

# Herefordshire Cultural Sector Review

**Final report (revised)**

**August 2024**

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THE FIFTH SECTOR



## Contents

Executive Summary .....	1
Key findings .....	1
Highly-skilled freelance creatives drive productivity and growth.....	1
A Place-specific Model of Growth.....	2
Recommendations.....	3
Next steps .....	4
Introduction .....	6
Scope & Methodology.....	6
Mapping Herefordshire's Cultural and Creative Industries .....	7
Herefordshire's creative workforce .....	7
Identifying the freelance and self-employed creative workforce.....	8
Herefordshire's creative businesses .....	9
Clustering of cultural and creative industries businesses and employment.....	9
Output of cultural and creative industries .....	12
Further evidence of clustering and growth.....	13
Relationship of clustering to productivity.....	15
Key Findings.....	17
1. Leadership and Focus.....	17
2. Co-production and Scale .....	17
3. Vision and Ambition .....	17
4. Whole-County Approach.....	18
5. Strategic Alignment .....	18
6. Investment Coordination .....	18
Appendix 1: Supply of creative skills.....	19
Recommendations:.....	19
National context.....	20
Funding changes .....	20
Diversity .....	22
CPD.....	22
Our Findings .....	22

Local Skills.....	22
The local learning landscape .....	23
Defining creative skills pathways .....	25
Creative Originals .....	26
Creative Experiences .....	26
Digital creative technologies.....	26
Apprenticeships .....	26
T levels.....	26
Challenges .....	28
Recommendations.....	28
Appendix 2: Scale and significance of Herefordshire’s Cultural and Creative Industries .....	30
Methodology .....	30
GVA (2022) .....	31
GVA (2020) .....	34
Change in GVA, 2020-2022 .....	35
Cultural and Creative Industries LQ, 2022.....	40
Impact of including freelance and self-employed creatives .....	42
Evolution of Herefordshire Cultural and Creative Industries businesses.....	48
Appendix 3: Stakeholder engagement and consultation .....	50

## List of figures

Figure 1 Change in Creative Industries employment in Herefordshire, 2020-2022.....	7
Figure 2 Highlighting the important of Herefordshire's freelance creative workforce .....	8
Figure 3 Herefordshire registered creative business population.....	9
Figure 4 Evidence of clustering in Herefordshire's cultural and creative industries sectors .....	10
Figure 5 Herefordshire creative and cultural sector GVA 2022 .....	12
Figure 6 Herefordshire creative and cultural GVA - including freelance workforce.....	13
Figure 7 Comparison of GVA per capita for Herefordshire cultural and creative sub-sectors .....	14
Figure 8 Dimensions of an economic cluster .....	15
Figure 9 'Heat map' of clustering in Herefordshire's cultural and creative industries sectors .....	16
Figure 10 Herefordshire Creative Skills Training Pathways.....	25
Figure 11 Proportion of courses within creative skills pathways .....	27
Figure 12 DCMS definitions of creative industries and cultural sectors .....	30

## List of tables

Table 1 Herefordshire Cultural and Creative Industries GVA 2022.....	31
Table 2 Herefordshire Creative Industries GVA 2022.....	32
Table 3 Herefordshire Cultural sector GVA 2022.....	33
Table 4 Herefordshire Cultural and Creative Industries GVA 2020.....	34
Table 5 Herefordshire Creative Industries GVA 2020.....	34
Table 6 Herefordshire Cultural sector GVA 2020.....	35
Table 7 Change in Herefordshire Cultural and Creative Industries employment and GVA, 2020-22 .....	35
Table 8 Change in Herefordshire Creative Industries employment and GVA, 2020-22....	36
Table 9 Change in Herefordshire Cultural sector employment and GVA, 2020-22.....	37
Table 10 Percentage change in Cultural and Creative employment and GVA, 2020-22 ..	38
Table 11 Percentage change in Creative Industries employment and GVA, 2020-22.....	38
Table 12 Percentage change in Cultural sector employment and GVA, 2020-22 .....	39
Table 13 Herefordshire Creative Industries LQ, 2022 .....	40
Table 14 Herefordshire Cultural sector LQ, 2022 .....	40
Table 15 Herefordshire Creative Industries GVA and LQ, LinkedIn 2024.....	42
Table 16 Herefordshire Cultural sector GVA and LQ, LinkedIn 2024.....	43
Table 17 Difference in Creative Industries GVA and LQ between LinkedIn and BRES 2022.....	44
Table 18 Difference in Cultural sector GVA and LQ between LinkedIn and BRES 2022	45
Table 19 Percentage difference in Creative Industries GVA and LQ between LinkedIn and BRES 2022 .....	46
Table 20 Percentage difference in Cultural sector GVA and LQ between LinkedIn and BRES 2022 .....	47
Table 21 Count of Herefordshire Creative Industries businesses .....	48
Table 22 Count of Herefordshire Cultural sector businesses .....	48



## Executive Summary

This report provides a review of Herefordshire's cultural strategy at the midway point of its 2019-2029 implementation timeline. Drawing on stakeholder consultation, including valuable insights from Hereford College of Arts, Herefordshire BID and the Director of Museums alongside a range of smaller cultural and creative organisations from across the county, it offers recommendations to sharpen focus and strengthen the impact of strategic leadership to build on the exciting investments already committed during the second half of the implementation period.

### Key findings

- **Resilience of Herefordshire's creative business base** is underlined by continued growth in the number of registered enterprises, from 645 in 2020 to 695 in 2023, despite the disruptive impact of COVID lockdowns.
- **GVA of Herefordshire's cultural and creative sectors grew by 38% between 2020 and 2022**, from £83.2m to £114.7m<sup>1</sup> – a far faster rate of growth than that for the county as a whole.
- Increased output has been driven primarily by productivity growth, not by increasing the scale of employment. GVA per capita in the sector grew by 31% in the same period, to £54,100 – nearly **double the average GVA per capita** for all employment in Herefordshire of £27,278<sup>2</sup>
- Analysis of LinkedIn identified a **creative workforce of 4,100** (including freelance and self-employed workers) – double the size of creative employment reported in national statistics.
- Adding the contribution of the wider creative workforce increases our estimate of the sector's economic output to **£229.7m in GVA- 5% of Herefordshire's total**.

### Highly-skilled freelance creatives drive productivity and growth

This evidence emphasises the critical role played by **freelances and self-employed** workers in the rural creative economy. Contrary to the received view that they are less productive and experience greater precarity of employment opportunities, freelance and self-employed creatives may be expected to generate greater revenue than those in other occupational categories due to their higher levels of knowledge and skill. Their contribution is critical in enabling businesses to manage and reduce entrepreneurial risk,

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<sup>1</sup> The Fifth Sector analysis of Office of National Statistics data on employment and economic output

<sup>2</sup> Herefordshire Council (2024). Understanding Herefordshire.

<https://understanding.herefordshire.gov.uk/economy-place/topics-relating-to-the-economy/productivity-and-economic-growth/>



de-risk market uncertainties, and reduce the amount of finance required for innovation and business start-ups, ultimately promoting **innovation, enterprise, and growth**.

### **A Place-specific Model of Growth**

National and regional strategies have for the last three decades been built upon a narrative around ‘creative industries’ formulated around the assumption that physical agglomerations of urban businesses and supply chains would drive growth of the local and national creative economy. As a consequence, rural creative economies such as Herefordshire have been disadvantaged by the assumption that their route to growth lies through replicating an urban model of creative industries. Our evidence shows that cultural and creative industries make vital and diverse contributions to Herefordshire's economy and quality of life, but its full potential remains untapped due to its fragmentation, inconsistent leadership focus and lack of coordination of investment in delivery and communication.

Whilst significant progress has been made in baseline connections and network growth, Herefordshire has lacked a model of growth which reflects the way in which the county's creative economy differs from that of urban and metropolitan areas and recognises (and celebrates) the differences between places within the county. There remains a pressing need to develop a co-production model (including flexible access to workspace and production facilities) that can build scale across dispersed cultural organisations in Herefordshire and neighbouring rural areas.

Three new initiatives demonstrate renewed focus on a place-specific model which offers the potential to leverage investment needed to grow capacity of the creative economy across the county:

- The **Hereford Museum** redevelopment project and early years operations offers opportunities to build a centre of excellence, co-production, training and outreach to catalyse creativity and collaboration county wide, providing a reinforcing county-wide network and national profile. This would in turn help provide evidence of unmet demand for additional production capacity to help direct both public and private investment into the cultural sector and creative industries.
- The operation of the **Herefordshire BID and Visitor Economy Plan Network** offers an opportunity to clarify the role and priorities of the sector in servicing and growth of key cultural visitor segments.
- The success of the ***Our Place*** bid (a £596k grant from the National Lottery through Arts Council England to initiate a transformative programme in Leominster, South Wye and the Golden Valley, facilitated by a further £100k from the Council)<sup>3</sup> highlights the potential for Herefordshire Cultural Partnership to build and

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<sup>3</sup> <https://www.the-shire.co.uk/news/ourplacefunding>

further focus collaborations across the existing centres of cultural practice and learning (in festivals, market towns, established colleges and dynamic creative businesses).

Each of them has potential to improve links between existing centres of delivery and county-wide sectors to enable them to respond in a more agile and effective manner to their overall opportunities for cultural development. In turn, this will enhance delivery of the cultural strategy's objectives.

## **Recommendations**

To capitalise on Herefordshire's unique cultural assets and drive progress over the next five years, we recommend:

- 1. Core administrative support will be needed to progress any or all of the recommendations.**

Uncertainty about the likelihood of continuing support and investment is arguably the single greatest barrier to developing resilience, retaining talent and attracting investment to the sector.

- 2. Capital investment plans need to reflect the needs expressed by practitioners through consultation.**

Better coordination is needed to leverage diverse funding streams and align cultural initiatives with broader economic and social policy agendas.

Expecting creative business owners to adapt to unsuitable premises in off-centre locations which require access to a private car places further barriers in the way of growth and investment. Providing suitable production and showcasing infrastructure within the county (frequently identified through consultation as a key need to help existing business grow and attract new talent) has the potential to amplify the returns from co-production and collaborative working.

- 3. Herefordshire's cultural and creative strategy needs to be articulated in a shared language which businesses, freelances, audiences, visitors and investors understand.**

The refreshed strategy needs to speak to people in terms they understand. It needs its own voice to articulate the passion and excitement about cultural activity across the county. The right language can better articulate and project the opportunities for local people to get involved, the benefits of increased attraction and retention of creative talent and potential for investment. For example, we should talk about Hereford College of Art as an *art school* and highlight the critical role of *participatory and community arts* in developing both skills and audiences.

Reframing the cultural strategy vision to emphasise the benefits of community engagement and co-production will help to drive innovation and investment in a diverse creative offer that leverages Herefordshire's natural and cultural heritage while addressing regional opportunities.

### Next steps

With focused leadership and sustained collaboration, Herefordshire can overcome fragmentation in its cultural sector, recognising the value of increasing specialisation within and collaboration between different cultural and creative sectors as a model for rural creative economies and firmly establishing itself as a distinctive cultural destination. To achieve this, partners should:

- Convene a **strategy refresh workshop** with key stakeholders to reframe the vision, strengthen the Cultural Partnership's strategic leadership role and sharpen objectives for the next five years. This should establish clear, measurable objectives for the strategy's second half, balancing specific actions with ongoing network building and allowing for adaptive management.
- Commission a **cultural asset mapping exercise** as a foundation for future planning and use the findings to create a detailed map of creative diversity and opportunities across the whole county, identifying potential clusters and collaboration points.
- Develop a detailed implementation plan for **scaling the co-production model** across the county. This will better articulate the value of cultural investment to diverse stakeholders.
- Create a **communications strategy**, including a robust communications plan, to demonstrate the value of cultural investment to council stakeholders and align with broader policy agendas around economic development, health, and wellbeing.
- Leverage the Hereford Museum redevelopment and other flagship projects to foster county-wide creativity, skills development, and cultural engagement. This will establish a **visionary collaboration** between key institutions like the Hereford Museum, Hereford College of Arts, and rural media organisations to develop a co-production model that can scale across the region.

By taking these steps, Herefordshire can build on its progress to date, overcome fragmentation, and position itself as a leader in rural cultural development. The key lies in harnessing the county's unique assets, affirming and promoting models to support genuine co-production and collaboration, and demonstrating clear value to both local communities and regional partners.



## Introduction

Herefordshire's 10-year cultural strategy, launched in 2019, set out to position the county as a "culturally vibrant, prosperous and sought after" destination. At the strategy's midpoint, significant progress had been made in building networks and baseline connections, reflected in sharp increases in sector productivity. However, the review identified a need for sharper focus, stronger leadership, and a more coordinated approach to leveraging existing resources and new investments.

The creative industries continue to be a major driver of the UK economy, with particular potential in rural areas to support wellbeing, attract and retain talent, and drive inclusive growth. However, realising this potential requires overcoming challenges of geographic dispersion, limited infrastructure, and competition from urban centres.

In Herefordshire, the cultural sector is a source of vibrancy, identity and innovation, but it must overcome fragmentation and inconsistent investment to fulfil its promise. The review aimed to chart a path towards a more cohesive, ambitious approach that could position Herefordshire as a leader in rural cultural development.

## Scope & Methodology

This midpoint review encompassed:

1. Mapping of creative employment and the scale and significance of Herefordshire's cultural and creative industries (CCI).
2. Stakeholder consultation with businesses, practitioners, educators and policymakers, including in-depth discussions with Council officers and key figures like the Director of Museums.
3. Analysis of strategy implementation to date, including progress on stated objectives and emergence of new opportunities.
4. Assessment of the current policy and funding landscape, identifying potential for greater coordination and alignment.

The aim was to develop holistic recommendations that could sharpen the strategy's focus, strengthen leadership, and drive meaningful progress in the second half of the implementation period.

## Mapping Herefordshire's Cultural and Creative Industries

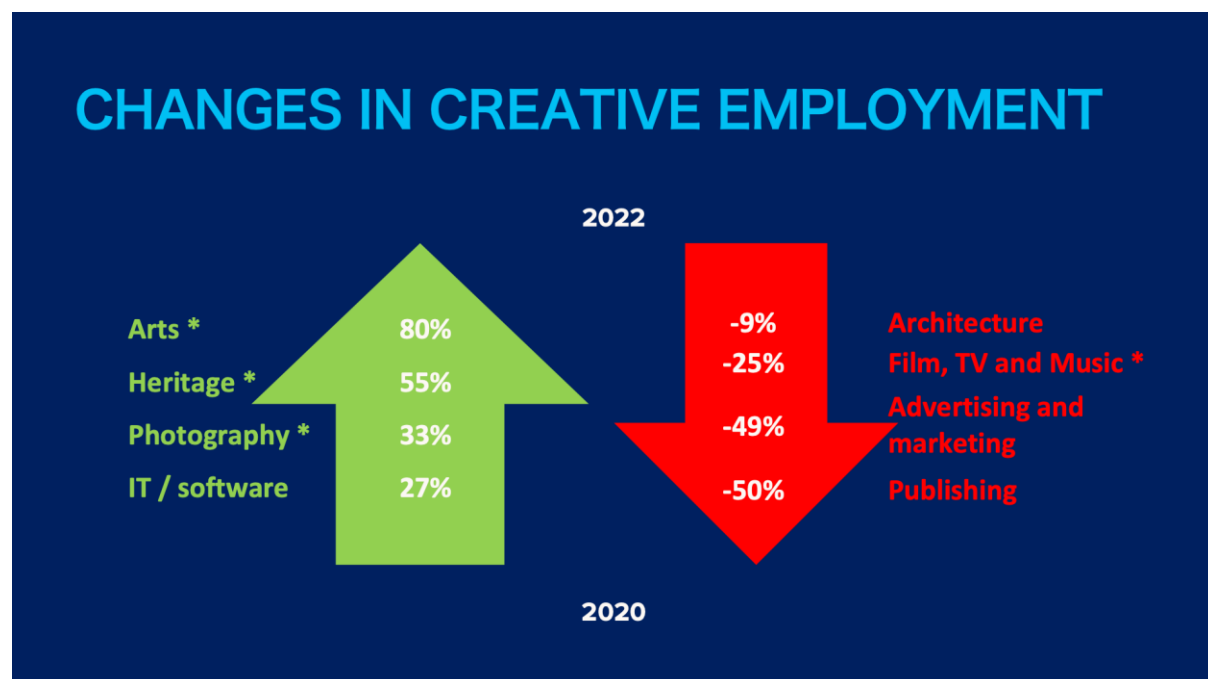
### Herefordshire's creative workforce

Creative employment in Herefordshire showed resilience in the face of COVID disruption, growing by 5% between 2020 and 2022 to reach 2,120 individuals (including both full time and part time roles). Increases in employment in software development and the arts balanced out a fall in creative services (Advertising and marketing, Architecture) and Publishing.

Largest employment sectors were:

- IT, software and computer services – 860 employees, split roughly evenly between software development and publishing (including computer games) and IT consultancy
- Music, performing and visual arts – 315 employees, an increase of 110 jobs (over a third of the total) over the period

Figure 1 Change in Creative Industries employment in Herefordshire, 2020-2022



- Asterisked sub-sectors are those within DCMS's definition of cultural sector; others from creative industries definition.

Source: The Fifth Sector analysis of employment data from Office of National Statistics' (ONS) Business Register and Employment Survey (BRES) 2022

The increase in employment in Arts and Heritage is notable when set against the backdrop of disruption to the sector from COVID lockdowns over 2020 and 2021.

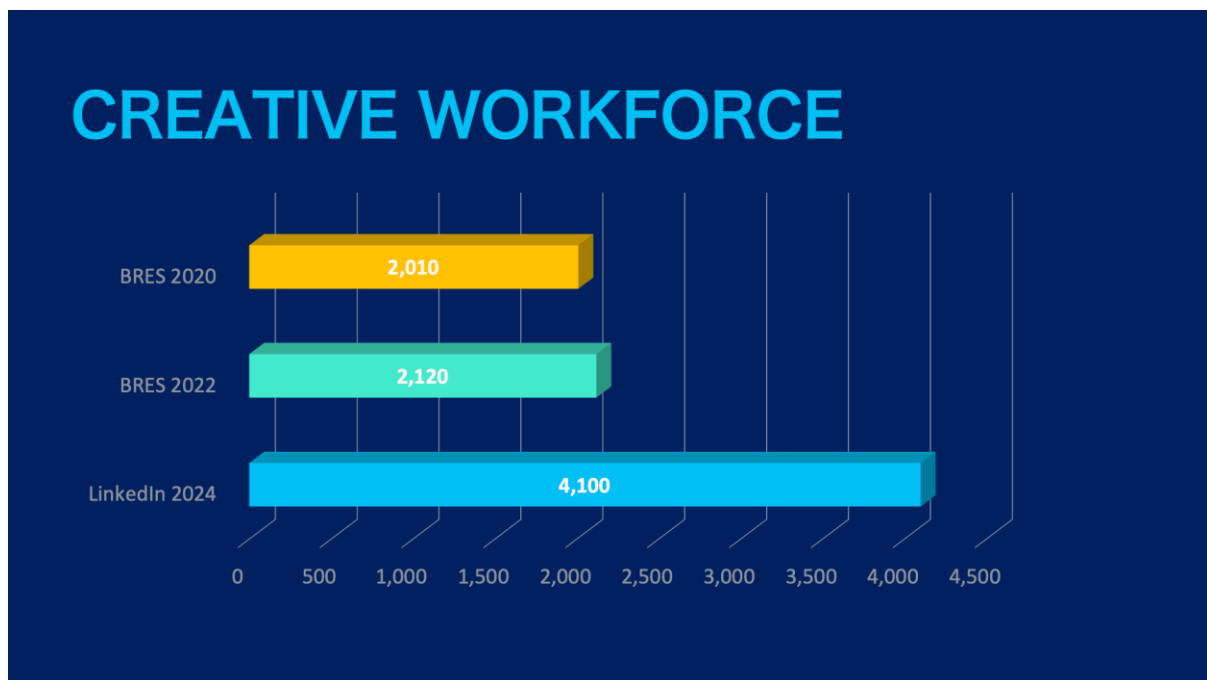
## Identifying the freelance and self-employed creative workforce

A frequent criticism of ONS data is that they omit freelance and self-employed workers (and even registered companies which do not make PAYE or VAT returns) and therefore understate the scale of the creative workforce. To counter this, analysis of LinkedIn helped identify an additional 2,000 creative workers located in the county, many of them freelance and self-employed; this brought the scale of Herefordshire's creative workforce to 4,100.

These findings contradicted the impression of a fall in the number employed in creative services: Design and designer fashion (739 subscribers) and Advertising and marketing (694) were two of the three largest sectors, ahead of IT, software and computer services (633).

The analysis confirmed the significance of arts and crafts as a production sector for the county, with 696 'makers' identified (as opposed to 10 employees in ONS!)

*Figure 2 Highlighting the important of Herefordshire's freelance creative workforce*



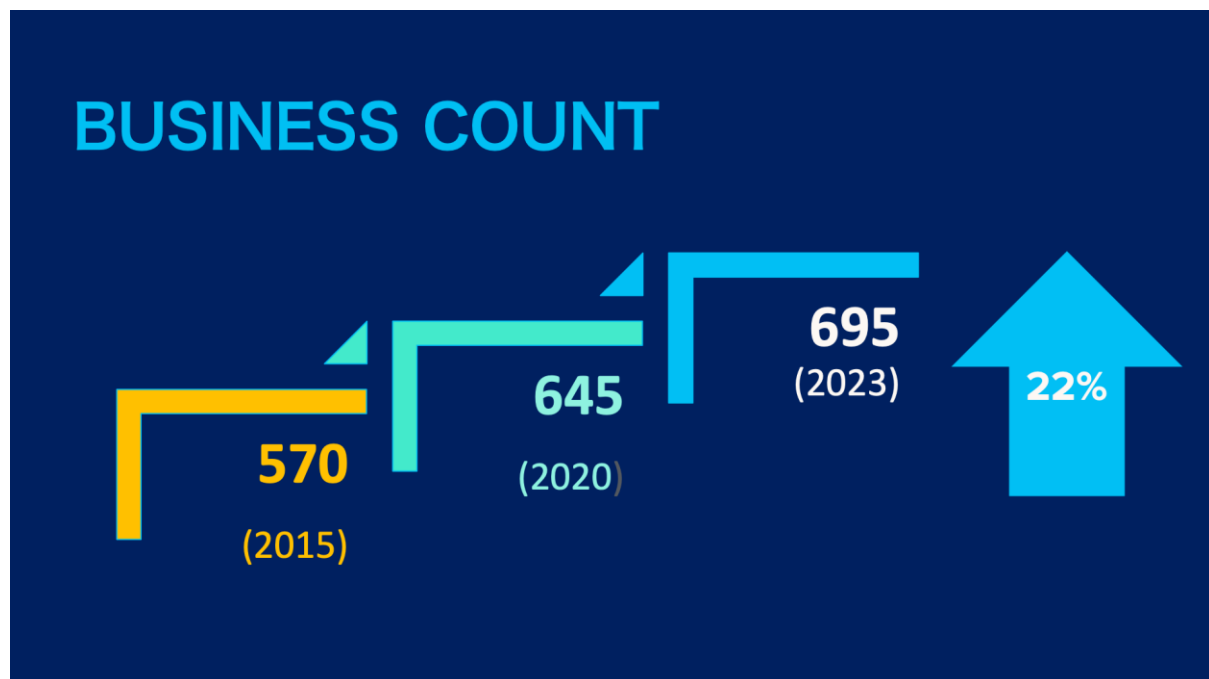
*Source: The Fifth Sector analysis of BRES and LinkedIn (2024)*

### Herefordshire's creative businesses

Analysis of the county's cultural and creative industries business sector showed similar resilience and sustained growth, growing from 570 firms in 2015 to 645 in 2020 and 695 in 2023 (the latest year for which figures were available).

IT, software and computer services again emerged as the largest sector (270 businesses), consistent with the pattern observed across the UK. Music, performing and visual arts (120) was the next largest sector. Film, TV, video, radio and photography (70) and Advertising and marketing (65) both showed steady growth without demonstrating the benefits of 'clustering.'

*Figure 3 Herefordshire registered creative business population*



*Source: The Fifth Sector analysis of Interdepartmental Business Register (from Nomisweb)*

### Clustering of cultural and creative industries businesses and employment

One of the stated goals of the cultural strategy was to increase the LQ of creative industries in Herefordshire – that is, the average density of sector businesses and employment – to the national average of 1.0 by 2029. This reflected an awareness of the benefits that increasing specialisation and knowledge exchange can bring to a creative economy which demonstrates effective clustering. However, this was always going to be a daunting target: cultural and creative industries are disproportionately aggregated in London and the South East, which are home to 60% of sector businesses and employment, so for any rural sub-sector to have an LQ of 1.0 or above represents a considerable concentration.



On the evidence of the latest available national employment statistics (BRES 2022), Herefordshire remained far from achieving these aims, with a creative industries LQ of 0.46 and no individual sub-sector having an LQ greater than 0.93 (Music, performing and visual arts). Looking at the cultural sector gave a slightly different outcome, with an LQ of 0.63 and evidence of clustering both in Heritage (170 employees, LQ of 3.17) and Cultural education (40 employees, LQ of 1.57).

Additional evidence of freelance and self-employed creative workers, drawn from LinkedIn, gave more support for the potential for a different model for rural creative industries: one built upon co-production and collaboration between companies and freelancers as much as scaling individual registered businesses or geographical agglomeration. Including the freelance and self-employed creative workforce within our analysis produced much clearer evidence of the strength of both creative industries (LQ of 0.98) and the cultural sector (1.25). By this account, Crafts (including arts and crafts, jewellery designers and local specialisms such as blacksmithing) emerged as a nationally significant sub-sector, with an astonishing LQ of 54.79 – in other words, that the concentration of makers in Herefordshire was more than 50 times the national average! Other creative industries sub-sectors, including Design and designer fashion (4.89), Advertising and marketing (1.43) and Publishing (1.04), showed evidence of clustering.<sup>4</sup>

*Figure 4 Evidence of clustering in Herefordshire's cultural and creative industries sectors*



*Source: The Fifth Sector analysis of BRES (2022) and LinkedIn (2024)*

<sup>4</sup> These raw data were likely to underestimate the real scale of Herefordshire's cultural and creative workforce, where consultation confirmed that many of its members would not think of using LinkedIn to promote themselves or their businesses.

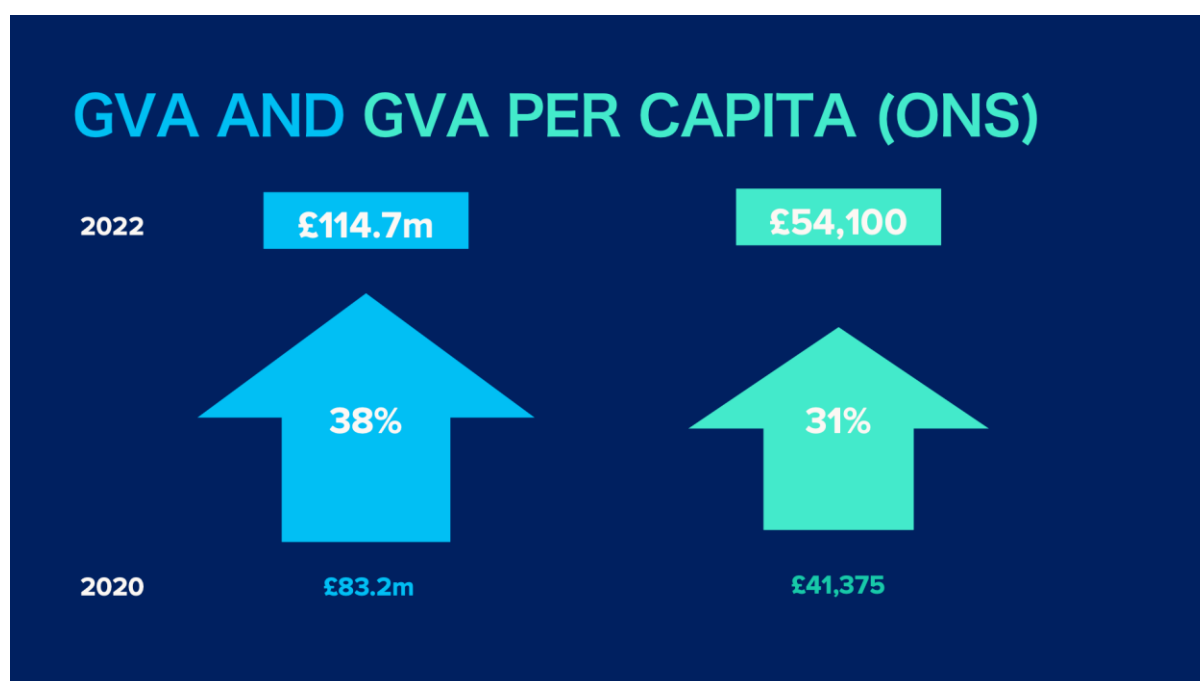


## Output of cultural and creative industries

Analysis of sector output showed a sharp increase in output of Herefordshire's cultural and creative industries, with GVA rising from £83.2 million in 2020 to £114.7m in 2022 (the last year for which full figures were available) – an increase of 38%, against growth of only 5% in the employment base.

Increased output was driven primarily by productivity growth, not by the scale of employment. GVA per capita in the sector grew by 31% in the same period, to £54,100 – nearly double the average GVA per capita for all employment in Herefordshire of £27,278.<sup>5</sup> Given that the analysis covered a period in which cultural production and consumption were severely disrupted by lockdowns, these findings are a remarkable testament to the resilience of Herefordshire's creative economy.

Figure 5 Herefordshire creative and cultural sector GVA 2022



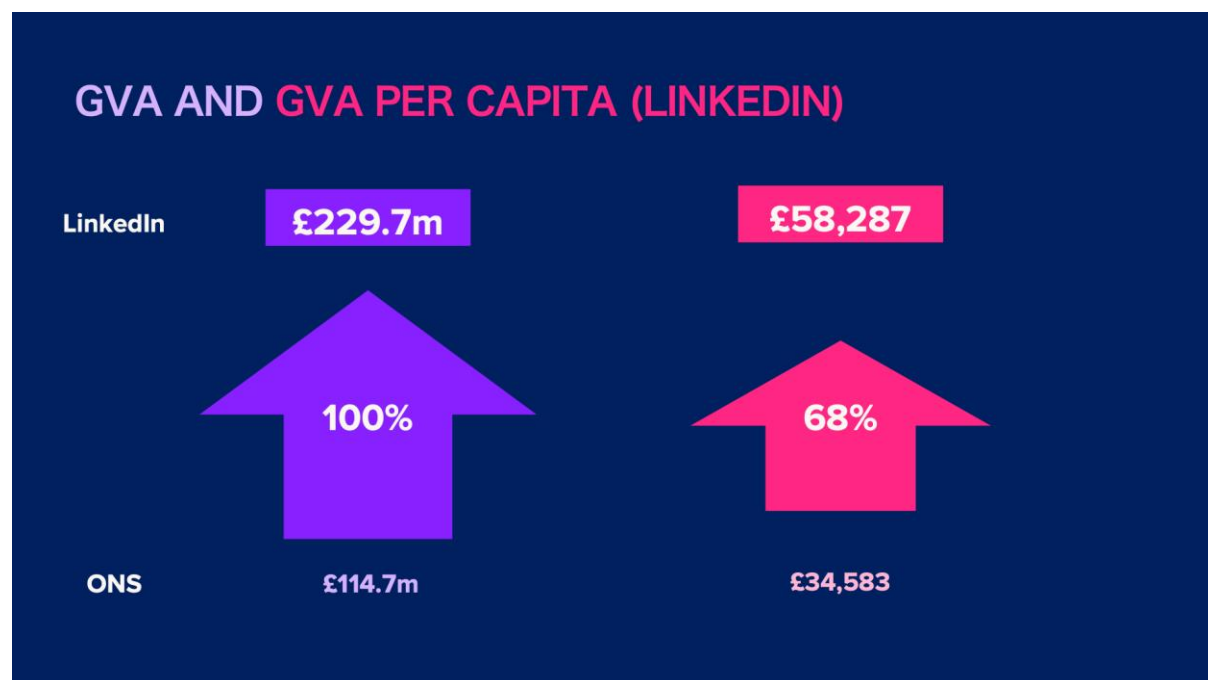
Source: The Fifth Sector analysis of ONS data: Business Register and Employment Survey (BRES) 2022; Current Price (unsmoothed) GVA (B) per hour worked indices for West Midlands Combined Authority (2022); Current Price (unsmoothed) GVA (B) per hour worked indices for County of Herefordshire (2022); and Regional gross value added (balanced) by industry: city and enterprise regions for West Midlands Combined Authority (2022).

<sup>5</sup> These figures were prepared on a conservative basis, using evidence of GVA from The Marches (the smallest economic region for which output data are broken down by SIC codes) and scaling this down to reflect Herefordshire's relatively lower levels of productivity (around 75% of the national average, compared with 86% for the West Midlands region).

### Further evidence of clustering and growth

DCMS Sector Estimates for Cultural sector and Creative Industries provide evidence of other IP-related income, such as export earnings, broken down into sub-sectors which more closely reflect output data than attribution of GVA based on wider SIC categories used in regional Current Price estimates. However, DCMS estimates are prepared only at a national level. Using LinkedIn workforce data to more accurately scale the proportion of total workforce in Herefordshire produced estimated GVA of £229.7m, double that of estimates based on ONS data on full and part time employment.

*Figure 6 Herefordshire creative and cultural GVA - including freelance workforce*



*Source: The Fifth Sector analysis of DCMS Economic Estimates (2022) and LinkedIn (2024)*

This level of analysis also more clearly demonstrated the economic contribution made by freelance and self-employed creative workers. Other independent research demonstrates that freelance and self-employed creatives may be expected to generate greater revenue than those in other occupational categories due to their higher levels of knowledge and skill. The total contribution of freelances to the UK economy in 2022 was estimated at £139 billion.<sup>6</sup>

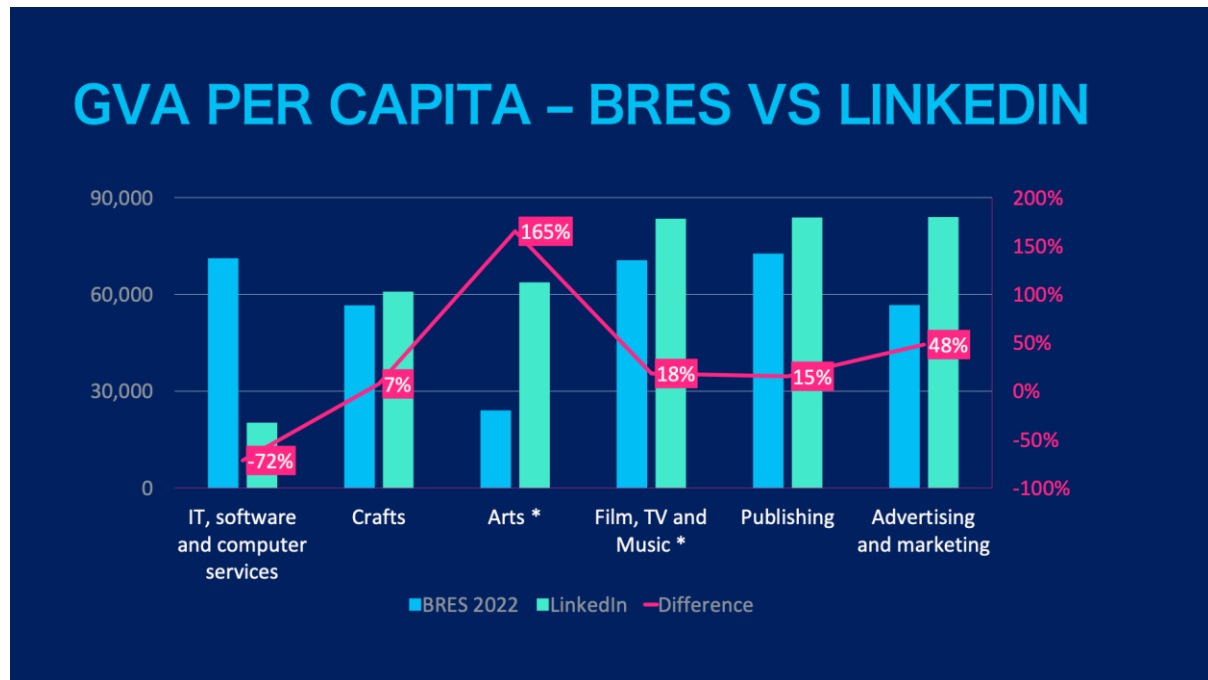
Comparing DCMS Estimates with LinkedIn data resulted in estimated average GVA per capita for Herefordshire's cultural sectors of £58,287, 68% greater than ONS estimates and 114% more than the county average for all sectors.

<sup>6</sup> <https://www.ipse.co.uk/policy/research/the-self-employed-landscape/self-employed-landscape-report-2022.html>

Three sub-sectors – Advertising and marketing, Film, TV and Music and Publishing – demonstrated GVA per capita of more than £83,000, three times the county average.

Figure 7 shows the comparison of GVA estimates for key cultural and creative sub-sectors using the two different methodologies:

Figure 7 Comparison of GVA per capita for Herefordshire cultural and creative sub-sectors



Source: The Fifth Sector analysis of DCMS Economic Estimates (2022) and LinkedIn (2024)

It also indicated higher levels of productivity in the cultural sector, where GVA per capita was £58,287 – 68.5% higher than suggested by analysis of ONS data alone, reflecting the relative importance of freelance working and self-employment. The DCMS cultural sector for Arts showed GVA per capita of £63,748 per annum, 265% of the ONS estimate. By the same method, three creative sub-sectors – Advertising and marketing, Film, TV and Music and Publishing – had GVA per capita of more than £83,000.

These estimates highlight that:

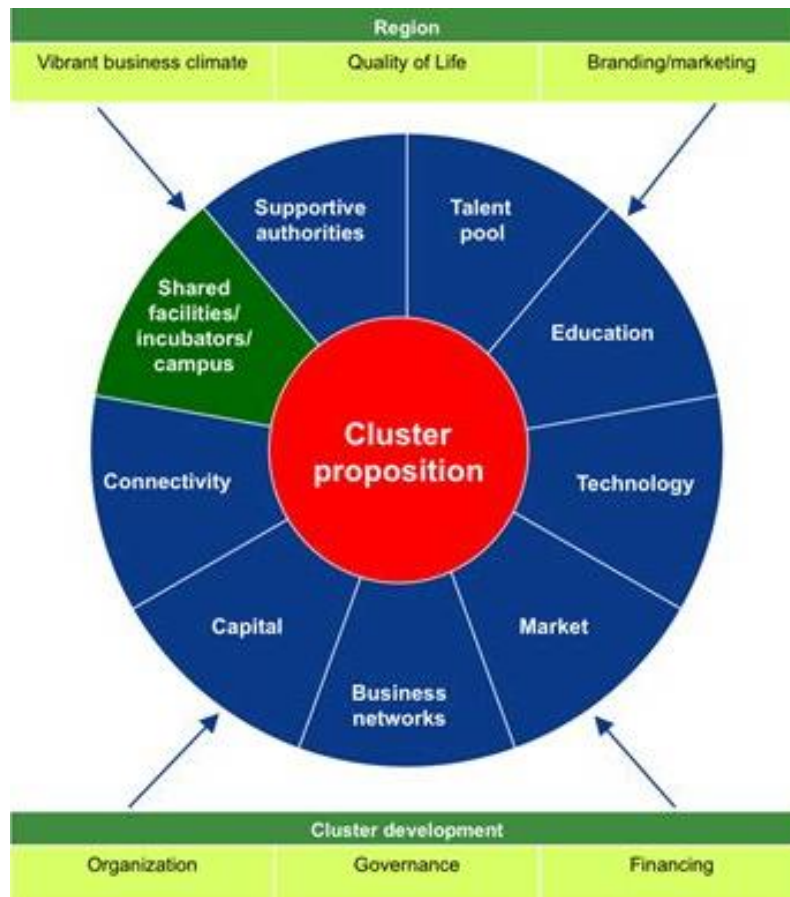
- Freelance and self-employed creatives play a critical role in the rural creative economy by enabling businesses to manage and reduce entrepreneurial risk, de-risk market uncertainties, and reduce the amount of finance required for innovation and business start-ups, ultimately promoting innovation, enterprise, and growth.
- Provision of suitable production and showcasing infrastructure within the county (frequently identified through consultation as a key need to help existing business grow and attract new talent) has the potential to amplify the returns from co-production and collaborative working.

## Relationship of clustering to productivity

Throughout this report we have used ‘clustering’ as a term to describe the concentration of creative employment and workforce across the county in relation to the national average. This reflects the fact that the economic phenomenon of clustering – and the realisation of its benefits in an increased *absorptive capacity for innovation* amongst sector actors – consists of other factors than simple physical agglomeration. These include:

- Shared facilities
- Connectivity
- Supportive authorities
- Governance
- Access to capital and finance
- Business networks
- Market opportunities
- Education
- Talent pool
- Technology
- Quality of life
- Branding and marketing
- Vibrancy of the business climate

Figure 8 Dimensions of an economic cluster



Source: BCI Global, <https://bciglobal.com/en/innovation-and-cluster-development>

Nonetheless, the relative concentration of creative workforce can be a useful indicator of productive capacity, based on the assumption that this will promote the exchange of skills and resources, shared access to market opportunities and the ability of organisations to draw on a wider pool of skilled specialists. In the context of a geographically dispersed and largely rural county, this is a more useful indicator of the capacity for innovation and growth than physical agglomeration alone.

Figure 9 shows a 'heat map' of sub-sector LQ and its relation to economic output which tends to support this assumption. The exception is the IT, computer and software sub-sector, which suggests that there are fewer firms taking advantage of opportunities in software development and creative technologies.

*Figure 9 'Heat map' of clustering in Herefordshire's cultural and creative industries sectors*

## SUB-SECTOR CLUSTERING

DCMS sub sector	LQ	GVA (£m)
Crafts	54.79	42.3
Design and designer fashion	4.89	32.8
Advertising and marketing	1.43	56.6
Publishing	1.04	26.6
Architecture	0.96	7.8
Music, performing and visual arts	0.83	19.7
Film, TV, video, radio and photography	0.70	30.8
Museums, Galleries and Libraries	0.48	0.5
IT, software and computer services	0.34	12.8

## Key Findings

### 1. Leadership and Focus

- While the cultural strategy has spurred positive activity, reflected in a steep rise in productivity across Herefordshire's creative workforce and economy, it suffers from lack of consistent focus and leadership effort.
- A disconnect between council priorities and cultural sector ambitions, with limited translation between policy goals and creative practice, constrains investment and limits potential future returns.
- Herefordshire Cultural Partnership, which should be driving implementation, lacks the capacity at the strategic level needed to effect real change.

**Recommendation:** Evolve the Cultural Partnership into a more empowered intermediary body, potentially taking account of a wider sub-regional geography, modelled on successful examples like South East Creative Economy Network<sup>7</sup>. This body should actively engage council leadership, translate between policy and practice, and drive collaborative action.

### 2. Co-production and Scale

Herefordshire's dispersed cultural ecology presents challenges for building critical mass, but also opportunities for innovative approaches. Hereford Museum's emerging co-production model offers a promising framework that could be scaled across the sector.

**Recommendation:** Establish a working group led by the Museum, involving key institutions like Hereford College of Arts and rural media organisations, to develop a county-wide co-production model. This should address how to build scale, share resources, and create pathways for talent development across dispersed communities.

### 3. Vision and Ambition

The current strategy vision, while positive, doesn't sufficiently differentiate Herefordshire or provide clear direction for action. It needs reframing to emphasise the county's unique assets and ambitions, using an appropriate register of language to reflect the distinctiveness of the cultural offer.

**Recommendation:** Revise the vision to stress Herefordshire's commitment to driving innovation in rural cultural development, leveraging its heritage and landscapes to create distinctive creative experiences and economic opportunities.

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<sup>7</sup> <https://www.southeastleap.com/our-network/working-groups/south-east-creative-economy-network/>



#### 4. Whole-County Approach

Although mapping identifies creative businesses, cultural organisations and a creative workforce distributed across the county, current activity is overly focused on Hereford city centre, with limited understanding of how to connect cultural development and increase specialisation and collaboration of creative industries across the wider county and region.

**Recommendation:** Commission a detailed cultural asset mapping exercise for the whole county, identifying potential clusters, collaboration opportunities, and strategies for overcoming geographic barriers. Use this to inform a "cultural geography" approach to future planning.

#### 5. Strategic Alignment

There are missed opportunities to align cultural initiatives with broader policy agendas around economic development, health and wellbeing, and education. The value proposition of culture is not consistently communicated to council stakeholders.

**Recommendation:** Develop a cross-cutting cultural policy that demonstrates clear links to council priorities. Create a **cultural value framework** that can be used to articulate benefits across diverse policy areas.

#### 6. Investment Coordination

While significant investments are being made (e.g., Museum redevelopment, public art initiatives), there was limited coordination ensure that these were linked to the development of new and sustainable production facilities to maximise their collective impact.

**Recommendation:** Establish a **Cultural Investment Board** to oversee major projects, ensure strategic alignment of place-based and sector-focused investment, and maximise spillover benefits across the county.

## Appendix 1: Supply of creative skills

This report provides an overview of provision of creative skills training in Herefordshire. It sets local skills needs and the learning landscape in the wider national context, examining funding changes, diversity issues and continuing professional development (CPD) opportunities.

Recent policy changes have impacted creative and course offerings in higher and further education, with reduced funding for arts, creative and media courses and a greater focus on technical and vocational education.

The creative sector faces significant diversity challenges, with those from wealthier backgrounds more than twice as likely to secure jobs in creative occupations.

While there are pockets of good practice, CPD opportunities in the sector are often poorly matched to current and future skills needs, particularly in terms of accessibility and updated content although we understand the College of Arts is developing new CPD/short course initiatives.

This section analyses the supply of post-16 education and learning across five key creative career pathways: Creative Originals, Creative Services, Creative Experiences, Creative Content, and Digital Technology. Whilst Herefordshire has a good range of creative courses available, with 100 offerings across the five pathways, there are opportunities to support the broadening of routes into the industry through targeted initiatives. This has been highly successful in other English regions through local authority support <sup>8</sup>

New initiatives such as the NMITE Future of Work Hub and the HCA Digital Skills Centre have the potential to significantly boost local skills development but will take time to fully establish themselves. HCA is currently developing its course portfolio.

### Recommendations:

1. Foster collaboration between key learning institutions to develop a comprehensive strategy for cultivating the future skills needed in the creative and digital workforce, with a focus on tailored CPD programs and ongoing communication with employers.
2. Promote equality, diversity and inclusive growth in Herefordshire's creative sector through targeted, place-based initiatives involving the Council, education providers and industry, with particular emphasis on widening access
3. Enhance talent attraction and retention by improving communication of current and future learning and career pathways, highlighting the specific future skills that will be nurtured in the region.

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<sup>8</sup> <https://www.westyorks-ca.gov.uk/all-news-and-blogs/apply-to-the-mayors-screen-diversity-programme-beyond-bront%C3%ABs/>

Concerted efforts are needed to address skills gaps, diversity challenges and talent retention if Herefordshire's creative sector is to overcome structural and logistical barriers to growth and fulfil its promise shown. By fostering collaboration, promoting inclusion and communicating clear pathways, the county can capitalise on its unique assets and position itself as a thriving hub for creative and digital innovation.

## National context

The change in Government in July 2024 meant that, at time of writing, it was unclear where changes to creative industries and skills policy would be made. However, some trends were likely to continue to influence development of policy:

- The creative industries are a significant contributor to the UK economy, generating £108 billion annually and employing over 2.3 million people. They rank among the world's fastest-growing sectors providing high-quality employment, drive innovation, and support civic and social wellbeing. The sector has been identified as a priority for future growth by successive administrations.
- As technology increasingly infuses the creative industries, the UK Government has recognised competitive advantage in both technology and creative sectors and identified the creative industries as one of five priority sectors in the 2023 Spring Budget to deliver future growth.
- The World Economic Forum's Future of Jobs 2023 report predicted that technology adoption will continue to be a major driver of business transformation over the next five years. It also stated that the fastest-growing roles relative to their size today are driven by technology, digitalisation and sustainability and that employers estimate that **44% of workers' skills will be disrupted** in the next five years. Over 85% of organisations surveyed identified increased adoption of new and frontier technologies and broadening digital access as the trends most likely to drive transformation in their organisation.

## Funding changes

Previous UK Government policy had negative impacts on the design and delivery of creative and digital courses both in higher education (HE) and further education (FE) institutions throughout England. In 2022, top-up funding for non-prioritised subjects – which include the arts, creative and media courses – was cut from £36m to £19m, with the savings being redirected to other areas such as nursing and computing. This highly criticised policy effectively meant a reduction in funding by half to arts, creative and media courses, and indicated greater focus on technical and further education.

The **Augar Review of 2018** on post-18 education and funding also highlighted the need for greater access to the Lifelong Learning Entitlement (LLE) and the need for more Higher

Level apprenticeships. It seems likely that the new government will revisit those recommendations.

The **Skills and Post-16 Education Bill** (from April 2022) aimed to,

"Embed employers in the heart of the skills system by making it a legal requirement that employers and colleges collaborate to develop skills plans so that the training on offer meets the need of local areas, and so people no longer have to leave their hometowns to find great jobs."

The Bill resulted in the creation of **Local Skills Improvement Plans** (LSIPs) which were created through involvement with employers and, most notably, the creation of new "T" levels which offer a more vocational route equivalent to three A levels. There are currently two pathways designed for the creative sector:

- Media Broadcast and Production (starting September 2024)
- Craft and Design (starting September 2024)

There are also three digital pathways (all at Level 3):

- Digital Production, Design and Development
- Digital Support Services
- Digital Business Services

The success of T levels is still being assessed but anecdotal evidence from employers in the sector is that they are not widely recognised and are difficult to engage with due to the amount of placement time needed (minimum 45 days).

In addition, there are apprenticeship pathways such as:

- Level 3 -- Advertising and Media Executive
- Level 3 -- Broadcast Production Assistant
- Level 3 -- Digital Marketer
- Level 3 -- Creative Venue Technician
- Level 4 -- Junior 2D Visual Effects
- Level 4 -- Assistant Technical Director

And at Higher level:

- Level 6 -- Digital Marketer (degree)
- Level 6 -- Broadcast and Media Systems Engineer (degree)

## Diversity

The creative sector still has serious structural, institutional and workforce diversity problems. Historic patterns of recruitment by “who you know” and a tendency amongst employers to hire people like themselves present considerable barriers to entry. Working patterns involving early starts, late finishes and ‘crunches’ to meet project deadlines place some roles out of the reach of those with caring responsibilities or without access to private transport. There is also evidence that employers are reluctant to hire “older” workers – meaning anyone over 35!<sup>9</sup>

Research from the Creative Industries Policy & Evidence Centre shows that those from wealthier backgrounds are more than twice as likely to land a job in a creative occupation, with the issue further compounded when class is combined with gender, ethnicity, disability and skill levels. The research identified that only through,

"Significant, systemic and sustained action [can] Government, industry and educators work together to seize this moment, as we emerge from an unprecedented crisis, to address long-standing inequalities in the sector."

## CPD

Throughout the creative sector, there is a broad range of good practice in providing continuing professional development (CPD) opportunities tailored to the needs of professionals, but it exists largely in dispersed pockets and is often poorly matched, in volume and accessibility, to current and foreseeable needs for training and development. Although there are some sector-specific private training providers, they are mainly London and Southeast based.

Research by the Higher Education Funding Council for England (HEFCE) on CPD within higher education (HE) provision for the creative sector found that,

“Existing provision [was] inflexible in terms of content and delivery. Opportunities [were] often inadequately responsive to individual requirements, with too much material re-used from other courses (within HE) or infrequently updated.”<sup>10</sup>

## Our Findings

### Local Skills

The Local Skills Improvement Plan for Herefordshire and Worcestershire (produced by the Hereford and Worcestershire Chambers of Commerce) did not identify the creative

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<sup>9</sup> <https://www.linkedin.com/pulse/why-do-creative-industries-shun-workers-artists-over-45-tom-harvey-vfvif/?trackingId=RD4rH77XQyKFx2YADQzCVQ%3D%3D>

<sup>10</sup> [https://dera.ioe.ac.uk/id/eprint/5158/1/01\\_67.pdf](https://dera.ioe.ac.uk/id/eprint/5158/1/01_67.pdf)

sector as a priority. However, it did prioritise the related digital sector and identified the following digital skills needs:

- More training on AI, AR/VR, robotics, sensors
- Digital marketing
- Integrated digital platforms to capture data and information in one place
- Data analysis and utilising data for performance improvement
- Software and web development
- Increased awareness and knowledge of cyber security
- Training to adapt and implement new technology

**Digital marketing** has been identified across all sectors as a skill employers think they will need over the next five years.

The report also endorses more employer involvement in learning and interactions within educational pathways:

"We will support embedding employer interactions over the course of study through, for example, work experience, visiting speakers, job shadowing, workplace visits and volunteering. Delivering these in partnership with employers is critical to providing authentic interactions with people in work and workplaces, which increases familiarity with and understanding of 'business as usual' in the workplace vs learning environment."

The LSIP data refers to 58 apprenticeships across the creative and digital sectors and a further 27 across digital. However, this apprenticeship data does not cover the Herefordshire Local Authority area.

Local policies identify the importance of retaining young people through further/higher education, skills and training, and the importance of creating high-quality, highly skilled jobs is recognised.

### **The local learning landscape**

Described as a "signature skills initiative", the **Skills Foundry** (part of the Stronger Hereford initiative) is an important realisation of the above policy, providing opportunities for individuals to develop new technical and digital skills with two initiatives that should impact positively on the growth of the future skills needed for the creative and digital sectors:

- **NMITE Future of Work Hub:** The NMITE Future of Work Skills Hub located on the Blackfriars campus in Hereford will work with individuals and businesses concentrating on immersive reality, digitalization and emerging technologies. A new six-month Innovation Support Programme for businesses, delivered in

partnership with Innovate UK, is providing businesses with 1-2-1 training and mentoring.

- **HCA School of Creative Digital Futures:** The new Digital Skills Centre offers courses such as the UAL Level 3 Diploma in Creative Media Production and Technology. There is a good emphasis on much-needed technical skills, and digital skills are used extensively in BA and MA programmes for CAD, visualisation, graphics, digital manufacture, animation, VR, AR, web design, content creation, programming etc. The Digital Skills Centre workshops and studios and performance spaces are available across all courses.

## Defining creative skills pathways

We examined the supply of education and learning for the creative sector in Herefordshire across five creative career pathways linked to industry supply chains:

- **Pathway 1: Creative Originals:** arts & crafts, fine art, apparel and fashion
- **Pathway 2: Creative Services:** marketing and advertising, photography, architecture & planning, graphic design, product design, design services
- **Pathway 3: Creative Experiences:** music, performing arts, museums and institutions, libraries
- **Pathway 4: Creative Content:** computer games, mobile games, publishing, motion pictures & film, broadcast media, animation
- **Pathway 5 Digital Creative Technologies:** computing and digital technologies, digital skills, coding, software development

Our research showed a fairly good range of creative courses available across Herefordshire. There are:

- 100 courses across all five creative pathways
- 57 academic courses
- 22 technical (vocational) pathways<sup>11</sup>

*Figure 10 Herefordshire Creative Skills Training Pathways*

PATHWAYS	CREATIVE ORIGINALS	CREATIVE SERVICES	CREATIVE EXPERIENCES	CREATIVE CONTENT	DIGITAL CREATIVE	TOTAL
ACADEMIC	21	2	19	8	7	57
TECHNICAL	3	4	11	3	1	22
APPRENTICESHIPS	0	1	0	0	0	1

<sup>11</sup> Technical (or vocational) qualifications combine practical learning mixed with classroom learning and include BTECs and HNCs. For the purposes of this work, we have included UAL qualifications<sup>11</sup> within the "technical" offer. UAL qualifications are submitted as "Alternative Academic Qualifications" (AAQs).



CPD	16	0	0	4	0	20
TOTAL	40	7	30	15	8	100

### Creative Originals

The largest supply of learning is within **Creative Originals**, making up 40% of the skills supply offer. A large proportion of these are CPD and/or short courses offered at Hereford College of the Arts which has a growing programme of such courses. For example, access courses to ceramics, creative writing, life drawing, ceramics, printmaking and screen printing. While the majority of courses on offer may be described as "recreational type" courses, recent additions include more professionally focused learning such as website building, animation and digital imagery of benefit to those working in the creative sector. In April 2024, they offered free 2-day digital "taster" sessions for school Years 10 and 11.

### Creative Experiences

The **Creative Experiences** pathway is also in good supply -- courses in performing arts, drama, music, dance etc., and there is a good range of both academic and technical pathways available.

### Digital creative technologies

There is a clear use of new digital technologies, with **Creative Content** courses at Hereford College of Art including UAL Level 2 and Level 3 in Creative Media Production and Technology using industry-standard software such as Unity. There is a clear merging of the skills between the two pathways of Creative Content and **Digital Creative Technologies**.

### Apprenticeships

Our research found no apprenticeships offered by local training providers. However, there is evidence that creative agencies are taking on apprentices from the Worcester-based training provider The Development Manager (TDM), who are offering a Level 3 Multichannel Marketer apprenticeship and Level 6 Digital Marketing Degree in partnership with Staffordshire University. A blacksmithing apprenticeship at Holme Lacy College, launched in 2021, is no longer advertised as taking candidates.

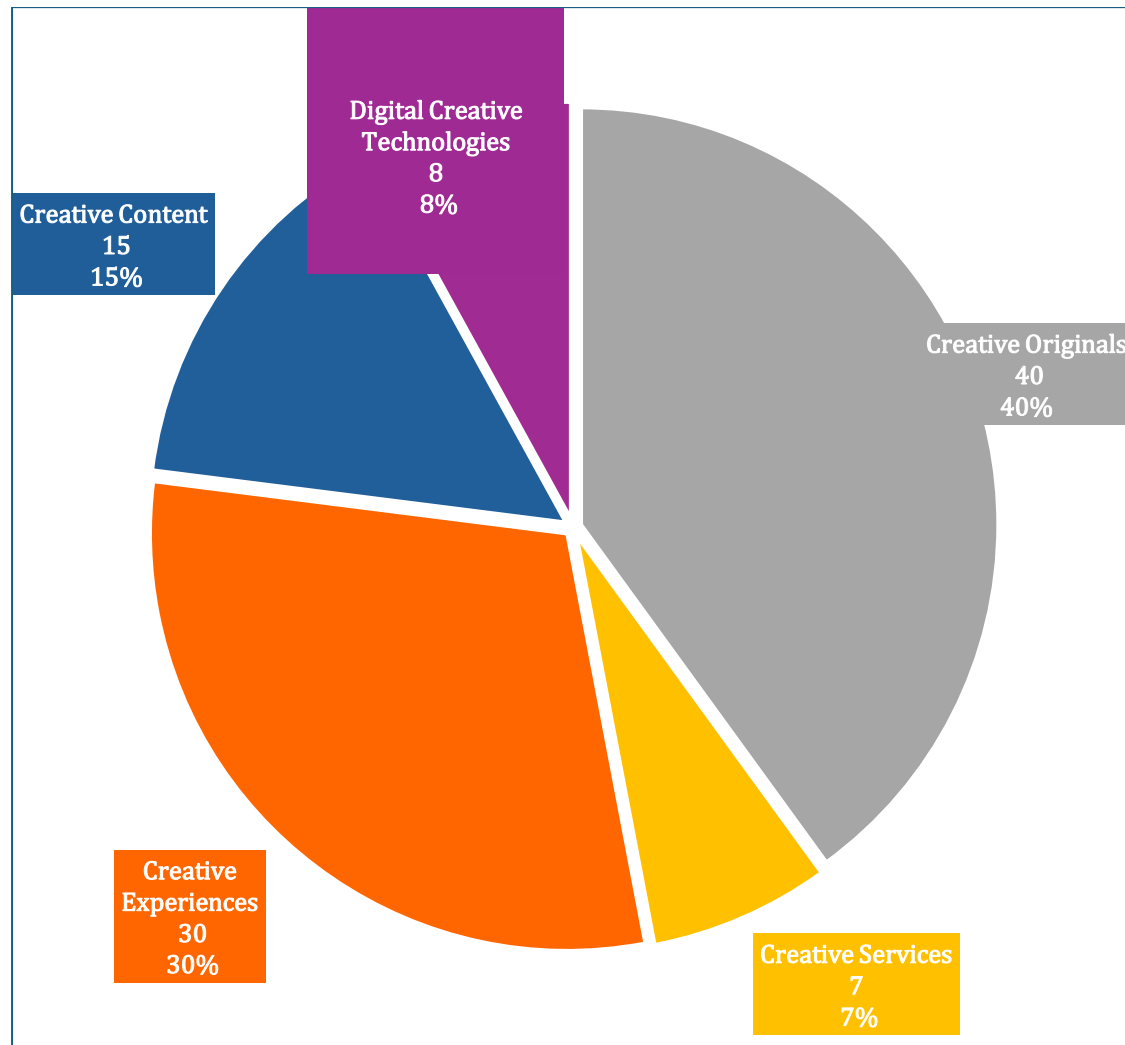
### T levels

T levels require a high level of workplace learning and related employer engagement, so they are not always an easy fit for a sector which is largely made up of freelancers or small businesses and so are not popular with either Herefordshire employers in the sector

– often small or even one-person businesses – nor with educational institutions who prefer the industry designed UAL qualifications.

We could not find a creative T level offer in Herefordshire. (Worcestershire College does offer a T level in Digital Production and Design, and there are non-creative T levels on offer at Herefordshire and Ludlow College).

*Figure 11 Proportion of courses within creative skills pathways*



## Challenges

- Although new initiatives at the Hereford College of Arts and NMITE will be enormously helpful in helping to attract and retain talent, both are relatively new and will take time to "bed in". Compared to other rural counties, these dual assets combine to present Herefordshire with a unique proposition which offers the future technical and creative skills so badly needed by employers in creative, digital and wider sectors.
- To encourage talent from a broader range of backgrounds.
- Retaining talent: the "draw" of opportunities in London and creative clusters in cities such as Bristol and Birmingham, both within daily commuting distance, is a real issue for retention of talent within Herefordshire.
- Professional development opportunities for creative workers in Herefordshire are lacking although we understand the College of Arts is in the process of developing more CPD routes aligned to the LSIP priorities and needs of the creative workforce. There is a shortage of local provision, and accessing opportunities in other places can be unaffordable for many, particularly freelance and self-employed creatives, when costs of travel and accommodation are added to time away from fee-earning work. While there is an ever-increasing availability of online learning, the volume of available learning can be confusing and sometimes expensive, especially for courses offering training in digital creative technologies.

## Recommendations

1. Support a visionary collaboration between HCA and NMITE (with emphasis on the two future skills projects) to develop a short-term and long-term strategy to cultivate the valuable "future" skills needed for the creative and digital workforce. The strategy should encompass clear deliverables around:
  - a. Developing tailored CPD programmes to support employers and employees at all levels, including managers and leaders. We understand this initiative is underway by the College of Arts which is to be welcomed
  - b. Implementing a sustainable, ongoing method of communicating with employers to assess immediate and future skills needs. It is acknowledged that many creative businesses – often individual practitioners – find it difficult to work with education so any support for current initiatives within the College ( such as industry liaison groups) could encourage further partnerships
2. Explore place-based approaches to promoting equality, diversity and inclusive growth of the creative sector in Herefordshire. This should involve the Council, education providers and industry working together to identify specific initiatives

and areas of support. In particular, focus on widening routes into the industry by developing and promoting better apprenticeship and T level opportunities.

3. Attract and retain talent through improved communication of current and future learning and career pathways. Develop a targeted marketing strategy that highlights clear routes for progression in creative and digital careers, with emphasis on the specific future skills that will be nurtured.

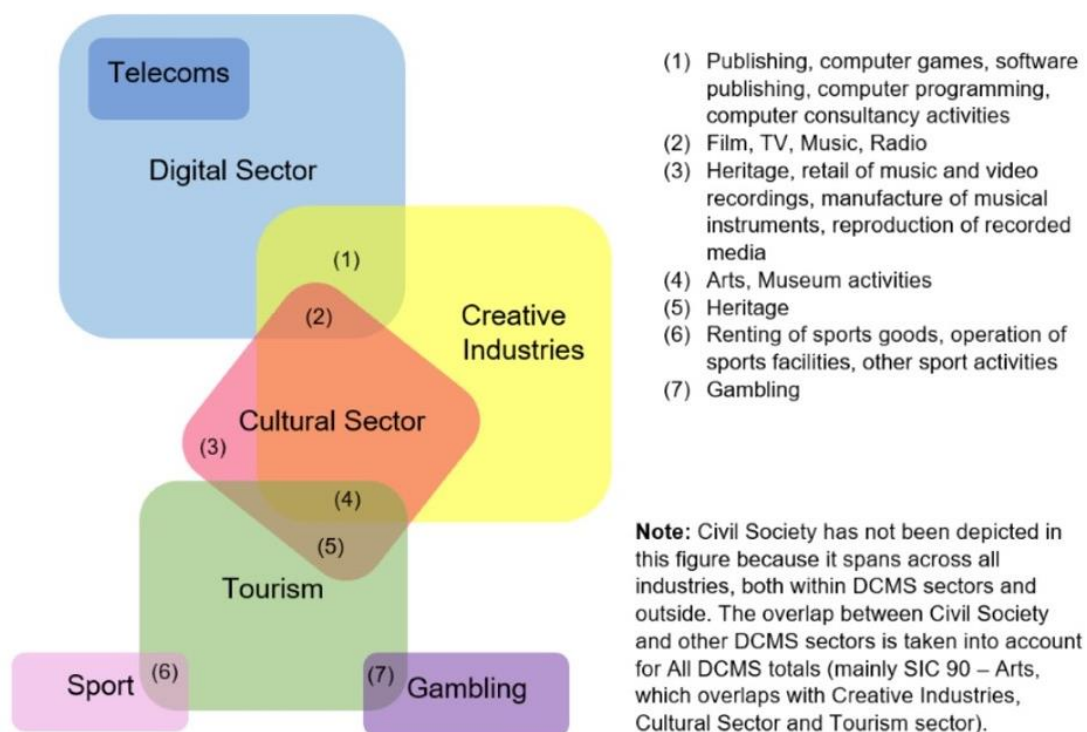
## Appendix 2: Scale and significance of Herefordshire's Cultural and Creative Industries

### Methodology

DCMS uses sub-sector definitions based on Standard Industrial Classifications (SIC codes) to determine and analysis the composition of cultural sectors and the creative industries in the UK. The definitions of creative industries and cultural sectors overlap, as shown in

Figure 12:

Figure 12 DCMS definitions of creative industries and cultural sectors



Source: DCMS Creative Industries Economic Estimates

For this study, we focused on the creative industries and cultural sector, in which there is a significant overlap of the workforce. The exceptions are in operation of heritage sites and a small element of music-related manufacturing and retail, which typically account for less than 10% of the total CCI workforce. Similarly, there is a significant overlap between creative industries and digital sectors, which includes computer games and software development and publishing and a significant population of computer consultants. The remainder of the digital sector involves elements of digital manufacturing, telecoms and other infrastructure (e.g., operation of data centres) which lie outside the creative industries.

The results of our mapping are represented below in a series of tables which show:

- Combined scale and output of the combined CCI sectors
- Scale and output of the creative industries only
- Scale and output of the cultural sector only

We compared ONS data for 2020 and 2022 (the latest publicly available data) to show evolution of workforce and businesses and added analysis of workforce (through LinkedIn) to highlight the contribution of freelance and self-employed to Herefordshire's creative economy.

### GVA (2022)

Analysis of employment data showed a sharp rise in output and productivity (measured in GVA per capita) between 2020 and 2022. With that, the creative industries sector was much more productive than the cultural sector.

*Table 1 Herefordshire Cultural and Creative Industries GVA 2022*

<b>Cultural and Creative Industries (Total)</b>	<b>Sector employment (BRES 2022)</b>	<b>Sector GVA 2022 (£m)</b>	<b>Sector GVA per capita 2022(£)</b>
Herefordshire 2022	2,120	114.7	54,101

*Source: The Fifth Sector analysis of ONS data from: BRES 2022, Subregional productivity: labour productivity indices by city region (release date 17 June 2024) and Regional gross value added (balanced) by industry: city and enterprise regions (release date 24 June 2024)*

Table 2 Herefordshire Creative Industries GVA 2022

<b>Creative Industries</b>	<b>Sector employment (BRES 2022)</b>	<b>Sector GVA 2022 (£m)</b>	<b>Sector GVA per capita 2022 (£)</b>
Advertising and marketing	100	5.7	56,686
Architecture	240	7.9	33,089
Crafts	10	0.6	56,605
Design and designer fashion	70	6.1	87,130
Film, TV, video, radio and photography	135	9.9	73,548
IT, software and computer services	860	61.2	71,186
Publishing	110	8.0	72,636
Museums, Galleries and Libraries	105	2.5	24,042
Music, performing and visual arts	315	8.1	25,855
<b>Total (Creative Industries)</b>	<b>1,945</b>	<b>110.1</b>	<b>56,598</b>

Source: *The Fifth Sector (ibid)*

Table 3 Herefordshire Cultural sector GVA 2022

Cultural sector	Sector employment (BRES 2022)	Sector GVA 2022 (£m)	Sector GVA per capita 2022 (£)
Arts	270	6.5	24,042
Crafts	10	0.6	56,605
Film, TV and Music	120	8.5	70,579
Radio	0	-	-
Photography	20	1.7	87,130
Museums and Galleries	40	1.0	24,042
Libraries and archives	65	1.6	24,042
Cultural Education	40	1.5	38,432
Heritage	170	4.1	24,042
<b>Total (Cultural sector)</b>	<b>735</b>	<b>25.4</b>	<b>34,583</b>

Source: The Fifth Sector (ibid)



## GVA (2020)

Table 4 Herefordshire Cultural and Creative Industries GVA 2020

<b>Cultural and Creative Industries (Total)</b>	<b>Sector employment (BRES 2020)</b>	<b>Sector GVA 2020 (£m)</b>	<b>Sector GVA per capita 2020 (£)</b>
Herefordshire 2020	2,010	83.2	41,378

Source: *The Fifth Sector (ibid)*

Table 5 Herefordshire Creative Industries GVA 2020

<b>Creative Industries</b>	<b>Sector employment (BRES 2020)</b>	<b>Sector GVA 2020 (£m)</b>	<b>Sector GVA per capita 2020 (£)</b>
Advertising and marketing	195	7.7	39,254
Architecture	265	4.4	16,720
Crafts (Creative Industries)	5	0.2	48,904
Design and designer fashion	70	2.8	40,596
Film, TV, video, radio and photography	160	9.1	57,060
IT, software and computer services	675	39.7	58,763
Publishing	220	12.8	58,350
Museums, Galleries and Libraries	100	1.1	11,430
Music, performing and visual arts	205	3.7	17,807
<b>Total (Creative Industries)</b>	<b>1,895</b>	<b>81.6</b>	<b>43,059</b>

Source: *The Fifth Sector (ibid)*

Table 6 Herefordshire Cultural sector GVA 2020

<b>Cultural sector</b>	<b>Sector employment (BRES 2020)</b>	<b>Sector GVA 2020 (£m)</b>	<b>Sector GVA per capita 2020 (£)</b>
Arts	150	1.7	11,430
Crafts (Culture)	5	0.2	48,904
Film, TV and Music	160	9.1	56,926
Radio	0	-	-
Photography	15	0.6	40,596
Museums and Galleries	35	0.4	11,430
Libraries and archives	65	0.7	11,430
Cultural Education	45	1.3	29,963
Heritage	110	1.3	11,430
<b>Total (Cultural sector)</b>	<b>585</b>	<b>15.4</b>	<b>26,367</b>

Source: The Fifth Sector (ibid)

### Change in GVA, 2020-2022

Table 7 Change in Herefordshire Cultural and Creative Industries employment and GVA, 2020-22

<b>Change in Cultural and Creative Industries employment and GVA</b>	<b>Sector employment (BRES 2020)</b>	<b>Sector GVA 2020 (£m)</b>	<b>Sector GVA per capita 2020 (£)</b>
Herefordshire 2020-22	110	31.5	12,723

Source: The Fifth Sector (ibid)

Table 8 Change in Herefordshire Creative Industries employment and GVA, 2020-22

	Change 2020-2022		
<b>Creative Industries</b>	<b>Sector employment</b>	<b>Sector GVA (£m)</b>	<b>Sector GVA per capita (£)</b>
Advertising and marketing	-95	(2.0)	17,431
Architecture	-25	3.5	16,370
Crafts (Creative Industries)	5	0.3	7,701
Design and designer fashion	0	3.3	46,534
Film, TV, video, radio and photography	-25	0.8	16,489
IT, software and computer services	185	21.6	12,424
Publishing	-110	(4.8)	14,286
Museums, Galleries and Libraries	5	1.4	12,612
Music, performing and visual arts	110	4.5	8,047
<b>Total (Creative Industries)</b>	<b>50</b>	<b>28.5</b>	<b>13,539</b>

Source: The Fifth Sector (ibid)

Table 9 Change in Herefordshire Cultural sector employment and GVA, 2020-22

	Change 2020-2022		
Cultural sector	Sector employment	Sector GVA (£m)	Sector GVA per capita (£)
Arts	120	4.8	12,612
Crafts (Culture)	5	0.3	7,701
Film, TV and Music	-40	(0.6)	13,652
Radio	0	-	-
Photography	5	1.1	46,534
Museums and Galleries	5	0.6	12,612
Libraries and archives	0	0.8	12,612
Cultural Education	-5	0.2	8,470
Heritage	60	2.8	24,042
<b>Total (Cultural sector)</b>	<b>150</b>	<b>10.0</b>	<b>8,216</b>

Source: The Fifth Sector (ibid)

## Percentage change in GVA, 2020-2022

Table 10 Percentage change in Cultural and Creative employment and GVA, 2020-22

Percentage change in Cultural and Creative Industries employment and GVA	Sector employment (BRES 2020)	Sector GVA 2020 (£m)	Sector GVA per capita 2020 (£)
Herefordshire 2020-22	5%	38%	31%

Source: The Fifth Sector (ibid)

Table 11 Percentage change in Creative Industries employment and GVA, 2020-22

	Percentage change 2020-2022		
Creative Industries	Sector employment (%)	Sector GVA (%)	Sector GVA per capita (%)
Advertising and marketing	-49%	-26%	44%
Architecture	-9%	79%	98%
Crafts (Creative Industries)	100%	131%	16%
Design and designer fashion	0%	115%	115%
Film, TV, video, radio and photography	-16%	9%	29%
IT, software and computer services	27%	54%	21%
Publishing	-50%	-38%	24%
Museums, Galleries and Libraries	5%	121%	110%
Music, performing and visual arts	54%	123%	45%
<b>Total (Creative Industries)</b>	<b>3%</b>	<b>35%</b>	<b>31%</b>

Source: The Fifth Sector (ibid)

Table 12 Percentage change in Cultural sector employment and GVA, 2020-22

	Percentage change 2020-2022		
Cultural sector	Sector employment (%)	Sector GVA (%)	Sector GVA per capita (%)
Arts	80%	279%	110%
Crafts (Culture)	100%	131%	16%
Film, TV and Music	-25%	-7%	24%
Radio	0%	0%	0%
Photography	33%	186%	115%
Museums and Galleries	14%	140%	110%
Libraries and archives	0%	110%	110%
Cultural Education	-11%	14%	28%
Heritage	55%	225%	110%
<b>Total (Cultural sector)</b>	<b>26%</b>	<b>65%</b>	<b>31%</b>

Source: The Fifth Sector (ibid)

## Cultural and Creative Industries LQ, 2022

Table 13 Herefordshire Creative Industries LQ, 2022

Creative Industries	Sector employment (BRES 2022)	LQ
Advertising and marketing	100	0.21
Architecture	240	0.86
Crafts	10	0.79
Design and designer fashion	70	0.46
Film, TV, video, radio and photography	135	0.23
IT, software and computer services	860	0.46
Publishing	110	0.36
Museums, Galleries and Libraries	105	0.62
Music, performing and visual arts	315	0.93
<b>Total (Creative Industries)</b>	<b>1,945</b>	<b>0.46</b>

Source: The Fifth Sector analysis of ONS data from BRES 2022 and DCMS Economic Estimates

Table 14 Herefordshire Cultural sector LQ, 2022

Cultural sector	Sector employment (BRES 2022)	LQ
Arts	270	0.86
Crafts	10	0.79
Film, TV and Music	120	0.23
Radio	0	0.00
Photography	20	0.43
Museums and Galleries	40	0.47
Libraries and archives	65	0.77
Cultural Education	40	1.57
Heritage	170	3.17
<b>Total (Cultural sector)</b>	<b>735</b>	<b>0.63</b>

*Source: The Fifth Sector (ibid)*



## Impact of including freelance and self-employed creatives

Table 15 Herefordshire Creative Industries GVA and LQ, LinkedIn 2024

Creative Industries	Workforce LinkedIn 2024	LQ	GVA (£m)	GVA per capita (£)
Advertising and marketing	674	1.43	56.6	83,964
Architecture	268	0.96	7.8	29,142
Crafts	696	54.79	42.3	60,840
Design and designer fashion	739	4.89	32.8	44,419
Film, TV, video, radio and photography	411	0.70	30.8	74,838
IT, software and computer services	633	0.34	12.8	20,249
Publishing	317	1.04	26.6	83,805
Museums, Galleries and Libraries	81	0.48	0.5	6,326
Music, performing and visual arts	281	0.83	19.7	70,148
<b>Total (Creative Industries)</b>	<b>4,100</b>	<b>0.98</b>	<b>229.9</b>	<b>56,082</b>

Source: The Fifth Sector analysis of LinkedIn (January 2024) and DCMS Economic Estimates (2022)

Table 16 Herefordshire Cultural sector GVA and LQ, LinkedIn 2024

Cultural sector	Workforce LinkedIn 2024	LQ	GVA (£m)	GVA per capita (£)
Arts	281	0.90	17.9	63,748
Crafts (Culture)	696	54.79	42.3	60,840
Film, TV and Music	198	0.38	16.5	83,475
Radio	-	-	-	-
Photography	213	4.57	7.9	37,069
Museums and Galleries	59	0.70	0.9	15,560
Libraries and archives	22	0.26	0.0	1,071
Cultural Education	-	0.00	-	-
Heritage		0.00	-	-
<b>Total (Cultural sector)</b>	<b>1,469</b>	<b>1.25</b>	<b>85.6</b>	<b>58,287</b>

Source: The Fifth Sector, ibid

Comparing analysis of LinkedIn and BRES showed that GVA per capita was consistent across both measures for the creative industries.

*Table 17 Difference in Creative Industries GVA and LQ between LinkedIn and BRES 2022*

<b>Creative Industries</b>	<b>Increase in Sector workforce</b>	<b>Increase in Sector GVA (£m)</b>	<b>Increase in Sector GVA per capita (£)</b>
Advertising and marketing	574	50.9	27,278
Architecture	28	-0.1	-3,947
Crafts (Creative Industries)	686	41.8	4,235
Design and designer fashion	669	26.7	-42,711
Film, TV, video, radio and photography	276	20.8	1,290
IT, software and computer services	-227	-48.4	-50,938
Publishing	207	18.6	11,169
Museums, Galleries and Libraries	-24	-2.0	-17,716
Music, performing and visual arts	-34	11.6	44,293
<b>Difference (Creative Industries)</b>	<b>2,155</b>	<b>119.9</b>	<b>(516)</b>

Source: The Fifth Sector, *ibid*

The introduction of the freelance and self-employed workforce in the cultural sector had marked and contradictory impacts on individual productivity:

- Arts sub-sector GVA per capita *grew* by nearly £40,000, reflecting benefits of co-production and collaboration with skilled freelance and self-employed specialist producers
- GVA per capita *fell* in sub-sectors with a more individual mode of production (Photography and Cultural education)
- The fall in total output and GVA per capita in sub-sectors with a higher degree of control by public sector bodies, charities or trusts (Museums and Galleries, Libraries and Archives, Heritage) is a statistical outlier – it is more a reflection of the underrepresentation of that workforce on LinkedIn than an actual drop in output and productivity in the cultural economy.

*Table 18 Difference in Cultural sector GVA and LQ between LinkedIn and BRES 2022*

<b>Cultural sector</b>	<b>Increase in Sector workforce</b>	<b>Increase in Sector GVA (£m)</b>	<b>Increase in Sector GVA per capita (£)</b>
Arts	11	11.4	39,705
Crafts (Culture)	686	41.8	4,235
Film, TV and Music	78	8.1	12,896
Radio	-	-	-
Photography	193	6.2	-50,060
Museums and Galleries	19	0.0	-8,482
Libraries and archives	-43	-1.5	-22,972
Cultural Education	-40	-1.5	-38,432
Heritage	-170	-4.1	-24,042
<b>Difference (Cultural sector)</b>	<b>734</b>	<b>60.2</b>	<b>23,704</b>

*Source: The Fifth Sector, ibid*

Table 19 Percentage difference in Creative Industries GVA and LQ between LinkedIn and BRES 2022

<b>Creative Industries</b>	<b>Sector workforce</b>	<b>Sector GVA (£m)</b>	<b>Sector GVA per capita (£)</b>
Advertising and marketing	574%	898%	48%
Architecture	12%	-2%	-12%
Crafts (Creative Industries)	6860%	7381%	7%
Design and designer fashion	956%	438%	-49%
Film, TV, video, radio and photography	204%	210%	2%
IT, software and computer services	-26%	-79%	-72%
Publishing	188%	232%	15%
Museums, Galleries and Libraries	-23%	-80%	-74%
Music, performing and visual arts	-11%	142%	171%
<b>Difference (Creative Industries)</b>	<b>111%</b>	<b>109%</b>	<b>-1%</b>

Source: The Fifth Sector, ibid

*Table 20 Percentage difference in Cultural sector GVA and LQ between LinkedIn and BRES 2022*

<b>Cultural sector</b>	<b>Sector workforce</b>	<b>Sector GVA (£m)</b>	<b>Sector GVA per capita (£)</b>
Arts	4%	176%	165%
Crafts (Culture)	6860%	7381%	7%
Film, TV and Music	65%	95%	18%
Radio	-	-	-
Photography	965%	353%	-57%
Museums and Galleries	48%	-5%	-35%
Libraries and archives	-66%	-98%	-96%
Cultural Education	-100%	-100%	-
Heritage	-100%	-100%	-
<b>Difference (Cultural sector)</b>	<b>100%</b>	<b>237%</b>	<b>69%</b>

*Source: The Fifth Sector, ibid*

## Evolution of Herefordshire Cultural and Creative Industries businesses

*Table 21 Count of Herefordshire Creative Industries businesses*

<b>Creative industries</b>	<b>2015</b>	<b>2020</b>	<b>2023</b>
Advertising and marketing	45	50	65
Architecture	45	45	50
Crafts	5	0	5
Design and designer fashion	50	50	60
Film, TV, video, radio and photography	50	70	70
IT, software and computer services	225	260	270
Publishing	40	50	45
Museums, libraries and galleries	15	10	10
Music, performing and visual arts	85	100	120
<b>Total Creative industries businesses</b>	<b>570</b>	<b>645</b>	<b>695</b>

*Source: The Fifth Sector analysis of ONS Interdepartmental Business Review (IDBR)*

*Table 22 Count of Herefordshire Cultural sector businesses*

<b>Cultural sector</b>	<b>2015</b>	<b>2020</b>	<b>2023</b>
Arts	70	80	95
Crafts	5	0	5
Film, TV and Music	55	50	70
Radio	0	0	0
Photography	20	20	10
Museums and Galleries	5	5	5
Libraries and archives	10	5	5
Cultural Education	5	10	15
Heritage	5	5	5
<b>Total Cultural sector businesses</b>	<b>175</b>	<b>175</b>	<b>210</b>

*Source: The Fifth Sector (ibid)*



### Appendix 3: Stakeholder engagement and consultation

Stakeholder consultation was designed to generate qualitative insights and provide assurance of both findings from quantitative research and our analysis, assumptions and recommendations.

Consultation took place through a mix of individual interviews with representatives of both the sector and public authorities and in-person and online forums.

This provided valuable insights from:

- Herefordshire Cultural Partnership
- Hereford College of Arts
- Herefordshire BID
- Herefordshire Visitor Economy Plan Network
- Herefordshire Council representatives, including:
  - Director of Economy and Growth
  - Director of Museums
  - Head of Economy and Regeneration
  - Service Director, Communities
  - Corporate Director, Community Wellbeing
- Herefordshire Business Board
- Hereford Make CIC
- Rural Media
- Ledbury Poetry
- Meadow Arts
- Arts Alive
- Hay Castle Trust
- Mountain Perspectives
- NMITE
- Bloom.Space