theatre. The children grew as individuals and became stars in their own right.

Many of our children struggle with confidence but after this opportunity you could visibly see the children change and become more confident, outgoing and animated. I can honestly say that this experience has changed our children for life and they will always remember this wonderful event.

Teacher, Ranworth Square Primary, Liverpool



Secondary School pupils taking part in Creative Choices at the National Theatre. Photo credit: Emma Hare

Conclusion



Salt by Dawn King, performed by Dimensions Performance Academy as part of the NT's Connections youth theatre festival. Photo credit: Richard Hubert Smith

Conclusion

As this document is published, the nation is in convalescence and taking tentative steps on the road to recovery.

All the cultural institutions have either opened in part or have plans to do so, albeit with social distancing in the first few months. The BFI, National Theatre and Southbank Centre have not only reopened hospitality venues with outside space, introducing additional pop-up food and beverage concessions, but have also begun opening bars, cafés and restaurants indoors. Live performances are making their way back.

This will bring visitors again, initially from London and the UK while government restrictions remain on international travel but with the prospect of overseas tourists before long. The magnifier effect will be at work, as theatre, dance and art audiences take transport and buy food, drink and other merchandise.



Elephant Juice Summer food & drink pop ups at Southbank Centre. Photo credit: Lia Vittone Photography

Conclusion

Building on their excellent outreach work during the pandemic, the institutions will be bringing further social value too. Both dance companies at Rambert are touring from mid-May and will be broadcasting a new live-stream series from July. A weekly performing arts school for young people – MX Masterclass – has also restarted. At The Old Vic, education and community programmes continue to run in full online and are gradually transitioning back to in person work.

Beyond these positive short-term effects, investment plans mean that there is great potential for further economic stimulation. The Old Vic, for example, is planning to add an Arts Hub Annex that will provide new spaces for rehearsal and learning programmes, improved catering and entertaining facilities and improved accessibility. Further development potential in the area includes the old ITV studios, Elizabeth House and Royal Street developments.

The South Bank and Waterloo cluster is wonderfully accessible by public transport, giving it an enviably large catchment area. The core cultural offer and amenity provisions represent a significant asset. A recent commercial office market report concluded that, with improved facilities and more improvements made to the public realm and permeability, the area has the strongest potential for growth of all market locations in the Borough.

With a combination of private and public investment, it is clear that the South Bank and Waterloo cluster has the potential to play a significant role in the recovery of London and the UK, both creatively and economically, as lockdown restrictions recede. The arts will flourish again and generate new, exciting enterprises. Just like the Festival of Britain 70 years ago, this unique part of London represents exactly the tonic that Britain needs right now. To not only to restore it to good cultural and economic health, but also to infuse life with the vibrancy, colour and creativity for which this country is rightly admired across the world.



Rambert dancers featuring Naya Lovell on the South Bank. Photo credit: Scott Garfitt

