

Society of London Theatre and UK Theatre response to Invest 2035: The UK's Modern Industrial Strategy

November 2024

Society of London Theatre (SOLT) and UK Theatre represent 500 of the UK's leading theatre producers, venue owners and managers and performing arts centres.

SOLT & UK Theatre appreciate the Government's ambition to move swiftly in driving economic growth. We would welcome the opportunity to discuss the points raised in this consultation further.

Key Points for Consideration:

- **Sub-sector Identification:** Growth sectors should be selected based on their potential to deliver widespread economic benefits and social value, supporting the Government's missions 1 and 4 concurrently.
- **Theatre's Unique Role:**
 - Theatre contributes significantly to place-making in towns, cities, and rural areas, with its buildings serving as cultural hubs.
 - Beyond performances, theatres deliver impactful outreach programmes and generate substantial local economic benefits – for every £1 spent on a ticket, £1.40 is generated in the local economy.
- **Barriers to Growth:** The theatre sector faces critical challenges, including:
 - Insufficient relief to stimulate research and development activities.
 - Limited access to finance.
 - Skills gaps and workforce shortages.
 - Aging infrastructure requiring investment, with no sustainable funding mechanisms currently in place.
- **Strategic Alignment:** To maximise the impact of reforms, the Industrial Strategy, Skills Strategy, and Curriculum Review must be aligned.



Learn More:

For additional insights into the theatre ecosystem and how to create the conditions for its growth, please refer to our briefing for MPs. Further information about our advocacy efforts is available on our websites, [SOLT](#) and [UK Theatre](#).

For inquiries, contact us at publicaffairs@soltukt.co.uk or follow us on social media: @SOLTnews | @uk_theatre | #TheatreForEveryChild | #ThrivingTheatres

Sector Methodology

1. How should the UK government identify the most important subsectors for delivering its objectives?

Subsectors should be identified based on their ability to contribute to the Government's five missions, not solely on short-term growth potential.

Theatre, as part of the vibrant creative industries already recognised by the Government as a growth sector, is uniquely positioned to deliver inclusive economic growth and social good while being deeply embedded in communities nationwide. This makes theatre an ideal contributor to missions 1 and 4: **driving economic growth and breaking down barriers to opportunity**.

However, while theatre is well placed to deliver growth, it faces mounting risks that necessitate targeted intervention to build a more sustainable and robust model:

- **Rising costs:** Production expenses are increasing faster than inflation, with energy costs up 120% since 2019.
- **Declining public investment:** Real-term public funding for the arts has declined significantly over the past 14 years.
- **Infrastructure challenges:** Without substantial investment in physical infrastructure over the next five years, nearly 40% of venues risk potential closure.

The eight growth-driving sectors identified in the Government's Strategy are informed by multi-indicator assessments using SIC 2-level data, which evaluate subsector strengths based on metrics like output growth, productivity, and international positioning. However, this reliance on broad, tech-forward indicators overlooks the full economic and social potential of the cultural and creative economy, particularly where more granular data is unavailable.

We recognise the challenge of capturing broader impact assessments but stress the importance of recognising **social and cultural returns**. A narrow focus on short-term economic metrics risks sidelining subsectors that foster vibrant communities, attract tourism, and sustain talent pipelines essential for future innovation and growth.

We urge the Government to adopt a balanced approach that accounts for these broader benefits to ensure growth and opportunity are widely and equitably distributed across the country.

2. How should the UK government account for emerging sectors and technologies for which conventional data sources are less appropriate?

As representatives of an established sector, SOLT & UK Theatre are not best placed to comment on this.

3. How should the UK government incorporate foundational sectors and value chains into this analysis?

SOLT & UK Theatre are not best placed to comment on this.

Sectors

1. What are the most important subsectors and technologies that the UK government should focus on, and why?

Theatre and the performing arts are vital subsectors for consideration.

As outlined previously, theatre is uniquely positioned to deliver **inclusive growth, social good, and deep community engagement** across the UK.

This makes it exceptionally well-placed to help the Government achieve missions 1 and 4: **driving economic growth while breaking down barriers to opportunity**. Theatre ensures that the benefits of growth are felt widely, with measurable impacts in communities nationwide.

2. What are the UK's strengths and capabilities in these subsectors?

British theatre is an economic powerhouse, a catalyst for transformative social good, and a cornerstone of communities across the UK. It generates a turnover of £4.4 billion per annum and contributes £2.39 billion in GVA.

Theatres, along with their service providers and workforce, are deeply embedded in every corner of the country, driving cultural, social, and economic vitality.

A Collaborative Ecosystem

The sector operates as a **complex, networked ecosystem**, with increasing cooperation and co-dependence across the sector due to rising costs and the persistent structural impacts of the pandemic.

Producers, producing organisations, and the venues that house them form the backbone of the sector.

Entrepreneurial Strength

Commercial producers raise over £100 million per annum in fresh capital to develop and produce theatre across the country. They are also the primary source of content for many regional and not-for-profit venues.

While some producers and organisations receive public investment from Arts Councils and Local Authorities, this constitutes only a small portion of their turnover. Revenue is largely driven by ticket sales, sponsorship, philanthropy, memberships, and commercial activities.

Venues are managed by various entities, including private owners, commercial operators, local authorities, not-for-profits, and charities. Venues that receive public funds also undertake commercial activity to support themselves, such as renting space and hospitality in their buildings.

A Significant Impact on Local Communities & Employment

Thriving theatres play a pivotal role in **place-making**, drawing people to local high streets, boosting tourism, and driving substantial economic benefits. For every £1 spent on a theatre ticket, an additional £1.40 is generated within the local economy.

The sector supports 205,000 FTE jobs directly and across service providers, including set builders, costume makers, lighting and sound technicians, transport companies, ticketing platforms, and professional services such as marketing and legal firms.

Community Outreach

Theatre delivers transformative social and cultural benefits. Theatre attendance promotes wellbeing, empathy, and confidence, and can boost educational attainment. Theatres deliver a range of community outreach and access schemes, including free and subsidised performances for schools, skills development initiatives and space for up-and-coming artists and community groups.

Some outreach initiatives include:

- The National Theatre, which delivers learning activities across every UK local authority, either in-person or digitally.
- Leicester Curve, where over 28,000 people participate annually in free and low-cost programmes, including Memory Cafes for individuals with dementia.
- Birmingham Hippodrome, which provides free Young Community Drop-In Sessions to foster creativity and connection among individuals aged 14 and above.

Foreign Direct Investment and Global Export Value

British theatre's international reputation strengthens the UK's economic and cultural reach:

- **Exports:** Iconic productions generate global audiences, create licensing opportunities, and sustain foreign tours. *Phantom of the Opera* has captivated over 140 million people in 183 cities across 41 countries since 1986. *The Play That Goes Wrong* has reached audiences in 57 countries since its 2014 West End debut. *SIX the Musical* entertained 2.6 million people last year across the UK, U.S., and South Korea, with recent or upcoming productions in Canada, Japan, China Australia, and the Netherlands. Its cast album has surpassed one billion streams.
- **Foreign Investment:** Theatre has become a growing magnet for foreign direct investment. Major stage adaptations of American brands, such as *Back to the Future the Musical* and *Stranger Things* have premiered in the UK, employing British creative talent. These generate ongoing economic benefits to Treasury via income from replica productions, licensing, and overseas tours.
- **Tourism Driver:** Visit Britain highlights theatre's significance in drawing international tourists, with 24% of London's foreign visitors attending a West End show.¹ West End theatre attendance in 2023 was 17.1 million, compared to only 12.3 million on Broadway.

¹ [The role of theatre in boosting London's tourism economy - London Business News | Londonlovesbusiness.com](https://www.londonbusinessnews.com/news/theatre-boosting-london-tourism-economy)

Competitive Edge

- **A Cultural Superpower:** The UK is a global leader in theatre, with London’s West End offering a more diverse and innovative programme compared to Broadway.
- **Lower Costs:** West End productions are estimated to be 3–5 times less expensive to stage than Broadway shows, fostering greater innovation in the UK.
- **Superior Structures:** The highly effective Theatre Tax Relief, strong collective agreements, and more affordable ticket prices create a lower-risk environment for productions debuting in the West End, further enhancing the sector’s competitive advantage.

6. What are the key enablers and barriers to growth in these subsectors, and how could the UK government address them?

Enablers:

1. Theatre Tax Relief (TTR)

The higher rate of TTR introduced in 2021 has proven instrumental in revitalising the theatre sector post-pandemic.² It has supported the production of larger and more ambitious shows, encouraged bold programming, strengthened talent pipelines, and expanded audience reach at a time when costs are rising faster than revenue growth. This has fostered a vibrant theatre ecosystem that delivers economic growth while driving transformative social good. Maintaining the higher TTR rate is essential to sustaining innovation, growth, and the sector’s world-leading status.

Barriers and Recommendations:

1. Lack of Research and Development (R&D) Relief

- **Current Challenge:** While R&D is recognised as a driver of economic growth, existing definitions exclude creative industries, making them ineligible for targeted R&D support. Similarly, theatre productions often fail to qualify for

² SOLT & UK Theatre February 2024 [report](#)

investor relief schemes like SEIS/EIS, creating a significant barrier to innovation and growth.

- **Proposed Solution:** Expand R&D definitions to encompass areas where the UK has established international strength, such as theatre. Introduce tailored early-stage tax relief for theatre to encourage capital investment, enabling greater innovation and risk-taking. This would boost activity, employment, and the development of creative, technical, and artistic talent.
- **Benefits:** Such measures would align the creative industries with other IP-driven sectors, enhance credibility within the investment community, and unlock larger-scale venture capital opportunities. They would also generate sustained value for British creatives through royalties and ongoing contributions to the economy.

2. Access to Finance

- **Current Challenge:** Financing for new commercial productions relies heavily on unstructured investments from individual angel investors, with limited access to larger-scale venture capital. This includes a lack of understanding concerning the opportunity to invest in theatre.
- **Proposed Solution:** Collaborate with officials and stakeholders, such as the British Business Bank, to explore structured mechanisms for improving access to finance.

3. Skills Gaps and Shortages

SOLT & UK Theatre conducted research on technical skills gaps and shortages which found:

- **Technical Skills Deficit:** Many candidates lack practical experience and hands-on training, with qualifications often failing to prepare them adequately for technical roles.
- **Educational Barriers:** Reduced funding limits organisations' ability to offer on-the-job training, while regional theatres face diminished opportunities to develop skills due to fewer productions.
- **COVID-19 Impact:** The pandemic accelerated career changes, promoted technicians prematurely, and created gaps in experience and confidence

across mid-level and senior roles, affecting the training pipeline for junior staff.

- **Proposed Solution:**

- Introduce a **Growth and Skills Levy** that meets the sector's needs and aligns with ongoing work on National Occupational Standards and IfATE Occupational Maps.
- Ensure the **Industrial Strategy, Skills England**, and the **Curriculum and Assessment Review** are cohesive and address workforce requirements effectively.

4. **Infrastructure in Need of Investment**

- **Summary of Key Needs:**

- Improved mechanisms for public investment distribution.
- Enhanced support for accessing private investment across subsidised and commercial members.
- Fiscal incentives to attract inward investment.
- Measures to reduce friction in processes.
- Support for sector-wide upskilling.

Further details are provided in response to Question 14.

Business Environment

7. What are the most significant barriers to investment? Do they vary across the growth-driving sectors? What evidence can you share to illustrate this?

As set out in answer to Question 1, the main barriers to investment in the theatre sector are:

- Lack of R&D relief.
- Limited access to finance, including lack of understanding around the opportunity to invest in theatre.
- Skills gaps and shortages.

- Insufficient infrastructure investment and lack of sustainable funding mechanisms.

These barriers are consistent across several growth-driving sectors but are particularly pronounced in the creative industries, where financial and structural challenges impede growth and innovation.

Business Environment – People and Skills:

8. What UK government policy solutions could address the barriers related to people and skills (including employment support, careers, and skills provision)?

A creative education in schools fosters a more well-rounded workforce and helps establish strong talent pipelines, which are currently lacking in the theatre sector. SOLT & UK Theatre are engaging with the curriculum review and emphasise that the Industrial Strategy, Skills Strategy, and Curriculum Review must be aligned to maximise the positive impact and benefits of these reforms.

1. Education and Curriculum Reform.

SOLT & UK Theatre members are concerned that the marginalisation of the arts in schools is preventing young people from being introduced to the diverse career opportunities within the theatre industry, which is already experiencing acute skills shortages.

Feedback from our members highlights the importance of fostering progression from primary to secondary education. For young people to fully benefit from secondary arts education and pursue careers in theatre, they must first have a strong foundation in the arts during their primary years.

SOLT & UK Theatre members highlight the importance of a broad curriculum that promotes both arts and STEM subjects. The marginalisation of arts in schools due to policies like the English Baccalaureate (EBacc) has hindered the development of future talent for the theatre industry.

A more balanced approach is needed to ensure that arts education provides the critical skills and attributes that all employers value, such as creativity, teamwork, communication, and problem-solving.

We urge the government to consider the *Cultural Learning Alliance Blueprint*, which recommends:³

- **New purposes for education**, incorporating expressive arts as a core and equal curriculum area with senior leadership support in schools.⁴
- **Minimum 4-hour arts entitlement** within the school week to ensure high-quality, progressive learning experiences.
- **Reform of school accountability** by considering removing EBacc in secondary schools, reform Progress 8, and revising student assessment methods in line with Rethinking Assessment.⁵
- **Teacher training and development** to include a minimum level of arts-specific education for primary teachers.

Key building blocks to support these changes:

- A renewed focus on providing a holistic learning experience that prioritises the personal development and wellbeing of the "whole child," preparing them for both the present and future.
- A commitment to representation, diversity, and relevance across the expressive arts curriculum, ensuring that children and young people can see themselves reflected in what they are learning, both in content and practice.

These foundational changes will support the growth of a robust talent pipeline for the theatre sector and the broader creative industries.

2. Skills and Training Reform.

- **Apprenticeships and T-levels:** Current apprenticeship schemes lack the flexibility to meet the specific needs of the theatre and performing arts sectors. We welcome

³ [Cultural Learning Alliance Blueprint for an Inclusive Arts-Rich Education](#)

⁴ Please note: SOLT & UK Theatre use the term expressive arts in our submission. By this we mean all art forms that contribute to the development and production of the performing arts. These are art and design, dance, drama, music – and film and digital media. We would argue for the inclusion of film and digital media within this curriculum area, as in Wales, due to its growing importance in technical aspects of theatre making such as moving image projection and automation.

⁵ [Rethinking Assessment](#)

the increased flexibility of the Growth and Skills Levy and look forward to collaborating with Skills England and the Future Skills Unit.

- **Portable Apprenticeship Pilot:** We call on the Department for Education (DfE) to publish its evaluation of the portable apprenticeship pilot. A portable or modular approach is also welcomed by other creative subsectors however we need to ensure that these approaches truly meet the needs of our industry and are not presented as a one size fits all solution.
- **Data Collection:** We call for improved data collection on skills to better inform the Industrial Strategy. Specifically, we ask the Future Skills Unit to ensure that publicly available data from DBT, DfE, HMRC, and ONS includes levy contributions from employers within the DCMS-defined creative industries. Currently, the dataset based on Sector Subject Areas (SSAs) does not capture the use of business and operational apprenticeships, which our members rely on for roles in areas such as ticketing and box office operations.
- **Correlating DAS and SIC Codes:** We call on the UK Government to consider correlating the employers registered on the DAS against their Companies House declaration of their SIC codes to facilitate better analysis.
- **Collaboration with SOLT & UK Theatre:** We recommend working with SOLT & UK Theatre and SkillsScene to ensure that the IfATE Occupational Maps accurately reflect theatre industry roles.
- **Review of Standard and EPAs:** Review the extent to which generic standards and end-point assessments (EPAs) can be adapted to fit specialist job roles and allow for the creation of bespoke apprenticeship standards for specialist jobs or add more options to existing standards.
- **Level 2 Apprenticeships:** Introduce more Level 2 apprenticeships to provide accessible, work-based entry routes into the theatre industry. These should be flexible enough to accommodate diverse learning styles, particularly for neurodiverse individuals.
- **16-19 Provision:** We advocate for the 16-19 provision to better reflect the broader skills essential for success in the creative industries, particularly for self-employed workers. Key skills such as teamwork, networking, innovation, and problem-solving are vital, and we believe these should be integrated as core competencies within educational specifications.

- **Support for Disadvantaged Students:** Arts BTECs have proven vital for disadvantaged students and should be supported to acquire, maintain and expand life options for young people.

9. What more could be done to achieve a step change in employer investment in training in the growth-driving sectors?

To achieve a step change, we need **fit-for-purpose training and apprenticeship schemes** tailored to the needs of specific industries. The government's direction on skills policy is promising, and SOLT & UK Theatre will continue to engage with Skills England to ensure the sector's needs are addressed.

Key to this is fostering collaboration between employers, educational institutions, and policy-makers to create a sustainable and flexible training ecosystem for the creative industries.

Business Environment - Innovation

10. Where you identified barriers in response to Question 7 which relate to RDI and technology adoption and diffusion, what policy solutions could best address these?

Intellectual Property Framework

SOLT & UK Theatre emphasise the importance of a robust and reliable intellectual property (IP) framework that support both the theatre sector and the wider creative industries.

The UK's intellectual property laws are generally regards as robust and innovative. However, with the emergence of new technologies such as artificial intelligence, it is crucial that our IP framework evolves accordingly.

SOLT & UK Theatre welcome ongoing dialogue with the Government to ensure that the IP framework keeps pace with technological advancements, ensuring continued protection and fostering innovation within the creative industries.

Additionally, SOLT & UK Theatre have supported research at Queen Mary University on the impact of AI in the creative industries, and the findings will be shared with the Government once available.

11. What are the barriers to R&D commercialisation that the UK government should be considering?

See the response above on the importance of R&D tax relief. Further support in this area is essential for unlocking the full potential of innovation within the sector.

Business Environment - Data

12. How can the UK government best use data to support the delivery of the Industrial Strategy?

See response to Question 1.

In summary, the current data used to identify the growth areas in the Industrial Strategy focuses too heavily on 'tech-forward' sectors, often overlooking the full economic and social impact of the cultural and creative industries.

To better support the Industrial Strategy, the government should:

- **Broaden Data Scope:** Include the cultural and creative sectors, recognising their long-term economic potential and wider social impact.
- **Balance Economic and Social Impact:** Ensure that data captures both economic return and the contribution to communities and wellbeing, aligning with the Government's missions for inclusive growth and fairness.

A more inclusive data approach would enable better-informed decisions and support sustainable growth across all sectors.

13. What challenges or barriers to sharing or accessing data could the UK government remove to help improve business operations and decision making?

The Government could improve data sharing with sectors, particularly regarding growth opportunities or barriers. For example, the Department for Culture, Media and Sport has not shared the findings of its research on cultural infrastructure investment needs. A

shared understanding of these needs would foster collaboration and help meet the Government's missions.

Arts Council England's reporting process could be streamlined to allow cultural institutions to focus on delivery. Data should be reported only if meaningful, with transparency on its use.

Moreover, data should also be shared, in keeping with GDPR principles, with sector bodies.

Business Environment – Infrastructure

14. Where you identified barriers in response to Question 7 which relate to planning, infrastructure and transport, what UK government policy solutions could best address these in addition to existing reforms? How can this best support regional growth?

Our research underscores the urgent need for sustainable investment in cultural infrastructure, particularly theatre buildings and performance venues across the UK.⁶ One in five venues require at least £5m each over the next decade to maintain current operations. Without significant capital investment in the next five years, nearly 40% of venues risk closure, and 40% will become too unsafe for use.

Investment in theatre and performing arts venues not only supports cultural heritage but also strengthens communities, creates jobs, and boosts the UK's creative exports.

If venues receive the necessary investment, they could:

- Create more local jobs (54%)
- Increase or improve outreach work (62%)
- Enhance environmental sustainability (100%)
- Diversify programming (57%)
- Improve accessibility for patrons in Victorian-era buildings (100%)

⁶ [UK Theatre: Investing in Infrastructure](#)

To address these infrastructure challenges, SOLT & UK Theatre propose the following mechanisms for long-term capital investment and inclusive growth:

Public Investment Mechanisms:

- **DCMS Maintenance Fund:** We propose ringfencing this fund for cultural performance venues.
- **Energy Efficiency Fund:** A shared fund for subsidised and non-subsidised venues, also benefiting other sectors with similar building challenges (e.g. libraries, leisure centres).

Private Investment Access:

- Government support to help members access blended finance models, such as those developed by organisations such as [Figurative](#), which raise and manage investment funds to support cultural and creative organisations that benefit individuals, communities, and society through their work. (See [case study](#) detailing Figurative’s work with the Birmingham Rep Theatre).
- Targeted public funding to help projects reach RIBA Stage 2, unlocking further financing and facilitating government support at all levels.

Fiscal Support for Inward Investment:

- Business rates relief;
- VAT relief on capital projects; and
- Consideration of additional tax breaks to incentivise investment.

Reducing Friction:

- **Streamlining Processes:** Align different government assessment criteria and processes for capital investment funds.
- **Reform Planning Regulation:** Ensure that regulations for historic buildings are not overly restrictive, allowing theatres to remain functional, accessible, and sustainable. We are currently engaging with our members to understand more about this issue and will share this insight with Government when it is available.
- **Streamline Planning Criteria:** To facilitate investment in cultural infrastructure to achieve inclusive growth in communities.

Sector Upskilling:

- Improve capital investment project management skills by pairing theatre and cultural sector leaders with those who have successfully managed large-scale infrastructure projects.

15. How can investment into infrastructure support the Industrial Strategy? What can the UK government do to better support this and facilitate co-investment? How does this differ across infrastructure classes?

Business Environment - Energy

16. What are the barriers to competitive industrial activity and increased electrification, beyond those set out in response to the UK government's recent Call for Evidence on industrial electrification?

SOLT & UK Theatre highlight that energy costs for the theatre sector have increased by 120% since the pandemic. This surge presents a significant barrier to growth.

Due to our significant estate footprint and aging infrastructure, the theatre sector is particularly vulnerable to a rise in energy costs.

86% of theatres identify finance as a major barrier to energy efficiency improvements, a figure that rises to 92% for historic theatres. Members urgently require funding for retrofitting, including triple glazing, high-spec insulation, motion-sensor systems, solar panels, and LED lighting. The cost of these adaptations is compounded by the need to close venues during installation, resulting in loss of revenue and additional costs.

In addition to the long-term strategy detailed above, we propose an upfront Initial Investment Fund of £56.7 million for these most urgent cases to safeguard our cultural assets. This initial £56m fund would help more venues to emulate the success of The Mercury Theatre in Colchester⁷ to implement energy efficiency renovations that will help them save money on their energy bills and cut carbon emissions.

17. What examples of international best practice to support businesses on energy, for example Purchase Power Agreements, would you recommend to increase investment and growth?

SOLT & UK Theatre do not have significant expertise in this area.

Business Environment - Competition

18. Where you identified barriers in response to Question 7 which relate to competition, what evidence can you share to illustrate their impact and what solutions could best address them?

This is not applicable to the theatre sector.

19. How can regulatory and competition institutions best drive market dynamism to boost economic activity and growth?

This is not applicable to the theatre sector.

Business Environment - Regulation

20. Do you have suggestions on where regulation can be reformed or introduced to encourage growth and innovation, including addressing any barriers you identified in Question 7?

Planning regulation is a significant barrier to capital investment. SOLT & UK Theatre would suggest streamlining processes and ensuring that planning does not hamper local growth.

We are collecting examples from our members regarding how planning has slowed down and/all hamper regional growth via preventing improvement to cultural infrastructure. We will share this with Government.

Business Environment – Crowding in Investment

21. What are the main factors that influence businesses' investment decisions? Do these differ for the growth-driving sectors and based on the

nature of the investment (e.g. buildings, machinery & equipment, vehicles, software, RDI, workforce skills) and types of firms (large, small, domestic, international, across different regions)?

See above regarding research and development relief. The introduction of and R&D relief for IP development in the creative industries would be a significant contributing factor to growth in our sector.

Business Environment – Mobilising Capital

22. What are the main barriers faced by companies who are seeking finance to scale up in the UK or by investors who are seeking to deploy capital, and do those barriers vary for the growth-driving sectors? How can addressing these barriers enable more global players in the UK?

Lack of R&D relief and lack of access to finance, as set out above.

We are currently engaging with our members to understand more about this and will share any insights with Government.

23. The UK government currently seeks to support growth through a range of financial instruments including grants, loans, guarantees and equity. Are there additional instruments of which you have experience in other jurisdictions, which could encourage strategic investment?

An R&D tax relief – see answer to question 6 for more information.

We are currently engaging with our members to understand more about this and will share any insights with Government.

Business Environment – Trade and International Partnerships

24. How can international partnerships (government-to-government or government-to-business) support the Industrial Strategy?

The theatre sector has significant potential to engage and work in foreign countries, further contributing to growth in the UK, with theatre produced here often having international potential.

Theatre's international footprint is significant, with one successful example being the Mamma Mia tour in China, however, our members tell us that delivering an international tour, or having a production based in a foreign country often faces multiple barriers and friction.

A key practical innovation would be a dedicated point-of-contact in each embassy and/or consulate for creative industries operating in that country and to promote and funnel inward investment towards the sector in the UK. This would upskill producers and others from the creative industries on custom and practice within foreign countries and help to identify key bodies and individuals to engage with within the territories.

Reform to the visa system to enable international tours, so companies do not need to regularly change casts of a production to adhere to rules introduced after Brexit.

SOLT & UK Theatre are engaging with our members to better understand how best to facilitate improved international partnerships. We will share this insight with Government once it is available.

25. Which international markets do you see as the greatest opportunity for the growth-driving sectors and how does it differ by sector?

Our members tell us that the Middle East and China are particular growth areas, followed by elsewhere in Asia.

We are seeking further details from our members and will update the Government once we have it.

Place

26. Do you agree with this characterisation of clusters? Are there any additional characteristics of dimensions of cluster definition and strength we

should consider, such as the difference between services clusters and manufacturing clusters?

In principle, for theatre and the performing arts, clusters can be very effective. London's West End is perhaps the first creative cluster and the ability to draw talent, pool skills and be a general hub of creativity and activity has resulted in considerable success.

There are also many examples across the country of culture being used extremely effectively to create identify and drive inclusive growth for place. Manchester is an obvious example and Cities of Culture being an effective broad scheme.

27. What public and private sector interventions are needed to make strategic industrial sites 'investment-ready'? How should we determine which sites across the UK are most critical for unlocking this investment?

Principles for good public and private interventions to be investment ready include the following

- Public money fulfilling the riskiest investment, providing confidence and a spring board for other investors. This could be via blended finance models.
- A planning system that facilitates good creative infrastructure in communities and mechanisms that support investment from within industries, such as VAT and/or business rates relief.
- Political will, at local regional and national level, for capital projects.

[Hall for Cornwall](#) is an excellent example of a successful capital investment project in the theatre sector, and this [case study](#) provides more information.

28. How should the Industrial Strategy accelerate growth in city regions and clusters of growth sectors across the UK through Local Growth Plans and other policy mechanisms?

The Industrial Strategy should ensure that Local Growth Plans factor creative industries as a potential for local growth, and that they work with local cultural leaders to realise the potential of theatre to drive local growth. These should be closely aligned with Local Skills

Improvement Plans to ensure that skills development is serving the needs of the local growth sectors and creating opportunities for people within those communities.

It should also recognise the connectivity between geographies. For example, some theatres from different parts of England collaborate on co-productions which originate in one venue and tour across others. The recent production of the stage adaptation of Kazuo Ishiguro's 'Never Let Me Go', for example, was a collaboration between Rose Theatre in Kingston Upon Thames, The Royal & Derngate in Northampton, Malvern Theatres and Bristol Old Vic.

Some productions that originate elsewhere in the UK can transfer into the creative cluster of the West End contributing to economic growth in London while also putting money back into the home theatre, enabling them to thrive. Likewise, London productions can go on UK tours, stimulating economic activity in towns and cities throughout the UK.

Therefore while local investment and growth is essential, the Industrial Strategy must also be concerned for the overall growth opportunities within the theatre ecosystem.

See answer 28 for UK wide connectivity, but there is also connectivity between America and the UK with transfers between the West End and Broadway, for example.

29. How should the Industrial Strategy align with devolved government economic strategies and support the sectoral strengths of Scotland, Wales, and Northern Ireland?

Theatre is a truly UK-wide sector. There are hubs for talent that flow across the borders of the UK, with the Edinburgh Fringe Festival, for example, playing a key part in the fostering of new talent in the UK-wide theatre ecosystem.

Touring, of course, takes place across the UK and to raise the potential for growth from the theatre sector there should be minimal friction experienced in operation across the different countries of the UK.

Partnerships and Institutions

30. How can the Industrial Strategy Council best support the UK government to deliver and monitor the Industrial Strategy?

The Industrial Strategy Council should have strong links to the sectors that are potentials for growth, such as theatre, the performing arts and the wider creative industries.

31. How should the Industrial Strategy Council interact with key non-government institutions and organisations?

The Industrial Strategy Council should have a good understanding of each of the growth areas of the economy, such as the creative industries and the theatre sector and performing arts specifically. It also have the potential to easily share data and case studies between sectors, enabling and prompting cross-industry learning.

32. How can we improve the interface between the Industrial Strategy Council and government, business, local leaders and trade unions?

The interface can be improved significant with effective engagement.

We would call on the Government to ensure that the Council engages with other key bodies such as Creative Industries Council and direct engagement with trade associations.

SOLT & UK Theatre would like to highlight that despite the significant potential for growth, theatre and the performing arts is not represented on the Creative Industries Council, which seems to be an oversight. We would welcome your support to address this.

Theory of Change

33. How could the analytical framework (e.g. identifying intermediate outcomes) for the Industrial Strategy be strengthened?

SOLT & UK Theatre are not best placed to answer this question.

34. What are the key risks and assumptions we should embed in the logical model underpinning the Theory of Change?

SOLT & UK Theatre are not best placed to answer this question.

35. How would you monitor and evaluate the Industrial Strategy, including metrics?

As mentioned above, we would suggest that metrics are used that do not solely capture economic growth, but also social impact that is felt in communities across the country.

Additional Information

36. Is there any additional information you would like to provide?

SOLT & UK Theatre would like to reiterate the potential for inclusion growth, while breaking down the barriers to opportunity, is significant in the theatre sector but can only be achieved if we collaborate to create the conditions for theatre to thrive.