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"Developing creativity, imagination and curiosity in the engineers of the future is at the core of NMITE's mission. This report is a compelling manifesto for revitalising our county's creative economy and should be supported by everyone with a stake in the future of Herefordshire."

Professor Elena Rodriguez-Falcon, President and CEO, NMITE

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FOREWORD

Herefordshire is one of the most sparsely populated counties in England with one of the lowest Gross Value Added per capita. Yet the findings and exemplars documented in this report, commissioned by Herefordshire Cultural Partnership (HCP), should give us confidence that, with appropriate support, our creative and cultural sector is set to play a critical role in our county's economic growth, health and wellbeing.

Over the last three years, Arts Council England has invested £9 million into the County's cultural sector and Herefordshire Council has adopted the Herefordshire Cultural Strategy 2019-29. The strategy is available to download from the HCP's website, www.the-shire.co.uk.

New cross-sector partnerships and investment will be key to retaining and attracting talent and creative businesses to the county, accelerating social mobility through digital and creative industry training, and putting Herefordshire on the national and global map.

To this end, HCP is leading on the development of a Cultural Compact aimed at strengthening links between our creative businesses and Herefordshire's public, private and voluntary sectors, and importantly across the West Midlands. Having worked within the cultural sector in Herefordshire for almost four decades, I have never seen anything like the recognition, excitement and determination that exists today to position our creative businesses and cultural enterprises at the heart of Herefordshire's future.

Onwards and upwards!



NIC MILLINGTON FRSA Acting Chair, Herefordshire Cultural Partnership

INTRODUCTION

The American academic and author Richard Florida is one of the world's leading authorities on the growth and increasing importance of the creative sector in the global economy of the 21st century.

In his seminal study, "The Rise of the Creative Class" published in 2002, he wrote:

"Places that attract and retain creative class people, succeed; places that don't, fail"

Herefordshire's creative sector has much to be proud of.



Our county is home to a myriad of creative businesses, organisations and activities - from global brands such as the Hay Festival (postcode: HR3 5PJ) and Three Choirs Festival, to national champions like Hereford College of Art, Architype, the 2Faced Dance Company and Edward Bulmer Paints, to regional stars including Orphans Press, Meadow Arts, the Courtyard - Herefordshire's Centre for the Arts, h.Art, Rural Media and the Ledbury Poetry Festival through to hundreds of freelance artists and designers, musicians and film-makers, performers and poets - all of whom are doing amazing and inspiring things which celebrate daily the huge creative heritage, energy and potential of this great place.

But it is also fair to say that much of that creative potential is unrealised and that we could and should be doing so much better.

Because, if Richard Florida is right, Herefordshire's failure to develop, attract and retain more creative class people contributed directly to our county's huge economic underperformance in the last 20 years, peaking in 2019 at a populationadjusted gap of around £1 billion with the UK average (excluding London) and resulting in some of the most intense pockets of deprivation in the country.

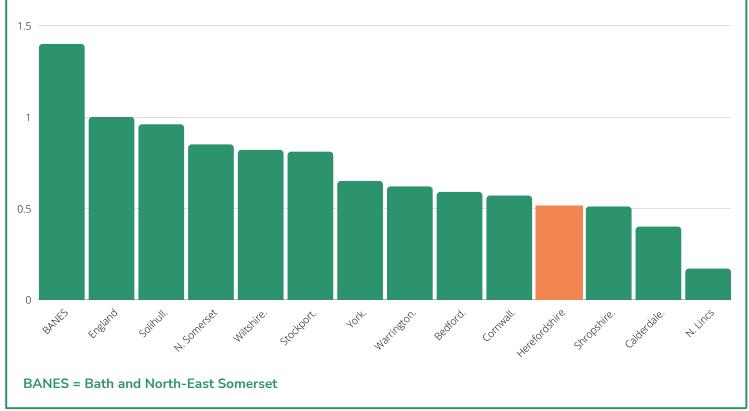
Between 1998 and 2018, Herefordshire's per capita Gross Value Added (GVA)* grew by 54% in nominal terms (compared to a UK average of 83%) ranking it 218 out of all of the UK's 232 local authorities (including London) over the same period. Source: Herefordshire 2030 project, ONS *Gross Value Added is a widely-accepted measure of economic performance

Many other places in the UK and around the world have reinvented themselves as creative beacons, more or less from a standing start, in the last ten years alone.

Why not us?

The chart below illustrates the Location Quotient (LQ) of Herefordshire's Creative Sector against the England average and a handful of comparators, generated automatically by CIPFA. A Location Quotient is an analytical measure of the economic output of a place or region's economy relative to a larger geographic unit (usually the nation); Herefordshire's Creative Sector LQ is half that of England and in the bottom quartile of the national peer group.

CHART 1: CREATIVE SECTOR LOCATION QUOTIENTS



WHAT IS THE CREATIVE ECONOMY?

The UK's creative industries contributed £115.9bn in GVA in 2019, an increase of 5.7% on 2018 and equivalent to nearly 4% of Britain's total economy. Between 2010 and 2019, the sector's GVA grew by 43%, more than twice as fast as the overall economy, while the number of creative sector jobs also grew by double the national average.

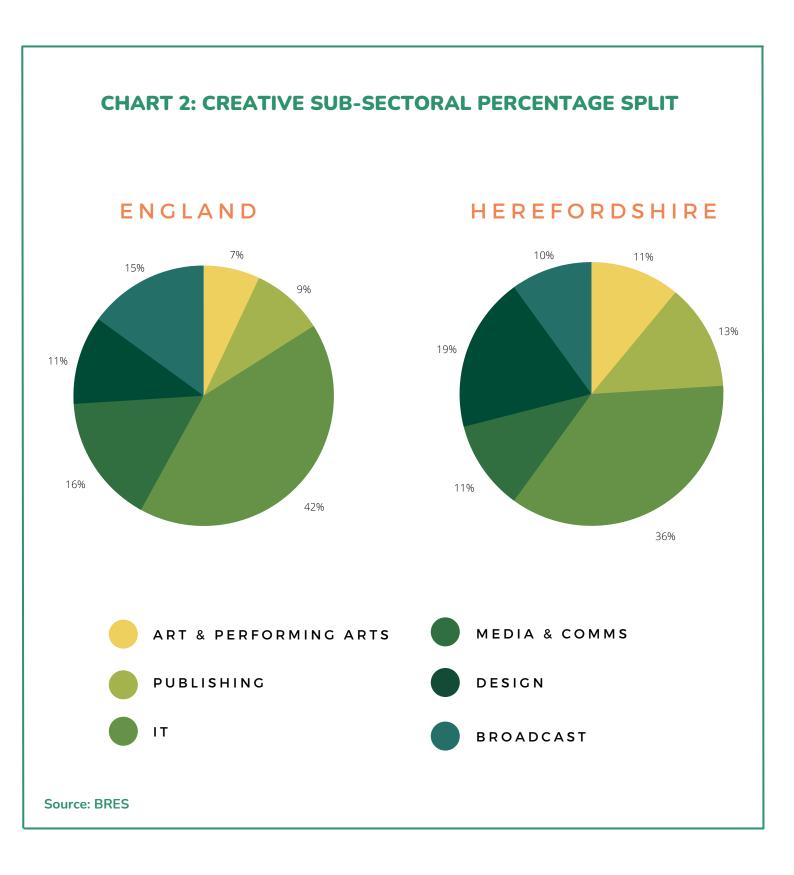
While this was unquestionably great news, the concept of a coherent creative economy is still very new and different people have different views on what exactly it includes, with hot debate about engineering, research and development, museums, food and hospitality and the complicating fact that 48% of people working in UK creative industries are freelancers. To make matters easier, the UK Government Department for Culture, Media and Sport (DCMS) avoided specific subsectors and opted for a now widelyaccepted generic and inclusive definition:

"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" (DCMS 2001)

The official data used in this report is drawn from the Business Register and Employment Survey (BRES) and the Chartered Institute of Public Finance and Accountancy (CIPFA) using the six core creative sectors of Broadcasting, Publishing, Media and Communications, Information Technology, Design, and Art and Performing Arts.



WHAT IS THE CREATIVE ECONOMY?



It should be noted that BRES and CIPFA data only captures those businesses that are VAT-registered and that creative businesses in the UK employed an average of 3.1 people in 2019, down from 3.3 in 2014 and just under four in 2007 due largely to explosive growth in the number of creative start-ups.

Data which included everyone engaged in creative industries might look quite different, both at a local and at national level although the geographic weightings would probably be similar.

According to BRES, there are around 1,800 people employed in creative businesses in Herefordshire, although that number could be significantly higher if freelancers were included.

	2015	2021	CHANGE
PUBLISHING	125	235	+88%
BROADCAST	135	175	+30%
INFORMATION TECHNOLOGY	615	650	+ 6 %
MEDIA & COMMUNICATIONS	105	195	+90%
DESIGN	485	345	- 2 9 %
ART & PERFORMING ARTS	185	200	+8%
TOTAL HEREFORDSHIRE	1,640	1,790	+ 9 %
TOTAL ENGLAND	1,026,630	1,166,625	+14%

TABLE 1: NUMBER OF PEOPLE EMPLOYED IN CREATIVE SUBSECTORS IN HEREFORDSHIRE

Sources: BRES, CIPFA

THE IMPORTANCE OF STRATEGIC GOALS

To level up its creative sector - and, by extension, its overall economy -Herefordshire needs to identify some ambitious but achievable strategic goals.

This research has identified the following nine opportunities.

STRATEGIC GOAL 1: HEREFORDSHIRE CREATIVE SECTOR LQ OF 1.0 BY 2029

Levelling up Herefordshire's economy closing the £1 billion annual performance gap with the rest of the UK outside London - will rely heavily on our ability to level up our creative sector Location Quotient to 1.0 and this, in turn, will depend on our ability to make our county a more attractive and exciting place for creative people to live, to work, to study, to visit and, crucially, to invest. We need to develop a strategy which links the private and public sectors and brings together all the ingredients needed to boost our creative sector, the most important of which is currently investment. Herefordshire's creative economy has suffered from underinvestment for many years and that has to be addressed now.

The Herefordshire 2030 project estimates that our county will need to attract an additional £100-150 million of inward investment (see chart 3 below) - much of it in the creative economy - on top of the historical annual runrate of around £100 million in every year of the next decade to close the gap.

A steady supply of investment will ultimately be needed to support the development and growth of creative companies such as Astute Graphics and Simple Design Works who can mobilise high-value intellectual property in the small market-place of Herefordshire and sell it in the much bigger market-place outside the county.

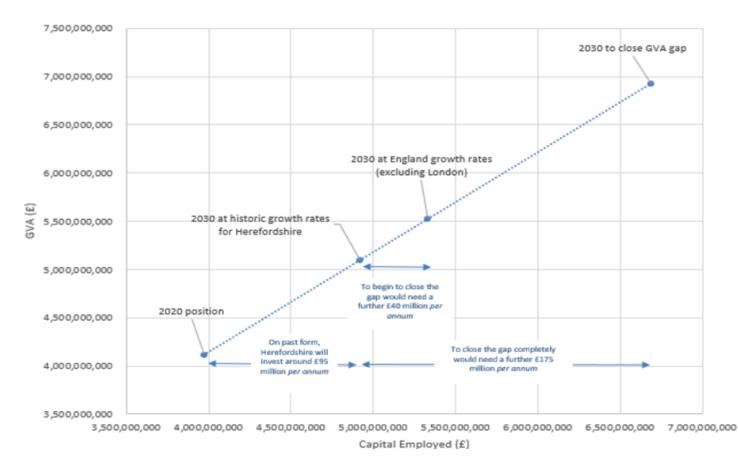


CHART 3 GVA GAP AND IMPLICATIONS FOR CAPITAL INVESTMENT

CASE STUDY 1: ASTUTE GRAPHICS

BLUEPRINT FOR HEREFORDSHIRE'S DIGITAL CREATIVE FUTURE



<u>Astute Graphics</u> is the creative technology business model that Herefordshire needs to replicate and multiply by the dozen. Founded in Hereford by Nicholas van der Walle in 2006 "as we were established here as a family", the company is now a leading cutting-edge graphic software developer on the Adobe Illustrator platform with thousands of customers around the world including Apple, Lego, Disney, GoPro, Adidas, VISA and Google and significantly less than 0.1% of users in Herefordshire.

In 2019, Astute Graphics re-engineered its offer by introducing a \$139 p.a. subscription model which already has 10,000 users which Nicholas estimates will double in the next three years, with the addition of new Herefordshire-based positions in sales, marketing and design.

For many years, Nicholas believed that Hereford was "the worst place possible" for a business like Astute Graphics, and he actively explored relocation to a more business-friendly environment such as Bristol where a much deeper creative talent pool would allow him to grow more quickly.

However, the company's recent move to the Shell Store on the Enterprise Zone has changed all that and, as one of the five larger businesses there (out of a potential total of 40) he can see the benefits of co-location (high-speed broadband, crossfertilisation of ideas with other businesses, skills development, state-of-the art business support, unrestricted parking) leading quickly to the development of a Herefordshire high-tech business hub. But investment is also needed now to address long-term weaknesses in the county's creative infrastructure which will stimulate the evolution of an ecosystem, a virtuous circle, a cluster of innovation, talent and collaboration, the conditions that will make the whole greater than the sum of the parts and make businesses like Astute Graphics the rule rather than the exception.

In this context, the recent investment of £7.3 million to develop 2,500 sqm of business incubation space at the Shell Store on the Enterprise Zone has the potential to be a game-changer, providing a cornerstone physical hub in the heart of the county which can support up to 40 new and growing businesses.

It goes without saying that investment in infrastructure is only part of the story and that investment in people is just as important.

Hereford's new university, New Model In Technology and Engineering (NMITE), has long recognised the need to develop the home-grown skills of the future (many of them highly creative) within Herefordshire and has developed a pioneering UK learning model which includes development of aesthetic and design skills and has so far attracted a total of £30 million of inward investment into the county.

This will soon be complemented by more than £7 million of investment in the Future Skills Foundry (of which NMITE is one of 5 partners), the largest project in <u>Hereford's Town Investment Plan</u>.

NMITE's current business model anticipates the need for a further £30-40 million of inward capital investment by 2030 to achieve mission velocity, by which time it will be the single most important agent of levelling up in the county and a key driver of Herefordshire's creative skills base, not least because of its commitment to addressing the gender imbalance in engineering.

Transformational investment in the county's creative economy also sits at the heart of Hereford's Town Investment Plan (TIP), which has received a grant award of £22.4 million (match-funded by more than £15 million) from the Stronger Towns Fund, a central pillar of the Government's Levelling Up agenda.

Key Towns Fund investments in Hereford's creative infrastructure include the refurbishment of Hereford Museum on Broad Street, the development of a Digital Cultural hub (sponsored by Rural Media) and performance space (sponsored by Powerhouse), the creation of a Digital Creative Futures hub on the HCA campus on College Road, the reinvention of the Castle Green Pavilion as a cultural collision space and festival hub, and art installations on the student accommodation block on Station Approach (sponsored by Meadow Arts).



Estimated investment of around £20 million is needed to develop long-listed creative projects generated through the excitement garnered by the development of Hereford's Stronger Towns Fund bid (including the Gate 7 open-air amphitheatre on Bishop's Meadow sponsored by 2Faced Dance and others) and locally-driven investment plans developed for Herefordshire Council by the county's five market towns which include a permanent festival site in Bromyard and the renovation of the old Market House in Ledbury.



After a long period of minimal investment in Herefordshire's creative sector, the tide appears to be turning but this needs to be sustained and increased if the county's full creative potential is to be realised and our creative sector LQ is to improve.

Many of the recent initiatives outlined above have only been achieved through collaboration between the private and public sectors. The scale of the challenge ahead suggests that this will only be more important in the future and much thought is needed on exactly how we secure the funding required.

FUNDING CASE STUDY 1: CREATIVE ENGLAND

Over the last ten years, Creative England has partnered with the British Business Bank to invest more than £30 million in loan and equity investments to creative SMEs. This step-up finance - from £10,000-£250,000 - is offered alongside business support. It has given creative, digital businesses based outside London the financial runway to develop new products or services, increase employment, turnover and scale up. To date, Creative England - supported companies have created or safeguarded 1,725 jobs and leveraged £49 million private investment. As an example, Creative England invested £50,000 in 2013 in Avocarrot, a digital advertising platform. By June 2015, the company had raised a total of \$2 million from venture capital and angel investors and doubled in size. In 2016 they were acquired by Glispa Global for \$20 million.

FUNDING CASE STUDY 2: WORCESTERSHIRE BETA DEN TECH ACCELERATOR PROGRAMME

The Worcestershire Beta Den Accelerator Programme was established in 2019 to turbo-charge young, innovative companies at the forefront of Worcestershire's evolving technology cluster. They have supported 30 companies in four funding cohorts so far (and are in the process of launching their fifth) with grants of £50,000+, free office space and hand-on business mentoring.

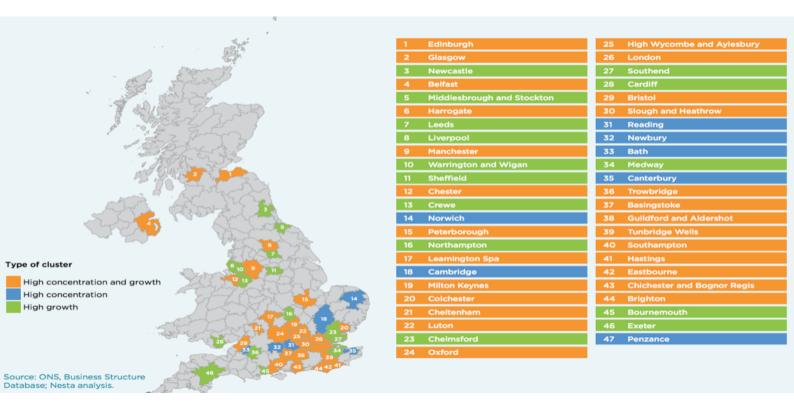
One of the companies in Cohort 3 is a Hereford-based company called <u>Veritherm</u> which has developed cutting edge and highly scalable thermal testing technology which will be at the heart of the UK's economic sweet spot in the decades ahead. They anticipate that their annual revenue could grow from £600k to £25 million in five years time and that their staff numbers could grow from seven to one hundred. Their head office is in Hereford and they have a branch in Malvern. In the last year, they have applied for and won four grants totalling around £100,000 from Beta Den in addition to rent-free offices and active and valuable business development support. They are highly committed to staying in Herefordshire but Worcestershire Council is doing everything they can to entice them to relocate.

STRATEGIC GOAL 2: A RECOGNISABLE HEREFORDSHIRE CREATIVE CLUSTER BY 2029

The key economic drivers of the 21st century - investment, skills, innovation, enterprise and competition (source: BEIS) - are not distributed evenly across the world; they are concentrated in specific locations, in clusters where collaboration and integration lead to higher productivity.

History is littered with creative clusters - from Renaissance Florence and Venice to Hollywood and Silicon Valley - but the power and importance of clustering has never been greater than it is now.

The UK innovation foundation NESTA has identified 47 creative clusters in the UK, based on methodology developed by leading academic economists.

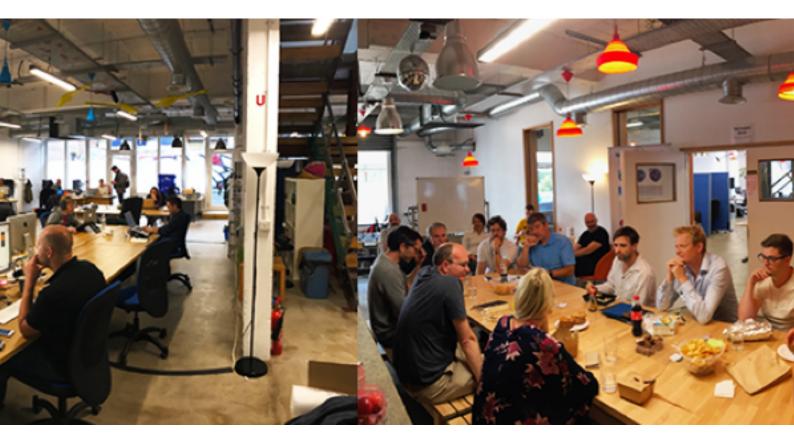


The map confirms that creative clusters are currently concentrated predominantly in London and the South-East of England (which together comprise around a third of clusters identified). Just over one-fifth of clusters are found in the North of England, and Scotland, Wales and Northern Ireland all feature too. There are a number of cities in the UK today where the growth of the creative sector has created transformational agglomeration. Although many of the best known, such as Shoreditch in London, MediaCity in Manchester, Digbeth in Birmingham and Baltic Creative in Liverpool are in the UK's biggest cities, there is now plenty of evidence to suggest that the development and support of hubs and clusters is no less important in smaller towns, cities and rural locations which are serious about developing their creative economy.



<u>Wired Sussex</u> is a great example of what could be achieved in Herefordshire. Launched in 2002 as an online employment noticeboard, it is now a network of around 2,000 small creative digital media businesses which includes two physical hubs (the FuseBox and the Skiff), providing a focus for the interests and concerns of companies scattered across a spread of villages and small towns in Sussex and in the city of Brighton. "Wired Sussex is an invaluable resource for the digital community, working hard to support and champion businesses locally." Gray Simpson, <u>If Destroyed Still</u> <u>True.</u>

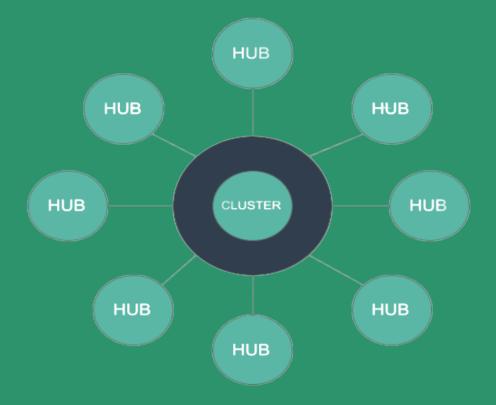
THE SKIFF, SUSSEX



Dundee (population: 148,820), like Hereford, is a small and relatively remote city. Unlike Hereford, it is now one of the world's leading video gaming development clusters since the creation there in 1997 of the Grand Theft Auto series of games, the most commercially successful global franchise in the history of the gaming sector, and subsequent launch in 2007 of digital animation courses at Abertay University. Designated as the winner of the 2021 Sunday Times Award for University of the Year for Teaching Quality, Abertay justifiably claims that it "has been instrumental in building the city of Dundee's place as a global cluster for computing and gaming, a perfect example of a university and business working together for the common good."

RELATIONSHIP BETWEEN HUBS & CLUSTERS

<u>The British Council wrote in its report in 2013</u> that "place', 'community' or 'location' are crucial elements in planning for the growth of the creative economy. Policy makers generally think in terms of national policies but the story of the creative economy over the last twenty years has been the story of initiatives that have been taken at neighbourhood and city level, the growth of hubs, clusters and regions."



"Clusters describe a group of related or mutually dependent businesses and resources that are grouped together in a neighbourhood or part of a city although the cluster may be a virtual network that is dependent on good internet connectivity rather than physical proximity." Video gaming has also been at the heart of the economic transformation of **Leamington Spa** (population: 52,213) since the launch in 2011 of <u>Kwalee</u> - a smartphone videogame application developer - by entrepreneur brothers David and Richard Darling in 2011. There is now a cluster of more than a dozen video game companies in the town, many of them located at <u>1 Mill Street</u>, and some of them with international reputations, generating some of the best-known titles in the world including Forza Horizon, Angry Birds Transformers, Sonic Boom, Tom Clancy's The Division and Dirt Rally, employing more than a thousand skilled workers and leading to Leamington being described as 'Silicon Spa', in emulation of California's Silicon Valley.

On a smaller but no less intensive scale, <u>Krowji</u> In **Redruth** (population: 14,710) started in 2002 as a collaboration between Cornwall Council, Cornwall Development Company, Arts Council England, Redruth Town Council and the European Regional Development Fund and is now Cornwall's largest creative initiative, with over 200 people working in a cluster of more than 50 studios in an upcycled grammar school.

Meanwhile in **Bristol**, the city's reputation as a creative cluster has gone from a standing start, to strength to strength since <u>Watershed</u> opened in 1982 on the first floor of two dockside sheds as Britain's first media centre, championing independent media creativity and emergent art forms.

PERVASIVE MEDIA STUDIO, BRISTOL



In 2008, Watershed launched the <u>Pervasive Media Studio</u>, a research space which now brings together a network of over 300 artists, creative companies, technologists and academics working on emergent ideas, experiences and applications which explore the possibilities released in the fusion of art and technology. Watershed has built an international reputation for pioneering creative technology collaborations which cross cultural, commercial and academic sectors.

All of these places - Sussex, Dundee, Leamington Spa, Redruth and Bristol have only really emerged as thriving creative clusters or hubs in the last 20 years, the period during which Herefordshire's relative economic underperformance became so pronounced. In all of these places, the success of their creative industries is now recognised nationally, in some cases around the world, and is increasingly central to their identities and to their futures.

Which is why Herefordshire Council's decision in July 2020 to acquire and repurpose the Maylord Shopping Centre in Hereford as a mixed-use creative hub is so important, providing the first critical piece in a jigsaw which could bring together the many different parts of the county's creative economy into a coherent and interlocking whole which is bigger than the sum of the parts.



CREATIVE CLUSTERS & UNIVERSITIES

Creative clusters or hubs contain many different ingredients but universities and other higher education institutions are now recognised the world over as a critical component of sustainable success, playing a key role in economic agglomeration, creating more efficient value chain linkages and stimulating innovation through knowledge spillovers (source: MDPI).

The importance of NMITE and Hereford College of Art to the future of Herefordshire's creative economy cannot be overstated, not only as critical economic and demographic levellers for Herefordshire but also as suppliers of skilled labour and potential entrepreneurial talent which will support the development of the county's creative sector.



Many businesses in Herefordshire identify the county's skills gap as the single biggest challenge that they face, with deficiencies ranging from basic life management and communication through to advanced IT and analytical skills. This challenge has only got harder as a result of COVID.

James Newby, NMITE's Chief Operating Officer, points out that creative innovation is at the heart of their mission to transform the teaching of engineering in Britain and that the revolutionary approach to learning the critical skills of the future in studio formats from committed business partners is, in itself, a highly creative process, more akin to an art school than the traditional lecture hall model of most British and global higher education institutions.

It is also worth noting that NMITE is also Herefordshire's single best creative hope of competing in the arena of green technology, with its **Centre for Advanced Timber Technology (CATT)** on NMITE's Skylon campus set to pioneer groundbreaking innovation at a national level.

CASE STUDY 2: CREATIVE DIGITAL SKILLS CENTRE

Hereford College of Arts (HCA) launched a brand new course in Creative Digital Futures and Interactive Media in 2019, as a response to growing national demand for digital skills in the creative industries and beyond and evident regional student interest in developing these skills in a creative context. The new programme, targeted at 16-18 year-olds, has expanded rapidly and with it an appetite in students (who even petitioned the college!) to be able to continue their studies at higher and more specialist levels in the college without moving away from Hereford.

HCA's new Creative Digital Skills Centre, currently in design, and funded by the city's Towns Fund award, will turbocharge a significant expansion in curriculum, from short courses to new degrees, for both local students and residential students from across the UK attracted to study in one of the country's few dedicated specialist arts schools. Curriculum areas will include film, animation, interface design, games design, social media content and creative digital marketing and the college will work closely with local and national businesses around live briefs and curriculum design.

These skills are critical to Herefordshire's future as a 21st-century creative cluster.

Whilst Hereford will draw inspiration from leading digital centres such as Ravensbourne University in London, Manchester Met University's School of Digital Arts and ADA (National College of Digital Skills) which has campuses in London and Manchester, key differentiators for the Hereford offer will be the unique creative culture and community of an independent arts school and its location in a dynamic but human-scale city.



STRATEGIC GOAL 3:

HEREFORDSHIRE IS A CREATIVE SECTOR REMOTE WORKING HOT-SPOT BY 2029

Richard Florida wrote in his 2008 book "Who's your city?" that one of the most important decisions that creative class people will ever have to make is where they live and work and that quality of life (including aesthetic/environmental value and open culture premium) generally scores very highly.

"As the most mobile people in human history, we have an incredibly diverse menu of places - in our own country and around the world from which to choose. Place is paramount for the creative class."

People in the creative class have more freedom to choose where they live and work than most. With 48% of people in UK creative industries working as freelancers and an average of 3.1 employees in UK creative businesses, creative enterprises can pick and choose their regional cluster or hub based on a far wider range of criteria than ever before.

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CASE STUDY 3: FROME, NORTH EAST SOMERSET SUNDAY TIMES "BEST PLACE TO LIVE IN THE SOUTH WEST 2021"



FROME FARMERS' MARKET

Packed to the rafters with historic buildings, beautiful independent shops and creative people, Frome is a wonderfully eventful town. It is the perfect destination for discerning tourists looking for something just a little bit different on visits to Somerset …or on the layover from Glastonbury.

Frome has a growing reputation as a hub for creative industries. Many professional craftspeople work from individual workshops with specialities ranging from designer jewellery and textiles to musical instrument makers and artist blacksmiths. It is also home to modern innovative and creative businesses, like 3D printing and new media agencies.

Source: Discover Frome

This has been magnified greatly by the opportunities created by digital connectivity; the evolution of creative clusters in smaller towns and rural locations across the UK would not have happened without the spread of super-fast broadband. COVID has only added (significant) fuel to the fire, with growth in freelancing estimated at 25% in the last two years.

<u>Herefordshire Council's Digital County Vision 2020</u> could not have anticipated the pandemic but it did correctly identify the rise of remote working as an economic opportunity for our county.

"Herefordshire has a great deal to offer through a strong work-life balance combining a stunning natural environment, a diverse business base, high standards of education complemented by a rich range of culture and leisure opportunities. The technology revolution has created an opportunity for Herefordshire to retain its key qualities while simultaneously meeting the requirements of modern-day living and working."



CASE STUDY 4: ARCHITYPE THE POWER OF REMOTE WORKING



There is no better example of the power of remote working in Herefordshire than Architype, one of the world's leading low environmental impact design architects, with a cupboard full of the UK's most important design awards and a central place in the county's creative economy. Started in London in 1984, Architype set up a new office in Herefordshire in 1997 and now has a third office in Edinburgh with 90 staff in total, some of whom are located in Spain, Bahrain and Ireland.

The Hereford office now comprises 25 staff but it generates approximately 80% of its income from outside the county. Having invested heavily in hardware and infrastructure in Twyford, Hereford now has the quickest broadband of the three Architype offices, helping to put it on a completely level geographical playing field.

Architype's commitment to sustainable design and construction is at the heart of a creative cluster of similar-minded companies and individuals in and around Herefordshire which Mark Barry, the director of the Hereford office, estimates at around 100 people, many of whom are avid supporters of the county's artisan food and drink culture. Herefordshire also has many companies formed by people connected with Architype. While the claim of the Digital County Vision that Herefordshire would be one of the most digitally connected counties in the UK by 2020 was arguably too ambitious (with the fastest download speeds in the county currently around 44 megabits per second still well below the the UK average of 60.9), it is almost inconceivable that the county will not be on a completely level digital playing-field by 2029, allowing the county to play to its other strengths in the competition for creative capital.

Out of 52 responses to our Herefordshire Creative Sector survey question "What are the main advantages of being in Herefordshire?" 41 mentioned Quality of Life.

We should be shouting about that at the top of our voices.



The recruitment blog, resume.io, has identified 7 scoring criteria affordability, broadband, well-being, schools, green spaces, food and coffee and connectivity - to identify the best remote working location in the UK. Out of a universe of 1,200 possible places, Llandough (population: 1,977) in the Vale of Glamorgan emerged at the top of the list.

Who knew?

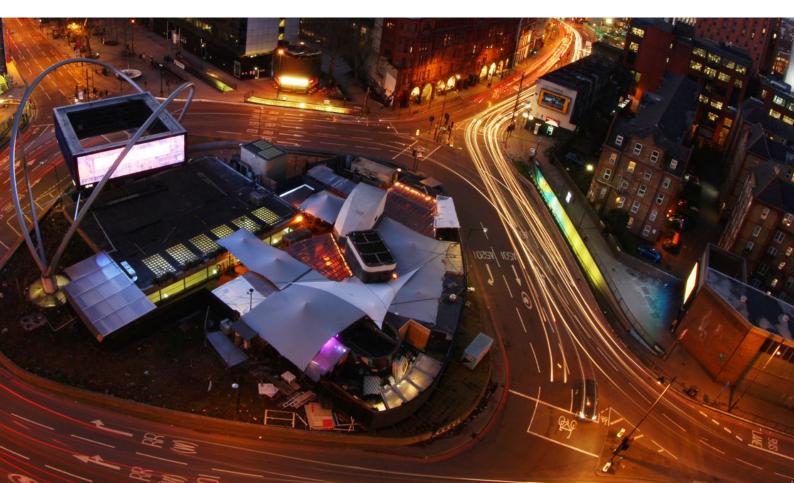
STRATEGIC GOAL 4:

CREATIVE ENTERPRISES FILL HEREFORDSHIRE'S EMPTY RETAIL UNITS BY 2029

In recent history, creative industries have played a critical role in urban regeneration in cities and towns throughout the UK and around the world. Policymakers have worked hard to attract small creative businesses, especially individual artists and entrepreneurs with very limited financial resources to locate in parts of a city or town where workspace and living space was cheap.

The most obvious example of this in the UK is the regeneration of Shoreditch in East London. In 2009, creative entrepreneur Charles Armstrong founded The Trampery in Shoreditch with a mission to develop a network of creative hubs across east London to underpin the formation of a distinctive innovation cluster spanning software and the creative industries.

SILICON ROUNDABOUT, SHOREDITCH



Between 2009 and 2015, The Trampery worked with planning authorities to develop a total of seven empty buildings in east London including dedicated incubators for software, fashion, digital arts and travel technology. The Trampery is now taking its experience from London and working with other cities around the world to help them cultivate new innovation clusters.

In a report for the British Council, Charles Armstrong wrote:

"This is the most exciting period in several centuries to be involved with real estate, urban planning and innovation. Working with cities and partners, I believe we can achieve amazing things in the coming years."

Charles Armstrong's optimism about the creative sector's need for property is in marked contrast to the relentless downward spiral in high street retail, with more than 17,500 UK high street shops closing in 2020 alone, as COVID turbocharged the structural switch to online shopping.

Herefordshire has not avoided this existential challenge and the county now has an estimated 100 empty retail units (source: Jackson Property). The repurposing of a block of Aubrey Street in Hereford has already proved that the creative sector could and should be a big part of the solution.

BURGER SHO?

STRATEGIC GOAL 5: HEREFORD JOINS THE UNESCO CREATIVE CITIES NETWORK BY 2029

The <u>UNESCO Creative Cities Network</u> (UCCN) was created in 2004 to promote cooperation among cities around the world that have identified creativity as a strategic factor for sustainable urban development. The 246 cities which currently make up this network work together towards a common objective, placing creativity and cultural industries at the heart of their development plans. The UCCN categorises its members in six areas of creativity: Crafts and Folk Art, Design, Film, Gastronomy, Literature and Music.



PENSONS - MICHELIN STAR, HEREFORDSHIRE

The 246 cities range in size from Kuhmo (population: 8,061) in Finland to Shanghai (population: 26.1 million) in China and include ten in the UK: Exeter (Literature), Manchester (Literature), Edinburgh (Literature), Nottingham (Literature), Norwich (Literature), Bradford (Film), Bristol (Film), Liverpool (Music), Glasgow (Music) and Dundee (Design).

Herefordshire is known the world over for its food and drink and its emerging independent food culture is rapidly placing the county on the UK food map, giving Hereford a strong natural claim to be the first UK city of Gastronomy in the UCCN.

The most obvious benefits of membership of the network are reputational, promoting brand recognition and attracting more creative businesses, investors and visitors but there are also clear interdependencies around the exchange of knowledge, best practices and experiences between members.

STRATEGIC GOAL 6: HEREFORD MUSEUM IS THE ART FUND MUSEUM OF THE YEAR BY 2029

Collaborative funding of £15 million from the Hereford Town Fund, Herefordshire Council and the Heritage Lottery Fund will transform Hereford's Museum on Broad Street, liberating the collections and objects which have been stored at the Friars Street Museum Resource and Learning Centre for many years and adding hugely to Hereford's cultural and creative infrastructure.

With drive and vision, the new museum could compete effectively for the first time for visitors at a local, regional and national level, positioning itself as a contender for the open-application <u>Art Fund</u> <u>Museum of the Year</u> award, the world's largest museum prize, which celebrates the UK's museums and galleries and rewards their resilience, creativity and imagination.

2021	FIRSTSITE, COLCHESTER
2020	ABERDEEN ART GALLERY, GAIRLOCH MUSEUM, SCIENCE MUSEUM, SOUTH LONDON GALLERY, AND TOWNER EASTBOURNE AS THE FIVE WINNERS OF ART FUND MUSEUM OF THE YEAR 2020. THE FIVE SHARED AN INCREASED PRIZE OF £200,000.
2019	ST FAGANS MUSEUM OF NATIONAL HISTORY
2018	TATE ST IVES
2017	THE HEPWORTH WAKEFIELD
2016	VICTORIA & ALBERT MUSEUM, LONDON
2015	THE WHITWORTH, MANCHESTER
2014	YORKSHIRE SCULPTURE PARK, WAKEFIELD

ART FUND MUSEUM OF THE YEAR PREVIOUS WINNERS

STRATEGIC GOAL 7: HEREFORDSHIRE IS THE 2029 UK CITY OF CULTURE

In 2017, Herefordshire made an ambitious but ultimately unsuccessful bid to be the 2021 UK City of Culture. The fact that Herefordshire is not a city may have had something to do with the bid's lack of success.

But since 2017, the rules have changed and, from 2022, the UK City of Culture designation will be awarded to a city or, for the first time, a local area (i.e local authority or county). The bidding process for the 2025 title* is currently underway, open to local areas across the UK with a final shortlist of bidders set to be announced in early 2022, and the 2025 holder announced in May 2022. Applying the same calendar to the 2029 award, a longlist of bidders will be announced in October 2025 with the winner announced in May 2026.

* 2025 long-listed bidders: Armagh City, Banbridge and Craigavon, Bradford, Cornwall, County Durham, Derby, Southampton, Stirling and Wrexham County Borough

The DCMS UK City of Culture website describes some of the benefits of the award:

"The UK City of Culture is more than just a title: it is an opportunity to bring communities together, build local pride, develop new partnerships, and attract tourists from across the UK and beyond. It is an opportunity to celebrate local culture with a programme of events that is ambitious, inclusive, and inspiring. But, most importantly, it is an opportunity to enable significant regeneration in a city, town or area. Culture has the power to transform communities by making a crucial contribution to the economic and social regeneration of our cities and towns".

The current UK City of Culture is Coventry. Between 2017 and 2021, it put together a cultural programme worth £30 million which has generated an estimated 2.55 million extra visitor days valued at £350 million in direct economic impact while investment on city-centre improvements (including £90 million upgrading the railway station) has left a legacy which will last for generations.

Similarly, the 2017 City of Culture, Hull, attracted £32 million of inward investment from a range of partners, underwent a major programme of regeneration and produced a year-long programme of cultural and creative events which transformed its visitor economy, with Rough Guide describing it as one of the best places in the world to live.

Why not us?

CASE STUDY 5: HEREFORD CATHEDTRAL CHOIR

FRONT AND CENTRE OF HEREFORDSHIRE UK CITY OF CULTURE 2029



As one of the few the Anglican choirs to sing at a Papal Mass in the Vatican (in 2018) since the Reformation and the only English cathedral choir to sing at the 75th anniversary commemoration of D-Day at Bayeux in 2019, there is no question that the choir of Hereford Cathedral is a national cultural asset with a global reach which has been at the heart of our county's cultural life for more than 800 years.

Remarkably, this has been achieved with the bulk of the choristers recruited from within Herefordshire although there has been some incoming external talent over the years (people moving to Herefordshire specifically to join the choir) and the Cathedral has a highly successful organ scholarship programme which draws applicants from all over the world, attracted by one of the great 19th-century organ builder Henry Willis' four finest organs in the UK.

Geraint Bowen, the Cathedral's Director of Music, points out that one of the many special things about the choir is the fact that its adult and child (starting at the age of 7) members are on a completely equal footing, with the same very demanding commitments of dedication, discipline and resilience.

Although COVID was probably the longest period without singing in the Cathedral since Oliver Cromwell's Commonwealth (1649-1660), the choir was sustained throughout by the furlough scheme and is now preparing to take its place at the front and centre of the 2022 Three Choirs Festival.

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CASE STUDY 6: 2FACED DANCE

FRONT AND CENTRE OF HEREFORDSHIRE UK CITY OF CULTURE 2029



There are few things in Herefordshire that are more surprising - or more inspiring than the 2Faced Dance Company. Started in Hereford by Tamsin Fitzgerald in 1999, it emerged in its current form around 2008 and has since developed into one of the UK's leading independent dance companies, performing in venues throughout the UK (including Wembley) and around the world.

In 2019-20, 2Faced Dance created 6 different shows (of which 3 were created for outdoor festivals and 3 for indoor spaces, including the highly successful "Box of Delights") which they performed 63 times nationally and internationally. During that same year, they also taught 14,170 children and young people nationally and hosted 531 workshops.

They currently employ 8 people on a full-time basis and approximately 70 freelancers annually from across Herefordshire and further afield, in addition to hosting a national professional placement programme. COVID has obviously been a massive body-blow but they are still alive and raring to go.

2Faced Dance is unquestionably a Herefordshire - and arguably a national creative treasure which has been nominated for some of the most prestigious British dance awards. But based on the company's experience of working nationally, it is clear that, although things may be beginning to change, Herefordshire has paid a high price for undervaluing the key role that arts and culture can play in the county's economic development. When asked what 2Faced Dance's biggest achievement has been, Tamsin answers in a heartbeat: "surviving".

STRATEGIC GOAL 8: HEREFORDSHIRE RECOGNISED AS UK COUNTY OF FESTIVALS BY 2029

Festivals - music festivals, food festivals, literary festivals, art festivals - are low hanging fruit for the creative sector and, while we have much to be proud of, we should beg, borrow or steal from what has worked elsewhere to fill some significant and expensive gaps.

When they are successful, festivals have the power to transform the creative identity and economy of a place, as the experience of Glastonbury, Hay, Edinburgh, Cheltenham (30 in total annually including world-class racing, literature, science, music and jazz festivals - claims for itself the title as Britain's town of festivals), Ludlow, Abergavenny, Frome, Altrincham and many, many other places in the UK and around the world has shown.

The growth in the popularity of festivals around the world appears to be correlated inversely with the decline of high street retail and, more recently, correlated positively with the rise of remote working, as people seek out authentic and memorable real-life experiences.

In a good year, there are more than 50 festivals within a 45 minute drive radius from the centre of Hereford, all of them celebrating, to a greater or lesser extent, the county's spirit of independence.

ELVEROPERTON (CONTRACTOR)

They include the world's best-known literary festival (Hay), one of the world's oldest music festivals (Three Choirs), the oldest UK poetry festival (Ledbury), the UK's original and fastest growing food festivals (Ludlow and Abergavenny respectively) and number 9 (Green Man, Brecon Beacons) and number 25 (El Dorado, Eastnor Castle) in Conde Nast's top 30 UK festivals in 2022.

But in that same good year, there are only six festivals in Hereford itself - Three Choirs (once every three years), Beer on the Wye, Hereford Food Festival, the River Carnival, the Indie Food Festival (dormant since 2017), Ferrous Festival (every two years) and, from 2022, Apple Fest.

So just three festivals in Hereford over the last 5 years.

With a bit of joined-up thinking and some elbow-grease, a more compelling and competitive festival offer in Hereford could drive the county's festival economy to a whole new level.

CASE STUDY 7: HAY FESTIVAL



It's a story that sounds almost too far-fetched for fiction. A not-for-profit book festival, founded just down the road from Hereford at the foot of the Black Mountains 35 years ago, is now part of an international cultural vanguard and one of the worlds' most successful literature and arts festivals.

Today, Hay Festival operates across three continents with eight annual events across Colombia, Peru, Mexico, Spain and the UK. In Hay-in-Wye alone, it injects an estimated £25 million during 11 days into the local economy (exclusive of ticket sales and sponsorship and equivalent to nearly one third of the annual economy of the town and immediate hinterland) and employs 21 full and part-time staff with hundreds more employed during the festivals themselves.

The strength of Hay Festival's brand was a life-saver during COVID, as "Haymakers" donated emergency funds to help the festival avoid a last-minute existential threat and move on-line, while the past two years have seen the organisation pioneer hybrid forms of cultural connectivity, reaching millions across the globe with inspiring programming.

Lyndy Cooke who was MD of Hay between 1999 and 2017 and continues to support other festival sponsors and promoters around the world believes strongly that Hereford has all of the ingredients necessary to develop a highly compelling festival offer.

STRATEGIC GOAL 9: HEREFORDSHIRE'S SUPERCHARGED CREATIVE ECONOMY IS RECOGNISED AS A MODEL FOR RURAL COMMUNITIES THROUGHOUT THE UK BY 2029

In a letter to Ian Hunter of the Littoral Trust in 2006, Richard Florida wrote:

"What you are doing in England is very important ... establishing a world lead. The knowledge industries and creative rural economy and environmental sustainability will likely be the key drivers in determining the next major breakthrough areas and challenges for the creative industries."

The Littoral Trust has been a pioneering champion for Britain's rural creative economy for more than 25 years, lobbying at the highest levels for more funding and recognition of its potential and for levelling up with the national creative economy.

That groundswell of activity contributed to the Creative Sector Deal embedded in the Government's 2017 Industrial Strategy which recognised for the first time that "joint action by industry and government could unlock further growth [in the creative industries], particularly outside their biggest existing concentration of strength in London and the South East".

Recognising that opportunity, Lord David Puttnam pointed out in the same year:

the rural sector is ideally placed to reinvent itself for the digital age, by opening up new world markets to locally..." based businesses and providing opportunities for jobs growth and inward investment. "

Still more recently, the Government's Levelling Up White Paper published in February 2022, built on that theme of rural enfranchisement, recognising NMITE as "a model of skills-based learning drawing from global best practice that emphasises work readiness, as well as self-reliance, community spirit and volunteering."

And also in February 2022, the West Midlands Combined Authority announcing its Creative Sector Delivery Plan for 2022-23, identifying investment in the region's cultural, creative and heritage activity capacity as "a major catalyst of post-Covid growth", pinpointing development opportunities in the games, virtual reality, 'Createch', e-sports and design sectors and recognising the potential of the Birmingham Commonwealth Games to "put the region on the map. Developing a stronger, more coherent rural creative economy could not be more closely aligned to current regional and national policy and strategic thinking, creating opportunities for those places with the ambition and the vision to super-charge their creative industries.

Although it is currently a creative sector cold-spot, there is no doubt that Herefordshire has many of the necessary ingredients to emerge as a model rural creative economy in the years ahead, if only we can join the dots.

What's stopping us?

CASE STUDY 8: RURAL MEDIA'S DIGITAL CULTURAL HUB A BEACON OF RURAL CREATIVE INNOVATION

In January 2022, Ian Hunter of the Littoral Trust name-checked Herefordshire as one of three English counties driving the development of an integrated rural creative economy (the others being Cornwall and Cumbria). This recognition was due in no small part to the tireless efforts of Rural Media over the last 30 years to link our county's creative sector to the wider regional and national creative landscape.

Founded in Hereford by CEO Nic Millington, the company is a beacon of rural creative innovation, using media and creativity as a catalyst for social impact and positive change for individuals, communities, organisations and cultures.

After a long period of steady development, Rural Media has expanded rapidly over the last five years and currently employs 15 staff and over 70 freelancers per year to produce content with partners including BBC, Sky Arts, BFI, Channel 4, national trusts and foundations, Hay Festival and more. In 2021, it produced 70 films, provided training and career support to over 500 individuals, and reached an audience of 20 million via broadcast, social channels, policy and professional networks, events and training programmes. The experience of delivering training programmes informs Rural Media's next and potentially most impactful phase of development: the creation of a Digital Cultural Hub (DCH) in Hereford city, funded by Hereford's Town Fund investment. Due for completion in 2023, the DCH will provide access to new cutting-edge digital media facilities, skills development programmes and improved communications, driving Herefordshire's national and international creative brand and profile, adding competitive edge to our tourism offer, and providing work experience and employment for emerging and established talent.

As a statement of intent for Herefordshire's creative ambitions, the DCH could not be more critical to attracting creative industry micro-businesses and freelancers looking for a better quality of life, to fuelling and strengthening the county's creative ecosystem and to knitting our creative economy further into the regional and national creative landscape.



CONCLUSION

It goes without saying that these nine strategic goals are not intended to be an exhaustive prescription for Herefordshire's creative economy, let alone for the county as a whole.

They do, however, represent a series of tangible and deliverable objectives, around which to build targeted interventions and initiatives, such as development of digital networks (like Wired Sussex), cultural apprenticeships, collaboration and partnerships with creative organisations and enterprises outside the county, more coworking spaces, bespoke development and investment programmes, directories of local creative suppliers and knowledge and inspiration events - to name just a few.

"Placemaking is community organising. It's a campaign." - Fred Kent

Carl Carl

Some people will argue that Herefordshire doesn't need supercharging, that breathtaking scenery and a slower pace is ample compensation for having one of the worst performing regional economies in the UK, that the inevitable cost of most people having a great quality of life is a minority of people living in deprivation, that we are too small or too old or too far away to matter, that another generation of lost opportunities and unrealised potential won't make much difference in the end.

But the energy, commitment and passion that we have encountered while working on this report suggests that many people in Herefordshire do not share that vision and believe strongly that a brighter, fairer, more prosperous and more creative future is well within our grasp.

We just need to get organised - we need to get creative!

HEREFORDSHIRE CREATIVE INDUSTRIES SURVEY RESULTS AND ANALYSIS

The Survey ran from November 2021 to January 2022. 52 responses from across Herefordshire were received. Results are set out below:

QUESTION 1: WHAT CREATIVE INDUSTRY ARE YOU IN?			
PUBLISHING	2 %	1	
DESIGN	9 %	4	
MEDIA & COMMUNICATIONS	9 %	4	
INFORMATION TECHNOLOGY	2 %	1	
ART & PERFORMING ARTS	74%	32	
BROADCAST	2 %	1	
OTHER (PLEASE Specify)	15		

QUESTION 2: HOW MANY EMPLOYEES ARE THERE IN YOUR BUSINESS/ORGANISATION?

MEAN = 8 MEDIAN = 1

QUESTION 3: IS YOUR LOCATION IN HEREFORDSHIRE A CONSCIOUS DECISION?

YES	75%	38
ΝΟ	25%	13

QUESTION 4: WHAT ARE THE MAIN ADVANTAGES OF BEING IN HEREFORDSHIRE?

42 RESPONSES MENTIONED QUALITY OF LIFE

Other comments:

"Big pool of creative professionals working in a wide range of media/genres. Rich cultural life. A certain audacity to 'just do x, y or z creative activity anyway'. Fabulous countryside and heritage. Creatives willing to help each other - a great community. I love it."

"...living in Herefordshire has allowed me to seek out lots of freelance jobs that are related to my ceramic practice. This has been through word of mouth and getting known in the county. This is something that would be harder in a larger city."

"It's a beautiful rural area which feeds my creativity. Cost of living is low. There is a creative network. It's geographically central which enables easy access to other areas such as Birmingham, Bristol and Cardiff. Lots of potential spaces for performance and exhibitions."

"...energy of its arts professionals, organisations and artists; its rural nature; beautiful scenery; authenticity; friendly people; low crime; centrality to England and Wales."

"Great collaboration between Herefordshire businesses - staff are more likely to be long-term as no plans to relocate from Hereford - sense of great community, customers are long-term - Word of mouth spreads far - Great to see lots of developments going on e.g. Skylon, NMite."

QUESTION 5: WHAT ARE THE MAIN DISADVANTAGES OF BEING IN HEREFORDSHIRE?

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28 RESPONSES MENTIONED TRANSPORT AND TRAFFIC.
14 MENTIONED FINDING STAFF.
11 MENTIONED LACK OF FUNDING SUPPORT.
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Other comments:

"...not being a particularly culturally diverse community means access to more engaging or challenging art forms could be an overall weakness."

" Small networks, travel to events/activities, smaller pots of money to support organisations, less arts organisations than urban context."

"There are no disadvantages."

"Could do with some more entertainment and nightlife. Professionally it's perfect though."

"Customer base."

"Sometimes you can feel isolated from what is going on in bigger cities and therefore accessing opportunities from outside the county can be harder."

"...some local resistance to change."

"Talent drain - young people go elsewhere because of lack of opportunity."

"No central hub to connect with other creatives - often a few different people trying to achieve the same things but in different circles so they are unaware of each other."

"Mostly have to train skills to new employees and start from scratch - Although we have the capabilities to supply large companies, large orders, we find these larger jobs have to be sort from different cities e.g London - Traffic - Lack of Small/Medium size commercial units available to let."

"Isolation, funding, largely lethargic and unambitious community."

"Not many at all from a business point of view."

QUESTION 6: DO YOU EXPECT YOUR COMPANY/ORGANISATION TO GROW IN THE NEXT 5 YEARS?

YES	73%	37
ΝΟ	28%	14

QUESTION 7: WHAT % OF YOUR REVENUE COMES FROM HEREFORDSHIRE?

AN AVERAGE 49% OF REVENUE COMES FROM BUSINESS WITHIN THE COUNTY

QUESTION 8: DO YOU HAVE ACCESS TO SPACE/FACILITIES YOU NEED?

35 RESPONSES SAID "YES"

Other comments:

"A lot of converted and restored barns."

"Yes at the moment, but we are starting to look for new modern office facilities which are very very limited in Herefordshire. There is a lot of run down industrial type sites, but hardly any purpose built modern state of the art offices for leading business. The Leominster Enterprise Park was designed to help this when it was owned by Advantage West Midlands, but once it was sold to John Lewis they have just land bank it and it is very very difficult to get them to sell any of it to local business."

"Yes, I am based at Artsite 3."

"Yes, we have been lucky to have just relocated although it took us 2 years to find a unit to let (7000 sq foot)."

"I rent an incredible space."

QUESTION 8: DO YOU HAVE ACCESS TO SPACE/FACILITIES YOU NEED?

13 RESPONSES SAID "NO"

Other comments:

"Always scrabbling/negotiating for rehearsal & creation space."

"I sometimes rent a desk in Hereford to work, but as my work is largely for outside the county I tend to work from home as being in Hereford isn't necessary for meetings etc. I go in more to connect with peers and be less lonely!"

"It's difficult. Hoping to be able to find a space where budding drag performers can meet and socialise, share their creativity, and be encouraged and emboldened by each other."

"No, limited space too expensive to expand with ground lease and rents."

QUESTION 9: DO YOU THINK THESE SPECIFIC INTERVENTIONS WOULD ENABLE YOUR BUSINESS TO THRIVE?				
REDUCED BUSINESS RATES	29%	14		
G R A N T P R O G R A M M E S	98%	48		
TRAINING	37%	18		

QUESTION 10: STAFF SKILLS

QUESTION 10: STAFF SKILLS			2	2	3	3		ł	5	5	TOTAL	WEIGHTED AVERAGE
ON SCALE OF 1-5, ARE YOU ABLE TO RECRUIT STAFF FROM LOCAL AREA (MARCHES REGION) WITH APPROPRIATE SKILLS?	20.51%	8	23.08%	9	38.46%	15	2.56%	1	15.38%	6	39	2.69
ON SCALE OF 1-5, ARE YOU ABLE TO RETAIN STAFF WITH APPROPRIATE SKILLS?	8.11%	3	13.51%	3	29.73 %	n	24.3%	9	24.3%	9	37	3.43

QUESTION 11: ARE YOU EMPLOYING REMOTE WORKERS?YES30%15

NO 70% 35

QUESTION 12: HOW MANY FREELANCE CREATIVE PROFESSIONALS DO YOU WORK WITH ON AVERAGE IN A TYPICAL YEAR?

MEAN = 48	MEDIAN = 8

QUESTION 13: WHAT IS THE AVERAGE SALARY IN YOUR BUSINESS/ORGANISATION?

HIGHEST= £35,000 LOWEST= £1,000 AVERAGE= £21,167

QUESTION 14: IS YOUR COMPANY MINORITY-LED?

YES	35%	16
ΝΟ	65%	3 0

This report was commissioned by Herefordshire Cultural Partnership (HCP) to stimulate discussion about the potential stored within the county's Creative and Cultural Industries (CCI). We hope the findings and recommendations support Herefordshire to take part in the growing regional and national discourse surrounding CCI and the role that the sector plays in economic growth and social wellbeing.

HCP is a non-for-profit consortium of Herefordshire-based arts, culture and heritage groups, local government and businesses with a shared vision to celebrate and strengthen the county's creative and entrepreneurial spirit.

To request copies of this report in any other format, including large print, please get in touch with via The Shire, <u>www.the-shire.co.uk</u>, the online home of the HCP.

You can also download the Herefordshire Cultural Strategy 2019-2029 on The Shire, and read more about opportuities and current activities that are strenghthening the county's arts, heritage and creative scene.







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