

1. About us

1.1 [SOLT](#) and [UK Theatre](#) are the trade associations and members' organisations representing the interests of those engaged in the production and presentation of medium to large-scale dramatic and lyric theatre in the UK. Their memberships are drawn from both subsidised and commercial theatre.

1.2 The combined box office income of SOLT and UK Theatre's membership was more than £1.28 billion across London and the rest of the UK, with 34 million tickets sold in 2018.

1.3 SOLT represents approximately 230 London-based producers, theatre owners and managers, including all the major subsidised theatrical organisations in London.

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

2. Why we are submitting evidence

2.1. The information provided in this submission is compiled from a combination of UK Theatre and SOLT members responding directly to the questions posed by the committee, and from information and conversations previously submitted / had with our members throughout COVID-19. It is also based on our workforce research findings of 2016. [Section five onwards](#) of this submission is made up of direct quotes and suggestions from members.

2.2. We submit this evidence as a reminder to government and parliament of the contribution theatres across the UK have played and need to continue to play in the levelling-up agenda. Theatres contribute:

- To Britain's future prosperity, national identity;
- To health and social care outcomes, increasing diversity and community cohesion;
- To national growth and local growth, directly through employment, and through attracting visitors to areas. Businesses and infrastructure – including restaurants and transport – develop around theatres and encourage a strong sense of place.

2.3. We submit evidence to place theatre's conversations and concerns of the impact of COVID-19 on levelling-up alongside other industries' thoughts and submissions – because theatre's ecology is more than what someone sees on stage. It consists of supply chains to theatres, the workforce, housing and transport, the hospitality industry etc.

2.4. Satellite issues such as access to finance and cost of living are also important factors to consider in the growth of theatre and how it contributes - thinking about how those who work in the theatre industry, including freelancers and SMEs have the right conditions to flourish, remains an important part of the equation. For instance, cost of living is also related to opening up and diversifying our pipeline of talent across the country.

2.5. We submit evidence to highlight that there are structures, potential programmes and changes to current government policies that could help theatres to do more to help the UK with its levelling-up agenda. These need to be considered in relation to elements such as: supporting new financial models and protecting the bedrock of public funding; access to finance for start-ups, SMEs and freelancers; and continuing Theatre Production Tax Relief.

3. Summary - theatre's social and economic contribution and how this aids levelling-up

3.1. The British performing arts and theatre sector is not merely treasured, but priceless (both for its work on stage and in communities) and must play a crucial role in both the economic, and the social recovery of the country and the wellbeing of its people.

3.2. However, the impact of COVID-19 has been immediate and devastating; the medium and long-term consequences see threats to economic, social and cultural wellbeing in communities all over the country. As a result, this will (and is already showing to) have a knock-on effect on the sector's ability to truly help level-up across the UK. For theatre this

manifests in terms of an inclusive workforce and audiences, which then in turn exposes what is now missing in communities up and down the UK whilst theatres are closed. Immediate impacts include:

- 3.3. On employment** – COVID-19 has forced widespread redundancies in the theatre sector
- 3.4. Work with the community** such as: programmes for young mums at the Unicorn Theatre, Arts Gymnasium sessions for over 50's at the Belgrade or Women's Confidence Workshops at Derby Theatre.
- 3.5. Tourism** - for instance, 10m tourists visiting the UK a year engage with the arts and culture (c.33% of West End audiences).
- 3.6. And the spending spill over** effect on towns and cities around local theatres. The Creative Industries in the average local economy increased by 11% from 2011 to 2016, doubling the increase in the overall economy (NESTA & Creative Industries Council, 2018).
- 3.7.** In addition, a number of respondents reflected on the **importance of infrastructure** in levelling-up. For example, as theatre is part of the night-time economy, having transport regular and accessible transport that facilitates people getting from villages in to towns and cities to work, train at and enjoy the theatre is vital).
- 3.8. A lack of in-school arts engagement:** The narrowing of the curriculum has resulted in a concerning decline in the take up of arts subjects, and in numbers of arts teachers. Both are vital to introduce young people to the wide range of careers available in the creative industries. A combination of STEM and Arts subjects (STEAM) will prepare young people to become the next generation of theatre designers, technicians, finance directors and chief executives.
- 3.9.** As a result of COVID-19, local councils are rightly diverting extra funds to immediate social care. This means most will have little or nothing left for cultural activities despite the recognised health benefits of theatre & arts engagement (for example through Social Prescribing). This inquiry is also a chance for this to be considered by government.

Impact of COVID-19 on theatre jobs, skills, education and workforce inequities across the UK

- 3.10. Theatre employs 290,000 workers across the UK. As a result of COVID-19 over 70% of those jobs are at risk. Many theatres have already gone out of business. This in turn has an impact on a place's ability to level-up. Theatres provide jobs. They provide spaces to come together. They drive footfall, engage communities, provide education services.**
- 3.11.** It was clear before COVID-19 that the workforce needed to become more representative of the population as a whole (as shown by UK Theatre and SOLT's [review of the off stage theatre and performing arts workforce](#) - e.g. Low representation of workers from black, ethnic and minority backgrounds; Very low representation of disabled workers; Over-representation of people from more affluent backgrounds; Shortage of skilled technical workers and senior managers (**especially outside London**). **COVID-19 has magnified some of these issues.**
- 3.12.** Regional inequalities in terms of funding, training and opportunities existed before COVID-19 (and the sector was already working hard to address these). Yet funding applications to The Andrew Lloyd Webber Foundation demonstrate that there is underfunding for performing arts organisations delivering to those who are socially, economically, geographically disadvantaged as well as to Black, Asian, Minority Ethnic, disabled and LGBGT+ people. In addition, these organisations will be further impacted by the pandemic, which is now evidenced to disproportionately negatively impact the health of socially disadvantaged and ethnic minority groups. **We are very concerned these inequalities are amplified – as shown by campaigns such as #PullUpOrShutUp, #CultureNeedsDiversity and #WeShallNotBeRemoved.**

3.13. Unfortunately, we have had to suspend several of our workforce initiatives at the present time due to our staffing levels and the sector's ability to engage and deliver during COVID-19.

3.14. And there are many examples of theatres across the UK engaging communities as a core part of what they do which aids levelling-up. For instance: The Kiln - a focus on [building community ties](#), in one of the most diverse boroughs in London: Hackney Empire do a huge [range of work](#), embedded in the community; Newcastle Under Lyme's New Vic Theatre's [Borderlines](#) works regionally, nationally and internationally, and is acknowledged as a national model for the ways theatre can be used to work within the community.

4. Examples of what is needed

4.1. The issue of levelling up and inequalities in the sector is not a new one. For example, in the last two years we have given oral evidence to the Labour Party's Acting-Up Inquiry and to the Performers' Alliance APPG on 'Breaking the class ceiling.' Looking at recommendations from these previous inquiries is a good start.

4.2. If the industry is to remain relevant and have the right skills and expertise in place across the UK to thrive in the future we must attract a wider range of people to join our workforce. The sector has been working hard on this, and during COVID-19 [organisations](#) have helped guide the sector to possible solutions to addressing some of these inequalities – some of these have suggestions for changes to current government legislation.

4.3. **But the sector can only do so much independently – it needs government policy to help boost its chances of recovering and create the right environment to act as a catalyst for jobs, attract and then develop highly skilled and inclusive workforce** (freelancers are a key part of this).

4.4. Government interventions and adjustment of policies such as being willing to tailor T Level placements and Apprenticeships, The Apprenticeship Levy to the creative industries will be key.

4.5. A continuation of the government's Creative Careers Programme because the creative industries has been seen by some parents and teachers as one that isn't made up of 'real jobs', now has the added challenge that indeed many jobs as a result of COVID-19 have been lost.

4.6. Continued conversations with DCMS and the Treasury for as long as COVID-19 exists to listen to what is needed to aid the sector in rebuilding.

5. What role do / could theatres play in the government's 'Levelling-up' agenda?

Below are direct responses from theatre businesses:

5.1. **The Shaftsbury:** Assistance in giving access to disadvantaged communities through low cost ticketing and support in providing programmes to encourage engagement. Often impossible for a commercial organisation but something that could cement a building's role whilst also opening opportunities. The Shaftsbury, within limited resources, supports access for youth and disadvantaged in its borough. However this is only on occasion, when there are available tickets, and it would be far better to be a long-term initiative. The West End provides some of the most accessible work but frequently because of financial demands cannot make this widely available to disadvantaged groups.

5.2. **[Theatre name]:** As soon as we can resume touring, we will bring economic growth to touring theatres based in constituencies that need this assistance. At the time of closure, we had two sold out tours crossing the country and playing in many of these constituencies. We have a diverse programme and audience, with 25% of our bookers are from learning households. We actively work within 24 schools within our region, impacting on over 10,000 young peoples' lives. Developing a skills development strategy along with our FE college bringing young people in to contact with word class artists. Further impact in our region will allow us to have a deeper impact in our community through our audience development strategy, skills development strategy, learning and participation strategy and artist development strategy.

5.3. Donmar: Access to high quality culture should be spread more evenly. Distribution by touring and screen capture needs greater investment. Donmar is growing a generation of artists skilled in new forms of storytelling with wide accessibility at its heart through our Future Forms programme.

5.4. RSC: Every child is expected to return to full-time education in September, with matching expectations from teachers in partner schools of “back-to-normal” levels of RSC Learning activity. We have a special and urgent responsibility to protect arts and cultural subjects in constrained schools and a changed economic climate, and to engage with curriculum review including decolonisation.

There are increased mental health challenges for young people, and a potential crisis in talent development. To meet the needs of our school partners we have already confirmed levels of activity for the Autumn term. The RSC’s regional theatre partners are experiencing a range of financial vulnerability, learning and engagement teams at risk, vulnerable adults a particular concern, and we hope to know if we will be able to tour at either scale next year.

Freelance artists are disproportionately affected by the crisis so far, many theatre workers were not supported by SEISS, and are not eligible for current public funding schemes... For our Stratford partners, residents, visitors and businesses anxiety is intense and the RSC is making every effort to make a positive contribution and fulfil some elements of our responsibility to Placemaking through a series of contained Public Programmes in the town in collaboration with partners wherever possible.

5.5. Belgrade Theatre: 1) Creating / Providing quality artistic experiences with and to audiences outside the big urban centres - easy access is a major factor 2) a breadth of on stage and participation programme clearly aimed at lots of different communities and interest groups 3) specific talent development, participation and education programmes working with marginalised or at risk groups 4) specific projects to move forward the diversity agenda 5) specific work to promote social and community cohesion 6) specific partnerships to work with local agencies to deliver against the local agenda and our City of Culture 2021 Project.

5.6. Theatre Royal Wakefield: Our Performance Academy works with over 200 young people each week, giving training in valuable performance skills which also give important life chances. 40% of participants have some level of bursary (awarded on the basis of financial need) to take part, ensuring these life-changing skills are shared with all those in our deprived area.

5.7. Wiltshire Creative: A recognition that cultural organisations have a huge role to play in recovery and levelling up as they can be great levellers - community and participation work. Arts act as a balm, a medicine in a crisis. This certainly proved to be the case during the Novichok poisonings, in which culture and, therefore, Wiltshire Creative were instrumental in the recovery programme - boosting morale, engaging people and promoting footfall back into the city of Salisbury.

5.8. Anonymous: It has been inspiring to see theatres like Eden Court and companies like Slung Low taking a lead on the delivery of local care and welfare whilst they’ve been unable to deliver their regular arts programme. Thinking post reopening, it is vital that the ACE strategic touring fund be renewed, to encourage producers to take work to places that wouldn’t normally get world class shows, and to develop new audiences.

6. Ancillary spend: We asked theatres to tell us about any ways in which their theatre helps support / drive their local economy / night-time economy, by encouraging footfall in the local area and spend in local businesses. For example, hotels and restaurants.

One member stated: ‘Independent economic analysis of the impact of theatre on local economies estimates that live entertainment and theatre contributes £11.5 billion of gross value to the UK economy annually and supports 400,000 jobs. Theatre contributes £4.8 billion gross value and 290,000 jobs ranging from on-stage talent to temporary bar staff. The additional value generated by theatre on the economy includes expenditure on dining in restaurants, travel on public transport, hotels and expenditure in local shops. Theatre supports an economic ecosystem that includes permanent staff, freelancers, contractors and SMEs and invests in, and maintains, a highly trained talent pool including

performers, creatives and technicians (inc. sound, electrical, lighting, costume, set designers and builders, master craftsmen).'

6.1. Regional Theatre case study: RSC

- Economic impact study showed visitor spend across the town of Stratford-upon-Avon per head for RSC attendees of £81.29 average in 2018-19 (excluding spend on theatre tickets)
- Inside the theatre (spending at the theatre) £33 average spend per booker within the theatre (2016 RSC research)
- Outside the theatre (spending at businesses/attractions etc near the theatre) £439 per booker average spend outside the theatre (accommodation, F&B, travel, shopping) (2016 RSC research) = total of £24.6m brought into local economy as a result of a summer season in Stratford (2016 figures).
- This would extrapolate to c.£36m across a 12-month period (Data from 2016) RSC audiences undertaking other activity in Stratford-upon-Avon while visiting the theatre: 65% visited a restaurant/café, 39% went shopping, 29% visited pub/bar, 28% visited a historic site.

6.2. A number of other theatres across the UK also provided evidence of the importance of ancillary spend in their theatre and how people are attracted to their area, because of the theatre. Whether this was interdependency of the accommodation, hospitality sector, transport network and retail sector within the West End or the Theatre Royal and Royal Concert Hall Nottingham who told us that their theatre: 'helps drive the night-time economy, in particular attracting a much broader demographic into the city in the evenings. With over 400 performances a year and audience of over 600,000 we have an estimated economic impact of £41m. Since our closure we have been contacted by adjacent restaurant and facilities who have faced a considerable downturn due to the loss of our footfall.'

7. How can theatres across the UK help government deliver on its industrial strategy?

Below are direct responses from theatre businesses:

- 7.1.** The theatre is a labour-intensive industry creating thousands of jobs. At the time we were locked down we employed around 1400 people - self-employed actors and musicians, part time and full-time employees. We now have 150. We hope to reinstate many of those when we are allowed to perform again.
- 7.2.** We are an organisation that is growing, and we are developing a skills strategy across our whole region. We will work with FE colleges, universities, schools and freelancers with our programme of skills development.
- 7.3.** Theatre has a major role to play in place making, community cohesion and cross generational interaction.
- 7.4.** Redevelopment using high quality design supports construction industries, engineers, electricians and artisans.
- 7.5.** Theatre uses a lot of technology in sound, lighting and automation which is often taken from other industrial sectors or moves to them having been developed within a theatre setting. Tax breaks and allowances for such innovation would help all sectors.
- 7.6.** By including creative subjects in the curriculum (encourages creative thinking and teamwork) and by using TiE and creative tools for teaching.
- 7.7.** Providing jobs, promoting spend, enlivening and enriching lives and attracting people to live and spend time in the locality and spend their money there.

8. Local structures: How should local structures support delivery of regional growth across England? What should local authorities do more or less of to support the theatre sector's growth? E.g. could investment in transport, technology, or skills help your theatre thrive and or help economic growth in your area?

- 8.1. Investing in transport particularly, technology and skills locally.
- 8.2. Investment and support for internships, trainee programmes would be welcome in order to support development of this truly "world-class" industry. Changes to the congestion charge rules in London to now make the charge applicable at the weekend and in the evening are a mistake in the current economic conditions, discouraging an audience from coming in to central London at the very time the economy needs them (and not consistent with govt messaging to avoid public transport where possible during the pandemic).
- 8.3. Public transport and roads network require significant improvement in [place name] especially for the night-time economy. Our local authority and park and ride is seen by our local authority as an income stream and therefore the strategy is flawed as they do not consider the wider economic impact of visitors to [place name] when setting prices.
- 8.4. Support for theatre infrastructure projects
- 8.5. Investment in transport is key (currently you can't go back to [place name]/London on an evening, as there are no trains). Local authorities could commission theatres / venue to deliver against key outputs.
- 8.6. Transport infrastructure for both goods and transport of people needs investment. Crowded public transport is no longer acceptable, we need better systems to support the journeys of our audiences. More frequent services to key hubs and fast efficient cycle and walking routes from them to venues are essential.
- 8.7. Green transport to/from the theatre and develop outdoor facilities nearby, support local restaurants to keep trading
- 8.8. Investment in public transport, cheap/free parking. Investment in the cultural infrastructure - e.g. [town name] is planning the development of a cultural quarter as part of the regeneration of the city... as they realise that culture promotes economic regeneration
- 8.9. Reliable public transport being available at evenings and weekends is vital to servicing theatre audiences.
- 8.10. Improving public transport outside London would help enormously

9. Where should government focus its post-Covid-19 levelling up policy to best support regional growth?

- 9.1. There was no overall consensus among those who answered this question as to whether it should be LEPs, core-cities, regions or towns. But one member noted: 'The current inability for theatres to reopen in a commercially viable manner impacts on all regions of the country and is having a material and significant impact on local economies across the whole of the country including urban centres. Restoring urban economies should be a major priority at this time.' Whereas another said: 'It should not be focused in one area or another but centred on areas of need. A more holistic vision needs to exist for all towns and cities that links to the community around themes.'

10. Regional Funding: What role should local structures play in allocating funding to best achieve regional growth?

- 10.1. The safe, commercially viable reopening of theatres is a critical first step for all regions as theatre plays a critical role in the economies of all regions. This is firstly a matter for central govt rather than regional funding.
- 10.2. Transport infrastructure, skills development, educational funding for learning and participation.
- 10.3. Wherever possible funding decision should be delegated locally

- 10.4.** Local authorities should consult widely with industry bodies, BIDs and third sector organisations in their areas to drive the best outcomes from any new resources
- 10.5.** They know what works best for their area. A big role.
- 10.6.** A key role as long as there is industry expertise as part of the decision-making process
- 10.7.** Supporting local infrastructures if they already deliver benefit to deliver more benefit - e.g. don't spend money of developing new cultural infrastructures if the existing ones are good and would be better with more investment.
- 10.8.** Local arts councils focus on subsidised venues and companies, but the commercial theatre sector could do a lot with relatively little investment, yet it is often passed over.

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