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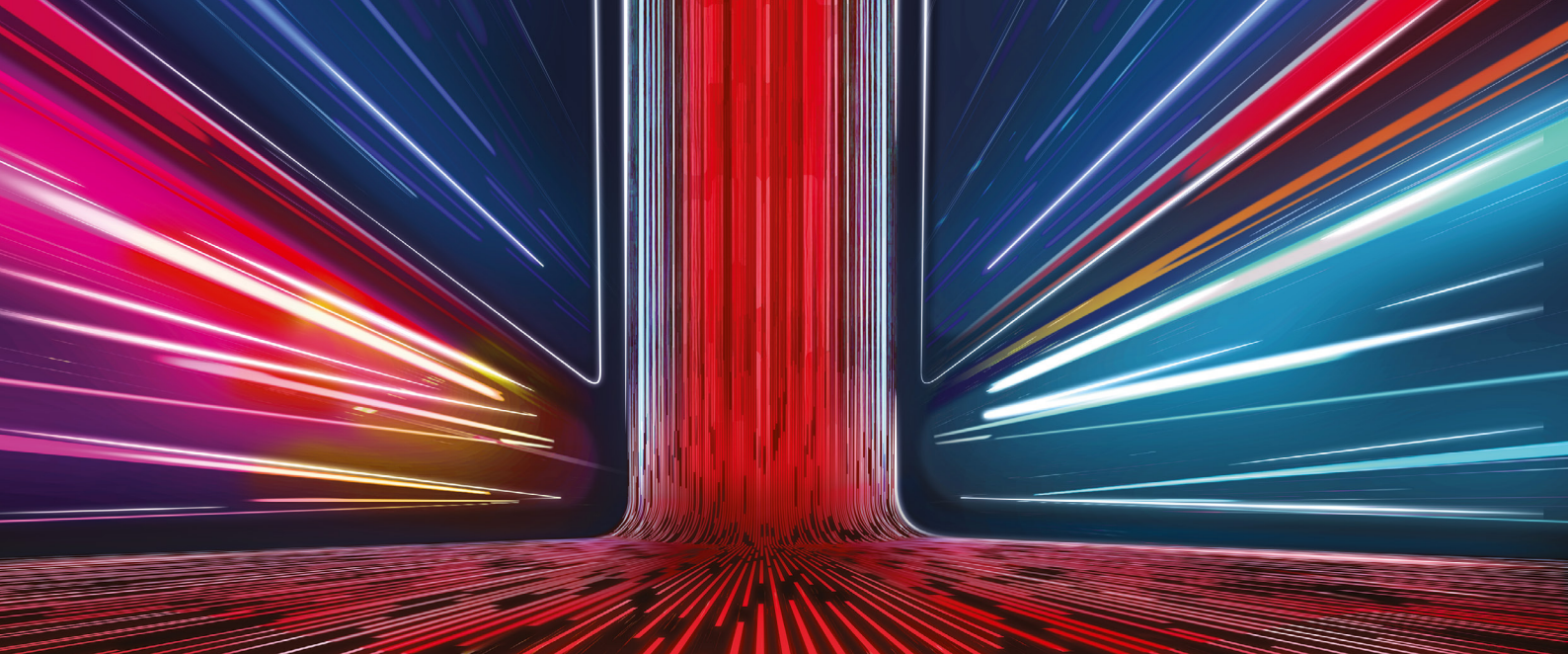
THE UK'S MODERN INDUSTRIAL STRATEGY

CREATIVE INDUSTRIES

Sector Plan

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Ministerial Foreword



The Rt Hon Lisa Nandy MP
Secretary of State for
Culture, Media and Sport

I am delighted to present the Creative Industries Sector Plan. It is a central part of the government's Industrial Strategy and our Plan for Change to ensure long-term economic growth across the UK.

The UK's creative output, our creative history and our future creative potential are unmatched. The sector already acts as a dynamic growth engine for our economy across the UK's nations and regions, contributing 2.4 million jobs and £124 billion GVA to the economy, generating knowledge spillovers that drive innovation and activity across the economy.

The government sees the high-growth value of the Creative Industries now and for the decades to come. We are entering a new world where data, content, and creative services and experiences are the fastest growing areas of consumption, offering new opportunities for growth.

In a changing world, with new technologies, audience behaviours and international competition transforming business models and routes to market, the UK is uniquely well placed to innovate and adapt. Our long-term fundamentals are strong, and we must retain and capitalise on our long-standing international comparative

advantage. Our government will oversee a creative economy that is open for investment from around the world, with creativity that crosses borders, world-class creative talent in every nation and region, and the cultural infrastructure and public service media to back it up.

For too long, however, the sector has not been given the recognition it deserves and the backing it requires. Investments – particularly outside London – have been seen as too risky, talent has been overlooked, and underpowered policies and programmes have failed to keep pace with the sector’s dynamism and ambition. The government, working together with industry, is making clear choices to back our nations and regions, and back talent everywhere, and this Creative Industries Sector Plan is the start of our commitment to ensure that we maximise the opportunities and tackle the issues that have long held the sector back from reaching its full potential.

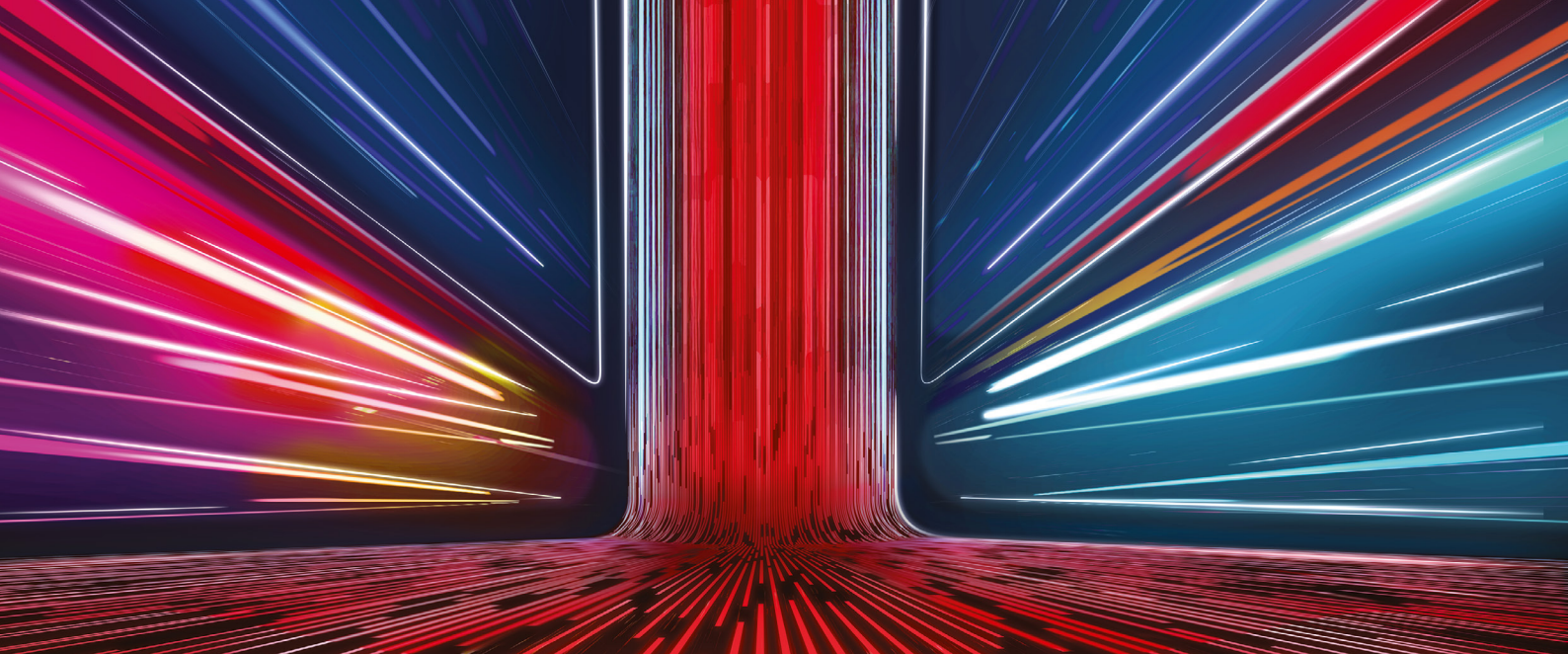
To do this, we are setting out a framework for the growth of the sector to 2035. We will build on strong foundations of world-renowned education providers, a robust copyright regime, and a vibrant ecosystem of talent, infrastructure and ideas. We will tilt government support towards the Creative Industries, and significantly increase direct funding for the sector. We will work across government and industry to tackle misperceptions of the sector’s value, in areas from bank lending to career choices. We particularly see the unique strengths and values of our public service broadcasting ecosystem, which in recent years have been devalued by political point scoring, undermining trust in our free media and holding back their catalytic role in growing the economy. We will unleash the innovative power of our creators, entrepreneurs and cutting-edge businesses, to ensure they are at the heart of the future economy. We will commit hundreds of millions of pounds of investment in creative clusters, helping talent thrive and businesses move from start up to scale up – right across the country.

In doing so, we will ensure the UK is recognised as the best place in the world to make and invest in film and TV, music, performing and visual arts, video games, advertising and beyond.

I am proud of the Creative Industries achievements we have delivered since entering government. We have brought in huge investment, such as Universal’s first European theme park to be built in Bedfordshire. We have supported the screen sector with a new independent film tax credit, an improved visual effects tax credit, and launched the £270 million Arts Everywhere Fund to support the cultural ecosystem that underpins the entire Creative Industries.

Our ambition is that every corner of this country will flourish as part of the UK’s position as a creative superpower, maximising the value and impact of our content, services, products and skills. That is why this Sector Plan is setting out an ambitious target to increase annual investment in the Creative Industries from £17 billion to £31 billion by 2035.

This is just the start of a 10-year journey and the government is committed to playing its part. We recognise that meeting our ambitious vision for the sector can only be delivered by the world-class talent and business in the UK. To successfully execute our vision we will work as open, respectful and collaborative partners with every creative business, large and small, to implement and build on this plan and to execute our vision. Together, we will raise business investment, drive innovation, boost exports and create the high-quality jobs – and storytellers – of the future.



Executive Summary

The Creative Industries are an economic success story. They are a major UK employer, exporter and a pull for inward investment. They drive innovation and productivity, improve our living standards and drive growth in the wider economy.¹ They create good jobs across the country, shape the way we talk about ourselves as a nation and are the face and voice of our reputation abroad. In short, they play a unique role in both an economic and social sense, and they are at the heart of our Industrial Strategy and our Growth Mission.

The sector has increased output at over 1.5 times the rate of the rest of the economy² and we expect further growth. Rapid increases in the consumption of content, leisure and experiences are driving demand. Social media, online TV, mobile gaming, podcasts, online press, and music streaming are now mainstream.³ While this evolution can pose challenges, it is stimulating innovation and new business models,⁴ providing new experiences and storytelling opportunities, and expanding the global reach of British creativity.⁵

By 2035, the sector will look very different. In addition to the creative works we currently recognise, technologies such as Artificial Intelligence (AI), Extended Reality (XR), and data analytics will create new, tailored experiences. New creators will enter the market as technology reduces barriers to entry, as well as increasing workplace productivity and supply chain resilience. But in a world of synthetic material and AI-generated content, human endeavour and creativity will be more valuable than ever.⁶

We need to be the best at capitalising on these opportunities and our exceptional creativity in order to maximise growth. Government has heard from industry through the Creative Industries Sector Plan Taskforce, the Invest 2035 consultation, and our wider

industry engagement, that the sector's growth is held back by barriers impacting their ability to innovate, access finance, access skills, and export to the world. We have reviewed the evidence to inform the actions and ambition set out in this Sector Plan. We will build on the sector's international competitiveness and navigate the impacts from global changes to trade flows. We will harness the power of creators, entrepreneurs and investors, and establish the UK as a global leader in the emerging 'createch' sector. We will embrace new technologies to drive intellectual property (IP) creation, maximising its value in the age of AI while protecting and incentivising human creativity.

Createch: Createch combines creative innovation and cutting-edge technology to generate novel products, services and experiences. Createch businesses have the same growth potential as other technology firms and are expected to generate £18 billion in gross value added (GVA) and 160,000 jobs over the next decade.⁷ They are found in every creative sub-sector, with an estimated 13,800 creative businesses leveraging technologies including robotics, engineering biology, and XR.⁸ 3D printing has revolutionised sustainable fashion, AI is reshaping video games and performing arts, and gaming technologies are used in mental health therapeutics, aeronautics and engineering.

We are starting from a place of strength. We have a comparative advantage in creative services exports⁹ driven by globally competitive businesses in every creative sub-sector, backed by world class cultural infrastructure and institutions such as the BBC. Our unique creativity crosses geographical borders, with access to a strong skills base, thriving creative clusters and microclusters, deep capital markets, and a stable and light-touch regulatory environment.¹⁰ The UK's Creative Industries ecosystem ensures the sector has an economic impact greater than the sum of its parts.¹¹ This creates tremendous potential for further economic growth, and the Prime Minister's Council of Science and Technology has said that "the revitalisation of the FTSE 100 should come from UK creative businesses."¹²



Creative ecosystem: The Creative Industries are an interconnected ecosystem of designers, creatives, artists and engineers across the UK, most visible in creative clusters. Sub-sectors such as film, TV, music, performing arts, visual arts, video games and advertising thrive because of each other and our excellence in areas like design, photography, architecture, software, publishing, crafts, audio and fashion.

The sector is made up predominantly of SMEs and microbusinesses which interact, while freelancers and creative workers play a key role in the sector's dynamism, moving between sub-sectors as well as beyond the Creative Industries where nearly 1.3 million more are employed in creative occupations.¹³ This movement is true of talent, with examples such as Sir Steve McQueen, a Turner Prize-winning artist and Oscar winning film director, and Jack Thorne, screenwriter of *Adolescence*, who has excelled across theatre and screen. And it is also true of IP, illustrated by Harry Potter, which has moved from best-selling novels, to films, theatre, video games, and now a television series. This ecosystem is underpinned by our public investment in museums, heritage and cultural infrastructure, and through Arts Council England, the British Film Institute and other Arm's Length Bodies around the UK.



By 2035 the UK's position as a global creative superpower will be enhanced with the UK becoming the number one destination worldwide for investment in creativity and innovation. Our ambition is to significantly increase business investment by the Creative Industries from £17 billion to £31 billion.¹⁴ We will retain our position in the face of intense international competition and drive growth across the economy, benefitting workers and businesses across the UK. By 2035, the UK will be recognised as the best place in the world to make and invest in film and TV, video games, music, performing and visual arts, and advertising and marketing. To achieve this, we must go further, delivering in four ways:

1. Transforming cross-cutting support

- **Accelerate innovation-led growth:** We will increase public and private levels of Research & Development (R&D) investment in the Creative Industries, make the UK the best place to start and grow a createch business, and support the creation and value of creative IP.
- **Secure growth finance for creative start-ups and scale-ups:** We will make the UK the best place to invest in creative businesses, support a wider range of types of growth capital, and address investors' risk aversion towards creative businesses.¹⁵
- **Build a resilient, skilled and diverse workforce fit for the future:** We will deliver a high quality workforce that is responsive to the needs of the Creative Industries and increase the productivity, resilience and diversity of the workforce, including creative freelancers.
- **Increase trade and exports:** We will maximise the UK Creative Industries' export potential in new and existing markets and remain a top-tier destination for inward investment.

2. Boosting growth in our highest potential sub-sectors

- **Film and TV:** We are a global centre for screen production, drawing in £4.8 billion of inward investment and co-productions in 2024,¹⁶ and our strength in visual effects and virtual production positions us well for next-generation content creation. We will strengthen our mixed film and TV ecology, backed by a BBC and public service media system fit for the future, and protect the UK's attractiveness for domestic and inward investment.
- **Music, performing and visual arts:** The UK has the third biggest music market,¹⁷ the second largest art market in the world,¹⁸ and a theatre sector that contributes nearly £1 billion in GVA a year.¹⁹ We will back the next generation of British talent, unlock new growth at home and abroad, and capitalise on the opportunities from digital platforms for musicians, performers and artists to reach new audiences.
- **Video games:** We have the biggest video games industry in Europe,²⁰ part of the fast-growing IT, software and computer services sub-sector, which can benefit from cross-cutting measures here and in the Digital and Technologies Sector Plan. We will expand our network of nimble, innovative studios and the rich

pipeline of inward investment to deliver more hit titles, nurture the next generation of UK games companies and talent, and support the exploitation of games software across the economy.

- **Advertising and marketing:** As a resource for all British industry, the UK advertising market is the most digitally mature in Western Europe, with internet advertising expected to reach £44 billion by 2028, from £32 billion in 2024.²¹ We will unlock the growth potential of AI and innovative technologies, and boost exports to increase the number of renowned UK-created advertising campaigns across the world.

3. **Realising the potential of Creative Industries clusters.** We will unlock the potential of our Creative Industries across the UK's high-potential city regions and clusters, where there are significant opportunities to boost regional economic growth and create high-quality jobs. Creative clusters, particularly where sectors and creative disciplines combine, have been a proven success.²² The 55 major clusters and 709 microclusters that already exist are a sound basis for further investment and growth.²³ We will go further, building on our R&D Creative Clusters programme²⁴ and Greater London supercluster. We will give six Mayoral Strategic Authorities the resources to catalyse business investment. We will work in partnership with devolved governments in Scotland, Wales and Northern Ireland to build on the support they deliver. And we will support creative corridors²⁵ across the UK, including supporting the growth corridor across our Northern city regions, the West of England-South Wales, and the Thames Estuary.
4. **Delivering joint commitments from government and industry, working in partnership.** As set out in the Plan for Change, we are resetting the relationship between government and businesses, and we are committed to delivering change together with stakeholders. We will strengthen our partnership with industry by relaunching the Creative Industries Council (CIC), which has informed the plan through its advisory Creative Industries Sector Plan Taskforce. We will also work with the CIC on wider areas, such as net zero and equality, diversity and inclusion, while responding to future global economic competition and security concerns. This is a long-term plan, and the CIC and industry will continue to play a critical role in delivery.

This Sector Plan is just the first step. We will kickstart growth, with DCMS more than doubling targeted funding for the Creative Industries, along with major investment in culture, innovation and access to finance, including significant increases in support from the British Business Bank and UK Research and Innovation (UKRI).

Accelerate innovation-led growth

- UK Research and Innovation (UKRI) will lead efforts to significantly increase public funding for the Creative Industries, including support for commercialisation and tech adoption.
- A £100 million UKRI investment over the Spending Review will support the ambitious next wave of R&D creative clusters in new sub-sectors and locations throughout the UK.
- A new Creative Content Exchange as a marketplace for selling, buying, licensing, and enabling permitted access to digitised cultural and creative assets.



Growth finance



- A significant increase in support from the British Business Bank for the Creative Industries with debt and equity finance.
- A new working group to tackle barriers to IP-backed lending in the Creative Industries.
- An industry-led “single front door” for creative firms to access information on how to unlock private investment, alongside improved government signposting to resources.

Skilled workforce



- Greater flexibility for employers and learners via the new growth and skills offer, continuing to consider the needs of small businesses.
- A curriculum in England that readies young people for life and work, including in creative subjects and skills, following the independent Curriculum and Assessment Review.
- A government and industry partnership to deliver a refreshed UK-wide £9 million creative careers service.

Trade and exports

- As committed to at the UK-EU Summit in May, we are supporting travel and cultural exchange, including the activities of touring artists.
- UK Export Finance has up to £80bn in financing capacity to support UK exports for Industrial Strategy sectors, including the Creative Industries.
- Increase the number of creative trade missions and markets we target, building on traditional markets like the EU and the United States with fast-growing markets such as Asia-Pacific.



City regions and clusters



- The government has identified 12 creative clusters across the UK where we will work with local leaders and devolved governments to drive growth.
- A new £150 million Creative Places Growth Fund devolved to six Mayoral Strategic Authorities to deliver tailored investment readiness support.
- Champion London as a ‘Creative Industries supercluster’, with the Mayor investing over £10 million over the next four years alongside significant investments including East Bank and Smithfield sites.

Frontier industries

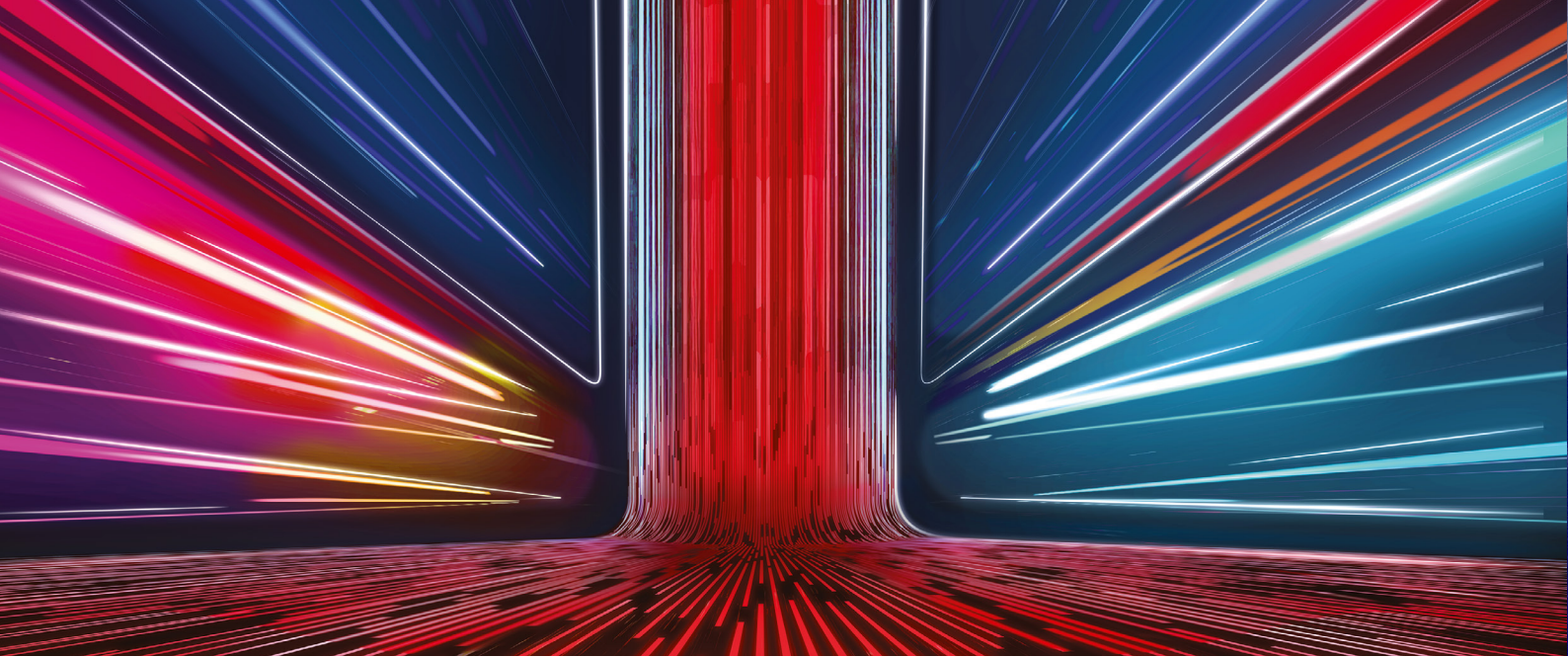


- New £75 million screen growth and £30 million video games growth packages, over three years, to develop and showcase UK screen content and support inward investment.
- Up to £30 million over three years for a music growth package to support emerging artists, alongside a new industry-led ticket levy on arena gigs to support the grassroots sector.
- Co-funding, between government and private investors including the Walt Disney Company, the Dana and Albert R. Broccoli Foundation and Sky, for the expansion of the National Film and Television School.
- Taking action to support public service media, including through BBC Charter Review, to ensure a vibrant domestic screen sector and a BBC that continues to act as an engine of Creative Industries growth across the country.

Endnotes

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- 14 DBT analysis using Office for National Statistics (2025) [Gross Fixed Capital Formation](#), and Business Investment and Annual Business Survey data. Business investment is either taken from the SIC division aggregates, or from SIC division aggregate totals apportioned using lower-level Annual Business Survey investment data. 2035 target is defined in real terms, 2023 prices, see Industrial Strategy technical appendix.

- 15 Bakhshi, H., Siepel, J., Carmona L. and A. Tarr (2025) [Unleashing Creativity: Fixing the finance gap in the creative industries](#). Creative UK and Creative Industries Policy and Evidence Centre
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1. Ease, speed and long-term stability for doing business

The UK's Creative Industries have a record of extraordinary growth.¹ However business as usual will not be enough to achieve our global creative superpower ambitions.

Extensive engagement with industry through responses to our Invest 2035 consultation, the Creative Industries Council and our advisory Creative Industries Sector Plan Taskforce, made clear the need to recognise the economic value of the sector more broadly and address barriers to growth relating to innovation, access to finance, skills, and exports. We will address these so that the Creative Industries are able to:

- **Accelerate innovation-led growth**, measured by increased business R&D expenditure and an increased proportion of innovation-active businesses.
- **Secure growth finance for creative start-ups and scale-ups**, measured by increased investment capital and a reduction in businesses reporting issues accessing finance.
- **Build a resilient workforce fit for the future**, measured by decreased skills gaps and shortages, and increased levels of training provision.
- **Increase trade and inward investment**, measured by increased exports of creative goods and services, and increased inward investment.



Credit Photographer Mark McNulty Exhibition at FACT, Liverpool

1.1 Accelerate innovation-led growth

Creative firms are highly innovative. The sector engages in internal R&D at a higher rate than other services and in product and new-to-market innovation more than the rest of the economy.² We have made significant and early investments at scale in a national infrastructure for creative R&D, with the Arts and Humanities Research Council's £75.6 million CoSTAR network transforming production across screen, live performance and beyond,³ while firms such as Synthesia, Chet Lo and Framestore are pushing new creative frontiers. This innovation is felt widely, with the Prime Minister's Council for Science and Technology finding that "R&D across the [Creative Industries] has produced spillover benefits across the wider economy in diverse areas such as defence, agriculture, healthcare, and education".⁴ There are also spillovers of the sector's green practices into wider supply chains.⁵

Despite these strengths, creative businesses report barriers to undertaking R&D including high development costs and challenges accessing finance, while public support is a key enabler for resolving these issues.⁶ Creative SMEs, microbusinesses and artists often lack the capacity for strategic, cross-sectoral R&D, including through linkages with universities.⁷ Due to factors such as a lack of qualified personnel, they can struggle to fund upfront technology investments or access cutting-edge facilities.⁸ And while firms in creative clusters are more innovative than other businesses, regional disparities still exist.⁹

We will address these barriers to strengthen innovation capacity, attract private investment, and support the disruptive potential of createch. We will help more creative industry businesses to adopt cutting-edge technology to boost productivity and unlock the full potential of human creativity. The UK has globally significant cultural and creative assets, from our world-renowned museums and archives to high-quality content produced year after year across our creative sub-sectors. We will work with the sector to maximise the full value of its creative content, exploring practical ways for creators to protect and

exercise their rights, and spur innovation across the sector and wider economy.¹⁰ We are committed to protecting and empowering creativity through a world-leading copyright regime that works for creators.¹¹

The approach

- Increase public funding for innovation across the Creative Industries, increasing business investment in R&D.
- Drive commercialisation of creative research and innovation, and creative assets.
- Deliver an intellectual property regime that protects and unlocks the value of historic and new creative content, creating new revenue streams for content owners and creators.
- Enhance productivity and further human-led creativity in the sector by supporting businesses to adopt new and emerging technologies, including AI.

The interventions

Public investment in R&D and Innovation

- **UKRI will lead efforts to significantly increase public funding, and leverage substantial industry investment, strengthening the research, development and innovation ecosystem for the Creative Industries.** It will publish a new Creative Industries R&D strategy later in 2025, enhance and streamline the funding support journey through Innovate UK from start-up to scale-up, and support access to Horizon Europe funding.
- **A £100 million UKRI investment over the Spending Review will support the ambitious next wave of R&D creative clusters in new sub-sectors and locations throughout the UK,** bringing together universities and SMEs to accelerate innovation. The first wave of clusters through the Creative Industries Clusters programme delivered £5 of private and public co-investment for every £1 spent.¹²
- **UKRI will strengthen support for commercialisation and tech adoption.** It will do this through a coherent suite of programmes and direct support for creative scale-ups including through the Catapult Network. UKRI will also invest in high-level skills via doctoral awards and embedded academic/industry placements, and in evidence including through continued investment in the Creative Industries Policy and Evidence Centre.
 - **DCMS will fund the £25 million Creative Futures programme** to add five new CoSTAR R&D labs and two showcase spaces across the UK to demonstrate new createch, screen and games innovations to investors alongside a package of commercialisation support.

- **HMRC will publish revised guidance for the R&D tax reliefs.** This will clarify that, where a project in the creative sector seeks an advance in science or technology, arts activities that directly contribute to the advance by resolving scientific or technological uncertainties are within the definition of R&D for the reliefs, and their qualifying costs, such as salaries, can qualify for relief. This guidance will be published in 2025 and will clarify that eligible interdisciplinary innovation can be supported by R&D tax relief.

Creattech

- **Learning lessons from fintech, government and industry will work together to maximise the potential of creattech.** This will be a central part of UKRI's new strategy for the Creative Industries. UKRI will bring together stakeholders to tackle barriers and accelerate creattech growth, reporting to DCMS and DSIT ministers with evidence-based recommendations by the end of 2025. This will gather best practice on creattech commercialisation and spinouts from world-leading institutions in higher education (including RCA, Imperial, Warwick and Manchester universities), as well as investment funds starting to work in this area, such as Northern Gritstone. Researchers led by the Creative Industries Policy and Evidence Centre will develop evidence, and the Creative Industries Council will have stronger creattech representation.

Intellectual property and creative content

- **We will ensure a copyright regime that values and protects human creativity, can be trusted, and unlocks new opportunities for innovation across the creative sector and wider economy.** The government wants to support rightsholders in licensing their work in the digital age while allowing AI developers to benefit from access to creative material in the United Kingdom. The right approach here will unlock new opportunities for innovation across the whole economy. The government is analysing responses to the consultation on delivering a copyright and AI framework, looking at all options. The government recognises the need for this to be done properly and carefully in a considered, measured and reasoned way, to develop any future proposals. The government will set out a detailed economic impact assessment on all options under consideration and a report on the use of copyright material for AI training, transparency and technical standards. This analysis will inform the government's position, alongside a series of expert working groups to bring together people from both the AI and creative sectors on the issues of transparency, licensing and other technical standards to chart a way forward.
- **We will establish a Creative Content Exchange (CCE) to be a trusted marketplace for selling, buying, licensing, and enabling permitted access to digitised cultural and creative assets.** This new marketplace will open up new revenue streams and allow content owners to commercialise and financialise their assets while providing data users with ease of access. In this way, the CCE will help fuel the next wave of creative innovation while facilitating the development of high-value AI models. Discovery and testing of appropriate models and technologies with early adopter content-owners will be supported by UKRI's R&D Missions Accelerator Programme.

- **We will make UK IP rights the best protected in the world, setting a gold enforcement standard in the UK and internationally to protect rights owned by UK businesses.** The Intellectual Property Office is working towards delivering this vision, including by promoting the UK's policy approach globally and strengthening resilience to IP infringement abroad. The Government's domestic policy decision to maintain the UK's bespoke exhaustion of IP rights regime (UK+ regime) has supported the sector and ensured that the British public have fair access to IP-protected goods.

Technology adoption

- **The government welcomes the findings for Creative Industries set out in the review by the Government Chief Scientific Adviser and the National Technology Adviser of barriers hindering the adoption of transformative technologies** and will be taking forward its suggested actions.¹³ UKRI will provide resources and support for technology adoption across its programmes under the 'Create Smarter' banner, as well as an online directory of facilities across the UK where creative businesses can access cutting-edge technology. The industry body, Creative UK, will work with Chief Technology Officers (CTOs) from the sector and other technology leaders to identify next steps to accelerate the adoption of responsible AI. The government will upskill creative businesses on security through advice and guidance from the National Protective Security Authority and National Cyber Security Centre .

Case study: Goggleminds

Cardiff-based createch company Goggleminds develops innovative, virtual-reality based training products such as its immersive healthcare simulation, Mediaverse is a medical digital platform that allows healthcare professionals and medical students to learn and collaborate. Supported by Clwstwr in the Creative Industries Clusters programme, and subsequently by InnovateUK, Goggleminds' in-house team has grown from one member of staff to ten,¹⁴ with further growth expected as they scale nationally and internationally and continue to innovate in simulation and augmented reality. Goggleminds received substantial investment from Oxford University Hospitals to work with healthcare providers and medical schools and is expanding in Africa, as well as using AI to support professional training to tackle violence against women and girls.¹⁵



The opening of the CoSTAR Screen Lab at Studio Ulster in Belfast. Image credit Ulster University, Studio Ulster

1.2 Secure growth finance for creative start-ups and scale-ups

Creative businesses across the UK and in every creative sub-sector want finance to fuel growth.¹⁶ They have a higher appetite for growth than other sectors, with 42% of creative businesses anticipating growing by more than 20% in the coming year.¹⁷ At the same time, it is estimated that the Creative Industries equity finance gap may be as high as £1.4 billion,¹⁸ and investors have reported that a lack of information on growth, exits, and returns discourages them from investing in the sector. From 2013 to 2023 the majority of equity investments in the sector were made in London and the South East, with private equity finance largely focused on the IT, software and computer services sub-sector.¹⁹

We can go further to satisfy the sector's appetite for growth and address this gap across the UK's cities and regions. Creative firms, even when revenue-generating, can also struggle to obtain finance, with 30% of creative businesses reporting they lacked knowledge about finance, half of businesses with fewer than five employees reporting that they lack financial skills to grow, and female CEOs are 8% more likely to report being discouraged from accessing finance.²⁰ Businesses can also lack access to debt finance because they lack the tangible collateral required.²¹

We will increase support from public financial institutions, catalyse private investment and support major investments such as Universal's recent decision to build its first theme park in Europe in Bedfordshire. We will also support creative businesses to develop financial skills, knowledge and networks to access finance, and work with lenders to unlock millions in future commercial lending.²²

The approach

- Increase private investment available to scaling creative businesses across the UK, with support from public finance institutions
- Increase access to suitable investment options for creative businesses
- Build the sector's investment readiness, ensuring that more creative businesses have the connections and resources to secure investment

The interventions

Public finance support

- **The British Business Bank (BBB) will significantly increase support for UK creative businesses with debt and equity finance.** The BBB is committing an additional £4 billion of Industrial Strategy Growth Capital to support investment and growth in the IS-8, crowding in billions of private capital. It will transform the BBB to include a range of more sector-focused activity, with improved monitoring and reporting functions and tools to ensure effective tracking of the BBB's support across sectors.
- **The BBB will fund specialist venture capital fund managers investing in the creative sector** and improve the availability of finance through expanded early-stage equity funds, angel syndicates and debt funds. For debt commitments, support for the sector will involve accrediting existing expert lenders such as Creative UK across its existing levers²³ and, working with the IPO, exploring how to encourage IP-backed lending. The BBB will work with the Creative Industries and DCMS to explore solutions that support and address the different challenges and needs of businesses in different creative sub-sectors.
- **The government will increase support for the sector through its public finance institutions and the Office for Investment (OfI) to catalyse private investment.** The National Wealth Fund's Statement of Strategic Priorities from the Chancellor indicates that the Fund should consider the role it can play in supporting the delivery of the wider Industrial Strategy, including in the Creative Industries. The expanded OfI will better support the creative sector by leveraging its senior commercial expertise to provide a seamless journey for our most important international and large domestic investors, unlocking new growth opportunities. The UK government will work with public bodies and the governments in Scotland, Wales and Northern Ireland to ensure investment opportunities are unlocked for businesses and places across the UK.

IP-backed lending

- **The government will investigate specific measures to tackle barriers to lending to IP-rich SMEs in the Creative Industries and other IP-rich sectors.** The government will establish a new working group convening relevant departments and authorities, and also engage closely with industry, commercial banks and other financial institutions, to consider steps to address regulatory and non-regulatory barriers to lending to IP-rich SMEs. As part of this work, the BBB and IPO will explore how to best support lending to IP-rich sectors including the Creative Industries and encourage IP-backed lending. The government will publish an update on this work and next steps by the end of the year.

Investment readiness

- **As part of the government's new £150 million Creative Places Growth Fund, six Mayoral Strategic Authorities will be able to increase locally-tailored investment readiness support.** This could include providing access to mentors, expert guidance – on presenting business plans to financiers, and recognising and registering IP and copyright, for instance – and connections to suitable investors, building on the work of the DCMS Create Growth Programme.
- **The government will improve signposting of financial support resources for SMEs,** like the British Library's Business and IP Centre, through the new Business Growth Service, a nationwide initiative designed to provide streamlined support, advice, and resources to businesses across the country.
- **Industry will create a 'single front door' for creative firms to access information on how to identify and unlock private investment.** Creative UK, the UK's independent network for the Creative Industries, will lead work with industry to provide a clear and accessible pathway through which creative businesses and organisations, regardless of size, stage, or location, can navigate their investment options with confidence.

Case study: Beam XR

Createch firm Beam XR received support and £266,000 in funding from DCMS's Create Growth Programme Investor Partnerships competition. Funding was matched with equity investment from Creative UK's North East Culture and Creative Investment Programme (CCIP) and angel investors. The company has been using this investment to improve their streaming software development kit, which is the first of its kind. Designed specifically for XR headsets, the technology will allow game developers and content creators to simultaneously stream on platforms including Twitch, TikTok and YouTube.



Students take part in technical theatre workshop at BOA Academy in Birmingham on 16th November 2023; photographer Victor Frankowski

1.3 Build a resilient, skilled workforce fit for the future

One of the sector's key strengths is its highly skilled, flexible and dynamic workforce.²⁴ Creative skills are vital for the growth of the Creative Industries as well as the wider economy. Creativity has been identified as the most significant predictor for an occupation's growth, and creative thinking is expected to be one of the most important skills for employment in 2035.²⁵

There is room for even faster growth if we tackle the increasing skills gaps and shortages in the Creative Industries.²⁶ Nearly half of all vacancies in the Creative Industries are hard-to-fill and businesses in this sector are more likely on average to report that these hard-to-fill vacancies are due to skill shortages.²⁷ Creative businesses who report skills shortages and gaps (7% have at least one skills shortage vacancy, and 11% experience skills gaps) are significantly more likely than the UK average to report that skills gaps and shortages delay the development of new products or services.²⁸ Left unaddressed, persistent skills gaps and shortages, particularly in specialist and advanced IT skills,²⁹ pose a threat to the sector's future competitiveness.

To maximise economic growth, we will build a skills landscape that meets business needs and ensures that our creative workforce is fit for the future. Partnering with industry, we will invest in developing skills throughout the talent pipeline, supplying the sector with the skills needed to keep pace with innovation. Improving access to opportunity in these sectors across the UK is key which is why we provided £3 million at the Autumn Budget to expand the Creative Careers Programme. The government also recognises the value of the sector's work to improve diversity, which is important for growth and providing opportunity for all,³⁰ including initiatives such as Project Diamond in the TV sector and Creative UK's Create Diversity Hub.

Creative exploration is a critical part of a rich education; this helps young people find opportunities, powers growth in the Creative Industries, and is important in its own right.³¹ We will unlock growth by reforming the skills system to address skills gaps and shortages in growth-driving sectors. The new sector body, Skills England, will lead work with DfE to deliver a growth and skills offer for England, and work in partnership with devolved governments to co-ordinate skills support. Finally, industry and government will together foster resilience, productivity and diversity within the creative workforce, recognising the importance of freelancers in sustaining the sector's dynamism.

The approach

- Develop a high quality, responsive, inclusive and targeted education, skills and training offer, meeting the workforce requirements of the Creative Industries.
- Increase the productivity, resilience and diversity of the creative workforce, including creative freelancers, to create the conditions for sustained economic growth.
- Develop a long-term government and business partnership to support all stages of the Creative Industries skills pipeline.

The interventions

Creative education

- **The independent Curriculum and Assessment Review will seek to deliver a curriculum that readies young people for life and work, including in creative subjects and skills.** We want every child, regardless of background, to have a rich and broad, inclusive and innovative curriculum, including in creative subjects such as art, design, music and drama. The Review will publish its final report in the autumn.
- **The government will launch a new National Centre for Arts and Music Education in England in September 2026,** improving access and opportunity for children and young people and strengthening collaboration between schools and industry. It will promote high quality arts education, provide continuous professional development to teachers and boost partnerships between schools and creative organisations.
- **DCMS, DfE and Skills England will work with industry to support increased access to quality specialist creative education provision across England** to strengthen the supply of highly trained creative students. The government will work with the Creative Industries Council to identify opportunities with a particular focus on high growth regions, working with Mayoral Strategic Authorities.
- **The government and industry will deliver a refreshed UK-wide £9 million creative careers service,** working closely with key partners such as the new Jobs and Careers Service, to equip the next generation of young people with the ambition and knowledge to work in the Creative Industries. This will raise awareness of creative careers, designed in collaboration with employers to support young people from all backgrounds.

- **The government will allocate £132.5 million to increase disadvantaged young people's access to enrichment opportunities**, including in arts and culture, aimed at improving wellbeing and employability.
- **The government will also consider the recommendations of the Digital, AI and Technology Task and Finish Group** on what changes can be made to prepare children and young people for the jobs of the future, including in the Creative Industries. The group will report to the Education Secretary before the end of the academic year.

Skills reforms

- **Working with industry, DfE and Skills England we will refine and develop the growth and skills offer to deliver apprenticeships and skills training that recognises the particular needs of the Creative Industries.** This will build on flexi-job apprenticeship agencies and the new flexibilities that will be available, such as shorter duration apprenticeships. We will ensure that we continue to consider the needs of smaller employers when developing our growth and skills offer.
- **We will go further by introducing short courses in England, funded through the Growth and Skills Levy**, in areas such as digital, artificial intelligence and engineering. These will support Industrial Strategy sectors such as in Creative Industries and Advanced Manufacturing from April 2026. We will work with Skills England to determine the courses which will be prioritised in the first wave of rollout and subsequent waves, and how those sit alongside apprenticeships and other training routes. We will work with Skills England to introduce these short courses and consider how to prioritise investment across the programme.
- **The government is developing a post-16 education and skills strategy**, which will include plans for reforming the higher education sector. The strategy will set out the framework for how the skills system will support growth-driving sectors, including the Creative Industries.
- **The government will continue to increase the quantity of creative training pathways** including further regional creative skills bootcamps and the introduction of creative Higher Technical Qualifications (HTQs) to support skills such as animation and audio-visual production in September 2025. The Lifelong Learning Entitlement (LLE) will transform the post-18 student finance system to create a single funding system. From September 2026, learners will be able to apply for LLE funding for the first time for courses and modules starting from January 2027 onwards.
- **The government will work with industry to build evidence, support sector training pathways and ensure the workforce is prepared for the future of work** through a new DCMS and Skills England led Creative Sector Skills Forum and the Digital Skills Council, an industry-led advisory body. The sector will work with Skills England to understand the skills needed to support emerging roles in AI and to ensure the skills system is flexible enough to respond to changes in job roles driven by technological change. Industry will also build comprehensive evidence on skills needs through the Creative Industries Council's sectoral skills audits, led by the Creative Industries Policy and Evidence Centre and Work Advance.

- **The government will ensure that elite talent in creative sectors have opportunities to come to the UK through our targeted routes for the brightest and best,** with a Global Talent Taskforce to turbocharge the UK approach to international talent attraction. This will include making the Global Talent Visa more accessible to a broader range of design talent. The new No.10-led Global Talent Taskforce will also work with the sector to identify, accelerate and facilitate the relocation of the best creative talent to the UK.

Resilient workforce

- **DCMS will appoint a creative freelance champion,** to advocate for the sector's creative freelancers within government and be a member of the Creative Industries Council. Terms of reference will be developed with industry and a freelance champion appointed in 2025. The government will continue to support the industry's work to deliver the Good Work Review action plan, which aims to strengthen job quality across the sector,³² support the self-employed and focus on developing high-quality jobs.
- **The government will support industry to develop skills passports and begin implementation in 2026.** This will support the documenting and transfer of industry-recognised skills and competencies, improve visibility for employers and providers, and improve progression and lifelong learning.
- **Through the Plan to Make Work Pay, the government will strengthen rights and protections to deliver good quality self-employment.** This will include measures to tackle late payments, the right to a written contract, extension of health and safety and blacklisting protections, and consultation on a simpler framework for employment status.
- **Industry will continue to tackle bullying, harassment and discrimination,** including through strong, cross-industry support for the Creative Industries Independent Standards Authority (CIISA), which will support priority sub-sectors film and TV, music and theatre during its initial stage before rolling out more widely, ensuring people can speak up without fear and supporting diversity within the sector.



Game making with Radical Forge at Longfield Academy, courtesy of Discover! Creative Careers

Case Study: Devolved governments skills interventions

The Scottish Government is working with Skills Development Scotland to implement their Creative Industries Skills Investment Plan which is addressing skills gaps.

Creative Wales will support growth-driving sectors through its Skills and Talent Action Plan and fund, placing skills and talent development at the heart of their ambition to boost economic growth. It will provide critical support for entry level and upskilling initiatives, and funding for increased access to the sector and mental health and wellbeing support.

The Northern Ireland Executive is partnering with Northern Ireland Screen, the education sector and industry to deliver initiatives which build accessible pathways to creative employment beginning at primary school level. This includes support for dedicated GSCE and A-Level qualifications in Moving Image Arts, and industry led careers programmes.



Students from Newham take part in an architecture workshop at RIBA during Discover Week 15th November 2023; photographer Victor Frankowski



Credit: Thomas Jackson, TyneSight Media. DBT's UK House, SXSW 2025.

1.4 Increase trade and exports

This Industrial Strategy has prioritised sectors which have experienced robust growth in worldwide demand, and where UK businesses have a comparative advantage in global trade. The UK is the third largest creative services exporter in the world,³³ with British films, TV and other creative content enjoyed by millions worldwide, projecting UK values and soft power.³⁴ We are a net exporter of creative goods and services, enjoying a comparative advantage in creative services, and the Creative Industries accounted for 15% of all UK services exports in 2021.³⁵ Global demand for Creative Industries imports have grown by 76% over the last 10 years, to £0.6 trillion,³⁶ driven by a rapid expansion of digital consumption and young populations in emerging markets. The sector also benefits from international investment and collaboration bringing greater global reach for UK content and funding UK productions, as well as opportunities to exchange skills and collaborate on research.

We want to cement and strengthen the Creative Industries' position. To do this we need to balance our trading relationships with our three major trading partners, with building new and deepening partnerships with fast growing creative economies. The UK-EU Summit on 19 May 2025 was a milestone, and marked progress with the European Union, our most significant trading partner,³⁷ on areas such as helping our touring artists, joint efforts to support travel and cultural exchange, and mutual recognition of qualifications through our new UK-EU Strategic Partnership. The government secured a landmark economic deal with the US on 8 May 2025. We will continue to maintain our mutually beneficial

relationship with the US, capitalising on our shared language, interests and values to ensure investment can flow and creative talent can find success on both sides of the Atlantic. We will work closely with the US to maintain the deep ties between the UK and US film and TV industries, and the mutual economic and cultural benefits this brings. We enjoy a strong trading relationship with China, but market access challenges exist in areas such as film, TV and video games.

We will diversify our creative exports and inward investment, to reduce dependency on traditional markets. We will pursue opportunities for mutual growth in dynamic creative markets such as Canada, India and Asia-Pacific (especially Australia, Japan and South Korea), as well as rapidly growing entertainment and media (E&M) economies in Central Asia, Brazil, Nigeria and the Gulf Cooperation Council (GCC) markets, especially Saudi Arabia.³⁸

The Creative Industries, to a limited extent, are reliant on complex global supply chains, which can be vulnerable to disruption, particularly those sub-sectors reliant on digital and textiles inputs. We will also consider how the government can work with business to build diversity and resilience into supply chains where needed, including through utilisation of the UK's network of international partnerships and efforts to enhance domestic capabilities.

To seize these opportunities, we will work with the Creative Industries Trade and Investment Board (CITIB) to leverage the benefits of free trade agreements and address challenges with proactive engagement.

The approach

- Grow Creative Industries exports and inward investment.
- Strengthen trading partnerships with the UK's major trading partners, the United States, the European Union and China.
- Build stronger trading relationships with rapidly growing creative economies.

The interventions

New industry partnership

- **We will launch a new partnership with industry by reforming and strengthening the CITIB**, with a new, globally recognised Chair to champion UK exports, catalyse inward investment, and act as a global ambassador.
- **Develop new trade and investment plans for priority and high-growth emerging markets**, working in partnership with the creative sector.³⁹ These will focus on high-growth sub-sectors and cover key policy levers, including export promotion, inward investment, trade policy and soft power.

Trade, investment and supply chains

- **The government will prioritise the removal of market access barriers**, including on intellectual property protection, the mutual recognition of qualifications and outbound temporary business travel. The UK-EU Summit in May recognised the value of cultural and artistic exchanges, including the activities of touring artists.⁴⁰ Together, we will continue our efforts to support travel and exchange. On intellectual property, we will continue our active and vocal role supporting robust IP protections, including through our global attaché network and interagency cooperation.
- **We will use trade agreements, economic dialogues and partnerships to grow trade and inward investment.** This includes agreements with the EU, United States, Japan, Australia, New Zealand, the Comprehensive and Progressive Agreement for Trans-Pacific Partnership and India, and new and existing economic agreements and partnerships with Japan, Saudi Arabia and Nigeria. The government will continue to robustly protect audio-visual services in all trade agreements.
- **We will deepen our understanding of supply chain vulnerabilities through our new Supply Chain Centre**, which will identify strategic inputs where additional action – such as building domestic capabilities or diversifying imports – is needed to build resilience.

Export and investment finance and promotion

- **UK Export Finance (UKEF) has £80 billion in financing capacity to support UK exporters, across the IS-8 including the Creative Industries.** UKEF will enhance its Export Finance Manager support to raise awareness of its offer to enable more creative businesses to access finance.
- **DBT will increase the number of creative trade missions and markets we target**, balancing traditional markets like the EU and the United States with other fast-growing markets such as those in the Asia-Pacific. We will increase funding to facilitate meetings and showcasing at major creative trade shows and events, including South by Southwest, Cannes Lions, Game Developers Conference and International Association of Amusement Parks and Attractions Expo.
- **The GREAT Trade and Investment campaign will amplify UK creative strengths** on the world's foremost global platforms, including through the 'Greater Together Los Angeles, in 2026 and Expo 2030, in Saudi Arabia.
- **New creative investment missions and events** will generate both new international capital and newly investable UK propositions, alongside increased government support for sub-sector accelerator programmes to broaden investor participation in the Creative Industries.
- **DCMS will invest in the British Fashion Council's NEWGEN programme**, backing emerging UK designers with funding for London Fashion Week showcases and business mentoring. This support is alongside the government's investment in the BFI Film Festival, the London Games Festival and the World Design Congress 2025. DBT will continue to champion international trade promotion for the fashion and design sector through initiatives like guest programmes and key international trades shows.

Case study: Halon

Los Angeles-based animation and visualisation company Halon, a pioneer in animation for game cinematics, real-time visualisation, and virtual production, is the latest global company to join Scotland's vibrant creative ecosystem. Attracted by the city's skilled workforce and world-renowned academic institutions, Halon has announced plans to invest £28 million in a new studio in Glasgow. Scotland has been at the vanguard of video game innovation for the last two decades, and is world-renowned for its talent, tech expertise, and production capabilities. "Our new Scotland studio strengthens our ability to collaborate seamlessly across time zones and deliver exceptional work to even more productions worldwide," said Chris Ferriter, President of Halon Entertainment. National economic development agency Scottish Enterprise is providing Halon with advisory services and £3.9 million of funding towards the overall project cost.⁴¹

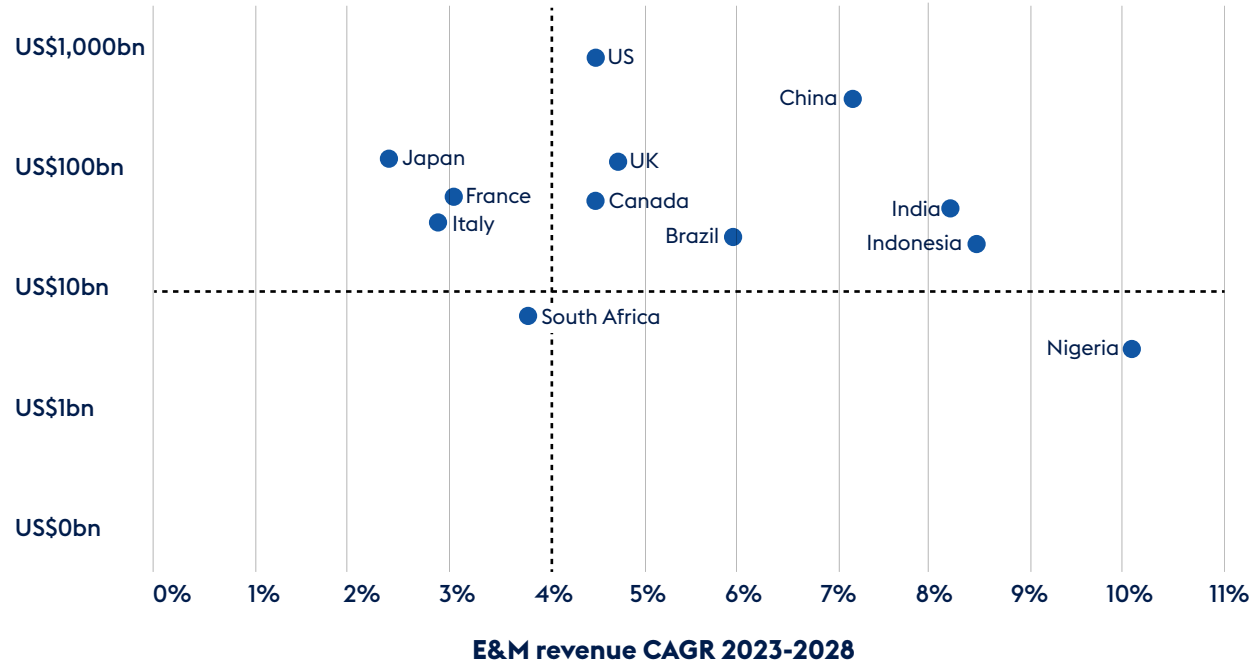


Credit: Thomas Jackson, TyneSight Media. Image - British Music Embassy, SXSW 2025

CREATIVE INDUSTRIES PRIORITY MARKETS

	PRIMARY	FUTURE GROWTH
Australia		
Brazil		
Central Asia		
China		
EU		
Gulf Cooperation Council		
India		
Japan		
Nigeria		
North America		
Association of Southeast Asian Nations		
South Korea		

Global E&M revenue (excluding connectivity), 2028



Source: PwC (2024) [Seizing growth opportunities in a dynamic ecosystem](#)

1.5 Drive sustainable growth through wider sector support

Beyond innovation, access to finance, skills and international trade, there are further measures that will help us to deliver our Industrial Strategy objectives. Creative businesses will benefit from the measures set out in the wider Industrial Strategy and in other Sector Plans such as the Digital and Technologies Sector Plan. In addition, we will look to address sector-specific regulatory barriers and promote the important role of the sector in helping to achieve our climate and net zero objectives.

The Creative Industries are inherently competitive, and regulatory requirements, while varying across sub-sectors, are generally relatively light touch.⁴² Regulation with cross-cutting impact includes public service broadcasting, planning, licensing, consumer protection, online safety, and online advertising. We will continue to maintain a stable, pro-growth regulatory framework in these areas.

The Creative Industries can play an important role in achieving climate goals by aligning with national, regional, and local net zero priorities and can benefit from green growth. Design and architecture play a vital role in developing more environmentally sustainable products and services and making the built natural environment less impactful on the environment, while the sector's storytelling skills can influence the decisions of consumers. There is a rich array of existing industry initiatives⁴³ and tools, such as the Theatre Green Book⁴⁴ and AdGreen's Carbon Calculator for advertising production.⁴⁵

The approach

- We will maintain stable, pro-growth regulatory frameworks, providing businesses with the space they need to innovate and grow and investors the confidence they need to invest.
- We will pursue specific improvements to regulation that back business, and unlock growth.

The interventions

Planning and licensing

- **Our planning reforms will enable more and faster development of economic infrastructure such as film studios, music arenas and large-scale performing arts venues.** The government amended the National Planning Policy Framework in December 2024 so that planning policies should have regard to the Industrial Strategy.
- **We want to improve the implementation of the ‘agent of change’⁴⁶ principle as part of wider planning reforms, and will consult on future policy changes.** We want to enable new developments such as housing to co-exist with cultural infrastructure such as music venues.
- **The government is working with industry and local authorities on delivering changes to the licensing system that support the growth of the creative and hospitality sectors, including live music.** The government has established a licensing taskforce, which will soon publish its recommendations for making improvements to the licensing system.

Business rates

- **The Government is transforming business rates over the course of this Parliament, co-designing a fairer system with stakeholders including those in the creative industries.** We are supporting cinemas, museums, galleries, and grassroots music and performing arts venues through permanently lower business rates multipliers for Retail, Hospitality and Leisure premises with rateable values under £500,000 from 2026/27. In the summer, the Government will publish an interim report that sets out a clear direction of travel for the business rates system, with further policy detail to follow at Autumn Budget 2025.
- **The government has introduced a 40% reduction on business rates for eligible film studios in England until 2034.**

Consumer protection

- **We will ensure more revenues flow to the Creative Industries, and not to organised touts who exploit fans with excessive prices.**⁴⁷ We will respond this summer to our consultation on improved protections for ticket resale and our call for evidence on pricing practices in the live events sector.
- **The Digital Markets, Competition and Consumers Act 2024 will create a fairer playing field for business and greater consumer confidence.** We will continue to engage with the Creative Industries and with the Competition and Markets Authority (CMA) to ensure new measures are proportionate and enable economic growth, including for creative businesses.

Net zero

- **The Creative Industries will continue to play a key role in the net zero transition.** The sector is tackling climate goals with sustainable practices and initiatives from music festivals⁴⁸ to museums,⁴⁹ touring artists⁵⁰ to theatre⁵¹, film production⁵² to fashion,⁵³ as well as in advertising⁵⁴ and game design.⁵⁵ The government will partner with the Creative Industries and other stakeholders to develop and deliver a net zero public participation strategy.
- **The government will continue to support green initiatives across the sector and work with industry to accelerate green growth.** This will include the relaunched Net Zero Council working with the Creative Industries Council and support for SMEs through the UK Business Climate Hub. We will make investments such as UKRI's £15 million Future Observatory: Design the Green Transition, which supports design-led research and innovation to tackle climate change, and Liverpool's recently announced MusicFutures R&D Cluster to support low-carbon innovation in the music industry.
- **DCMS, UKRI and industry will co-fund the World Design Congress in September 2025,** bringing together world leading creatives to demonstrate and drive forward the UK's global leadership in sustainable design. DBT will host an international sustainable design delegation and business exchange, to drive green export opportunities.
- **DBT will promote UK Advertising's Ad-Net Zero initiative across prominent international platforms,** championing UK Advertising's leadership and expertise in sustainable production, experiences and behaviour change.

1.6 Valuing and measuring an evolving sector

The UK has led the world in the development of definitions, statistics and evidence for the Creative Industries, establishing their economic and wider value. The sector has benefited from robust official statistics and a strong foundation of evidence that supports policy, business and investment strategies, and innovation decisions.⁵⁶ However, the sector still suffers from misperceptions and recognition challenges. Therefore we must continue to enhance our understanding and measurement of the sector. We will do this by tackling data collection barriers, making publicly funded data and research more accessible, and incentivising industry to share more data about their activities. We are also committed to collecting and analysing spatial data for the sector to help evaluate our programmes for impact, and better target the collective endeavours of government and industry.

The approach

- We will continue to provide high-quality and robust evidence and research, and will enhance and expand the range of statistics and data available for the Creative Industries, ensuring this is accessible to businesses and investors.
- We will take a joined-up approach to data and evidence, working with other departments such as DBT, DSIT, and ONS, as well as public bodies, devolved governments and Mayoral Strategic Authorities.

The interventions

- **DCMS and DBT will improve access to official statistics, evidence and data.** We will explore how to make official Creative Industries statistics easier to find in partnership with the Office for National Statistics (ONS), for example through an annual compendium publication. Additional estimates will be considered in collaboration with the ONS and other departments using data sources including: UK Innovation Survey; Management and Expectations survey; Quarterly Acquisitions and Disposals of Capital Assets Survey (QCAS); Longitudinal Small Business Survey; HMRC Research and Development tax relief statistics; and data on apprenticeships. We will continue to work in partnership with our Arm's Length Bodies (ALBs), Arts and Humanities Research Council (AHRC) and the sector to develop guidance on the measurement of the economic, social and cultural impact of the sector through DCMS's Cultural and Heritage Capital Framework.⁵⁷
- **DCMS will work with the ONS, DBT and other departments to contribute to the review of the Standard Industrial Classification (SIC) codes** with a view to improving how the sector is identified, particularly for video games and music.

- **DCMS will also continue to work with industry to develop new data and evidence.**
Through the UKRI R&D strategy, we will continue to invest in the Creative Industries Policy and Evidence Centre to keep delivering top quality data and analysis. With DBT support, we will also support the delivery of the Creative Business Panel (CBP), a new longitudinal study on business behaviours, performance and activities.⁵⁸

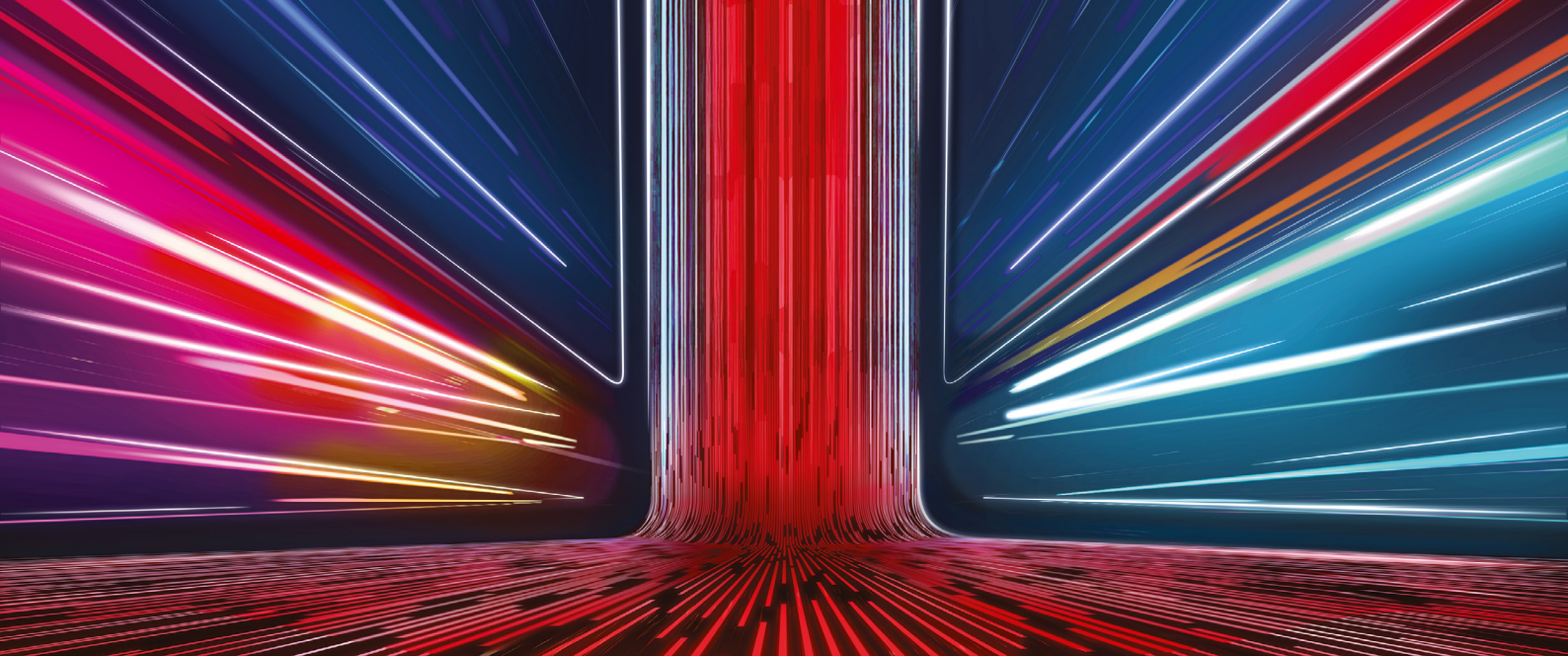
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2. Supporting our frontier industries

We have a rich ecosystem of creators, start-ups, scale-ups, and global creative giants. There are nine established creative sub-sectors, as defined in official statistics.¹ Within these we have identified four frontier industries with particularly high growth potential – film and TV; video games; music, performing and visual arts; and advertising and marketing. These sub-sectors contribute significant growth thanks to strengths in their size, employment, and connectedness with other parts of the Creative Industries and wider economy. The measures we are proposing will particularly target these high-growth sub-sectors, as well as unlocking the emerging, disruptive growth potential of createch.²

We also recognise that no creative business or organisation exists in a vacuum. Many films and television shows, for instance, have sprung from UK-published books or video games IP, and rely on music for their soundtracks and podcasts, radio and advertising for their promotion. Theatremakers and filmmakers work in close proximity and share creative and technical expertise across their disciplines. Museums house millions of artefacts, serving as a source of innovation for creative professions, with significant educational and R&D potential – as strikingly demonstrated by the new V&A East Storehouse. Fashion, design, architecture and craft both fuel and are fuelled by this dynamic creative exchange. Each

creative sub-sector is hugely valuable on its own and as part of this ecosystem, and it is often at the intersection of sub-sectors that creativity, innovation and growth is most apparent.³

To deliver our 2035 vision of enhancing the UK's status as a global creative superpower, we need to foster the right environment. We will ensure the UK continues to be a globally competitive destination for inward investment in these sub-sectors, while enabling a foundation to develop talent, stimulate new entrants, and grow established businesses across the ecosystem.

The approach

- Make the UK the best place in the world to create content, in film and TV; video games; music, performing and visual arts; and advertising and marketing.
- Enable audiences to access the best of UK and international content, from community and grassroots venues, to arena shows and international festivals.
- Create the right conditions across the country for a mixed ecosystem that supports inward investment from major international players, a vibrant independent and grassroots sector, and for UK companies to scale up and retain the benefits of their IP.
- Back the next generation of creative talent to break out and reach new audiences in the UK, Europe and across the world.



Credit: Adolescence. (L to R) Amari Jayden Bacchus as Adam Bascombe, Matthew Lewis on the set of Adolescence.
Cr. Courtesy of Ben Blackall/Netflix © 2024

2.1 Film and TV

We want to be the best place in the world to make film and TV, staying at the cutting edge of content creation. We want to build on our award winning talent both on and off screen, our world-class infrastructure, our competitive tax incentives, our renowned skill in fields such as animation and visual effects, and our unique public service media ecology. We want to capitalise on the strength of this industry as a source of economic growth, soft power, and attracting ‘set-jetting’ tourism.⁴ We start from a position of strength as the largest exporter of unscripted TV programming in the world and with UK films commanding over a fifth of global box office revenues in 2024.⁵

We want a healthy, mixed film and TV landscape. This includes public service broadcasters (PSBs) providing an engine room of creativity and a strong independent sector creating more UK IP, producing and distributing British content seen at home and around the world on screens of all sizes. This is a landscape where major inward investment continues to create jobs and nurture our creative and technical skills. We also want to harness the potential of the growing creator economy, built upon the shift towards video sharing platforms, which is developing new models for the production, distribution and consumption of content. YouTube reports that for content produced by its channels in the UK, nearly 90% of watch time is from outside the UK.⁶

We will ensure the resilience of domestic production, which is the bedrock of future growth, especially for nascent clusters outside of London and the South East, and of the sector’s cultural impact. Having experienced a tumultuous few years, our domestic sector continues to face rising production costs,⁷ barriers in accessing finance, and challenges around IP retention, all while navigating a highly competitive global content landscape.⁸ We have an internationally renowned workforce, but 65% of freelancers have reported difficulty finding work in the last year and persistent skills gaps and diversity challenges remain.⁹

We will remain a strong global partner and retain our position as a destination of choice for inward investment. This is a globally interconnected industry where productions are international partnerships developed across borders. A strong UK industry provides mutual benefits to both the UK and its international partners, and we will continue to support the sector to collaborate with global partners and investors. We recognise there is no room for complacency in maintaining our international position of strength, with many other countries offering generous tax incentives, infrastructure investment, and financial support for content creation.¹⁰

The interventions

Alongside our plan for the whole Creative Industries that will address many of these challenges, we will go further with the following measures specifically for film and TV:

- **A new £75 million Screen Growth Package over three years to develop independent UK screen content, support inward investment, and showcase the best of UK and international film.** This includes a scaled-up £18 million per year UK Global Screen Fund (2026–2029) to develop international business capabilities, enable co-productions and distribute independent UK screen content.¹¹ We will ensure our studio infrastructure is set up to attract and accommodate productions through funding for the British Film Commission. We will attract inward investment with tailored support to film and high-end television (HETV) productions in the UK. And we will boost exports and celebrate UK creativity through funding for the BFI London Film Festival¹² and with a strong UK presence at international festivals. In addition, mayors in our highest potential regions will be able to spend their Creative Places Growth Fund to develop regional film and TV hubs across England.
- **Stable, efficient and competitive tax measures for film and TV production** underpinned by effective administration by the BFI and HMRC. We will maintain an Audio-Visual Expenditure Credit and have introduced an enhanced rate for UK visual effects costs as well as an Independent Film Tax Credit. The government will continue to work with stakeholders to ensure the continued effectiveness of the reliefs.
- **Dedicated funding to support screen sector skills and strengthen the pipeline of talent for the future industry workforce.** The government will provide £10 million to expand the world-leading National Film and Television School, subject to a full business case. Our investment will unlock £11 million of private investment, including from the Walt Disney Company, the Dana and Albert R. Broccoli Foundation, and Sky.¹³ As part of the Screen Growth package, we will also scale up the BFI Film Academy (2026–2029) to support 16–25 year olds from underrepresented backgrounds to enter the film industry. Industry will deliver on the recommendations of the Screen Sector Skills Task Force, including through ScreenSkills's new five-year strategy, the BFI's Skills Clusters, the Good Work Programme for Screen, and the work of Into Film including to improve careers guidance.
- **Modernising co-production treaties with Canada, Australia and New Zealand as a priority, and identifying other valuable co-production treaties,** as well as ensuring tax reliefs are effective in stimulating international collaboration.

Public Service Media

Our PSBs are at the heart of our public service media ecology and drive growth and investment in the television sector. Our unique and globally-admired system of public service broadcasting – comprising the BBC, ITV, STV, Channel 4, Channel 5 and S4C – is a global success story. The PSB commissioning model, which means IP is retained by independent producers, has been a key driver of growth with producer revenues increasing 150% between 2004 and 2022.¹⁴ As the UK's production market becomes more global, PSBs can continue to support producers in negotiations with international buyers, for example, through co-productions.

The BBC continues to hold a uniquely important role as a cornerstone of the whole of the UK's creative economy. We know that a 1% increase in the BBC's local footprint results in an estimated 4.5% increase in the rate of creative cluster growth,¹⁵ and 50% of the BBC's overall economic contribution is generated outside London.¹⁶ The Charter Review will consider options for ensuring the BBC's sustainability for the long term to support its vital work and its role investing in the growth of the Creative Industries.

Public service content also delivers significant social and democratic benefits, whether it is ITV highlighting the experiences of subpostmasters in Mr Bates vs The Post Office, or Channel 4 changing perceptions of disability through their groundbreaking coverage of the Paralympics.¹⁷ While they are not subject to the same regulatory requirements as PSBs, commercial broadcasters and streamers also deliver high-quality original UK content, for example Sky News' award-winning news coverage or Netflix's recent dramas *Adolescence* and *Toxic Town*. Impartial and accurate news, and content that brings the nation together, are increasingly important antidotes to mis- and disinformation and the highly personalised information flows people experience on social media.¹⁸

The television market is transforming, leading to consolidation. The way we watch and listen is changing, with different forms of video and audio consumption converging,¹⁹ while global technology companies are now the gatekeepers to audiences. These trends have led broadcasters in many countries to cut costs and pursue consolidation to increase economies of scale.²⁰

We must take active steps to ensure our domestic broadcasters can adapt to this changing market, and continue their support for independent producers of all sizes so that IP remains in the UK. The financial sustainability of our PSBs is under pressure as they compete for content and advertising revenues with global media and technology companies. While the sector was successful in attracting investment post the Covid-19 pandemic they have reported higher production costs,²¹ making it harder for PSBs to make the distinctively British dramas they are known for around the globe.

We will support PSBs' digital growth and transformation plans. PSBs are becoming multi-platform, developing joint ventures such as the new streaming service Freely,²² and diversifying their revenues.²³ We will support the PSBs to provide public service content to all audiences including through co-productions, encourage PSBs to create deep strategic partnerships, and ensure they remain at the centre of a strong and resilient domestic TV sector.

The interventions

Alongside our plan for the whole Creative Industries that will address many of these challenges, we will go further with the following measures specifically for our PSBs and to preserve our mixed ecology:

- **We will build on the Media Act and Ofcom's Public Service Media review by taking action to support public service media and the wider television ecosystem.** We will update the policy and regulatory framework to respond to the changing market and promote a more level playing field, while maintaining universal access to distinctive and trusted public service content. This work will complement the BBC Charter Review.
- **We will launch the BBC Charter Review.** It will ensure the BBC is empowered to continue to deliver a vital public service funded in a sustainable way, delivering a BBC that can maintain the trust and support of the public in difficult times, support the wider ecosystem, and that is set up to drive growth in every part of the United Kingdom.
- **We will explore how BBC Commercial's activity could support the BBC to do even more** to invest and grow, develop and promote UK IP internationally, and unlock wider benefits to the UK screen and TV production sector.
- **We will shortly ask the CMA, supported by Ofcom, to set out how changes in the sector – such as the convergence of broadcast, on-demand and video sharing – could be taken into account as part of any future assessment of television and advertising markets.** This would include when considering any potential closer, strategic partnerships or possible consolidation between broadcasters which may benefit their financial sustainability and audiences. In the context of a fragmented and highly competitive TV landscape, we want to ensure that domestic companies are able to compete effectively, ensuring that they are not held back from funding and producing the distinctively British content that brings benefits to audiences.



Paddington in Peru © STUDIOCANAL 2024



2.2 Video games

We want to cement our position as the best place in the world to make games. The UK's games ecosystem features globally-leading publishers and developers, alongside new growth drivers such as mobile and user-generated content producers, supported by an ecosystem of nimble independent studios. We are one of the world's largest exporters of video games,²⁴ and hit titles such as Grand Theft Auto and PowerWash Simulator are made across the country, with nearly 80% of developers based outside London.²⁵

We want to enable the next generation of UK games companies and talent that will be the foundation of future games growth and productivity, sitting within a thriving IT, software and computing Creative Industries sub-sector. With the right financing, a strengthened talent pipeline, and leveraging existing and emerging clusters, we can build on our success and grasp domestic and international growth opportunities. We will support the 95% of UK studios who export to reach a global market estimated to hit \$213 billion by 2027.²⁶

Video games jobs are highly productive – nearly double the average national output.²⁷ There are also spillover benefits. Technology developed by games businesses contributes an estimated £1.3 billion output to the UK economy, from autonomous vehicles to virtual reality surgical training tools, and games inspire hit films, TV shows, esports franchises and new methods of production.²⁸

The UK must retain a balance of incentives and highly specialised talent to remain attractive to international developers. Higher and further education must generate the technical skillsets needed to sustain the games industry and other sub-sectors, such as film and architecture, which increasingly rely on games technology to underpin their creative outputs. Many studios report a significant skills shortage for technical roles and mid to senior level games developers.²⁹

UK studios also need the right finance to capitalise on growing consumer demand as the sector recovers from a global market correction. The UK games sector needs a competitive financial and policy framework.³⁰ We will enable inward investors to continue building hit games in the UK, as well as supporting independent studios to cut through to fresh audiences while retaining rights to their IP.

The interventions

Alongside our plan for the whole Creative Industries that will address many of these challenges, we will go further with the following measures specifically for video games:

- **A new £30 million Games Growth Package over three years to back the next generation of start-up games studios and talent, and drive inward investment in the sector.** We will enhance the UK Games Fund (UKGF) by providing support for new UK titles and skills over 2026-29 attracting match-funding for every supported project. We will provide funding for the London Games Festival to help strengthen investor partnerships, including with regional games clusters, doubling the value (to £30 million per year) of private investment deals at the festival.
- **Stable, efficient and competitive tax measures for video games production underpinned by effective administration by the BFI and HMRC.** We will maintain a Video Game Expenditure Credit for video game developers. The government will continue to work with stakeholders to ensure the continued effectiveness of the reliefs.
- **DSIT's UK-wide TechFirst programme will train the next generation of tech pioneers,** with benefits across the sector including for the video games sector.
- **A new industry-led UK Video Games Council of industry representatives** will work with the government and the Creative Industries Council to support growth of the video games sector.
- **A new industry-led video games skills strategy in 2025,** developed and published by a sector-convened UK Games Skills Network, which will build on findings from the upcoming Creative Industries Council Skills Audit, giving video games skills organisations and delivery partners a clear remit for tackling persistent skills gaps.



Jamie Cullum performing at the launch of the CoSTAR Live Lab at Production Park in Wakefield. Image credit: University of York, Alex Holland

2.3 Music, performing and visual arts

We want to be the best place in the world to make, perform and enjoy music, as part of the wider performing arts sector. The UK is the second largest exporter of music after only the US,³¹ with emerging and established stars like Myles Smith and Charli xcx the latest in a long line of globally impactful British talent. With events like Glastonbury Festival, and headline international tours from Coldplay to Ed Sheeran, we are a global leader in live as well as recorded music. With global music revenues projected to double by 2031,³² by backing the next generation of British talent, we can unlock new growth at home and abroad.

Digital platforms are creating new ways for music artists to reach audiences, reducing barriers to entry and increasing competition. The rise of video on demand platforms has increased the global value of music and other copyright,³³ and music streaming enables UK artists to generate revenues across the world. However, the immense volume of content³⁴ can make it more challenging for new artists to break through on a national and international stage. The rise of generative AI poses fresh challenges around copyright, authorship, and fair compensation. And as recorded music revenues grow in every region, with the fastest growth from the Middle East and North Africa, the UK has to work even harder to thrive in a changing global market.³⁵

Cost increases and new barriers have hit UK and international music touring activity. The UK touring circuit has shrunk, with artists playing 11 shows on average in 2024 compared to 22 in 1994.³⁶ Grassroots venues are struggling to break even – 125 closed in 2023 alone, representing 16% of UK grassroots venues.³⁷ EU exit and post-Covid inflationary pressures have created new barriers for international touring,³⁸ undermining opportunities for

early-stage artists to perform, build audiences, and hone their craft. To respond to these challenges, government and industry must work together to support talent pathways and emerging musicians, as the foundation for the long-term success of the sector.

The UK is home to a world-leading performing arts sector, with the potential to drive growth across the Creative Industries ecosystem. The Society of London Theatre estimates that, nationally, theatre contributes nearly £1 billion annually in GVA and sustains over 135,000 jobs.³⁹ Music, performing and visual arts filled jobs grew by 35% between 2011 and 2023,⁴⁰ and performing arts specialists work in increasing collaboration with the music and screen sectors. The UK has huge strengths in its educational infrastructure for music and drama, including world-leading institutions such as the Royal Central School of Speech and Drama, the Royal Academy of Music, the Royal College of Music, and the Royal Northern College of Music. These institutions support not only the UK's classical music and theatre sectors but the whole creative ecosystem. The government is investing in the quality culture infrastructure essential for the sector's success, with venues in towns and cities across the UK driving footfall, visitor spend and economic spillovers.⁴¹

We want to embed our position as the best place in the world to trade art. The UK has the second largest art market in the world, with 18% of global sales in 2024.⁴² Art is also one of the UK's top 30 exports, totalling almost £4 billion in 2024.⁴³ The UK art market has faced challenges post EU exit⁴⁴ and new requirements for traders importing cultural goods into EU territories may further impact the ability of art market businesses and museums to import cultural property into the EU. We will maintain the competitiveness and resilience of this sector by tackling growth barriers and encouraging global partnerships.



Les Girafes in Bradford by Sherman Rabbit 5 Photo © Patrycja Maziarz 2025

The interventions

Alongside our plan for the whole Creative Industries that will address many of these challenges, we will go further with the following measures specifically for music, performing and visual arts.

- **Up to £30 million for a new Music Growth package over the next three years to help more UK emerging artists break through on a domestic and international stage.** With Arts Council England and the sector, we will support emerging artists with touring, performance, mentoring and export opportunities, and music businesses to strengthen grassroots infrastructure and invest in a portfolio of high potential artists.
- **A new industry-led ticket levy on arena and stadium gigs will deliver up to £20 million annually through the LIVE Trust to bolster the UK's grassroots music sector,** supporting artists, venues, festivals and promoters. Widespread adoption of the levy will help reverse the decline in grassroots venues and enable more artists to tour nationally.
- **We are working towards an industry-led agreement on music streaming, which will boost earnings for creators** including by helping legacy artists to renegotiate their contracts, providing new packages of support from record labels, increasing session musician remuneration, supporting songwriters and composers, and empowering UK labels to support long-term artist development.
- **As committed to at the UK-EU Summit in May, we are supporting travel and cultural exchange, including the activities of touring artists.** In doing so, we will make it easier for UK artists to perform in Europe, and deliver mutual economic and cultural benefits for the UK and the EU.
- **We are supporting our arts ecosystem through a range of government funding, including grants and the cultural tax reliefs** for theatres, orchestras, museums and galleries, to boost investment in these sectors.
- **We will fund transformative capital investments in arts and culture infrastructure.** Over the Spending Review period DCMS will commit significant funding to safeguard and modernise much-loved arts and cultural institutions across England. This will build on the new £85 million Creative Foundations Fund, supporting organisations to make buildings and infrastructure fit for future generations.
- **Arts Council England will continue to support artists, creatives and organisations across England.** The Arts Council has invested over £440 million annually through its latest National Portfolio round, supporting the creation and promotion of new work and talent,⁴⁵ accounting for £1.35 billion GVA and supporting 28,000 jobs across England.⁴⁶ The government's ongoing independent review of the Arts Council will seek to ensure that this vibrant arts and culture ecosystem serves every corner of the country.⁴⁷
- **We will identify and support art market events that boost global partnerships,** such as Frieze which attracted over 90,000 international visitors and 270 galleries from 43 countries to its London fairs in 2024.⁴⁸



Arabian Nights photo © Ellie Kurttz

2.4 Advertising and marketing

We want to be the best place in the world to produce advertising. The UK advertising sector is thriving and resilient, unmatched in its creative excellence, and the most digitally mature in Western Europe.⁴⁹ It also adds £109 billion in indirect GVA across the UK economy more broadly.⁵⁰

The advertising sector is an early adopter of AI and innovative technologies and its potential for future growth is fuelled by the shift to digital and online. In 2024 Adtech businesses attracted investment funding of £1.7 billion,⁵¹ firmly positioning the industry as a central force in the digital transformation of the UK economy.

The UK is the second largest exporter of advertising and marketing services after the United States, according to the Advertising Association, with exports reaching £18 billion in 2023, four times higher than a decade ago.⁵² However, currently only a third of UK advertising firms export, meaning there is untapped potential for growth in the sector.⁵³ We want to see more advertising businesses explore their export potential, as well as increased production of advertising across the UK, building on the strong regional creative hubs across the country, including in Greater Manchester, Leeds, Glasgow and Bristol.

Digital marketing will be a driving force for continued growth in the advertising sector and the sectors whose services and products it helps to promote, but the complex nature of the online ecosystem creates concerns around transparency and trust. If the advertising sector wants to ensure continued growth and sustainability it is vital to maintain consumer trust in advertising. The adoption of AI will be key for future growth, but advertisers will need to ensure that it is used in a responsible way to maintain strong public trust in the sector.

The interventions

Alongside our plan for the whole Creative Industries sector that will address many of these challenges, we will go further with the following measures specifically for advertising and marketing:

- **Support adtech businesses with accelerator programs, to upskill founders towards international expansion and connect them with key investors.** In doing so, the UK will build on its position as the second largest exporter of advertising and marketing services⁵⁴ by building trade relationships with new markets and opening up more of our advertising companies to export opportunities.
- **We will continue to work with the advertising industry to ensure consumer trust in advertising continues to grow.** The Online Advertising Taskforce brings government and industry together to help promote and extend industry best practice, supporting sustainable growth. We want UK best practice in this field to provide a template for other countries.

- **Create further opportunities for growth for advertising agencies** by ensuring that smaller advertising agencies are able to navigate the Crown Commercial Service and Local Authority procurement process for public sector advertising services contracts. The Procurement Act (2023) and 2025 National Procurement Policy Statement ensure a simpler, more transparent regime for services such as advertising. As will be set out in the upcoming procurement consultation, proposals to go further will reduce barriers for SMEs to win contracts, and ensure procurement strategically supports Industrial Strategy priorities.
- **The government will launch an expanded GREAT campaign** to raise the profile of UK advertising and AdTech to ensure the UK retains a consistent top three position amongst Cannes Lions awards winning countries.



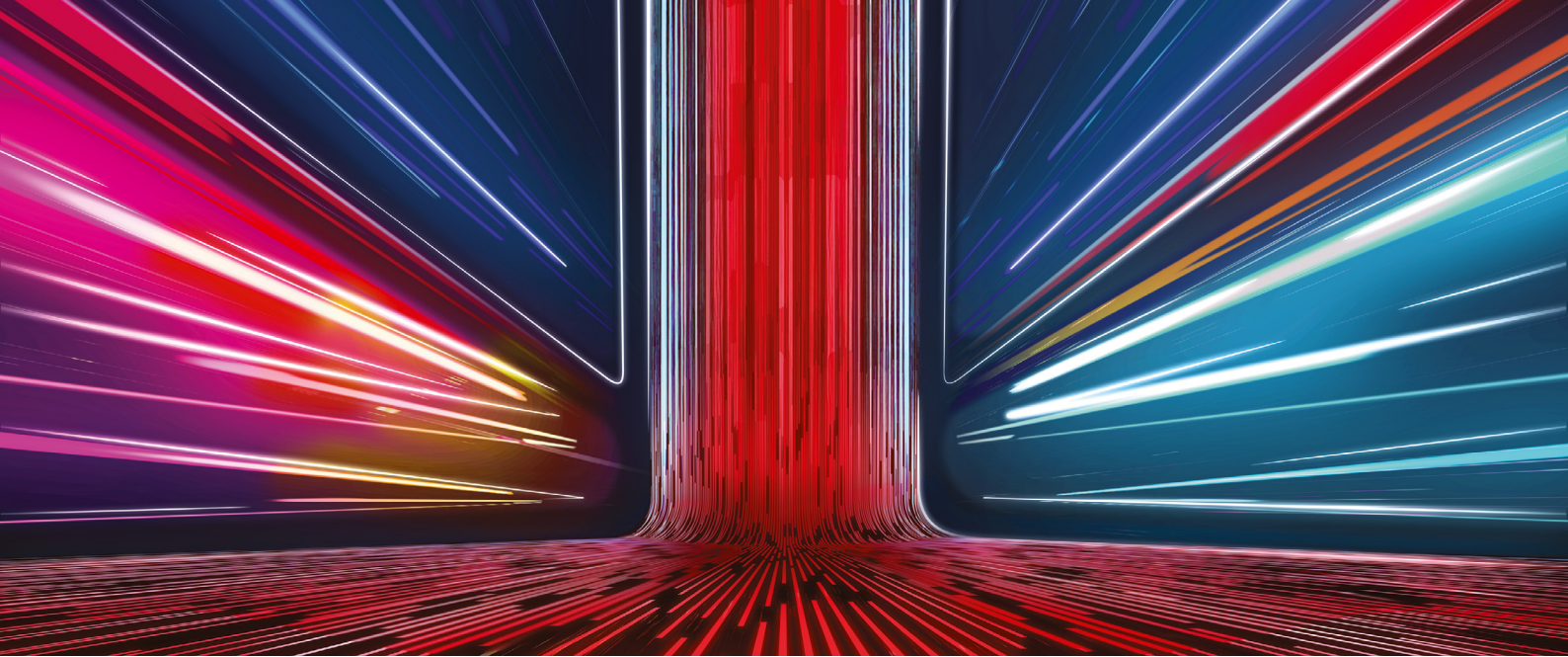
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3. Supporting the UK's city regions and clusters

Unleashing the full potential of our city regions and clusters across the UK is a core objective of our modern Industrial Strategy. In 2022, 67% of Creative Industries GVA was located in London and the South East, with only a small decrease in this share since 2010,¹ but creative clusters have been identified in all the regions of England and in all the devolved nations across the UK with growth potential.² Businesses outside London, the South East and East of England often face greater barriers accessing finance while there are indicators some clusters in England face higher barriers to exporting.³ While creative talent is everywhere, work in the sector remains mainly concentrated in London and the South East.⁴

The government will concentrate its efforts in places with the greatest potential for growth, namely, in our city regions and high-potential clusters. This plan has identified places with the greatest potential for Creative Industries growth which are illustrated in the map below. These locations were identified based on their current strengths across multiple growth-driving sub-sectors, the presence of significant concentrations of creative businesses and future investment opportunities. From world-class video games expertise in Dundee, cutting-edge createch in West Midlands, West Yorkshire and Bristol and Bath, and

game-changing plans for film production in Sunderland, this plan will support local leaders to unlock more growth, create more good local jobs and continue producing world-class creative content.

London is a global Creative Industries supercluster. The capital is one of the leading exporters of Creative Industries,⁵ is a global hub attracting creative talent and investment, and has thriving ecosystems in sub-sectors including screen, music, fashion, design, architecture and performing arts. We want to support its continued success, as well as learning from and replicating it across the UK.

Case Study: The BBC plays a key role in driving growth through regional clusters

The move of many BBC functions to MediaCityUK, Salford, contributed to the development of a creative and digital cluster. The area saw a growth of 142% since 2010 and the number of digital and creative businesses grew by 70%.⁶ The BBC's decision to make the rebooted Doctor Who in Cardiff in 2005 generated more than £134 million GVA in Wales between 2004 and 2021 and created a pipeline of jobs for Welsh crew.⁷ The BBC Studio's Natural History Unit in Bristol has led to the region being known as 'Green Hollywood' and not only boosts the region's economy but also adds vital social value.⁸ Planned BBC investment in the West Midlands, including the development of the Tea Factory site and moving programmes such as MasterChef and Silent Witness is estimated to add an additional £282 million to the local economy.⁹ The BBC is actively working with partners in the Midlands, including the West Midlands Combined Authority and Create Central to grow its investment over the coming years and increase its economic impact further.



Cultural Connectors Mural at What's Next Southampton courtesy of University of Southampton c. @devplacephotos

3.1 Unleashing the potential of our city regions and clusters



1 Dundee

Video Games, Design

- CoSTAR Realtime Lab opened its first dedicated virtual production studio at Chroma Developments' Water's Edge, which will provide world-class resources and expert support to creative and technology companies.
- Abertay University hosts the National Centre for Excellence in Computer Games Education.
- The UK's only UNESCO City of Design.

2 Edinburgh City Region

Film&TV, Performing Arts, Publishing

- The Edinburgh Festivals incubate creative talent, with Fleabag and Six debuting at the Fringe.
- The Edinburgh Futures Institute drives innovation in the Creative Industries.
- As part of the £9m CoSSTAR Realtime Lab, the University of Edinburgh has set up a state-of-the-art studio at First Stage Studios, with further expansion planned for 2026.

3 Glasgow City Region

Marketing, Design, Createch, Film&TV

- HQs for BBC Scotland, STV, and a Channel 4 Creative Hub.
- US animation and visualisation firm, Halon Entertainment, is investing £28m in a Glasgow studio.
- The School of Innovation and Technology at The Glasgow School of Art is exploring the application of social and technological innovation across discipline boundaries.

4 North East

Film&TV, Publishing, Music, Video Games

- Sunderland's £450m Crown Works Studios will be among Europe's largest.
- Home to the Centre for Writing to nurture new talent and boost NE as a publishing hub.
- A growing NE music scene with Generator, Sunderland Music City, and Newcastle's new Quayside studios with Warner Music.
- A growing game development cluster in Tees Valley with a £160m creative/digital investment zone.

5 Belfast City Region-Derry/ Londonderry

Film&TV, Video Games

- A thriving screen industry with Belfast Harbour Studios, Studio Ulster, and Titanic Studios.
- Studio Ulster is at the cutting edge of virtual production globally and houses the CoStar Screen Lab - a partnership with Ulster University.
- Northern Ireland's successful video games ecosystem includes companies like Hypixel, BlackStaff Games, Whitepot Studios, and Italic Pig.

6 West Yorkshire

Music, Film&TV, Video Games, Createch, Fashion/Textiles

- Production Park in Wakefield, host of a CoSTAR Live lab, deploys pioneering technology to develop arena tours, film and TV.
- Channel 4's Leeds HQ equips regional talent with industry-leading training and opportunities.
- Home to Game Republic Ltd, which operates two leading games networks across the North of England.

7 Greater Manchester

Film&TV, Music, Advertising and Market Research.

- Largest number of creative businesses outside London.
- World-class creative developments such as MediaCityUK, BBC North, SODA, and Factory International.
- Ambitious plans for Greater Manchester's Music Export Office - a UK first which will catapult home-grown talent onto international stages.

8 Liverpool City Region

Music, Video Games, Film&TV

- Home to over 50 active gaming companies including Sony PlayStation.
- The most filmed location outside of London with the trailblazing LCR Production Fund and planned Littlewoods world-class Film/TV studios and production space.
- The UKRI £6.8m MusicFutures Creative Cluster will spearhead the proposed Music Lab facility, reimagining how we create and consume music.

9 West Midlands

Film&TV, Video Games, Createch, Music & Performing Arts, Design

- 15,130 creative enterprises generating nearly £4 billion in GVA in 2022.^{1,2}
- With a focus on Createch, the region offers significant R&D opportunities in convergent technology.
- On the HS2 line, Digbeth hosts Digbeth Loc Studios and the BBC, supporting a growing creator economy.
- Craft and Design expertise, including Birmingham's World Craft City status.

10 Greater London

Film&TV, Video Games, Music, Marketing, Fashion, Architecture, Performing Arts, Design

- Leading global exporter of creative industries worth £63bn in GVA in 2022, with investments including East Bank, the Thames Estuary Production Corridor, and Smithfield.³
- The third biggest city for filmmaking in the world with two new film studios in development (Hounslow Creative Enterprise Zone and Camden Film Quarter).

11 Cardiff City Region

Film&TV, Video Games, Music

- Home to top-quality screen studios such as Wolf Studios Wales, an array of filming locations, highly skilled crew, and post-production facilities.
- A thriving games industry with companies like Rocket Science supported by graduates from three universities.
- A flourishing music scene with grassroots venues such as Clwb Ifor Bach.

12 West of England

Film&TV, Music, Createch

- The UK's third-largest production hub, a global centre for natural history filmmaking, and film tourism hotspot.
- Houses the BBC, Channel 4, The Bottle Yard Studios, and Oscar-winning Aardman Animations.
- The new arena at the Brabazon site presents a major opportunity to elevate the region's music sector.

Map References

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3.2 Realising the economic potential of Creative Industries city regions and clusters

Interventions set out in this plan and across our modern Industrial Strategy will support our city regions and clusters, in particular:

- **Innovation:** A £100 million UKRI investment over the Spending Review will support the ambitious next wave of R&D creative clusters in new sub-sectors and locations throughout the UK, aligned with the new Local Innovation Partnerships Fund, which will give up to £500 million to regions across the UK and make local leaders part of decision making. The £25 million Creative Futures programme will also expand the CoSTAR network across the UK, adding five new R&D labs and two showcase spaces to strengthen commercialisation and tech adoption.
- **Securing growth finance:** Increased British Business Bank support for the Creative Industries will unlock more finance for creative businesses in our city regions and clusters. The British Business Bank will also launch a Cluster Champion programme, with 'Champions' with deep expertise and local knowledge to support investment in ten city regions.¹⁰ This will be backed with an expansion to its Nations and Regions Investment Fund and we will work with local leaders to ensure creative businesses benefit from these programmes.
- **People and skills:** Measures in the Sector Plan including the launch of the new National Centre for Arts and Music Education, the development of the growth and skills offer, and further regional creative skills bootcamps will ensure that talent and opportunity is supported across the country, increasing the productivity and resilience of the creative workforce.
- **Business rates:** The government is transforming business rates over the course of this Parliament, co-designing a fairer system with stakeholders including those in the creative sectors.

Alongside this we will create a new Creative Places Growth Fund, which will devolve a total £150 million over three years to six high-potential Mayoral Strategic Authorities (MSAs).¹¹ This funding will empower Mayors to design interventions that work for the creative businesses and freelancers in their region. This will allow areas to maximise the impact of national policy, for example by supporting local creative businesses and practitioners to up-skill, enabling them to be more innovative, to develop their knowledge and understanding of the often complex investor landscape, giving them the skills they need to unlock investment, or by providing production support services.

In London, the Mayor has invested significantly in new world-class creative districts, committing £95 million to the new Smithfield site of the Museum of London,¹² over £650 million in East Bank¹³ and supporting artists and creatives to thrive through Creative Enterprise Zones.¹⁴ Alongside this the Mayor has committed £10.7 million to growing the Creative Industries over the next four years and providing backing for a new International

Centre for the Creative Industries.¹⁵ The Government will support this, providing funding to the BFI London Film Festival and London Games Festival as part of the screen and games sector growth packages, as well as funding for London Fashion Week.

Tees Valley's £160 million government-funded Investment Zone is unique in the country for its focus on innovation and growth in the Digital and Creative sectors.¹⁶ Through a partnership between Tees Valley Combined Authority and Teesside University¹⁷ investment is available to support innovation infrastructure, accelerate business growth, attract, grow and retain a skilled workforce, catalyse innovation and IP, and welcome inward investment.

Creative Corridors

We want to recognise and support not just individual city regions and clusters but partnership and collaboration across the UK, to deliver growth together by sharing ideas, suppliers, and skilled workers. This includes supporting the growth corridor across our Northern city regions through the partnership of northern Mayors and creative leaders in One Creative North, which brings together all northern Mayors, from South Yorkshire to the North East, Hull and East Yorkshire to Liverpool City Region. There are also important partnerships between MSAs, such as the North East and Tees Valley Combined Authority, whose partnership to drive growth in the screen industry, through the North East Screen Industries Partnership, has led to an 89% increase in production in recent years.¹⁸

Our new Creative Places Growth Fund will also support the development of a West of England-South Wales Creative Corridor. This will be supported by the government's commitment to improve rail connectivity between Welsh regions and clusters across the border with a £415 million package to fund enhancements to the network. We will also work closely with the Welsh and Scottish governments, as well as Mayors, on development of other emerging corridors such as North Wales-North West and Scotland Central Belt.

Cross regional partnerships in the arts sector are also driving forward creative and economic opportunities across the UK. The Thames Estuary Production Corridor has the potential to double its creative production economy, creating 50,000 jobs and generating £3.7 billion for the UK economy. The partnership includes Creative Estuary, a consortium of public sector and cultural organisations across the Estuary, aiming to support more than 400 jobs in the creative and cultural industries.¹⁹

3.3 How we are working with devolved governments and regional leaders

MSAs in England will deliver ambitious 10-year Local Growth Plans (LGPs). These statutory, locally-owned, long-term plans will set how each MSA will use their powers and funding to drive growth in their region. Each plan will set out an economic overview of the region's sectoral strengths, a small number of joint priorities for growth between national government and the MSA, alongside their wider regional priorities and an investment

pipeline setting out the area's most important opportunities for public and private partnership. As part of this, our highest potential MSA LGPs will highlight where Creative Industries can drive growth in a region, supported by initiatives set out in this Sector Plan.

This Sector Plan has been shaped by engagement with MSAs and with businesses in the regions. We will continue to work closely with Mayors to ensure strong alignment with relevant LGPs ahead of their publication later in the year. We will also establish a new Creative Places Group, building on the successful Creative Industries Council Place Forum, with representatives including from DCMS, devolved governments, highest-potential MSAs, and others to create a network of policy makers committed to unlocking the potential across our nations and regions.

We will also continue to engage with MSAs and Local Authorities outside of high-potential clusters, ensuring that creative businesses across the UK can access national support programmes.

We are designing and delivering the Industrial Strategy in partnership with devolved governments to drive growth in Scotland, Wales and Northern Ireland. This means working together on shared growth objectives in order to realise the Creative Industries opportunities in every nation, because the Creative Industries are a UK wide success story.

The Culture and Creative Industries Inter-Ministerial Group is the primary forum for ministers from all four nations to develop policy that works for the whole UK. Sitting under this, our new Creative Places Group will be used by all governments of the UK, alongside regional Mayors, to work together to grow clusters and develop cross border super-corridors.



HAVOC. Forest Whitaker as Lawrence Beaumont in HAVOC. Cr. Courtesy of Netflix © 2025

The Welsh Government provides investment and support for creative businesses and international projects looking to locate in Wales. Creative Wales has financial support schemes for all its growth-driving sectors including a production funding scheme for the Film, TV and Games sector,²⁰ annual development fund for gaming, scale up fund in partnership with UK Games Fund²¹ and annual funding schemes for the further development of the commercial music industry in Wales.²² The Welsh Government also runs a Creative Skills Action Plan and fund, which provides critical support for entry level and upskilling initiatives, as well as funding for increased access to the sector and mental health and wellbeing support.²³

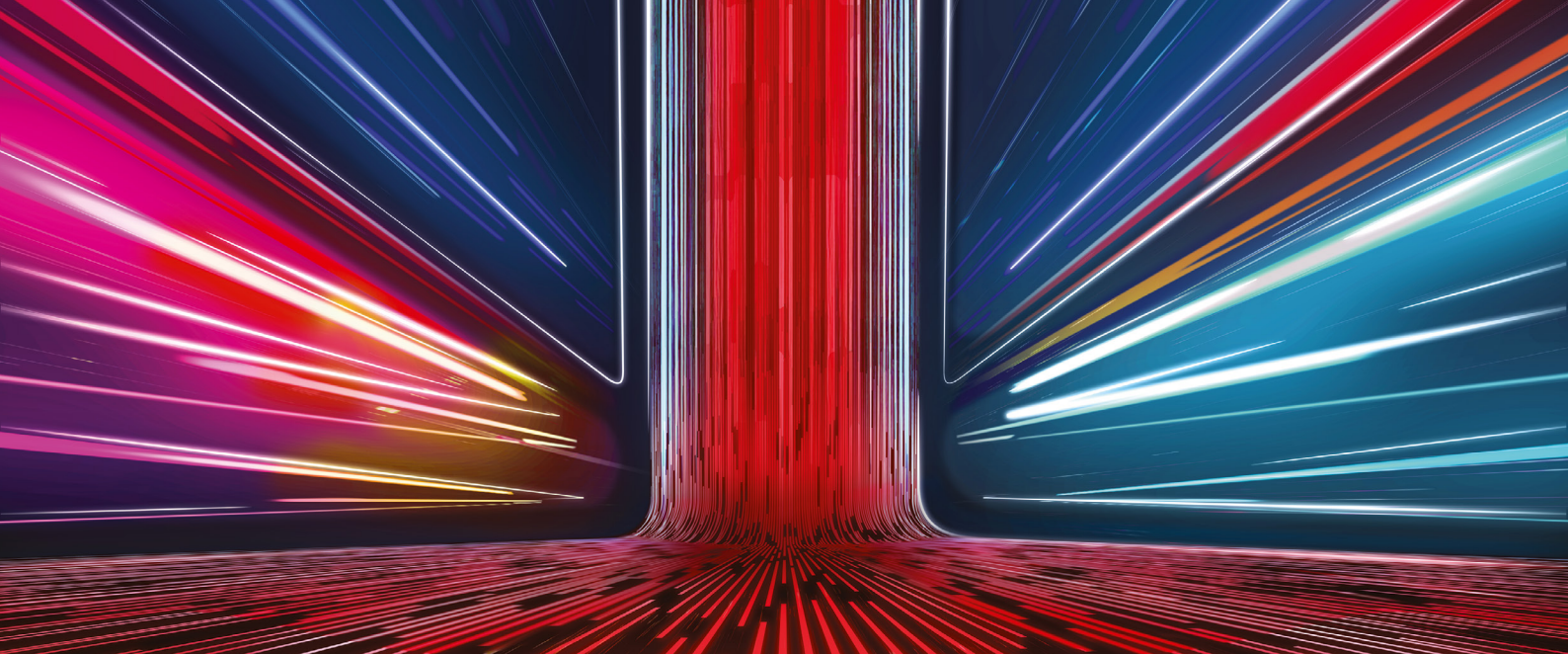
The Northern Ireland Executive's support for the Creative Industries includes funding for locally based and incoming productions to help accelerate the development of the screen production sector in respect of large-scale production, television drama, independent film, factual/entertainment television, animation and games/interactive. Support is also provided to creative businesses and individuals for training, skills and career development, and R&D. Partnerships with Northern Ireland Screen,²⁴ the education sector and industry deliver initiatives which build accessible pathways to creative employment beginning at primary school level. This includes support for dedicated GSCE and A-Level qualifications in Moving Image Arts, and industry-led careers programmes.

DCMS will continue to work with the Northern Ireland Executive to support culture and creativity in Northern Ireland. This includes continued annual funding from the UK government to NI Screen to support the Irish Language and Ulster-Scots Broadcast Funds. DCMS will work with the Northern Ireland Executive to develop the Belfast cluster, in particular as an anchor location creating opportunities for businesses and talent across Northern Ireland.

The Scottish Government works in partnership with a range of organisations to support Scotland's Creative Industries and ensure that they continue to enrich and grow Scotland's economy, including in rural and island areas. DCMS will work with the Scottish Government to support this ambition as well as develop the clusters in Dundee, Edinburgh and Glasgow. The Scottish Government funds Creative Scotland, the public body for the arts, screen and Creative Industries, to develop and promote creative talent in Scotland.²⁵ The Scottish Government also funds incentives and resources for the screen industry. They are working with Skills Development Scotland to implement their Creative Industries Skills Investment Plan for addressing skills gaps, and they chair the Creative Industries Leadership Group, which aims to advise Scottish Ministers on how best to support and grow the sector.

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4. Creating an enduring partnership with business

4.1 How we have worked with industry to develop this plan

The Creative Industries Sector Plan has been created in consultation with industry stakeholders, in particular through an advisory taskforce. The Creative Industries Taskforce was established by DCMS and DBT Secretaries of State and co-chaired by Sir Peter Bazalgette and Baroness Shriti Vadera. It met four times between December 2024 and April 2025. The Taskforce has led work to develop the evidence base informing the Sector Plan, with extensive contributions from the AHRC-funded Creative Industries Policy and Evidence Centre, and industry body Creative UK.

The Creative Industries Council (CIC) has also played a major role in the development of this plan, as it will in its implementation, having met in January to discuss the Sector Plan and having provided input to the Taskforce through working groups and common

members. In addition to this, there has been direct engagement with businesses and trade associations, including the DCMS Creative Industries Growth Summit in January in Gateshead.

The government has worked closely with Mayoral Strategic Authorities and devolved governments in the development of the plan. Officials have visited all 12 high-potential places and have taken part in regional roundtables with local businesses, universities and other key partners across the country. In these engagements we have listened to stakeholders to understand key regional barriers and have tested emerging policy thinking with businesses from a wide range of sectors and from micro businesses to major employers.

4.2 How we will work with industry over the next 10 years

We expect the sector to grow over the next decade, where – based on past trends – annual GVA could increase by £40 billion in real terms and over 400,000 additional jobs could be created by 2035.¹ This is not the limit of our ambition, and we believe with the right conditions and interventions more can be achieved. This plan is a first step, and over the next 10 years we will work together with industry to deliver more growth.

The **Creative Industries Council** has been a key partner for the government over the last decade and will continue to be over the decade to come. It will be reshaped to align with the Sector Plan's objectives and play an essential role in delivery. It will be tasked with steering and tracking implementation of cross-industry commitments, and monitoring progress against the key metrics of the plan.

A new **Creative Places Group** will convene a group of policy makers across all 12 high-potential places to share best practice, promote collaboration and partnership and ensure that place-based policy making runs through future policy development.

DCMS will continue to **engage directly with trade associations and companies** (from SMEs and freelance representatives to multinationals) to understand their needs, inform policy, support investment and drive economic growth.

We will ensure we are on track to deliver our ambitions by monitoring and evaluating the impact of policy interventions. The Industrial Strategy Advisory Council will also support this work, monitoring progress across all of the growth driving sectors. This will allow us to remain flexible so that we can adapt to new opportunities as they arise and to coordinate with other growth-driving sectors on shared priorities.

Industry will play a key role in delivering the policies set out in the Sector Plan, including a number of commitments delivered by the CIC and its members, working with the government. Together this will drive growth and help deliver more major investments across the UK, building on Universal's decision to build its first European theme park in Bedfordshire. Industry's role includes:

- Sharing knowledge and broadening access, including Creative UK-led work on tech adoption and creating a single front door for creative firms to access information on how to unlock private investment.
- Providing private investment to match government funding over the next decade, including private spend leveraged through UKRI and BBB investments, as well as investments made by Mayors funded by the Creative Places Growth Fund.
- Driving work to maximise the growth potential of createch including bringing together createch innovators and sharing best practice on commercialisation and investment.
- Working with the government to support increased access to quality specialist creative education provision across England.
- Working with the government to deliver a refreshed UK-wide £9 million creative careers service.
- Working with the government to refine and develop the growth and skills offer to deliver apprenticeships and skills training that is responsive to the varied needs of the sector.
- Working with the government to develop and deliver the role of a new freelance champion.
- Working together with the government and Skills England to deliver Skills Passports.
- Building evidence through Sector Skills Audits led by the Creative Industries Policy and Evidence Centre, working with Skills England, and supporting transparency on skills shortages and gaps, and post-16 training pathways.
- Working with the government to develop new trade and investment plans through a reformed and strengthened Creative Industries Trade and Investment Board.
- Investing in the expanded National Film and Television School, and delivering on the recommendations of the Screen Sector Skills Task Force.
- Establishing a new UK Video Games Council to work with the government and CIC on growth of the sector, and a new UK Games Skills Network to publish a video games skills strategy to tackle persistent skills gaps.
- Pursuing widespread adoption of a new ticket levy on arena gigs to support grassroots music, and work towards a new industry-led agreement on boosting creator earnings from music streaming.
- Delivering the next steps on the industry's world-first Creative Climate Charter including stimulating the market of green products and services and driving positive action through raising awareness and inspiring narratives, working in partnership with organisations such as Julie's Bicycle, the Royal Institute of British Architects and the Design Council.

4.3 How we will measure success

Implementation matters and so we will establish a monitoring and evaluation framework to build evidence on how the actions and interventions outlined in this plan translate into outcomes and impacts. It consists of two components:

- evaluations, which are used to determine whether our interventions have (or have not) delivered their intended outcomes and impacts and whether there is a causal link between interventions and outcomes; and
- an outcome monitoring framework that will use a range of metrics to track progress towards realising the outcomes.

These components will be used together to understand the differences that government and industry action is having and the wider context of industry performance, the insights being fed back into future policy design.

Each government intervention established under the framework of this plan will have its own evaluation. This will consist of a systematic assessment of the intervention's design, implementation, outcomes, and additional impact. The aim is to determine whether the intervention's actions can be attributed to changes in the outcomes observed.

The monitoring framework's metrics will capture both operational measures to track policy delivery, and economic indicators to understand developments and trends in the Creative Industries across sub-sectors and nations and regions. While economic indicators on their own are not a good measure of policy performance or quality given the difficulty in attributing changes in the UK economy to particular interventions, along with operational measures these will allow the government to determine whether policy is on track or needs a shift in strategy.

An indicative set of metrics is presented to monitor the intermediate outcomes linked to each area of the Sector Plan, this includes core metrics measured across the Industrial Strategy. As the framework develops, further metrics will be added where these can be monitored against the Creative Industries definition (see the technical annex). As set out in section 3.6 it is our ambition to improve the range of data available with which to monitor the sector. DCMS will work with the Industrial Strategy Advisory Council (ISAC) by collating data and evaluation documents to support the Council's work to monitor the growth-driving sectors and advise on delivery of the Industrial Strategy.

Indicative metrics to monitor Creative Industries Sector Plan Outcomes

Sector plan 2035 ambition	Intermediate outcome to be measured	Outcome indicators
Overall	Increase in GVA (gross value added)	GVA, DCMS economic estimates
Overall	Increase in productivity growth	Productivity per hour worked, DCMS economic estimates
Crowding in investment	Increase in business investment	Gross fixed capital formation as measured by the ONS
Innovation	Increase in the level of business R&D expenditure	R&D expenditure, Business Enterprise Research and Development survey
Innovation	Increase in the proportion of innovation active businesses	Percentage of innovation active businesses as defined in the UK Innovation Survey
People and Skills	Decrease in skills gaps and shortages reported by creative businesses	Incidence and density of skills gaps and shortages in the CIs and CI sub-sectors
People and Skills	Increase the level of training provision by CI businesses	Proportion of workers in Creative Industries that have received job-related training.
People and Skills	Increase in the real wages of employees in the CIs	Median annual earnings, DCMS economic estimates
Exports	Increase in CI exports in services and goods	Export in services and goods value and volume, DCMS economic estimates
Place	Priority places GVA increase and their share of UK GVA increases	GVA by region AND real terms change in GVA by region

As part of a centralised monitoring and evaluation process, six core metrics will be used to monitor the impact of all Industrial Strategy Sector Plans (including Creative Industries). These metrics will measure; Exports, Business Investment, Gross Value Add, Productivity Growth, Labour Market Earnings, and the number of new, large ‘home grown’ businesses. (Please note, the methodologies behind these metrics will be chosen centrally, and may therefore differ from the methodology utilised to measure outcomes in the table above).

Creative Industries in the UK Economy

The Creative Industries were first defined in 1998 and refined in the government’s 2001 Creative Industries Mapping Document as ‘those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property.’²

The Creative Industries definition is a UK government definition based on the international standard industrial classification.³ These have been grouped into nine sub-sectors: Advertising and marketing; Architecture; Crafts; Design and designer fashion; Film, TV, video, radio and photography; IT, software and computer services; Publishing; Museums, galleries and libraries; Music, performing and visual arts. Video games are also identified as a sub-set of IT, software and computer services.

DCMS produces a series of economic estimates for the Creative Industries with some of the key indicators presented below along with their contribution to the UK economy.

Measure		
Creative Industries Economic Estimates⁴	Creative industries	UK Economy (% of which is Creative Industries)
Gross Value Added (£ billion) 2023	124	2,369 (5.2%)
Filled jobs (million) 2023	2.3	34 (7.1%)
Business R&D (£ billion) 2022	6.5	48.6 (13%)
Exports in services (£ billion) 2021	45.6	312.9 (14.6%)
Exports in goods (£ billion) 2021	9.2	342.3 (2.7%)
Business investment (£ billion) 2023 ⁵	17	234 (7%)
Productivity growth (Output per hour) 2019-2023	1.3%	2.8%
Earning (median annual earning £)	42,399	31,602

PLAN THROUGH TO 2035

2025

- Relaunch the Creative Industries Council and appoint a new CITIB chair
- Launch Creative Sector Skills Forum, publish CIC Skills Audits and an industry-led video games skills strategy
 - Appoint Freelance Champion
- Publish the Curriculum and Assessment Review and Post-16 Education & Skills Strategy
 - Introduce Higher Technical Qualifications
- Publish revised HMRC guidance for R&D tax reliefs, a UKRI Creative Industries R&D Strategy and createch recommendations
 - Publish IP finance recommendations
- Publish responses to AI copyright consultation and live events ticket resale consultation
- Launch DBT Trade & Small Business Strategies
 - Launch new missions to Japan, a UK-France business forum and sign MoUs with Qatar and Saudi Arabia
 - Agree industry-led creator remuneration package on music streaming
 - Publish the Terms of Reference and consultation for the next BBC Charter Review
 - Publish first results of Creative PEC Longitudinal Small Business Survey

2027

Early

- Lifelong Learning Entitlement available
- Launch new innovation showcase labs and Creative Clusters

2027

Late

- Publish final BBC Charter
- Creative industries export promotion, support and trade mission programme

2026

Early

- Launch of scaled up £75 million screen, £30 million video games, and up to £30 million music growth packages, delivered over three years
- Launch of DSIT's TechFirst programme
- Launch of Creative Places Growth Fund
- Launch next Creative Clusters competition
- Launch of DBT-led creative innovation mission and dialogue at GREAT Futures Los Angeles
- First year Industrial Strategy review

2026

Late

- Expansion of the CoSTAR network through the Creative Futures programme
- Deliver the Creative Skills Passport
- Launch refreshed creative careers service
- Establish the National Centre for Arts and Music Education
- Launch new CITIB International Action Plan
- Creative industries export promotion, support and trade mission programme

2028

- Creative industries export promotion, support and trade mission programme



2030

- Completion of Creative PEC Longitudinal Small Business Survey published
- UK Pavillion Expo 2030 Saudi Arabia
- Mid-point review of the Sector Plan

2035

- Significant increase in investment by the Creative Industries from £17 billion to £31 billion
- UK's position as a creative superpower is enhanced
- UK recognised as the number one destination worldwide for investment in innovation and creativity
- UK is recognised as the best place to make and invest in film and TV, video games, music, performing and visual arts, and advertising and marketing

Endnotes

- 1 Department for Culture, Media and Sport analysis of (2024) [Sectors Economic Estimates](#), and Office for Budget Responsibility (2025) [Economic and fiscal outlook – March 2025](#). Projections for Creative Industries GVA based on OBR forecasts and Creative Industries compound average growth rate for 2010–2023, in real terms 2022 prices. Additional jobs are estimated using the increase in GVA and productivity (GVA per filled job), assuming productivity growth of 1% per year.
- 2 Department for Digital, Culture, Media and Sport (1998) [Creative Industries Mapping Documents 1998](#); Department for Digital, Culture, Media and Sport (2021) [Creative Industries Mapping Documents 2001](#)
- 3 Department for Culture, Media and Sport (2022) [DCMS Economic Estimates – Sector definitions \(Standard Industrial Classification\)](#)
- 4 Department for Culture, Media and Sport (2024) [DCMS Sectors Economic Estimates](#), unless otherwise stated
- 5 Office for National Statistics (2025) [Gross Fixed Capital – Formation](#)



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