THE ROLE OF CREATIVE HUBS

IN CORNWALL & THE ISLES OF SCILLY

Foreword

The identity of Cornwall is uniquely tied to its rich cultural heritage. From our Medieval Plen an Gwari amphitheatres, the global influence of Cornish painters and playwrights in the 19th and 20th century, to the thriving creative microbusinesses and rapidly growing screen and digital sector today, Cornwall is living evidence that the creative economy can thrive in rural regions.

Falmouth University is the only university headquartered in Cornwall. As an anchor institution, the University's 2030 strategy outlines its deep commitment to developing the economy of the region, no more so than in the area of research and innovation.

Cornwall is the UK's leading rural creative economy. In 2021, Cornwall Council published a Creative Manifesto (2021-2025), which outlined the centrality of the sector to Cornwall's future. Creative Hubs are key to the development of talent in the creative sector. They enable creatives to collaborate and offer space to develop their skills and businesses, especially in a rural area like Cornwall.

Building on this context and drawing on funding from Research England, Falmouth University and Cornwall Council are pleased to be co-publishing this report, which both deepens our understanding of the current situation and outlines a series of recommendations for future policy development.

The University, Cornwall Council and the Cornwall and Isles of Scilly Local Enterprise Partnership benefit from a very close, collaborative relationship. Beyond developing a pipeline of talent into the region, Falmouth University plays a vital role as a research partner, working with Cornwall Council and regional stakeholders to respond to the national research and development roadmap. This report is one such example.

We believe that the partnership between Cornwall Council and Falmouth University is pivotal to the success of our region and we are proud to endorse this report.

Professor Anne Carlisle OBE, Vice Chancellor & CEO, Falmouth University

Councillor Stephen Rushworth, Portfolio Holder for Economy, Cornwall Council

About the authors

Ellen O'Hara, Deepa Naik and Dr Ceri Gorton have extensive experience working in higher education institutions, public sector bodies and creative arts organisations. We have founded our own micro creative businesses, held board positions within creative/cultural organisations and worked with over 500 innovation, creative, cultural and HE organisations as clients and collaborators.

Ellen O'Hara is a creative enterprise specialist with a track record of 20 years in the field supporting hundreds of creative and social entrepreneurs to build sustainable businesses, as well as consulting the British Council on creative hubs strategy, programmes and research. Ellen was also Head of Business Development for award winning creative hub Cockpit Arts for eight years, is a Clore Fellow and SFEDI accredited coach.

Deepa Naik is a cultural producer and researcher who has worked with Bishopsgate Institute, Whitechapel Art Gallery, Tate Modern, Arts Council England and the British Council. Deepa is also a publisher and co-founder of the independent imprint Myrdle Court Press as well as previous Director and Co-founder of a knowledge hub and cultural organisation This Is Not A Gateway.

Dr Ceri Gorton is an experienced creative leadership and collaboration specialist, academic and user researcher, Clore Fellow, and Ideo/UPenn Creative Impact Fellow. Ceri is Co-Director of design consultancy Bird & Gorton, working regularly with clients including the National Theatre, RSC, Royal Opera House, Imperial War Museums, The Space, and more than a dozen UK universities.

Our first-hand experience of working within and supporting creative hubs, has informed our approach which is evidence-based and rooted in primary sources. We are also all rurally based creatives (Cornwall, Derbyshire and Wales), which provides an understanding of the specific socio-economic challenges and nuances of rural life and work.

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Background

In 2020, the Government encouraged Research England to support universities in addressing particular economic and social issues and priorities facing different local areas. In order to facilitate this, Falmouth University was awarded £50,000 from Research England's Strategic Priorities Funding (SPF) to be utilised for research activity that supports evidence-based policy making.

As part of the University's role as an anchor institution with a commitment to growing the creative economy in Cornwall, the funding was used to support research into an important aspect of Cornwall's Creative Manifesto – the role of creative hubs in developing Cornwall's creative economy.

Following an open tender process, in March 2021, Falmouth University in partnership with Cornwall Council commissioned Deepa Naik, Ellen O'Hara and Dr Ceri Gorton to undertake the study.

Purpose and scope

The aim of the study was to produce a report that:

- Provides a high-level overview of the current landscape of creative hubs in Cornwall and the Isles of Scilly (CIoS)

- Illustrates the role creative hubs can play in the development of the creative industries in rural regions

- Recommends specific interventions to support creative hubs in CIoS

- Offers a basis for future research in this area and identifies areas for future development

This report sought to understand the role that hubs play in CIoS: specifically, *how* hubs serve their community and users through their activity, programmes and provisions. From this, it was then possible to discern the function of hubs with respect to their locality. Although the report did not undertake an impact assessment of the various roles that hubs do play, it does refer to the impact and effect (potential and actual) of hubs where data is available.

Previous research mapping creative hubs across England, revealed that hubs are bound together by a focus on "convening and building creative communities, often nurturing and maintaining a complex set of relationships and partnerships".[1] We know that hubs make a difference in their communities in a multitude of ways, delivering social, cultural and economic value – and this report investigates the specific potential and significance of hubs in CIoS.

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[1]British Council, *Mapping Creative Hubs in England* (2021), pg. 5

Headline recommendations

Visible and vibrant creative communities act as both magnets; attracting creative talent and ideas; and as beacons, building critical mass and signalling to global audiences. The ability to connect otherwise dispersed freelancers and microbusiness to each other is what makes creative hubs an essential part of flourishing creative industries in rural regions and why they are worthy of investment.

While the rich mix of 59 hubs (49 active and 10 in development) identified through this study may suggest that creative industries are already well serviced in Cornwall and the Isles of Scilly (CIoS), many of the hubs we spoke to cited financial sustainability and capacity as key barriers to growing impact. 'Capacity' in this context relates to time, energy and resources to deliver more services to hub users, engage in community building activities and build collaborative partnerships.

The report makes four core recommendations and central to these is the issue of revenue funding. The report recognises that investment in buildings is important for enabling physical co-location of businesses and providing access to specialist facilities. However, it argues that capital investment needs to be accompanied by sustainable revenue streams that invest in people, to ensure that buildings are animated and succeed in convening and connecting communities, reaping the highest return on investment in the longer-term. Crucial in this is the role of the hub leader/ organisation or business.

Recommended projects, programmes and areas for further research are summarised on the right. The report Annex details how each initiative would work, outlining deliverables, providing best practice examples relevant to CIoS, and suggesting the types of CIoS organisations that would be best placed to lead and manage them.

1. Cornish creatives connect/hub of hubs

Create a hub of hubs – a network connecting creative hubs and their communities, building critical mass, enabled by an interactive digital platform. The network would result in tangible value for network members in the form of collaborative project activities and knowledge exchange as well as opportunities to meet and connect. This could take the form of a series of Challenge Funds to address cited opportunities around graduate retention, scale up support and hub users accessing new markets through digital channels.

2. Creative hub data: gather, analyse and share

Launch a challenge to the sector in CIoS to develop a solution for data collection, analysis and communication that addresses some of the challenges identified in this report; namely the lack of impact data, challenges in collating timely, real time data on the needs of hub users, survey fatigue among users and a lack of a fit for purpose impact framework for creative hubs. The result would be the creation of actionable intelligence, information and insight that benefits and provides impact evidence (economic, social, cultural and environmental) for Cornwall's creative sector.

3. Animate and amplify programme

A capacity building programme comprising revenue funding for infrastructure support, leadership development for hub leaders and flexible 'Animate & Amplify Grants'. The programme would result in more financially sustainable hubs as well as increased capacity and capability of hub leaders to foster collaboration between their rural, dispersed hub communities.

4. Hubs and high street initiative

A place-based, flexible programme of support comprising funding, consultancy and guidance (aligned with the Town Centre Revitalisation Fund) to undertake demand and feasibility studies and Seed Grants. This would enable new and existing hubs to test new hub models of pop up, satellite or touring hubs whilst revitalising high streets across CIoS.

1. Production and post-production hub for screen industries

A comprehensive feasibility study to inform the development of a post-production hub in Cornwall for the emerging and growing screen industries, as cited by both Cornwall's Creative Manifesto, Saffrey's Screen Industries report and stakeholder interviews.

2. Video games cluster support

Retaining talent in Cornwall to support the growth of the games sector is challenging without bespoke provisions for this sector, both in terms of physical hub and sector support. Future research could therefore explore the specific needs of this growing sub sector and elements required to place Cornwall's games sector on an international map.

3. Coordinated support for graduates and entry level creatives

Building on existing strengths and programmes, a collaborative and coordinated approach to support graduates, informed by a detailed mapping and needs assessment. This could include, for example, sponsored studio space within hubs funded by Falmouth University, the University of Plymouth and the University of Exeter.

4. Rural creative pre-accelerator pilot

A pilot industry-led Rural Creative Pre-Accelerator[2], delivered in partnership with existing providers, funders and investors, helping to build the local entrepreneurial ecosystem and address the cited low density of Research, Development and Innovation (RD&I) activity and investment.

Cornwall is well placed to be a test bed and pioneer in the development of a successful rurally dispersed model. This approach and set of ingredients could then be shared and add value to many other rural regions across the UK and the globe.

[2]A pre-accelerator focusses on developing ideas and/or early stage startups

Introduction

For the purpose of this study, the British Council's definition of creative hubs has been adopted. This is because it is extensively used and widely understood within the sector:

"A physical or virtual place that brings enterprising people together who work in the creative and cultural industries."[3]

The spectrum of services, ambitions and purposes of hubs in the report are wide-ranging but the thread that holds them together is a focus upon:

- Curating and building a creative and/or digital community

- Facilitating collaboration and networking

- Providing services for businesses and practitioners in the creative industries

The report focused on creative hubs that serve the nine Department for Digital, Culture, Media and Sport (DCMS) creative industry sub sectors because this is the widely recognised categorisation.

The role of hubs in rural creative regions

The literature review suggests that hubs act as nodes in a network, helping to create the conditions for collaboration, experimentation and innovation, which in turn can fuel creative and business development and boost productivity. This is of particular importance in dispersed rural areas where natural co-location of creative business is far less likely to occur.

The specific role and impact (potential or actual) of each hub is distinctive and relates directly to the specific mission of each hub and the needs of their users. Nonetheless there are some common themes suggested by the literature, many of which are acutely important to hubs in rural regions. These include:

Role	Potential impact
Creative community convenors and builders	• Reducing isolation and creating a sense of belonging • Fostering cross pollination of ideas leading to new products, services and innovations • Acting as a meeting point for surrounding businesses to converge, network and receive business support
Audience development and access to markets	• Co-creating/producing/curating public programmes that enrich lives of the local community • Improving visibility of the creative and digital business in their locality • Positively contributing to cultural tourism
Talent development	• Addressing graduate talent attraction and retention • Providing pathways into the creative and digital industries by under-represented groups through apprenticeships, internships and work placements
Business development	• Providing opportunities for home-based businesses to grow • Providing access to markets and audiences
Brokers and anchors	• Brokering cross-sector collaborations and links between the hub community and the wider creative ecology, institutions, funders and partners
Cultural infrastructure builders	• Reimagining and repurposing disused industrial space, empty high streets and forgotten heritage buildings • Positively contributing to place-making and place-based regeneration
Sector leaders and advocates	• Advocating for policy change and championing the voice of creative social business within Local Economic Partnerships

The literature also reveals the important role of hub manager or leader, which is shown to be critical to the success of creative hubs. Hub managers are trusted individuals; they are often well-networked and carry job titles such as CEO, Community Manager and Producer. "They are the primary curators, intermediaries, brokers and knowledge agents"[4], which means they tend to not only influence the membership mix of a hub, but also to act as animateurs.

Keeping these two aspects in mind – hubs as communities first and foremost and the critical role of the hub leader – is essential for policy makers when making decisions on how and where to best invest in creative hubs.

Cornwall bucks the trend with respect to two challenges suggested by the literature as common challenges for rural creative hubs – vacancy issues and digital access and exclusion – highlighting particular strengths upon which to build.

The operating and policy context for creative hubs in Cornwall and the isles of Scilly (CIoS)

CIoS are a magnet for creativity. The area has a rich and proud history of cultural expression from the Cornish language to literature, music and theatre. It is home to the UK's largest industrial World Heritage site and boasts 70 museums. Most recently, strengths in screen industries, creative technology and a burgeoning digital cluster, are positioning Cornwall at the forefront of the rural creative industries.

Particularly notable for physical creative hubs is the fact that CIoS has a unique settlement pattern within England. Twenty or so towns of various sizes, and one small city are inter-dispersed with a range of villages and hamlets that have a varying range of community and business services.

CIoS has a number of distinct business challenges and strengths that create opportunities for creative hubs and help make the case for further investment.

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[4] Virani, T and Malem, W (2015), *Re-articulating the Creative Hub Concept as a Model for Business Support in the Local Creative Economy: The Case of Mare Street in Hackney*, London, Creative Works, page 15

Challenges to respond to:

- Rural peripheral geography; dispersed population and communities that sit outside the agglomeration impact of a large urban conurbation[5]

- Largest proportion of workforce employed in very small businesses[6]

- Low Research, Development and Innovation (RD&I) infrastructure and investment[7]

- Low levels of higher qualifications and a skills shortage[8]

- Cross-cutting low productivity across the local economy[9]

- More dispersed businesses than in other areas of the UK, providing fewer opportunities for peer-to-peer support, collaboration and knowledge transfer[10]

Strengths upon which to build:

- A strong RD&I knowledge base that requires support to grow

- 92.6% of premises have access to superfast broadband or higher[11], compared to the UK average for rural areas of 85.1%[12], making it one of the best-connected rural areas in the UK

- A strong further education and higher education offer, supporting the pipeline of creative talent in the area

- Above average productivity in the creative sector which is predicted to grow by 22% between 2017 and 2027[13]

- 2076 creative businesses of which 552 are screen based creative companies[14]

- Steady growth in the number of creative companies across Cornwall and the Isles of Scilly over the last three years[15]

- 532 new creative businesses over the last three years[16] (this figure doesn't include freelancers, which indicates even greater growing potential hub users)

- The Penzance Travel to Work Area is identified as one of the key Creative Clusters in the UK (Nesta 2018)

- A further nine creative 'microclusters' located in the commuting zones for St. Ives, Truro, Wadebridge, Redruth, Falmouth, St Austell, Newquay and Launceston (Nesta 2019)[17]

[5]CIoS Draft Industrial Strategy (2020)
[6]CIoS Draft Industrial Strategy (2020)
[7]CIoS Draft Industrial Strategy (2020)
[8]CIoS Draft Industrial Strategy (2020)
[9]CIoS Draft Industrial Strategy (2020)
[10]CIoS Draft Industrial Strategy (2020)
[11]CIoS LEP, Local Industrial Strategy Evidence Base (2020)
[12]House of Commons Library, Superfast Broadband in the UK (2021)
[13]CIoS Draft Industrial Strategy (2020); [14]Companies House data; creative industry SIC codes, 2020
[15]Companies House data; creative industry SIC codes, 2018-2020
[16]Companies House data; creative industry SIC codes, 2018-2020
[17]Dr Josh Siepel, Dr Roberto Camerani, Dr Monica Masucci, Dr Jorge Velez-Ospina, Dr Patrizia Casadei, Martha Bloom, Creative Industries Policy and Evidence Centre, *Creative Radar: Mapping the UK's creative industries* (2019)

92.6%

OF PREMISES HAVE ACCESS TO SUPERFAST BROADBAND OR HIGHER, COMPARED TO THE UK AVERAGE FOR RURAL AREAS OF

85.1%

532

NEW CREATIVE BUSINESSES OVER THE LAST 3 YEARS

ABOVE AVERAGE

PRODUCTIVITY IN THE CREATIVE SECTOR WHICH IS PREDICTED TO GROW BY

22%
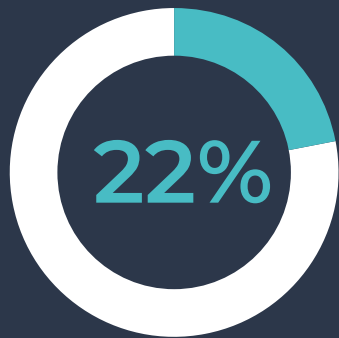
BETWEEN 2017 AND 2027

2076 CREATIVE BUSINESSES

552 SCREEN BASED

9

A FURTHER NINE CREATIVE 'MICROCLUSTERS' LOCATED IN THE COMMUTING ZONES FOR ST. IVES, TRURO, WADEBRIDGE, REDRUTH, FALMOUTH, ST AUSTELL, NEWQUAY AND LAUNCESTON (NESTA 2019).

STEADY GROWTH IN THE NUMBER OF **CREATIVE COMPANIES** ACROSS CORNWALL AND THE ISLES OF SCILLY OVER THE LAST 3 YEARS

The Cornwall and Isles of Scilly (CIoS) Local Industrial Strategy has cited the creative industries as a key area of growth and opportunity. Meanwhile, Cornwall's Creative Manifesto specifically references the role of hubs "to nurture innovation, skills, collaboration and productivity in place-based growth."

The local and national policy review identified a number of cross-cutting priorities against which we believe creative hubs are well placed to deliver. These were:

- Facilitation of networking and collaboration between creative businesses, academia and other sectors to boost innovation and productivity

- Regeneration of towns and revitalisation of high streets

- Increasing investment in Research, Development and Innovation (RD&I) infrastructure and embedding RD&I, creativity and innovation in business to improve productivity

- A post-production facility for the screen industries

- Developing the talent pipeline and addressing skills shortages

Investing in hubs represents a strategic investment in the creative industries. Furthermore, sector-wide challenges and opportunities (such as the ongoing RD&I conversation for example) would benefit from a coordinated and collaborative approach facilitated by a network of hubs.

The creative hub landscape in CIoS

The Cornish model is notably different to the urban-centric models of the creative city, which is often home to large scale hubs and critical mass in terms of sector specific creative clusters. Rather than a hub and spoke model, CIoS are home to a dispersed network of creative hubs in towns and villages, each serving distinct communities. This network is overlaid by sector specific support organisations serving hub-based and home-based businesses alike. It is a dynamic and evolving scene boasting the oldest artist studios complex in the UK (Porthmeor Studios) alongside burgeoning new networks and communities such as Doorstep.

The mapping exercise outlined in the annex to this report identified 49 active creative hubs across CIoS and ten hubs in development, revealing that hubs are overwhelmingly concentrated in the constituencies of St. Ives, Camborne and Redruth, and Truro and Falmouth.

The highlighted cases illustrate a rich and diverse mix of artists' studios, co-working spaces, community hubs, managed workspace, innovation centres, a digital hub housed within a cultural institution (Husa), sector support networks and a makerspace within a community orchard (Newquay Community Orchard). The diversity of roles represented by the hubs is wide-ranging and their impact equally so. Alongside the core role as community convenors and builders, hubs in CIoS demonstrate cultural advocacy (IntoBodmin), leadership in environmental sustainability (Jubilee Wharf) and the fostering of collaborative innovation (Launchpad).

CIoS is also served by a number of sub-sector specific networks that increase the visibility of the region's strengths (e.g. screen, games, software, museums) alongside distinct interventions to address challenges around talent development and skills shortages.

Published economic impact data was only located for two hubs – Krowji and Workbox. While these data go some way to demonstrating the potential economic impact of hubs in terms of job creation, turnover growth and the number of businesses supported for instance, they only represent a snapshot of a much bigger picture. Moreover, they do not capture the nuance and complexity of those hubs driven by the diversity of artistic, cultural and social missions demonstrated by many of the hubs highlighted in this report.

Opportunities and challenges for creative hubs in CIoS

This report drew upon both a literature survey and stakeholder consultation. The findings from these have informed the recommendations and have been framed as 'How might we?" questions associated with both key opportunities and challenges for creative hubs in CIoS.

Collaboration	Data and influence	Models and resources	Meeting future needs
• How might we better **collaborate with each other, and with key partners such as universities** to address key challenges collaboratively? • How might we enable **greater collaboration between our communities?** • How might we better capitalise on **Cornwall's Superfast Broadband** to build networks and markets?	• How might we better **measure our impact and communicate our value?** • How might we better **gather, use, and share data about user needs** to develop our services? • How might we better connect with and **inform the development of relevant spaces** and opportunities?	• How might we **adapt funding models** and engage funders to **increase financial sustainability?** • How might we **test new models** to increase our impact and reach? • How might we enable hub leaders to **build capacity and leadership?** • How might we **be more environmentally sustainable,** and share insights into developing environmentally sustainable creative spaces?	• How might we better **work together with further and higher education to attract and retain graduates** and address sector skills shortages? • How might we **anticipate and meet the future needs of creative businesses** in CIoS? • How might we play a role in **revitalising high streets?** • How might we better **enable businesses to scale up?**

Recommendations

Visible and vibrant creative communities act as both magnets; attracting creative talent and ideas, and as beacons; building critical mass and signalling to global audiences. The ability to connect otherwise dispersed freelancers and micro business to each other is what makes creative hubs in rural areas such an essential part of flourishing creative industries and why they are worthy of investment.

While the rich mix of hubs may suggest that creative industries are already well served in Cornwall and the Isles of Scilly (CIoS), many of the hubs consulted in this report cited financial sustainability and capacity as key barriers to growing impact. Capacity in this context relates to time, energy and resources to deliver more services to hub users, engage in community building activities and build collaborative partnerships.

Central to this report's four recommendations is the issue of revenue funding, highlighting the crucial role of the hub leader/organisation or business. The report recognises that investment in buildings is important for enabling physical co-location of businesses and providing access to specialist facilities, for instance. However, capital investment needs to be accompanied by sustainable revenue streams that invest in people to ensure that those buildings are animated and succeed in convening and connecting communities, reaping the highest return on investment in the longer-term.

1. Cornish creatives connect/hub of hubs

Create a hub of hubs – a network connecting creative hubs and their communities, enabled by an interactive digital platform.

- To enable hubs to identify, connect and share best practice

- To create tangible and value-added opportunities for hubs (and their communities) to experiment, collaborate and create together

- To increase the visibility of hubs and their creative communities across CIoS and beyond, illustrating the critical mass and enabling stronger advocacy around the value and potential of creative hubs and the creative community in Cornwall

- To act as an advocacy body and conduit for interventions that address strategic initiatives such as levelling up Research, Development and Innovation (RD&I)

- To act as a conduit for universities to support micro creative industries through activities such as research, innovation and knowledge exchange

2. Creative hub data: gather, analyse and share

Launch a challenge to the sector in CIoS to develop a solution for data collection, analysis and communication that addresses some of the challenges identified in this report namely the lack of impact data, challenges in collating timely, real-time data on the needs of hub users, survey fatigue among users and a lack of a fit for purpose impact framework for creative hubs.

- Build a user-led, real-time body of evidence on the impact of creative hubs and the current/emerging needs of hub users

- Co-create and test a fit for purpose impact measurement framework that could be co-designed by hubs for hubs, to capture and communicate data on cultural, social, environmental and economic impact

- Develop a user-friendly solution for data collection, analysis and sharing

- Resulting in the creation of actionable intelligence, information and insight that benefits and provides impact evidence (economic, social, cultural and environmental) for Cornwall's creative sector

3. Animate and amplify programme

A capacity building programme comprising revenue funding for infrastructure support, leadership development for hub leaders and flexible 'Animate & Amplify Grants'.

- Build the financial sustainability of existing hubs

- Boost capacity of hub leaders and augment their vital role as animateurs by providing revenue funding for posts

- Offer leadership development to existing and emerging hub leaders, building a peer network

- Provide small, flexible grants for hubs to address specific needs identified by their community, e.g. training and support to grow online sales or the development and delivery of a hybrid support programme to reach businesses outside of their immediate network

- Increase the capacity of hub leaders to build collaborative partnerships with other hubs, key partners such as universities and national sector development agencies, and grassroots organisations to grow impact

4. Hubs and high street initiative

A place-based, flexible programme of support comprising funding, consultancy and guidance (aligned with the Town Centre Revitalisation Fund) to undertake demand and feasibility studies, as well as Seed Grants for new and existing hubs to test new models.

- To transform underused historic buildings, neglected sites and empty retail units into affordable, flexible workspaces and community hubs

- To revitalise highstreets of market towns and villages not already benefiting from the Towns Fund

- To test new models of hubs on high streets such as pop ups, touring, satellite and micro hubs

Four further areas of research are also suggested:

1. Production and post-production hub for screen industries

A comprehensive feasibility study to inform the development of a post-production hub in Cornwall for the emerging and growing screen industries, as cited by both the Creative Manifesto, Saffrey's Screen Industries report and stakeholder interviews.

2. Video games cluster support

Retaining talent in Cornwall to support the growth of the games sector is challenging without bespoke provisions for this sector, both in terms of physical hub and sector support. Future research could therefore explore the specific needs of this growing sub sector and elements required to place Cornwall's games sector on an international map.

3. Coordinated support for graduates and entry level creatives

Building on existing strengths and programmes, a collaborative and coordinated approach to support graduates, informed by a detailed mapping and needs assessment. This could include, for example, sponsored studio space within hubs funded by Falmouth University, Plymouth University and the University of Exeter.

4. Rural creative pre-accelerator pilot

A pilot industry-led Rural Creative Pre-Accelerator[19], delivered in partnership with existing providers, funders and investors, helping to build the local entrepreneurial ecosystem and address the cited low density of RD&I activity and investment.

Cornwall is well placed to be a test bed and pioneer in the development of a successful rurally dispersed model. This approach and set of ingredients could then be shared and add value to many other rural regions across the UK and the globe.

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[19]A pre-accelerator focusses on developing ideas and/or early stage startups

Section 1:
Methodology

Overview

The project began with a focused literature review to provide a contextual overview of the local economy and creative industries of Cornwall and the Isles of Scilly (CIoS), the national rural creative industry context and creative hubs globally. The document and data review, which included a policy review, informed the key insights, questions and gaps we sought to explore further in the primary research phase.

The statistics and data cited in the report have been published by organisations who have a particular expertise in policy, the creative industries, and/or CIoS. A full reference list is included in the bibliography.

The literature review informed the baseline analysis of current creative hubs in Cornwall, with a description of the activity of each hub, of its operating model and the sectors that it supports. The baseline document, which included existing and forthcoming hubs, was then built upon throughout the project.

Primary research and fieldwork included both quantitative and qualitative components. Two bespoke public consultations, targeting creative hub managers were facilitated by the research team. The consultations were heavily promoted via social media, Cornwall Council's Creative Industries database and newsletters, and industry support websites. This resulted in a high level of engagement and participation. A quantitative survey was developed and sent to all creative hub managers on the baseline database. A further ten in-depth stake-holder conversations were undertaken to test specific questions and recommendations that arose from the consultations.

The emerging findings were shared with the commissioning team at Falmouth University and Cornwall Council and feedback on key points informed the stakeholder conversations and fed into the report recommendations.

Key insights from the desk-based research and fieldwork were then explored through a series of 'How might we?' questions. This format allowed us to highlight challenges and opportunities for hubs in relation to;

1. Collaboration

2. Data and influence

3. Hub models and resources

4. Meeting future needs

It was also an effective starting point to inform the best practice and recommendations sections of the report, which were tailored to respond to the specific 'How might hubs we?' questions, in consideration of policy priorities and literature review findings.

Methodological map

Informed by the brief, timescale, and priority research questions, the project adopted a four-stage methodology;

1. Understanding the context for creative hubs in Cornwall and the Isles of Scilly (CIoS)

- Literature review

- Policy review

- Initial creative hub mapping

- Gap analysis to inform design of consultation activities

2. Understanding the needs, priorities, challenges and opportunities of creative hubs in CIoS

- Interactive consultation workshops attended by 59 people. These were designed to gather insights into the challenges and opportunities for hubs, the needs and barriers of their users, and hub plans for post-Covid services and facilities, both online and offline

- Survey of 8 creative hub leaders to fill in gaps in creative hub mapping, e.g. related to company structure, boards, funding sources, services and fees

- Hub user needs data review to collate what data already exists about the needs of hub users

- Gap analysis to inform recommendations

- Development of recommendations long list and finalising of creative hub mapping

3. Developing recommendations to support the development of creative hubs in CIoS

Ten stakeholder interviews with sub sector specialisms

4. Refining recommendations to ensure they are ambitious, actionable and relevant

- Testing recommendations with the commissioners and stakeholders

- Final edits to report

Limitations

As with any research project, timescales, priorities of the brief, and availability of consultation participants have informed the findings of this report and the ways in which we adapted the research as we progressed. Methodological limitations included;

- The participants in the consultation workshops were heavily weighted to cultural organisations. This was principally due to the organisations on Cornwall Council's database. We addressed this via strategic stakeholder interviews, for example with a range of representatives within the digital sector

- Primary research focused on the perspective of hub managers and not those of hub users (i.e. creative businesses). Had time and resource permitted, we would have liked to speak with users about their needs directly via workshops and in-depth conversations. We addressed this by asking hub managers a series of specific questions concerning the needs of their hub users and via the literature review

- We expect that some grassroots, emerging and smaller hubs, who may not have a strong online presence or staff capacity, may have missed the opportunity to engage in the consultation. We addressed this by sending the survey directly to smaller hubs we identified during the desk research – though acknowledge this doesn't bring forth the full nuance of their experience

Definitions

Creative hubs – a working definition

For the purpose of this study, we adopted the British Council's definition of creative hubs because it is most widely used and understood within the sector:

"A physical or virtual place that brings enterprising people together who work in the creative and cultural industries." [20]

We recognise that many creative hubs don't identify with the term and instead will describe themselves as:

- Artist studios
- Co-working spaces or workhubs
- Arts and/or community venues
- Open access print workshops
- Innovation centres
- Accelerators and incubators
- FabLabs
- Makerspaces
- Virtual networks
- Collectives and face-to-face networks

The spectrum of services, ambitions and purposes of hubs in the report are wide ranging but the thread that holds them together is a focus on:

- Building a creative and/or digital community
- Facilitating collaboration and networking
- Providing services for businesses and practitioners in the creative industries

The report includes the experience of building-based hubs, virtual hubs and networks and highlights the fact that hubs are communities first and foremost. Therefore, there is a clear distinction made between creative hubs and managed workspaces where the relationship is primarily one of landlord and tenant.

We focused on creative hubs that serve the nine Department for Digital, Culture, Media and Sport (DCMS) creative industry sub sectors because this is the widely recognised categorisation. We are mindful of the fact that these hubs sit within the wider creative economy in Cornwall and the Isles of Scilly (CIoS), which contains a wealth of cultural and creative activity spanning heritage, cultural tourism, and the natural environment.

[20]creativeconomy.britishcouncil.org/projects/hubs

Sector Definitions

The Cultural Sector

Department for Digital, Culture, Media and Sport (DCMS) defines the cultural sector as industries with "a cultural object at the centre of the industry". Sub-sectors included in this definition are Arts, Film, TV and Music, Radio, Photography, Crafts, Museums and Galleries, Library and archives, Cultural education, and Heritage.

The Creative Industries

DCMS defines the creative industries as those with "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"

This definition recognises nine creative subsectors:

- Advertising and marketing

- Architecture

- Crafts

- Design and designer fashion

- Film, TV, video, VFX/SFX, animation, radio and photography

- IT, software, computer services, gaming

- Museums, galleries and libraries

- Music, performing and visual arts

- Publishing

The Creative Economy

While the terms creative industry and creative economy are often interchanged, it is important to qualify that the creative economy comprises "those economic activities which involve the use of creative talent for commercial purposes", which includes the creative industries, and creative talent working in other sectors.[21]

John Howkins developed the concept in 2001 to describe economic systems where value is based on novel imaginative qualities rather than the traditional resources of land, labour and capital.[22]

A reflection on language

"Speak the language that people understand."

"The term 'creative hub manager' or 'creative hub' doesn't resonate with people on Scilly...Think about the language that is used and whether it connects with the community it's meant to serve and describe."

The consultations and stake-holder conversations reiterated that the DCMS definition of creative industries did not resonate with people or fit with the nuance of Cornwall or the wealth of diversity within the rural creative industries. Recognising where rural creativity exists, having conversations in market towns and villages and asking creatives to define themselves and their work, is key to fully understanding the rural creative ecology.

While we acknowledge this argument and agree a further consideration of language is crucial, due to the confines of our time and the brief, our report focuses on hubs that primarily build communities of practitioners and businesses in the nine defined creative industry sub sectors.

[21]Nesta, The Creative Nation (2018)
[22]John Howkins, *The Creative Economy,* Chap 1. (2001; 2nd Edition, 2013)

Section 2:
The role of creative hubs in rural regions

Much of the academic literature on creative hubs seeks to define them, rather than interrogate their role, motivations and therefore potential impact. To date, there are few studies that focus on the role that creative hubs play in rural areas, making it an important new field of study.

In this section we have drawn out convergent themes from the literature on creative hubs, homing in on the specificities of the rural context. Centrally we reinforce the case that hubs "can be key nodes in the flow of knowledge within the rural economy – both within the hub and between the hub and the wider economy".[23] We also highlight the importance of the hub manager or leader and show that Cornwall bucks the trends in many aspects such as vacancy issues and digital exclusion.

Key themes from the literature

Challenges and opportunities of hubs in rural areas

The literature suggests that one of the challenges in developing the creative industries in a rural area is the **availability of appropriate business spaces.** This is not only a question of quantity; it is a question of quality as well. Value can be created by adapting and repurposing underused buildings (heritage or industrial, for example), constructing purpose-built hubs and enabling existing hubs to develop their facilities.[24]

In an increasingly digital world, rural hubs regularly struggle with **digital access and exclusion**. Nationally, almost a quarter of households in rural areas have no or slow broadband, compared to 5% in urban areas. Again, this is not the case in Cornwall where 92.6% of premises have access to superfast broadband or higher.[25] The investment in broadband infrastructure in Cornwall presents a real opportunity, especially post-Covid with the move towards digitisation of services and the growth of the digital sector. Hubs in Cornwall are in a favourable position to adapt to the considerable changes in the way business is conducted in the last 20 years; "Online sales are not just restricted to retail businesses, many knowledge-intensive businesses based in rural areas operate significant elements of their business via the web."[26]

A study on the feasibility of co-working in rural South Wales cites there is **growing appetite for creative co-working** spaces across rural and urban areas. These highly flexible spaces with a range of membership options and communal space, are an increasingly popular alternative to traditional office-based working, commercial studio space or working from home. "This rise in popularity reflects the changing nature of the job market and advances in communication and technology. This comes at a time when the UK's digital and creative sector has grown rapidly and is predicted to increase demand for spaces."[27] In addition, the programme of business support, activities, networking and specialist amenities offer a further incentive to rural creative businesses whether they are just starting up or seeking to expand.

Other studies on hubs in a rural context however, suggest that they generally encounter **vacancy issues and spaces are frequently under-used.** Cornwall is unique in that hubs report little difficulty locating home-workers, commuters and local creative businesses who might be interested in joining their hub community.

[23]*Honey Pots and Hives: Maximising the potential of rural enterprise hubs* (2013)
[24]For more, see *Honey Pots and Hives: Maximising the potential of rural enterprise hubs* (2013)
[25]CIoS LEP, Local Industrial Strategy Evidence Base (2020)
[26]*Honey Pots and Hives: Maximising the potential of rural enterprise hubs* (2013)
[27]Co-working in the Vale of Usk? The Means (2018). This is an insightful and thorough feasibility study into the potential for a creative, tech and digital co-working space in rural South Wales

Role and potential

The recent Mapping Creative Hubs In England report argues that role and potential impact can be traced directly back to the stated mission or purpose of a hub, which in turn has evolved in response to the needs of a specific and distinct community. This may have a focus on artistic, social or economic impact, or a combination of the three. The report revealed 'a high degree of complexity and nuance in operating models, mission and output, reaffirming that 'creative hubs' are by no means homogenous.'[28]

The literature does converge however around the primary role of **hubs as curators and convenors of communities.**

"What binds creative hubs together is the focus on convening and building creative communities, often nurturing and maintaining a complex set of relationships and partnerships."[29]

"The added value an enterprise hub can bring to the rural economy is in the way it can help the businesses operating from the hub to gain access to a variety of knowledge networks. An enterprise hub is thus able to both foster the bottom-up development that helps build capacity at the local level whilst at the same time drawing in extra-local resources which would otherwise be beyond the reach of local actors. At a functional level enterprise hubs offer physical space, but also and perhaps more importantly a space that provides opportunities to make connections to other businesses and institutions both within the hub and beyond."[30]

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[28]British Council, Mapping Creative Hubs in England (2020)
[29]British Council, Mapping Creative Hubs in England, 2020
[30]Honey Pots and Hives: Maximising the potential of rural enterprise hubs (2013)

Hubs are therefore much more than physical business spaces. "They can be key nodes in the flow of knowledge within the rural economy – both within the hub and between the hub and the wider economy".[31]

A key distinction between hubs and other managed workspaces is the provision of activities, facilities and services that **help facilitate flows of knowledge** as part of a deliberate management policy.[32] Rather than providing businesses spaces on traditional letting terms and rates, with little or no services or interactive space, an ideal hub offers space on flexible and affordable terms. They also provide communal services and shared spaces as well as opportunities to be involved in a range of networks and knowledge exchange activities both within the hub and connected to the wider economy.

This function is of particular importance in areas where businesses are dispersed and co-location does not organically occur. Developing a highly networked and supported rural creative community can foster a "resilient local economy with an army of agile workers who live locally and spend locally, generating high quality jobs and enabled by local empowerment where services are delivered by its people for the people, increasing local prosperity and improving local democracy."[33]
In this context therefore, **networks are of equal importance to physical and building based hubs.**

To better understand the role rural creative hubs play, it is helpful to consider rural hubs in Scotland; a pertinent case study because 98% of the land area is rural and is home to 17% of the population, while only 2% of the land area is urban, populated by 83%. Scotland has a sizeable number of rural creative hubs – in fact, in Lindsay Dunbar's report on Scottish Creative Hubs for the British Council (2020), 44% of the hubs surveyed were in rural areas compared to 56% in urban areas. Cited roles and potential impact of hubs in these contexts included:

- Positively contributing to cultural tourism

- Place-making and creating opportunities for business to stay within specific rural areas

- Addressing rural deprivation

- Audience development, helping to address limited access to local markets

"Sparse populations reduce the customer base, resulting in limited venue options and increase the out-migration of young people to pursue careers/education."[34]

A report commissioned by the Centre for Rural Economic Research at Newcastle University (2013), differentiates between two types of rural enterprise hubs – Honey Pots and Hives. The Honey Pot model is of particular relevance to the rural context. These 'destination hubs' help to increase the visibility of creative businesses, attracting audiences to a specific location and offering direct selling opportunities for their members. They are often based around visual art, heritage and crafts, which are dependent on customers visiting the hub to view and purchase their goods and services. For this type of hub there is a point of interest to draw customers to the location. Examples of this are historic houses, gardens, or museums.

[31]Honey Pots and Hives: Maximising the potential of rural enterprise hubs (2013)
[32]Honey Pots and Hives: Maximising the potential of rural enterprise hubs (2013)
[33]Co-working in the Vale of Usk? (2018)
[34]Mapping Scotland

The table below summarises the myriad roles that hubs play and potential impact that they can have, illustrating the points of convergence from the literature review.

Role and potential impact of hubs

Role	Potential impact
Creative community convenors and builders	• Reducing isolation and creating a sense of belonging • Fostering cross pollination of ideas leading to new products, services and innovations • Creating a safe environment for people to take creative risks • Acting as a meeting point for surrounding businesses to converge, network, receive business support
Audience development and access to markets	• Improving visibility of the creative and digital businesses in their locality • Positively contributing to cultural tourism • Increasing sales
Talent development	• Addressing graduate talent attraction and retention • Talent and skills development among entrepreneurs • Providing pathways into the creative and digital industries by under-represented groups through apprenticeships, internships and work placements
Business development	• Business startup and scale up • Job creation • Providing opportunities for home-based businesses to grow
Brokers and anchors	• Brokering cross-sector collaborations and links between the hub community and the wider creative ecology, institutions, funders and partners • Enabling Research, Development and Innovation (RD&I) collaborations with academics and researchers
Cultural infrastructure builders	• Reimagining and repurposing disused industrial space, empty high streets and forgotten heritage buildings • Positively contributing to place-making and place-based regeneration
Sector leaders and advocates	• Taking the strategic lead, driving cultural strategy and policy, urban planning, regeneration • Advocating for policy change and championing the voice of creative social business on Local Economic Partnerships

The importance of the hub leader as animateur within the hub community

Another important point of convergence is the emphasis on hubs as communities of practice and that the relationship between hubs and their beneficiaries is neither instrumental, nor transactional, but reciprocal (Pratt 2016). This sets hubs apart from managed workspace where there is little interaction or exchange between hub users and speaks to the important role that hubs can play in reducing isolation and creating a sense of belonging.

In this context, the hub manager or leaders play a critical role in the success of a hub. "They are the primary curators, intermediaries, brokers and knowledge agents"[35] which means they tend not only to influence the membership mix of a hub, but act as the animateur. In practical terms this means making introductions between hub users, producing events and opportunities for hub members to meet, make and collaborate together, signposting to external sources of support and brokering partnerships with stakeholders that can help the hub and its members reach its aims. They are trusted individuals, often well networked within the local ecology, and may carry the job title of CEO, Community Manager, Producer or similar.

This point is central to several studies on the success of creative hubs, including those with a focus in rural hubs, and was repeatedly mentioned during the consultation process.

> "Buildings are only as good as the people who run them and building a community really needs that care and engagement."
>
> Workshop participant

Keeping these two aspects in mind – hubs as communities first and foremost and the critical role of the hub leader – is essential for policy makers when making decisions on how and where to best invest in creative hubs.

Overall success factors

While each hub exists within a unique environment, there are some common traits, behaviours and modes of operation that influence the success and growth of creative hubs. Combining the convergent views from the literature review and our own lived experience of initiating and building thriving creative hubs, we would summarise these as:

- Being user-led, listening and responding to the hub community to ensure relevance and responsiveness of services, facilities and programming

- A focus on community building, offering ample opportunities to meet and connect socially around shared values and ideas

- Fostering a collaborative culture, embedded in the design of the space (e.g. communal space, cafe or bar) and programming (e.g. socials, networking events)

- A strong brand, locally distinct identity and the ability to tell a compelling story about its distinctiveness, role, value and impact

- A diverse hub membership, with a mix of creative practice and industries, business maturity, other sectors including academia to enable interdisciplinary collaboration

- Entrepreneurial leadership that can spot new opportunities for the hub and its members

- An active hub leader in the role of Community Manager or similar to curate and animate the community, brokering links between the hub members and build partnerships

- Maintaining strong partnerships with the local community and wider networks that help the hub and its members achieve their goals

- Securing and developing the right space to host and house the hub community, often in characterful or unusual buildings (for those that are building based) that appeal to creatives to work and play

- Establishing a sustainable business model with diverse, predictable income streams to build better resilience against financial shocks

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[35]Virani, T and Malem, W (2015), *Re-articulating the Creative Hub Concept as a Model for Business Support in the Local Creative Economy: The Case of Mare Street in Hackney*, London, Creative Works, page 15

Section 3:
The operating and policy context for creative hubs in CIoS

Cornwall and the Isles of Scilly (CIoS) has a unique settlement pattern in England, with twenty or so towns of various sizes inter-dispersed with villages and hamlets that each have a varying range of community and business services. To understand the role and potential of creative hubs within this geographic context, we set out to discern the general operating framework of the area highlighting the region's strengths and weaknesses. We also delve into the cultural and creative context and consider the national rural picture to help draw out points of distinction.

The section also presents headlines from local and national policies, illustrating alignment and potential opportunities for hubs to deliver on wide-ranging agendas from increased collaboration and connectivity, high street revitalisation, talent development and levelling up of Research, Development and Innovation (RD&I).

Operating context

Distinctive challenges for businesses

The CIoS Draft Industrial Strategy sets out eight key challenges[36] that help to set the context for the creative industries and hubs in Cornwall:

- Rural peripheral geography: dispersed population and communities that sit outside the agglomeration impact of a large urban conurbation

- Large number of jobs in low-wage sectors and areas of significant deprivation

- Smaller than average working age population and higher 65+

- Low levels of higher qualifications and a skills shortage

- Largest proportion of workforce employed in very small businesses

- Cross-cutting low productivity

- Lack of adequate grid capacity and distribution networks

- Limited Research, Development and Innovation (RD&I) experience, infrastructure and investment

Due to dispersed settlements in CIoS, connectivity is therefore a key issue – Cornwall has one of the largest enforced car ownerships per household in the country.[37]

Across all business sectors, CIoS has a high proportion of people working in small and micro businesses, and a much higher proportion of people in self-employment. While this is not a challenge in itself, dominance of small and micro-enterprise makes it more challenging for the public sector to invest strategically and attract good levels of private sector investment. Furthermore, businesses in CIoS are much more dispersed, providing fewer opportunities for peer-to-peer support, collaboration and knowledge transfer.[38]

Scale and readiness are major barriers to success for businesses in the region. There is demand for suitable workspace to enable better networking opportunities and access to specialist equipment and facilities. In addition, there is demand for industrial space and high-quality sustainable sites all with good access and connectivity.[39]

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[36]CIoS Draft Industrial Strategy (2020)
[37]CIoS Draft Industrial Strategy (2020)
[38]CIoS Draft Industrial Strategy (2020)
[39]CIoS Draft Industrial Strategy (2020)

Economy and productivity

- Cornwall and the Isles of Scilly (CIoS) is an £11 billion economy – Cornwall (£10 billion) and the Isles of Scilly (£0.07 billion)[40]

- The local economy experienced 4% average annual GVA growth compared to 3.5% in the South West and 3.9% in the UK overall from 2012-2018[41]

- Productivity is lower than comparators at £26.5 GVA per hour worked compared with £31.8 for the South West and £35 for the UK[42]

People

- CIoS have almost 570,000 residents, with population growth of 4.4%, compared with 3.6% nationally between 2013-18[43]

- 25% of residents are aged 65 and over, compared with 18.4% nationally[44]

- Inclusive growth challenges with lower skills levels and 29.3% of employees earning below the Real Living Wage in 2020

Infrastructure

- 92.6% of premises have access to superfast broadband or higher[45], compared to the UK average for rural areas of 85.1%[46]

- Extensive road and rail infrastructure enables regional and national connectivity however there are challenges around congestion and frequency of trains within the region

Business environment

- Of the 24,825 local businesses, 88.6% are micros, 9.9% small, 1.2% medium and 0.3% large

- Rates for 2019 expressed as a % of total enterprises were business death rate of 8.6% and birth rate of 10.3%[47]

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[40]ONS, Regional economic activity by gross domestic product at current prices
[41]ONS, Regional economic activity by gross domestic product at current prices
[42]ONS, Sub regional productivity in the UK, Nominal (smoothed) GVA (B) per hour worked (£)
[43]CIoS LEP, Local Industrial Strategy Evidence Base (2020)
[44]NOMIS, Mid Year Estimates
[45]CIoS LEP, Local Industrial Strategy Evidence Base (2020)
[46]House of Commons Library, Superfast Broadband in the UK (2021)
[47]ONS, Business Demography

CORNWALL AND THE ISLES OF SCILLY IS AN £11 BILLION ECONOMY

570,000
CORNWALL AND IOS RESIDENTS

4.4%

3.6%

POPULATION GROWTH OF 4.4%, COMPARED WITH 3.6% NATIONALLY BETWEEN 2013-18

24,825
LOCAL BUSINESSES
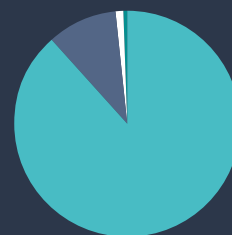
88.6% ARE MICROS, 9.9% SMALL, 1.2% MEDIUM, 0.3% LARGE
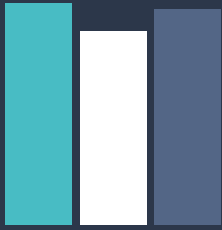
AVERAGE ANNUAL GVA GROWTH

OVERALL FROM 2012-2018

4% LOCAL ECONOMY

3.5% SOUTH WEST

3.9% UK

PRODUCTIVITY AT GVA PER HOUR WORKED

£26.5 LOCAL ECONOMY

£31.8 SOUTH WEST

£35 UK

29.3%
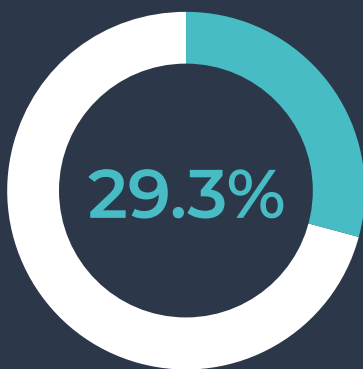
29.3% OF EMPLOYEES EARNING BELOW THE REAL LIVING WAGE IN 2020

25% OF RESIDENTS ARE AGED 65 AND OVER, COMPARED WITH 18.4% NATIONALLY

8.6%

BUSINESS DEATH RATE

10.3%

BUSINESS BIRTH RATE

RATES FOR 2019 EXPRESSED AS A % OF TOTAL ENTERPRISES

92.6%

OF PREMISES HAVE ACCESS TO SUPERFAST BROADBAND OR HIGHER COMPARED TO THE UK AVERAGE FOR RURAL AREAS OF 85.1%

Cultural and creative industry context

A magnet for creativity

"Over hundreds of years, this creative place has attracted artists, makers and thinkers. And this inspiration has shaped their work and their lives. Together the place and the people have created ways of making money from their creative work. And this work has led to more jobs. And today, Cornwall has more of these people and these jobs, than any other rural area of the UK."[48]

"Cornwall has strong brand visibility, with a unique and unusual offer that includes an alternative creative community, health and wellbeing and distinctive environment, that draws people to it."

[48]Cornwall Council, Creative Manifesto (2021)

Cornwall, located on a peninsula at the far south west of Britain, was almost completely isolated via land from England by the Tamar River until 1867 when the rail network was completed. Its geographic isolation and inaccessibility enabled the region to develop and retain a distinctive culture; from the Cornish language, literature and poetry, folk dance and music, to crafts. Cornwall is not an insular place however and has long been associated with international links and at the forefront of global communication; from the Falmouth Packet ships to Marconi's early experiments in wireless telegraph technology; to the global communications hubs at Porthcurno and Goonhilly. Cornwall has a long-held reputation for its creativity and culture, from the Newlyn School art colony in the 1880s to the St Ives School, which became the centre of the international arts scene in the 1940s and 50s. The ancient Plen an Gwari theatre tradition has evolved into to a contemporary theatre scene, much of which still takes place in the open-air, and a thriving festival network.

"Cornwall has always been renowned for its creativity and it's this creativity which is spearheading the growth of business."[49]

Creativity and culture continue to be intrinsic to the region, which is home to a diversity of traditional artists, craft makers, internationally significant performance companies and writers, as well as increasingly attracting new screen and digital talent.

"Creativity is an increasingly important part of Cornwall's public perception with new creative products and experiences attracting visitors to the region and the creative industries helping to boost out of season visits."[50]

There are a range of museums, art galleries, studios and hubs available to visit as well as numerous courses, workshops and spaces to support Cornwall's thriving creative communities. Cultivator's Workspace Demand report found a synergy between the creative industries and the tourism sector, which is evident by "the high number of visitors who include museums, galleries and heritage sites on their itineraries (with more visitors coming to Cornwall for arts and cultural activity in the colder months[52]) and the development of partnerships between accommodation providers and creative producers to meet demand for tailored cultural packages".

Cornwall's Creative Manifesto, the Isles of Scilly's Manifesto and Cultivator's[51] Creative Workspace Demand report detail the region's unique cultural, heritage, archaeological and environmental assets. The Manifesto for Culture produced by the Isles of Scilly Partnership notes that "engagement in creativity has the potential to reveal what makes Scilly special" including dramatic landscapes and seascapes, hidden coves, quaint fishing villages, vestiges of industries based on fishing, copper and tin mining to contemporary arts, digital innovations and way of life.

[49]falmouthlaunchpad.co.uk/about
[50]Cornwall Council, Creative Manifesto (2021)
[51]Cultivator is a business development programme that supports the creative sector in Cornwall and the Isles of Scilly. It is a project run by Creative Kernow and works in partnership with the University of Plymouth, Real Ideas Organisation, Cornwall College and Cornwall Development Company
[52]Typically, May to June and September to October for Cornwall

In order to grasp the range of creative activity in Cornwall and the Isles of Scilly (CIoS), some of the sector highlights are outlined below:

Arts and culture

"Cornwall and the Isles of Scilly have a proud history of cultural expression from the Cornish language to literature, music to theatre... Cornwall's distinctive culture and burgeoning creative industries have been recognised through the investment of competitive European Structural Investment Funds and national funding awards including Arts Council Cultural Destinations, Creative Local Growth Fund and Coastal Communities Funding."[53]

Cornwall has a strong cultural offer and is home to eight Arts Council National Portfolio Organisations (NPOs). According to Cultivator's research, visual arts are the most prevalent category of creative business in Cornwall. It should be noted that this includes freelancers and those businesses below the VAT threshold, which tend not to be counted in official government statistics.

Heritage

"Over 60% of the islands are classified as of archaeological importance with 239 scheduled monuments, these represent over four thousand years of occupation from pre-history to the second World War. Features range from a unique concentration of Bronze Age entrance graves through to remains of the islands' strategic importance in the successful defence of England, with fortifications spanning three hundred and fifty years. The preservation of these features, which has occurred fortuitously through both a lack of development and relatively low levels of agriculture, means they are accessible to visitors today. Many of the granite structures have weathered the elements and have remained undisturbed for centuries."[54]

CIoS is home to 70 museums: more than any comparable region. It also has a dedicated archives building, Kresen Kernow. It is the largest industrial World Heritage Site in the UK and has the highest number of statutorily protected heritage assets in a local authority area. Plans are also underway for the development of a new Museum on the Isles of Scilly. This will be a space for performing arts, alongside a coordinated programme of cultural events and festivals, the commissioning of new work, and support for Scilly's creative economy.

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[53]Cornwall Council, Creative Manifesto (2021)
[54]Isles of Scilly Partnership, Isles of Scilly Manifesto for Culture (2021)

Higher and further education

CIoS boasts a number of further and higher education institutions that fuel the cultural and creative talent pipeline.

Falmouth University acts as an anchor institution for skills and education in Cornwall and is the only higher education institution headquartered in Cornwall. Established in 1902 as Falmouth School of Art, Falmouth gained university status in 2012 and is now a vital talent pipeline and innovation hub for the region. Recognised as the top University in the UK for Games and one of the top 30 worldwide[55] and host to departments that cover the full range of creative disciplines, the University has also been ranked by the Higher Education Statistics Agency as one of the best universities in the UK for producing start-ups and social enterprises. In the years 2017/18, 197 new businesses were created, surpassing both the University of Oxford (34) and the University of Cambridge (11). Falmouth's Launchpad project aims to establish 72 new creative and digital companies by 2023. The University takes creativity beyond the creative sector into other high-growth markets including e-health and wellbeing, aerospace and agri-tech.

The Universities of Exeter and Plymouth also have a strong presence in Cornwall. Cited as "the UK's fastest growing research university" is The University of Exeter, with a focus on science, engineering, mathematics, and medicine research.[56] Exeter has two campuses in Cornwall - the Truro Campus and the Knowledge Spa on the Royal Cornwall Hospital site, and the Penryn Campus. The University of Plymouth has a notable presence in Cornwall which can be observed through affiliation with Cornwall College. Cornwall Innovation is also a University of Plymouth initiative, delivering three innovation centres on behalf of Cornwall Council.

Plymouth College of Art is an independent art school run by artists and designers for artists and designers. As such it is not only an employer of local creatives, who run their courses and programmes, but it provides practical expertise to enable artists, designers and makers to reach global markets. The College is also a partner in the Cattle Market Makers project in Liskeard which is being supported by the Community Led Local Development (CLLD) Fund.

The South West Creative Technology Network (SWCTN) is a £6.6 million project, funded by the Connecting Capability Fund, to link research to development by expanding the use of creative technologies and supporting business growth across the South West region of the UK. The network comprises University of the West of England, Falmouth, Plymouth and Bath Spa Universities, alongside Watershed Bristol and Kaleider Exeter as production partners. Since 2018, SWCTN has supported research and development in emerging technologies on the themes of Immersion, Automation and Data, including In the Loop, cited in the recommendations. The SWCTN comprises established and developing researchers, artists, technologists, and businesses from across the region, representing multiple disciplines and industries.

In the Further Education sector, both Cornwall College and Truro & Penwith College have forged academic partnerships to offer a range of games, IT, software, film/TV and digital courses. Truro & Penwith College was one of only four colleges selected nationally as part of the NextGen Skills Academy to offer the AIM Level 3 Extended Diploma in Games, Animation & VFX Skills for example. Cornwall College has teamed up with Redruth-based Bluefruit Software to offer a Technical Baccalaureate in software development, which includes substantial hands-on experience.

[55]falmouth.ac.uk/news/falmouths-games-academy-moves-up-the-global-top-50-table
[56]exeter.ac.uk/research/about/aboutus

Screen industries and creative technology

"Strengths in software, IT and digital content are now propelling Cornwall's creativity to new audiences and markets and underpin both the creative and visitor economy."[57]

The screen industries – film, TV, digital media, video games and immersive technologies – represent one of the fastest-growing segments of the UK's creative industries and are a particular strength of the region. The growth of these sub-segments is being driven by new and disruptive technologies, which are opening up new opportunities for not only innovative content creation and consumption, but also for novel ways of distributing content to audiences.

"Falmouth University is central to the growth of the screen and creative technology sectors in the region. From our Sound Image Cinema Lab involving staff and students in the production of a BAFTA winning film to our Games Academy being ranked 1st in England and 28th in the World by the Princeton Review, we are proud of our role in extending Cornwall's global reach."

Professor David Prior, Director of Research, Falmouth University

Based at Falmouth University's School of Film and Television, the Sound/Image Cinema Lab[58] is responsible for the production and co-production of a series of narrative and documentary, short and feature films since the start of the 2010s. It supports national and regional feature film productions following a strategy of accessing greater professional opportunities for students and graduates. Alongside co-producing feature films, the Lab directly funds and offers executive production for micro-budget feature films.

Cornwall has a strong track record in attracting TV productions (Poldark, Doc Martin, Delicious and Rosamunde Pilcher) and the county is also home to several notable screen sector businesses, including Spider Eye Animation in St Just, Antimatter Games in Falmouth, Pixel Rain in Penryn, Engine House Animation Studio in Redruth, and LightColourSound in Newquay.

Cornwall has a thriving Games sector, with Cornwall Games functioning as a virtual creative hub for developers in the region. Notably, Truro is home to the largest game development studio in the South West, Antimatter Games (AMG) employing a team of nearly 50 people, ranging from expert developers to creative artists. The video games sector is one of the fastest growing creative industry sectors in the world, with the UK industry generating £5.35bn in sales in 2019.[59] While The Games Academy attracts hundreds of talented new students every year and has been instrumental in the development of the burgeoning games sector in Cornwall, graduate retention in this field is recognised as a challenge.

Creative industries key statistics

In 2020, across Cornwall and the Isles of Scilly (CIoS), there were 5,745 people employed in the cultural and creative industries, and 1,035 creative businesses.[60]

A more recent study conducted by Creative England suggests the total number of creative businesses is 2076 of which 552 are screen based creative companies.[61] This same data set reveals growth in the number of creative companies across CIoS over the last three years.[62]

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[57]Cornwall Council, Creative Manifesto (2021)
[58]falmouth.ac.uk/research/programmes/pedagogy-futures/cinema-lab/#partners
[59]thecreativeindustries.co.uk/site-content/industries-games-games-why-the-uk
[60]CIoS Draft Industrial Strategy (2020)
[61]Companies House data; creative industry SIC codes, 2020
[62]Companies House data; creative industry SIC codes, 2018-2020

Growth of creative businesses 2018-20

AREA	NO. NEW BUSINESSES 2018-20	% INCREASE 2018-20
CAMBORNE AND REDRUTH	85	45%
NORTH CORNWALL	69	26%
SOUTH EAST CORNWALL	70	41%
ST AUSTELL AND NEWQUAY	83	43%
ST IVES (INC ISLES OF SCILLY)	68	27%
TRURO AND FALMOUTH	157	34%

The data gathered by Creative England shows that the screen sector has shown consistent growth over the last three years and now comprises a total of 552 companies (this figure does not include freelancers). Redruth is in the top three Tech Hub locations in the south west, behind only Bristol and Bournemouth, and is ranked 31 out of all cities in the UK in terms of levels of tech investment.[63]

NESTA and Creative England's report 'The Geography of Creativity in the UK' recognises the importance of the creative industries in the Penzance Travel to Work Area, identifying it as one of the key Creative Clusters in the UK. A further nine creative 'microclusters' are identified in the 'Creative Industries Radar: Mapping the UK's creative clusters and microclusters', located in the commuting zones for St. Ives, Truro, Wadebridge, Redruth, Falmouth, St Austell, Newquay and Launceston.[64]

The creative sector shows above average productivity and is predicted to grow by 22% between 2017 and 2027.[65] There is also a strong Research, Development and Innovation (RD&I) knowledge base that requires support to grow. However, based on location quotients for concentrations of firms and employment in comparison to the UK average, these are not yet specialised strengths in CIoS.[66] The burgeoning digital cluster provides 2,368 jobs, with a turnover growth of 95% from 2011-2017, generating £70,000 digital turnover per employee and £93m GVA in 2017.[67]

The national rural context

"We now have a historic opportunity to harness the economic potential of our rural communities. The creative sector has a significant contribution to make. I therefore welcome initiatives by the sector itself to identify ways in which it can stimulate this."

DEFRA Secretary of State, Andrea Leadsom, 31/08/2016[68]

3 REDRUTH IS IN THE TOP 3 TECH HUB LOCATIONS
IN THE SOUTH WEST, BEHIND ONLY, BRISTOL AND BOURNEMOUTH

31 AND IS RANKED 31 OUT OF ALL CITIES IN THE UK IN TERMS OF LEVELS OF TECH INVESTMENT

[63]TechNation Report (2021), UK Spotlights section
[64]Dr Josh Siepel, Dr Roberto Camerani, Dr Monica Masucci, Dr Jorge Velez-Ospina, Dr Patrizia Casadei, Martha Bloom, Creative Industries Policy and Evidence Centre, *Creative Radar: Mapping the UK's creative industries* (2019)
[65]CIoS Draft Industrial Strategy (2020), page 21
[66]CIoS Draft Industrial Strategy (2020), page 20
[67]CIoS LEP 10 Opportunities Towards Local & Industrial Strategy (2020)
[68]The quote was made following the announcement that a new Industrial Strategy would be launched, in the wake of the 2016 referendum to exit from the EU. The Prime Minister and the DCMS and DEFRA Secretaries of State called upon all sectors of the creative industries, urban and rural "to come forward and give of their best"

Combined, the rural creative industry makes a significant contribution to the wider national economy.[69]

The New Creative Rural Economies (2019) estimates the rural creative sector contributes £2 billion p.a. to the national economy. This is in part due to the shift within rural economies away from traditional rural sectors such as agriculture and fishing towards the more knowledge intensive sectors and services. Surveys by the Commission for Rural Communities (CRC) (2007, 2008 & 2010) highlight that, in terms of employment and output, the wider rural economy now mirrors the national picture with 'property and business services' and 'manufacturing' being the largest employers in rural areas.

The Creative Rural Industries Consortium argues that there is an urban bias in terms of understanding the creative industries. They contend that, in addition to the DCMS definition of creative industries, there is a 'hidden' creative rural economy which might include the following:

- Land-based creative industries, and creative alternative land-use

- Farmer creatives, 'artfarms', and 'agri-cultural' entrepreneurs

- Contemporary rural crafts and design

- Rural digital arts, media, and communications

- Rural festivals, art biennales and cultural events

- Public art and sculpture trails in the countryside, and rural cultural tourism

- New rural architecture, creative rural settlements, new rural housing and workspace

- Culture-led outdoor recreational, heritage and sports events[70]

Appetite and engagement for creativity and culture

The Active Lives Survey shows there is a large appetite for and engagement with creativity and culture, in general, in rural areas.[71] In fact, those in rural areas are typically more likely than those in urban areas to engage with a range of cultural activities, such as spending time doing a creative activity, attending an event or attending a museum or gallery. This pattern is consistent in both individual and repeat instances of engagement, and across almost all key demographic categories.[72] The two areas that urban residents were more likely than rural residents to engage with were digital arts such as filmmaking (6% versus 4.6%) and visiting libraries.

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[69]With strategic investment and policies, the Creative Rural Industries Consortium propose this could increase to £4 billion p.a. by 2025
[70]ruralculture.org.uk/rural-cultural-strategy/3-creative-rural-economy
[71]Cited in the Rural Evidence Data and Review, Arts Council England (2019)
[72]One exception to this was in those aged 25-34, among whom engagement was higher in urban areas

Policy context and alignment

The local and national policy review identified a number of cross-cutting priorities against which we believe creative hubs are well placed to deliver. This is because the scale and services provided by hubs are wide ranging – from workspace and facilities such as specialist equipment to skills development, networking and retail opportunities. Hubs also are flexible, people-centred and rooted in their local communities – as such they can adapt and respond to shifting needs.

This section sets out key themes followed by details of relevant policies; which hubs themselves may find useful to refer to.

Priority	Policy alignment
Developing a distinctive and region-specific cultural and creative offer	• Cornwall & Isles of Scilly Local Industrial Strategy • Cornwall's Creative Manifesto • Isles of Scilly Manifesto for Culture • Falmouth University 2030 Strategy • University of Exeter Arts & Culture Strategy: 2018-2021

Facilitation of networking and collaboration between creative businesses, academia and other sectors to boost innovation and productivity	• Cornwall's Creative Manifesto
	  – Evolving our ways of working
	• Cornwall & Isles of Scilly Local Industrial Strategy
	  – Place
	• Time for a Strategy for the Rural Economy
	  – Better connectivity for rural businesses

Regeneration of towns and revitalisation of high streets	• Addressing graduate talent attraction and retention • Cornwall's Creative Manifesto – Ambition for communities • Town's Fund Initiative • Cornwall Council Town Centre Revitalisation Fund

Increasing investment in RD&I infrastructure and embedding RD&I, creativity and innovation in business to improve productivity	• Cornwall & Isles of Scilly Draft Industrial Strategy
	  – Ideas
	• Falmouth University Research and Innovation Strategy
	• The UK Research and Development Roadmap
	  – Driving innovation and productivity
	  – Levelling up RD&I across the UK

Post-production facility for the screen industries	• Cornwall's Creative Manifesto – Evolving our ways of working • Cornwall & Isles of Scilly Vision 2030 & 10 Opportunities • Strategy for the Screen-based Sector in Cornwall and the Isles of Scilly

Developing the talent pipeline and addressing skills shortages	• Cornwall's Creative Manifesto
	  – Creative talents
	• Cornwall & Isles of Scilly Draft Industrial Strategy
	  – People
	• Falmouth University 2030 Strategy
	• The UK Research and Development Roadmap
	  – Inspiring and enabling talented people and teams

Cornwall's Creative Manifesto 2021-25 (Cornwall Council, 2021)

> *"Cornwall's commitment to culture, and its recognition of the broad and deep benefits that investment in the rural creative economy can bring, has been evident for many years; their approach has seen them recognised as leaders in the field."*
>
> Sir Nicholas Serota, Chair Arts Council England

Cornwall Council aims to consolidate Cornwall's position as the UK's leading rural creative economy. The Manifesto details the ambitions, focus, and pipeline projects that will enable this. The Manifesto has four key ambitions, and we have highlighted those areas that creative hubs are particularly well positioned to help achieve;

1. 'Ambition 1: Our communities' with emphasis on place making and participation/taking part, including;

- Regenerating towns and supporting creative industries, for example through developing active new uses for historic buildings and retail units

2. 'Ambition 2: Evolving our ways of working' with emphasis on support for a dispersed cultural and creative sector including;

- Supporting cultural and creative hubs "to nurture innovation, skills, collaboration and productivity in place-based growth"[73]

- Creating a robust framework for monitoring and evaluating social, cultural and economic impact

- Developing networks and support, particularly for freelancers and micro creative businesses, and exploring opportunities for a new sector network/platform to facilitate collaboration for Cornwall's creative industries

- Investment that values RD&I and creativity and enables growth in Cornwall's creative ecology

- Identifying key opportunities for growth, for example digital, screen, advertising and marketing, including the exploration of establishing flexible post-production facilities in Cornwall

3. 'Ambition 3: Our creative talents': with emphasis on nurturing all creative talents and enabling creatives to thrive in Cornwall at all stages of their life and career. This ambition includes a focus on graduates and creative entrepreneurs building their careers in Cornwall, with three initial strands of raising aspirations, developing inclusive career opportunities and leadership, and removing barriers to accessing workspace, developing skills, and networking. The opening of Hall for Cornwall's creative digital business hub Husa, is highlighted as a project to help deliver this ambition.

4. 'Ambition 4: Our inclusivity and sustainability': with emphasis on increasing and diversifying creative engagement while encouraging environmental and business sustainability for the creative sector. This ambition notes how critical it is that Cornwall's cultural and creative sector "is open to all voices, experiences and perspectives."[74]

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[73]Cornwall Council, Cornwall's Creative Manifesto: The Future of the UK's Leading Rural Creative Economy (2021), p17
[74]Cornwall Council, Cornwall's Creative Manifesto: The Future of the UK's Leading Rural Creative Economy, 2021-2025, p20

Isles of Scilly Manifesto for Culture

(Council of the Isles of Scilly Partnership, 2021)

"Culture should be seen as not only the commissioning of arts and the production of events, but also as a tool; that builds upon the heritage of the area; that builds a shared vision and identity for the area that is steeped in history and has a wealth of cultural assets; that builds the local economy particularly in the context of tourism and creative industries; that improves the local quality of life and encourages engagement in community activities; and that provides new ways of tackling challenges around health and well-being."[75]

The Isles of Scilly Manifesto for Culture aims to set out clear and deliverable ambitions, endorsed by the Council of the Isles of Scilly, supported by the Scilly arts, culture and heritage sector and other key stakeholders, and valued by the local community.

The Manifesto outlines two central and inter-linked elements that underline the initiative:

1. Developing a distinctive and region-specific cultural and creative offer – thriving arts and cultural sector are seen as ways of celebrating and sharing Scilly's uniqueness, enabling visitors and residents to experience its special character.

2. Recognising the essential role that culture plays in contributing to wider ambitions for Scilly – around the economy, the environment, sustainability, equality and diversity, lifelong-learning and well-being.

One of the key commitments of the Manifesto is the development of a purpose-built museum to animate Scillonian history and culture through multiple art forms. The museum would have spaces to accommodate live events including music, theatre, dance, storytelling, literature, film and visual arts as well as providing a permanent, purpose-built home for the museum collections and archive. Alongside the museum, additional space would function as a hub for contemporary arts, crafts and culture. This would give the islands a showroom to celebrate and share local heritage and history, as well as providing a space for visiting events.

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[75]Definition of culture by the Local Government Association, which underpins the Isles of Scilly's Manifesto

Cornwall and the Isles of Scilly Draft Industrial Strategy

(CIoS LEP, March 2020)

The draft strategy sets out the 2030 Vision for Cornwall and the Isles of Scilly (CIoS), with a focus on the creative and carbon-neutral economy:

> *"Cornwall and the Isles of Scilly's creative and carbon-neutral economy will be realising opportunities for its people, communities and businesses to thrive, benefiting the environment and providing an outstanding quality of life for all."*

'The creative economy driving innovation' is cited as one of the four principles of growth, having the potential to drive both productivity and inclusive growth. Creative hubs in particular are well placed to contribute to a number of the ambitions set out in the draft strategy:

- **Place:** A thriving network of connected and innovative businesses, equitable communities and productive systems, all capitalising on the strengths and opportunities of our cultural assets and natural capital

- **People:** A skilled, healthy and inclusive workforce that feels inspired and valued, enjoying quality of life, a living wage and pride of place

- **Business environment:** Prosperous and creative businesses and pioneering start-ups, working together to broaden CIoS capabilities and retain value from a circular economy

- **Ideas:** A growing entrepreneurial ecosystem nurtured by our anchor institutions, embedding RD&I, creativity and innovation in business to improve productivity

Strategy interventions that creative hub activity align well with include:

- Leveraging digital capabilities to enable **interconnected virtual networks** and collaborations and increasing the use of digital technology and platforms to access funding, markets and talent, and optimise business processes

- Capitalising on consistent **investment in creative and digital infrastructure**

- **Facilitating productive connections** across sectors and linking businesses with academia and other relevant skills development initiatives, including with hubs – avoiding silos based on sectors and encouraging diversity and expression

Time for a Strategy for the Rural Economy

(House of Lords Select Committee on the Rural Economy, 2019)

The report highlights the work of the **South West Rural Productivity Commission,** which was established by four Local Enterprise Partnerships (LEPs), including Cornwall and the Isles of Scilly (CIoS). The Commission's **inquiry addressed themes including 'Rural Identity and Sectors', small and scale-up businesses, workforce and skills, communities and workspace,** and hubs and spheres of influence. The report set out five "overarching" recommendations for LEPs, their local partners and government, including a call for better connectivity for rural businesses.

It also draws attention to the **impact that universities operating in Cornwall can have for the rural economy;** providing opportunities for business collaboration, incubation facilities for students to develop their business ideas, and boosting Cornwall's Gross Value Added (GVA).[76]

Towns Fund Initiative & Town Centre Revitalisation Fund

The Towns Fund is a £3.6 billion fund investing in towns as part of the government's plan to level up our regions. The overall purpose is to drive the sustainable economic regeneration of towns to deliver long term economic and productivity growth. Penzance, St Ives, Camborne and Truro have been selected to participate in the initiative and the creative economy has been identified as a key opportunity for each town. Hubs already feature in the plans of the four towns (detailed in Section 3).

On 12 February 2020, Cornwall Council approved a Place Policy and set-up a £4 million **Town Centre Revitalisation Fund (TCRF)** to support towns in Cornwall to work on and develop investment proposals. The first phase of the TCRF is the Town Vitality Funding (TVF) in which £1 million is available for Town Development activities. The TCRF Town Vitality Funding is an important opportunity to help the delivery of place shaping objectives in Cornwall's towns. It will also assist with the recovery from the impact of the Covid-19 pandemic.[77]

One of the key commitments of the Manifesto is the development of a purpose-built museum to animate Scillonian history and culture through multiple art forms. The museum would have spaces to accommodate live events including music, theatre, dance, storytelling, literature, film and visual arts as well as providing a permanent, purpose-built home for the museum collections and archive. Alongside the museum, additional space would function as a hub for contemporary arts, crafts and culture. This would give the islands a showroom to celebrate and share local heritage and history, as well as providing a space for visiting events.

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[76]The strategy specifically refers to Falmouth University, University of Exeter, and University of Plymouth
[77]cornwall.gov.uk/business-trading-and-licences/economic-development/town-centre-revitalisation-fund

The UK Research and Development Roadmap

(HM Government 2020)

The roadmap describes ambitions and actions for achieving the overarching goal "to further strengthen science, research and innovation across the UK, making them central to tackling the major challenges we face, and taking advantage of opportunities." It is described as 'The start of a conversation' and represents a number of opportunities for creative hubs – specifically, a coordinated network of hubs – to engage with and shape that conversation. Relevant themes include:

- **Inspiring and enabling talented people and teams:** Attract, retain and develop the talented, diverse people and teams that are essential to delivering our vision, through a new RD&I People and Culture Strategy

- **Driving innovation and productivity:** Ensure research and discovery translates to commercial application; support entrepreneurs and start-ups and increase the flow of capital into firms carrying out RD&I enabling them to scale up

- **Levelling up RD&I across the UK:** Level up RD&I activity and investment through a UK RD&I Place Strategy

- **Being at the forefront of global collaboration:** Support new and existing strategic collaborations on a global scale

- **Developing world-leading infrastructure and institutions:** Provide long-term flexible investment into infrastructure and institutions, building on the UK's system of universities, public sector research establishments and other publicly funded laboratories

The UK Research and Innovation Roadmap makes a clear commitment to taking a more considered approach to place-based investment and shows that Cornwall is an area of low research and development intensity. This represents a key opportunity for the region and for hubs – for example place-based advisory functions at a regional level.

Strategic Plan 2030

(Falmouth University)

Falmouth University's 2030 Strategy includes the key objectives of 'Taking Cornwall Global', 'Open Innovation', and 'Doing it for Real' and a commitment to grow the Creative Industries, providing a 'Creative Bridge' into other industries.

> *"We are unwavering in our mission 'to help grow Cornwall"*[78]

Falmouth graduates are more than five times as likely as other UK graduates to start their own businesses. In 2015/16, 28% of Falmouth Graduates were self-employed within six months of graduation, compared with the national average of 5.3% of UK graduates.[79] The University aims to increase this proportion of self-employed graduates to 33% by 2030. This highlights the growing pool of entrepreneurial creatives entering Cornwall's workforce each year and could inform future demand for creative hubs.

By 2030, Falmouth has set the goal of 1,575 jobs being created through startups; these startups and workers are likely to be a key demographic in considering potential creative hub users.

Research and Innovation Strategy 2030

(Falmouth University)

Falmouth University's 2030 R&I strategy focuses on the role it takes in future-proofing the regional economy. The University is committed to 'creating bridges' between creative, cultural, civic and industrial processes to enable an inclusive and human-centred approach to the development of business, the economy and wider society. A number of targets are cited that are especially interconnected with the development of hubs in Cornwall:

- Assist 222 enterprises by 2030 (baseline 2018: 3)

- Develop 111 new-to-market products by 2030 (baseline 2018: 7)

- Build investor networks to support innovation initiatives including the Launchpad incubation programme

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[78]Falmouth University, *Strategic Plan 2030* (2018), p9
[79]Falmouth University, *Research & Innovation Strategy 2030* (2018), p5 and HESA Graduate Employment Data, (4.7% self employed, 0.6% started own business.)

Our Strategy: 2016-2021 Making the Exceptional Happen

(University of Exeter)

The University of Exeter's vision is "to be a global 100 research leader and create graduates of distinction within a community of the most talented and creative minds". Their vision is to grow an entrepreneurial and enterprise culture among students, graduates, colleagues and academics. In part, this will be accomplished by developing partners and generating new opportunities for their students, graduates, colleagues and academic staff including:

- Connecting with the public through our research and strengthening local links including through an Arts and Culture Strategy and community events

- Building upon the south west region's strengths to promote local innovation and partnerships

- Using Innovation Exeter and the Exeter Science Park to promote entrepreneurial activity

Exeter will also invest in state-of-the-art specialist buildings and equipment – such as world-class new facilities for Digital Humanities, special collections and digital library resources.

Arts & Culture Strategy: 2018-2021

(University of Exeter)

The University intends to play a leading role in the social, cultural and economic development of the south west region and beyond by developing purposeful creative partnerships and engagement across disciplines, places and audiences. The strategy sets out three Aims:

- **Aim 1:** Develop purposeful encounters: test and develop ways of collaborating that enrich teaching and learning, enhance research potential and connect partners through innovative, structured encounters between academics, students, cultural practitioners and organisations

- **Aim 2:** Enrich our cultural environment: develop the conditions for a diverse, creative and internationally relevant artistic and cultural environment

- **Aim 3:** Unlock resources and potential: maximise the benefit and visibility of the University's Arts and Culture offer with flexible and creative use of existing and potential skills and facilities

There is potential for hubs to develop partnerships with the University, to deliver "distinctive and ambitious cultural activity beyond our campuses". The University seeks to offer "flexible and creative use of existing and potential skills and facilities" in response to the University's Business Engagement Strategy and the Government's Industrial Strategy. Growing networks, collaboration and support, and maximising resources presents an opportunity for hubs to partner and co-create.

University 2030: Future of Excellence

(University of Plymouth)

The University of Plymouth aims to maintain and build upon their pre-eminence in the sustainability of marine and maritime environments and societies.

Their strategy maps out three strategic priorities, the third of which is to "drive global connectivity that makes a difference. Achieve influence and impact through significant industry and business partnerships".

Hubs could support the University to:

- Optimise research impact and knowledge exchange to the benefit of society and the economy

- Capitalise on applied expertise to support graduate pathways into employment

- Drive revenue from shared RD&I activities to support investment.

- Maximise reach through strategic and exciting institutional partnerships

Strategy for the Screen-based Sector in Cornwall and the Isles of Scilly

(Saffery Champness & Nordicity, 2017)

This strategy sets out an approach that seeks to leverage Falmouth University and the region's other screen sector assets to unlock the so called 'talent-business dilemma' by encouraging the formation of a **cluster** that emphasises **skills** and **product development** centred around immersive technologies and traditional film and TV production.

Aspects of the strategy have already been implemented and with respect to hubs, the report recommends:

- **a state-of-the-art workspace** open to businesses looking to **scale-up** their operations

  - Flexible configurations with few, if any, permanent walls. It should offer tenants enterprise-calibre digital connectivity

  - Curation and access to the business advice and support

  - Could incorporate Cultivator or be modelled on Google's Digital Garage drop-in centres in Cardiff, Birmingham and Glasgow with opportunities for knowledge sharing

- **Production spaces hub** to house many of the **production services businesses**

  - From drone-filming services to location production catering

  - Resemble the workshop wing of many existing production studios

  - Act as a one-stop shop for location producers

  - To scale the investment, a certain percentage of the space could be pre-sold

Section 4:
The role of creative hubs in CIoS

The Cornish model for creative hubs is notably different to the urban-centric models of the creative city, which is often home to large scale hubs and critical mass in terms of sector specific creative clusters. Rather than a hub and spoke model, Cornwall and the Isles of Scilly (CIoS) are home to a dispersed network of creative hubs in towns and villages, each serving distinct communities. The role and therefore impact (potential and actual) of each hub is also unique and is determined by the mission and users' needs of each hub.

This section describes the distinctive characteristics of the hub model in Cornwall, providing a baseline map of 60 hubs and highlights some example hubs in North, East, Mid and East Cornwall to illustrate the depth and diversity in terms of role.

What makes creative hubs in CIoS distinctive?

During the consultation workshops, 51 people told us – in three words each – how they describe creative hubs in CIoS. These descriptions indicate some of the characteristics that make hubs here distinctive and valuable for their users, as hyper-local creative resources with national and international connections.

The repeated use of 'eclectic' and 'diverse' and 'varied' highlight that not only are creative hubs in CIoS distinctive from their city cousins, they are also distinctive from each other, and as diverse as the creative communities they serve.

This variety of hubs in CIoS nonetheless find common ground in collaboration, community, inclusion and inspiration. Creative "awenek" hubs here are "rugged", "grassroots", "from the land", "community-oriented", and "organic", often growing from "micro-networks." The words hubs use to describe themselves also highlight the strong commitment to Cornwall's natural environment and the need for environmentally sustainable practices.

Engagement
Much-needed
Connecting
Share-skills-and-ideas
Dispersed
Spread-out
Sustainable
Varied
Building-confidence
Important
Regional
Conversations
Exciting
Micro-networks
Localised
Diversity
Community-oriented
Self-starting
Under-funded
From-the-land
Needed
Inspirational
Not-big-enough
Sustainability
Experimental
Innovative
Hyper-local
Hidden
Linking
Awenek
Lively
Salty
Do-it-differently
Networking
Collaborative
Inter-connected
Poor
Supporting
Investment
Rugged
Place
Complex
Vibrant
Entrepreneurship
Community
Flexible
Innovation
Cornish
Broad-appeal
Inclusive
Diverse
Youth Sharing
Growing
Vital
Thriving
Exploratory
Eclectic
Benefiting-all
Multifaceted
Resourceful
Place-specific
Accessible
Responsive
Connected
Great-place
Inspiring
Communication
Interesting
Regenerative
Entrepreneurial
Disconnected
Grassroots
Aspirational
Cold
Curious
Energetic
International
Networked
Collaboration
Flowing
Dynamic
Organic
Job-creating
Supportive
Rich-supply-chains
Communicate
Motivational
Opportunity
Truro-Creative-Network
-in-operation

A note on rural creative industries

Rural creative enterprises (and therefore hubs) are often multifaceted enterprises bringing together heritage, natural environment, and technology. In Cornwall, for example, the Newquay Community Orchard provides makerspace, community events, orchards and a well-being hub and garden. Land stewardship and sustainable environmental growth lies at the heart of the enterprise.

Another example is the Family Foraging Kitchen (FFK), which offers wild food education across South East Cornwall. FFK have developed a programme of foraging walks, cookery classes, courses on heritage skills and traditional countryside crafts such as dry-stone walling and hedge laying. They have an education space and organise sessions on seaweed foraging and beekeeping. The relationship to the land is a defining characteristic of their creative programme. Although FFK does not fit neatly within a siloed definition of a creative industry sector, we would argue that the project is a notable example of a rural creative enterprise.

For the richness and role of the rural creative sector to be fully understood, the parameters used to demarcate creative industries should be expanded to address the rural context.

The creative hub landscape in CIoS

The mapping exercise revealed a wide range of hub operating models including artists' studios, managed workspace catering for a range of creative sectors, networks, innovation centres, and co-working spaces alongside some models that are unique to the landscape in which they are located. We have highlighted a number of examples to illustrate the depth and diversity of hubs across Cornwall and the Isles of Scilly (CIoS), describing their role and citing impact data where available. These are divided into North (using the North Cornwall constituency boundary), East (using the South East Cornwall constituency boundary), Mid (combining the Truro and Falmouth with Newquay and St Austell constituencies) and West (combining the Camborne and Redruth with St Ives constituencies), with a particular focus on Penzance, Falmouth, Truro and Liskeard, as set out in the research brief.
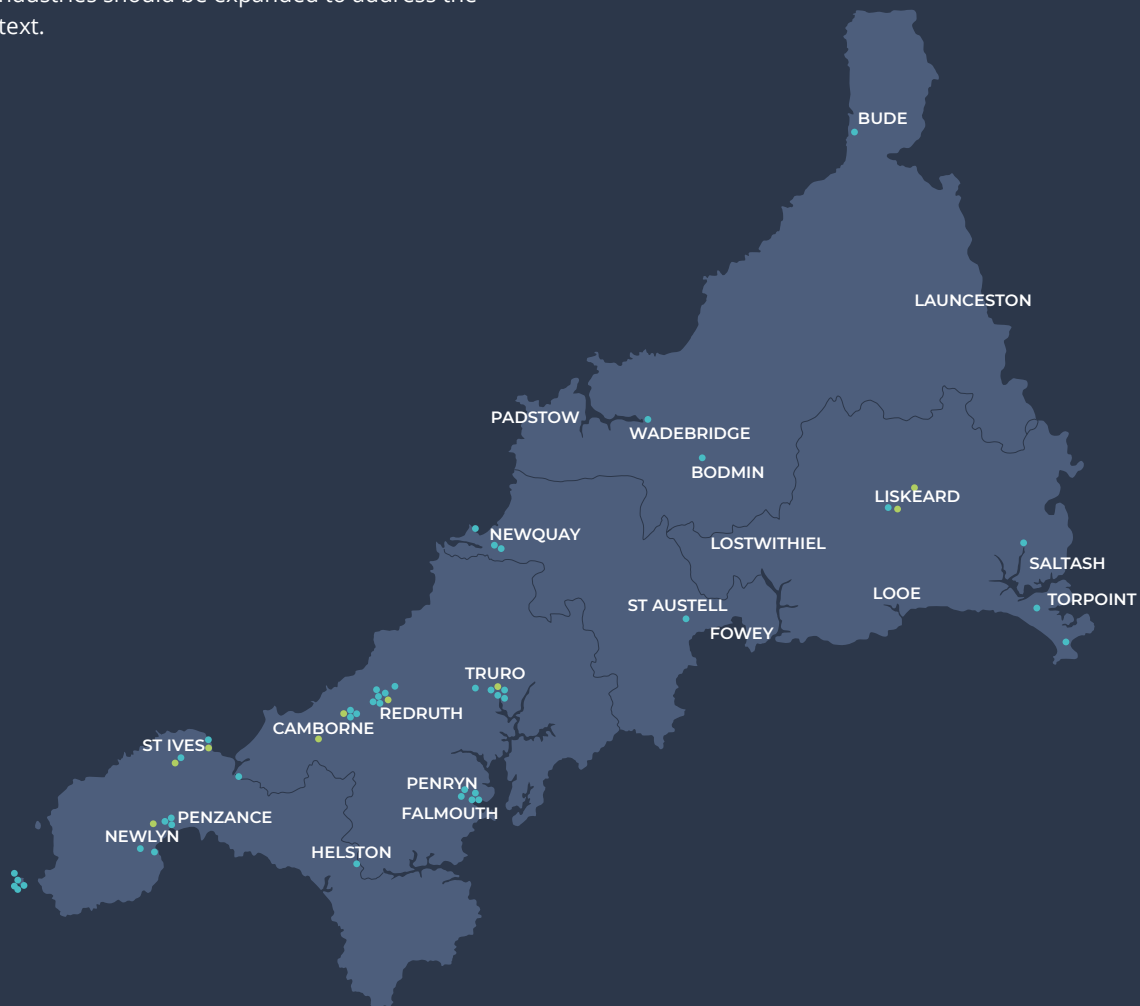
North

Into Bodmin, Bodmin
The Pearl Exchange, Bude
Wadebridge Creative Hub,
Wadebridge

BUDE

LAUNCESTON

PADSTOW

WADEBRIDGE

BODMIN

The fewest hubs were identified in North Cornwall – three in total, of which two are highlighted here. A new hub run by Suchstories should also soon emerge in a former chapel in Bude.

IntoBodmin is a cultural advocacy organisation with the remit to "actively promote Bodmin as an attractive, engaging, inspirational and progressive town. A place where communities are strong and businesses are innovative."[80] Based at the Old Library, they describe their role and function in three distinct ways:

- A venue

- A making and learning space

- A community facility

This hybrid model is reflected in both their programming and facilities which include a cafe, offering locally produced food and drinks with an emphasis on healthy eating and quality produce; performances; classes and drop-in services, and the intoBodmin co-working space with eight hot desks for hire.

Founded in 2020, **The Pearl Exchange** aims to improve the lives of 18–30-year-olds in the Bude and surrounding areas through creative practices and cultural experiences. Rather than a sole focus on creative enterprise, The Pearl Exchange supports young adults through wellbeing activities and creative collaborations, "facilitating connections that lead to work and life opportunities". Central to the offer is counselling and The Pearl Exchange Community, making this a unique hub in its focus and role.

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[80]intobodmin.co.uk/about-us

East

LISKEARD

LOSTWITHIEL

SALTASH

LOOE

TORPOINT

Like North Cornwall, East Cornwall has a relatively low level of hub provision with four active hubs, and two in development, centred around Liskeard, a small town in south east Cornwall with a population of 9,417.

Owned and managed for the community by the community, is the **Liskerrett Community Centre**, a multi-purpose community resource home to Liskerrett Pre-school, Liskeard Children's Centre, Lyskerrys Youth Project and provides an IT Suite, a vegetarian cafe, a community garden and ten art studios that are rented out to local artists. As a venue, they are members of Carn to Cove, Cornwall's rural touring scheme and regularly host events and performances from touring companies making live theatre accessible to a local audience. The venue is in need of extensive repairs and for this reason, a newly built community and cultural space is being considered as part of the Liskeard Cattle Market redevelopment.

In the heart of Liskeard, at the edge of the main shopping area, is Liskeard Cattle Market. Since the closure of the cattle market in December 2017, the Town Council, Cornwall Council and community groups have been working together to develop proposals to transform the site with a mix of uses that will regenerate the site and support the vitality of the town centre.

This includes a proposal for 17 flexible creative workspace units for **The Workshed** redevelopment - 'supporting around 33 jobs and adding around £1.2m a year to the local economy.' The Liskeard Cattle Market Makers Project, led by Liskeard Town Council, is another initiative that is planned for the site. Subject to funding and planning approvals, it will include delivery of a **Creative Industries Hub**, a small-scale and modular development of c.100m^2 that will incorporate workspace units, training rooms and a site office aimed at individual craftspeople and makers, as well as providing business and skills support.

Liskeard Library will become a co-working and meeting space, creative hub and innovation space following the transfer of the library to social enterprise Real Ideas. Cornwall Council has allocated a total of £250,000 to the project and Real Ideas has secured a £180,000 grant from the Architectural Heritage Fund to help fund the refurbishment.

Mid

Mid Cornwall is home to 16 active hubs with particular concentration in Truro, Falmouth and Penryn.

Old Bakery Studios are an independent creative space located next to BBC Radio Cornwall, in the Media/Creative District of Truro. Based in the historic Blewett's Bakery, the hub offers over 50 unique studios and workspaces varying from 80 to 1,000 sqft. The studios serve an eclectic mix of small businesses, artists and entrepreneurs spanning visual arts, crafts, photography, fashion and digital design alongside landscape/garden design and wellbeing businesses. As well as providing studio and workspace, Old Bakery Studios functions as an arts venue with in-house team of light and sound technicians, together with a stage, enabling them to programme music events as well as offer space for private hire.

Built using pioneering techniques of eco-development is **Jubilee Wharf**, an award-winning development with a mixture of housing, workshops, offices and a children's nursery in Penryn. The development includes

The ZedShed, a community hall with a roof made from reclaimed timber that is shaped like the upturned hull of a boat. The community of businesses based there include arts organisations, craft makers, a bicycle workshop, and wellbeing and health businesses alongside offshore renewable energy and other industries. **Jubilee Warehouse** is the conversion of the old storage units next to Jubilee Wharf into 13 high quality accessible workspaces with a communal space. Robotmother Ltd developed and manages both buildings and they describe their role as "creating the right physical environment for our businesses and individuals to flourish in." Arguably, Jubilee Wharf and Jubilee Wharf also play a leadership role in terms of sustainability best practice and impact. A recent survey with tenants revealed that under 50% drive a regular car to work; a significant point for a rural area with high levels of car ownership. Adjacent to the Jubilee Wharf and Jubilee Warehouse is **Grays Wharf**, an arts venue housing a gallery, workshop and events space and a range of studios. Grays Wharf is home to over 20 tenants.

Falmouth University is home to **Launchpad**, a venture studio which is creating a new generation of Cornwall-based companies operating in high-value, high-growth sectors. The programme is designed to develop and retain talent to boost the local economy and create global opportunities. Underpinned by a one-year MSc in Entrepreneurship, Launchpad brings together software engineers, digital creatives and business people to solve industry challenges, taking on briefs from companies like Sony Interactive Entertainment and Hitachi.
A new, 1,200m² purpose-built facility has recently been completed to accommodate Launchpad's incubating and accelerating businesses as well as its staff.

Combining the role of business and artist development is Husa – a new co-working space within The Hall for Cornwall, an arts venue which also hosts Cornwall Playhouse, and Cornwall Playhouse Productions.
Husa will offer business advice and support, 'designing development programmes that work for them and making sure talented artists thrive on home turf.'[81]
Digital, data and performance disciplines will be invited to occupy four permanent offices.

Due to open in Autumn 2024 is Launchpad+, a hub for the screen and digital sectors focusing on film, television, games and animation. With an emphasis on entrepreneurship, Launchpad+ intends to offer 'a new model of living, learning, working and playing'.[82]
It will be home to students, researchers and entrepreneurs from Falmouth University as well as local digital start-ups. The intention is that **Launchpad+** will support Truro to become a destination city with young people living, studying and working in the city.
It is part of a wider regeneration programme – Pydar – an ambitious Cornwall Council led project to transform an underused site in the heart of Truro. The masterplan is to create a dynamic, inclusive community hub with green spaces, new affordable homes for local people, cutting-edge innovation and businesses delivering high quality jobs, new social and cultural opportunities, improved and sustainable transport links and an active waterfront.[83]

[81] hallforcornwall.co.uk/husa
[82] trurotownfund.com/projects/the-hive-at-pydar
[83] trurotownfund.com/projects/the-hive-at-pydar

West

We identified 17 active hubs in West Cornwall. The most westerly major town in Cornwall is Penzance with a population of 21,200.[84] While it is recognised as an established creative cluster,[85] it is home to just two active hubs, **Workbox Penzance** and **Redwing.**

The Workbox Penzance operates in the same way as its sister hub in Truro, but with some differences in the membership offer. The Penzance branch has lower rates for example (e.g. Reserved Desk at £165/month plus VAT compared to £195/month plus VAT). Facilities include ultra-fast fibre broadband, a board room with screen, garden terrace by the river, kitchen and social areas. Members span web design, photography, film, marketing, community arts organisations, environmental consultants, renewable energy companies and DJs.

Workbox is only one of two hubs for which we located published impact data and the results illustrate the role and impact of this particular hub model of co-working. A survey of over 22 Workbox users in early 2018 showed:

- Total turnover generated since joining the Workbox was £7.57 million

- 15% of turnover (value £1.14 million) was directly due to Workbox membership

- £661,000 of turnover was a result of collaboration at the Workbox

- 32 jobs were protected as a result of Workbox membership

- 100% spent more money in Penzance town centre as a result of membership

Redwing plays a very different role, serving a distinct community of artists whilst providing the art-buying public opportunities to see and buy work. As a community interest company, their mission is 'to support artists who are marginalised by the mainstream art world.'[86]

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[84]2011 Census

[85]Nesta, Creative Nation (2018)

[86]redwinggallery.co.uk

This includes people with mental or physical health problems, learning difficulties and others who may be disadvantaged or excluded from showing their work in public or commercial art galleries. They do this through the provision of exhibition opportunities in their galleries, affordable art studios, open access arts facilities, classes and workshops, affordable meeting and event space, and a 100% vegan cafe.

Penzance will soon be home to a new development – the **Penzance Creative Cluster.** The scheme is part of a wider strategy in Penzance to regenerate the town centre by encouraging people to live and work in the town centre, increasing footfall and spend in the main high streets. A modern, three-storey building is planned for the Causewayhead on the site of a small car park. Completion and occupancy of the new building is expected from October 2022.

West Cornwall will benefit from Towns Fund initiatives in St Ives and Camborne which include:

- **St Ives:** Workstation Project – enterprise space in the old town funded through the Coastal Communities Fund and scheduled to open in 2021 – and the Palais de Danse Skills Hub[87]

- **Camborne:** Contemporary Crafts Hub – providing community craft facilities for the people of the town and beyond and establishing a centre of excellence in glass design[88]

Redruth is home to Krowji, Cornwall's largest creative hub, providing studios, workspaces, meeting rooms and other services for a diverse range of creative businesses. Krowji is delivered by Creative Kernow[89], the creative and cultural sector support organisation for Cornwall and the Isles of Scilly. According to a report on the benefit of EU Structural Investment in Cornwall and the Isles of Scilly[90], their impact is demonstrated in three distinct ways:

Individual business impacts:

- A survey of Krowji tenants in 2018 showed that 48% of tenants reported increases in turnover since moving their business to Krowji and 26% had increased turnover by more than 50%

- 45% of tenants reported working collaboratively with other Krowji tenants in some way whilst 75% of tenants attributed a percentage of their previous year's turnover to work created with other Krowji residents or work secured through contacts made at Krowji

Graduate retention:

- The 2018 Tenant Survey showed that 30% of tenants studied at Falmouth University and 30% studied at other Cornwall-based education institutions

- Additionally, Creative Kernow runs an annual bursary competition for students leaving Cornwall College's fine arts degree course, with two bursaries awarded annually to cover the cost of a Krowji studio for a year

Redruth regeneration:

- The re-use of the old Grammar School has contributed to the regeneration of Redruth, helping to build local community confidence and activities

- Artists and creatives are moving to the Redruth area from across the UK to take up studio opportunities at Krowji

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[87]stivestowndeal.org.uk
[88]cambornetowndeal.com/camborne-contemporary-crafts-hub
[89]Creative Kernow also deliver Carn to Cove, C Fylm, FEAST, Cornwall 365 What's On, Cultivator, Screen Cornwall and Cornwall 365 Network
[90]Ash Futures, The benefit of EU Structural Investment Funds for Cornwall and the Isles of Scilly, (2019)

CIoS wide networks

The physical hub ecology is strengthened by a number of networks and sub-sector support organisations, some of which are highlighted below.

The screen sector is served by **Screen Cornwall,** whose aim is to strengthen and grow the region's screen sector into a hub "where creative production flourishes and local talent and businesses thrive." They offer connections with local experienced professionals, emerging talent, recognisable locations and more. They are funded predominantly by Cornwall Council's Creative & Cultural team and the Local Enterprise Partnership for whom creative and digital are two of the ten opportunities for growth within Cornwall and the Isles of Scilly (CIoS).

Software Cornwall is "an open and collaborative group of technology-based businesses, education providers and business support organisations connected to Cornwall, UK".[91] The community is independent and funded by its members, sponsors and supporters. "Founded on the premise that there was not a pathway within the county to enter the industry", Software Cornwall notably plays an important role in recruitment and skills development, inspiring people into careers in digital technology and helping to address the skills shortage through targeted programmes and partnerships with schools, colleges, universities and businesses.

Cornwall Museums Partnership's Rural Diversity Network is an example of good practice in raising awareness of geographic exclusion and helping "to balance cultural policy that is currently heavily centred on the visible diversity of big cities."[92] The role of rural creative hubs and networks such as the Rural Diversity Network (RND) in shaping national as well as local cultural policy is highlighted by Arts Council England in the strategy. Any member can use the umbrella of RDN to start a new collaboration, create their own campaigns and events that promote rural diversity.

Cornwall Games is a community of game developers and businesses based in CIoS. Their aim is to support and highlight the talent of developers in Cornwall regionally, nationally and to the rest of the world. Representing all forms of gaming; from board games, live games and escape rooms, to serious games and uses of games technology in immersive media, Cornwall Games support the needs of the games sector through advocacy, lobbying, showcasing, sharing knowledge and acting as a touchpoint for the public.

Since 2018, **Doorstep** has been working to facilitate and support creatives in Cornwall, "building a community and not just a network." Doorstep aims to build bridges, connecting creatives in Cornwall across social and geographical boundaries, working with students, graduates, freelancers and local businesses. Informed by lived experience, co-founders Charlotte Higgins and Emily Sorrel state that "Knowing how difficult it can be to establish yourself in a rural creative community, we are always working to create the infrastructure to pave the way for others as we go, to boost creativity, local economy and graduate retention in the south west."

Providing business development support across the sector is **Cultivator**, run by Creative Kernow and delivered in partnership with the University of Plymouth, Real Ideas Organisation, Cornwall College and Cornwall Development Company. Cornwall Council financially supports Cornwall Museums Partnership, Creative Kernow, Screen Cornwall as well as Cultivator. The perception is held that there are too many 'generic' business support projects.[93] In response to this, **Cultivator** was established "specifically to help established and aspiring Cornish creative entrepreneurs develop their skills and grow their businesses".[94] Cultivator has a team of seven advisors that provide bespoke mentoring, coaching and grants to creative entrepreneurs. Since the project started in January 2017, 650 creative entrepreneurs have benefited from the support. The Cultivator Graduate Start-up Programme is designed to support graduates during the first year to 18 months of their start-up journey. Alongside the tailored one-to-one support is a grant of up to £1,400 towards rental costs for the first year of taking on a workspace. This is proven to have a positive impact on graduate retention as 71% on its graduate start up strand of activity came from Falmouth University.[95]

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91 softwarecornwall.org/about-us/
92 House of Lords, *Time for a strategy for the rural economy: Select Committee on the Rural Economy Report of Session 2017–19* (2019)
93 CIoS Draft Industrial Strategy (2020)
94 cornwallislesofscillygrowthprogramme.org.uk/case-studies/cultivator-provides-tailored-support-to-cornish-creatives
95 Ash Futures, *The benefit of EU Structural Investment Funds for Cornwall and the Isles of Scilly,* (2019)

Demand for creative workspace in Cornwall

The following data is drawn from the Creative Workspace Demand report, produced by Cultivator for Cornwall Council in 2019. The overarching aim of the study was to deliver quantitative and qualitative data relating to the demand for creative workspace in Penzance and Liskeard. As such it provides the most robust evidence to date on demand and barriers to engagement with creative hubs in Cornwall and has informed the gap analysis element of this study. The study:

- Provides insight into the size and structure of the creative industries in Penzance and Liskeard

- Examines how particular subcategories of businesses are driving demand through their connectivity

- Explores current provision along with insight into the barriers preventing businesses from accessing these spaces

- Investigates what additional services could be attractive to businesses, make workspace economically sustainable in the long term, and ensure they can link with the wider network of creative workspaces in Cornwall

The study found that, in both Penzance and Liskeard, "there was strong stakeholder demand for the towns to be known for their creativity. The proposed new schemes were therefore about making visible and connecting creative practices to achieve a range of goals from inspiring the next generation to attracting visitors. There was also evidence of support for the development of spaces which could facilitate cross-sector working which is an important condition for creative business growth."

Demand for workspace[96]

65% of those who responded to the survey were interested in renting a workspace.

- 78% were interested in renting their own personal space

- 35 creative businesses expressed definite or possible interest in Penzance

- 30 creative businesses expressed definite or possible interest in renting workspace in Liskeard

- 52% were interested in an anchor tenancy arrangement whereby reduced rent is offered in exchange for performing management or administrative duties in the workspace

Existing workspace providers report that they are busy with high occupancy levels and waiting lists for spaces. There is evidence of creative businesses travelling from the Liskeard and Penzance areas to be part of established creative communities.

Reasons for workspace need

- The need for improved or larger premises

- To join a creative community/work with like-minded people

- The need for professional facilities into which they could invite clients, collaborators and investors for meetings

- The need for focus and to not be distracted by the demands of home

- The need to have appropriate specialist facilities which they can't provide at home or in current workspaces e.g., soundproofing, dirty/messy space

- Location: A central location was unanimously welcomed. Creative businesses want to be together in the town and not on the periphery

- They want to support other local businesses, be visible and be associated with the regeneration of overlooked areas of their towns

- Creative businesses want to share a hub with other creative businesses

- They want a sense of community that does not just happen by building facilities and renting them out – it requires organising. The curation of the mix of different businesses is important and activities which bring the tenants together in communal spaces are vital

- A central location would allow residents and businesses who were culturally engaged to create footfall, ticket sales and audiences for events in surrounding areas outside the towns

The sector consultation for this study revealed that most hubs are at capacity with many having waiting lists.

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[96]Total of 139 businesses were surveyed; 12 interviews with stakeholders; two focus groups in each region with 12 stakeholders
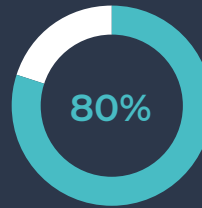
Impact of the Covid-19 Pandemic

The Covid-19 pandemic has profoundly impacted all sectors of the economy and society. Lockdown and social distancing measures introduced to slow the spread of Covid-19 have led to the closure of creative and cultural spaces and businesses, cancellation of events, suspension of regular activities and services, and more. There will be long-lasting impacts and changes to creative practices/businesses, and cultural engagement at large.

Understanding the impact on the cultural sector and creative industries

To map the impact of the pandemic on Cornwall and the Isles of Scilly (CIoS), a Baseline Covid-19 Survey for Creative and Cultural Sectors in CIoS was undertaken by Cultivator on behalf of Creative Kernow, Cornwall and the Isles of Scilly Local Enterprise Partnership and Cornwall Council. The survey received 216 responses and focused on the economic impact experienced between March and July 2020.

- Over 80% of the respondents had experienced direct financial losses as a result of Covid-19. This amounted to a total of £4.07 million across the sample – an average of £24,838 and a third of annual income

- 72% of those reporting financial loss were freelance/ sole traders

- 23.6% of all respondents did not think they were eligible for any government support

- 63.2% of respondents will not survive for more than six months without additional support, and 42.8% believe they will not survive for more than three months

80% OVER 80% OF THE RESPONDENTS HAD EXPERIENCED DIRECT FINANCIAL LOSSES AS A RESULT OF COVID-19.

72% 72% OF THOSE REPORTING FINANCIAL LOSS WERE FREELANCE/ SOLE TRADERS.

23.6% 23.6% OF ALL RESPONDENTS DID NOT THINK THEY WERE ELIGIBLE FOR ANY GOVERNMENT SUPPORT.
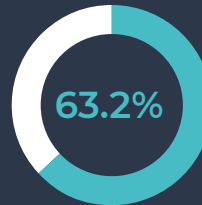
63.2% 63.2% OF RESPONDENTS WILL NOT SURVIVE FOR MORE THAN 6 MONTHS WITHOUT ADDITIONAL SUPPORT.
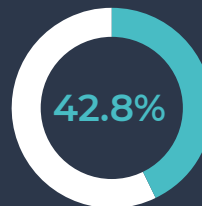
42.8% 42.8% BELIEVE THEY WILL NOT SURVIVE FOR MORE THAN 3 MONTHS.

"Respondents call for more support to overcome their feelings of separation from their creative community and warn that as mental health issues in the creative sector were already a concern before the pandemic, a major crisis is approaching."[97]

"Concern about access to studio or creative workspace was a significant theme. Businesses making use of co-working spaces reported frustration at not being able to access these spaces due to enforced closures and whilst there were no reports of tenancies being terminated during the period of the survey, the future need or ability to afford workspace was certainly being questioned."[98]

Understanding the impact on hubs

Despite the challenges of the last 12 plus months, hubs in Cornwall report a high degree of optimism and ambition for their future. Our consultation showed that rural hubs are confident about maintaining and/or growing their users and feel positive about adapting to new ways of working. For example, lockdown has grown audiences for digital cultural/creative content and hubs have responded rapidly by boosting their online presence and creating opportunities for digital engagement. New forms of cultural activity are developing using digital technology including online artist-led markets, webinars (online workshops, seminars, networking and discussions), virtual exhibitions, simulcasting concerts, theatre or dance performances.

[97]Cultivator, Baseline Covid-19 Survey for Creative and Cultural Sectors in Cornwall and Isles of Scilly (2020)
[98]Cultivator, Baseline Covid-19 Survey for Creative and Cultural Sectors in Cornwall and Isles of Scilly (2020)

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"I have been working online with people all around Britain and networking in Bangladesh, America and Europe, mostly Germany. It's been great fun. It was more about learning new things, looking at new technology and how I would like to see it in my local rural town."

Workshop participant

"Digital events help us reach audiences across the region, whereas previous dispersed geography made events tricky."

Workshop participant

On an organisational level, enhanced digital communication during lockdown has contributed to a more connected workforce and community, including breaking down traditional silos. The success of home-based work has allowed hubs to consider flexible ways of operating with their staff, to support a better home/work balance post Covid-19.[99]

"We just don't know yet how people will work post Covid. Certainly hybrid models with part home, part collaborative working. My co-working space in Truro (Newham) is getting busier."

Workshop participant

[99]Though there are concerns about digital inequity and reaching vulnerable audiences or those who lack digital access, including network bandwidth and devices, in rural areas
[100]Mapping Creative Hubs Across England, British Council (2021), p33

Hubs also reported an increased awareness about the importance of the creative sector and the role that Cornwall creatives can play in the recovery. Creative organisations have realigned their services towards arts and culture with social, health or wellbeing impacts. There is potential for nimble organisations to step in and fill in gaps for cultural/well-being provision for local communities.

"There is more of an understanding of the role creativity plays and how crucial the sector is (i.e. social prescribing and wellbeing)."

Workshop participant

"There is an opportunity to engage good quality talent to work in Cornwall and build our crew/ creative offer."

Workshop participant

Hubs expressed a keen interest to galvanise local partnerships and build networks with other rural creative hubs.

"Networking and finding time to understand what others are trying to achieve, creating opportunities for collaboration."

Workshop participant

"Pooling resources with other hubs, to support each other going forwards".

Workshop participant

This echoes the experience of creative hubs across the country, who demonstrate "an incredible degree of resilience and imagination, having pivoted business models and discovered new ways to engage with their communities. The nimble and entrepreneurial nature of many hubs means they are spotting and moving on a range of opportunities emerging in their specific context and in response to the pandemic."[100]

Section 5:
Opportunities and challenges for hubs in CloS

This section sets out the findings of the consultation process, with a focus on the opportunities, challenges and needs of hubs in Cornwall and the Isles of Scilly (CIoS). It also highlights some trends in terms of the needs of hub users as well as feedback on what users may be seeking from a physical hub space.

The survey and consultation workshop with hubs in CIoS, and interviews with key stakeholders, highlighted a range of challenges and opportunities for the hubs themselves in relation to;

1. Collaboration

2. Data and influence

3. Hub models and resources

4. Meeting future needs

All of the quotes are from either workshop participants or stakeholder interviewees.

1. Collaboration

A. Collaborating with other hubs, microhubs, and partners (e.g. universities)

The consultation workshops and stakeholder interviews revealed a strong appetite for greater collaboration and networking between hubs, including microhubs and spaces that might not identify themselves as 'creative hubs' but nevertheless serve the function of supporting and housing creative businesses and freelancers.

"We are interested in being part of a wider network of hubs"

The nature of inter-hub collaboration included a range of purposes, from networking to support each other and share insights into changing needs, to more formal collaborations to share resources or work on joint projects and funding bids.

"[There is an opportunity to] pool resources with other hubs, to support each other going forward"

Raising the profile of hubs across Cornwall and promoting each other's spaces was also raised as a collaborative opportunity.

"Could we propose a new layer on the amazing CC Interactive Map for the creative industries? We could add where we are based but also where we are connected through our work practices – and we could advertise spaces that can be used for creative industries. This would be a really great addition to what is already a hugely useful tool – and would offer the creative industries a more visible status in the Cornish mindset..."

Another recurring opportunity identified in the consultation – and mirrored by the strategic priorities of Falmouth University – is the potential to build more and deeper collaborative partnerships between hubs and universities. Suggestions in relation to this included funding and sponsorship for hubs supporting graduates, joint initiatives and space sharing, collaborative research, and technical facilities and support (e.g., in relation to livestreaming technologies). One of the cited barriers to engagement with universities was not having a named/dedicated person with whom to develop partnerships and collaborations.

"We would be interested in hosting a researcher from Falmouth University to find out what we do and help us collate data about our project"

There was general agreement in consultation workshop discussions that a network of hubs, perhaps facilitated by the Council, would be very useful – for sharing ideas, best practice, building partnerships and collaborating on programmes. There was consensus that a network would need to be seed funded with a person in post to coordinate network activity, with access to a programming budget. It should also be fleet of foot, agile and dynamic.

B. Enabling collaboration between businesses and making use of high-speed broadband

Since Cornwall offers higher than average access to superfast broadband, there is substantial potential for rural creatives to harness digital to start and scale their businesses as well as facilitate collaboration between businesses. Consultation contributors highlighted the importance of digital working, enabled by high-speed broadband, to hubs' ability to reduce their environmental impact and increase their reach through online activities and services.

"[Digital working] is helping to reduce our environmental impact which is key to our vision to be net zero carbon by 2030"

There was also recognition of the importance to hub users of access to high-speed broadband, in order to build their own markets and collaborations.

"[Digital working offers a] Huge opportunity for local companies to better to connect with national/ international markets"

Over the last 12 months, new forms of creative activity are also developing using digital platforms including online artist-led markets, virtual exhibitions, simulcasting concerts, theatre or dance performances.[101]

"Artists are moving more into digital media for reach and market"

[101]*Impacts of Covid-19: a snapshot from the cultural sector*, Karen Gray and John Wright, Centre for Cultural Value (January 2021)

2. Data and influence

Measuring impact was noted as a challenge during consultation workshops, with limited capacity often cited as a reason for this evidence gap. Six of the eight hubs who responded to the survey do not collect data about the impact of their hub and its services, and this lack of evidence about impact poses a significant risk to the future of hubs.

"[We need] support measuring impact and collecting useful data."

"The main support need for our grassroots hub is to have help with measuring our impact."

The ability to evidence and communicate impact was also noted as a real opportunity for creative hubs, with impact being discussed in economic, social, and cultural terms. There is clear understanding among hub leaders that being able to measure and communicate the impact of hubs could boost recognition and sustain investment.

"[We need] Recognition that we exist. Support to evaluate the social benefit of our services."

Larger hubs and especially those that have received investment from EU Structural Funds are more likely to gather such data, yet this often comes with a time lag making it hard to be as responsive as they might like and anticipate future needs. Survey fatigue and a lack of incentive for users were also noted as barriers to data collection.

B. Updating services in response to data about user needs

The consultation indicated that while creative hubs have valuable day-to-day insights into the needs of their users, they often lack more formal user data that could help them to collaborate and evolve their services.

There was a real appetite among hubs to gather this kind of data, with hubs individually planning and gathering a range of unconnected user data.

"We have plans to ask our tenants what services we could provide to help them in today's climate."

There is an opportunity for hubs to collaborate to reduce duplication of effort and enable benchmarking when researching and gathering data about the needs of their users. This is especially relevant where hubs are interested in working together to develop shared services.

One area where hubs were receiving direct requests from their users for specific services was in relation to digital, and while this data is anecdotal, it is driving some hubs to adapt their services.

"It's important to focus on hybrid rather than go fully digital"

"Adapting spaces for digital users – sound proofing, blackout curtains, etc."

"[We are experiencing demand for] technology to do live streams"

Stakeholders highlighted the importance of basing future interventions on strong evidence of the needs of creative business – both those within hubs and home-based businesses.

C. Informing and connecting with sector opportunities

As anchor creative organisations connected with hundreds of creative businesses and freelancers across Cornwall and the Isles of Scilly (CIoS), as well as relationships with key funders and stakeholders, creative hub leaders are well positioned to inform the development of strategies, initiatives, and new spaces related to the creative industries.

"[Important for] individuals concerned with the development of a creative space having a long-term interest in ensuring the space is right to its users."

"[Hub users find it challenging] Connecting with bigger conversations"

Both the sector consultation and stakeholder interviews highlighted the importance of early consultation and close collaboration (rather than competition) with existing hubs in the development of new spaces and initiatives.

"As developer/manager of creative workspaces, I'd like to reiterate my comments today about the importance of individuals concerned with the development of a creative space having a long-term interest in ensuring the space is right to its users."

Hubs being in competition with each other for users was raised by many as a challenge to their interest in working more collaboratively. Questions were also raised about how existing hubs could be supported – and perhaps connected into – the development of new spaces.

"We need 100% occupancy, so nervous about impact of too much additional creative workspace"

3. Hub models and resources

A. Being financially sustainable

Hubs identified a number of pressing challenges to their financial sustainability through the consultation.

Concerns were repeatedly raised about the end to European funding following Brexit, the limited availability of funding for non-capital or overhead costs, limited longer term funding, and very short funding deadlines combined with very limited staff capacity.

"Facing cliff edge as EU programmes come to an end and SPF not confirmed and likely to be much smaller"

The challenge of securing revenue funding to meet core costs was directly linked to limiting the growth of hubs and the development of services which could better contribute to users' growth.

"[We need] Funding for overheads, subsidy for users with no budget, support to grow the support we can offer"

"Project funding is very limited in allowing hubs to grow"

Developing mixed economy models and social enterprise business models were highlighted by both hub leaders and stakeholders as essential for the long-term sustainability of existing hubs. Sponsorship and brand partnerships with universities and larger corporates seeking access to talent, ideas and creative space to experiment were also highlighted as untapped opportunities.

B. New models of working to increase the impact of existing hubs

Recognition of the geographic specificity of Cornwall and the Isles of Scilly (CIoS), and the tapestry of creative hubs, microhubs, businesses, and users across a large area with limited public transport, underpinned the interest in opportunities for new models of hub working such as touring hubs and shared membership schemes across multiple hubs.

"Could we have a 'touring hub' with an iterative model – so each place it goes, it develops something new that influences the next space it goes to?"

"Perhaps the pop-up model could utilise spaces already within the community to deliver creative activities started in larger hubs."

"Something schools have is space, it's something that we want to start to have a look at – the use of space when our community at school is on holiday"

C. Capacity and leadership development

The consultation confirmed the essential nature of the hub leader/community manager role to the success of a hub, enabling the hub and its community of users to connect with new opportunities, develop strategic partnerships, and benefit from facilitated networking and collaboration.

"If a member of staff got ill then it would really affect the organisation"

"I have been running our creative hub for ten years, mainly as a volunteer. It has now grown so that it really needs paid staff."

The challenge of funding staff and leadership capacity to run hubs is significant, partly due to the difficulty of securing funding for salaries.

"A lot of the funding is capital specific so sustaining salaries is challenging."

Beyond securing capacity, the need for specific support for individuals running hubs was raised repeatedly during the consultation.

"Need for a mentor and other professional support"

"The level of professionalism required to run a successful 'hub' is very demanding, but mostly unrecognised."

Leadership and partnership development support for hub leaders poses an opportunity which could inform the development of more sustainable, innovative, and networked hubs across CIoS. Examples suggested included an extension of the Cultivator Cultural Leadership Programme aimed at the next generation of hub leaders.

"How can we support new players and mavericks who can help take these spaces to the next level?"

D. Being environmentally sustainable

The ongoing challenge of being more environmentally sustainable emerged as a key theme and area of interest and commitment among the hubs who contributed to the consultation process.

"We are always looking at... what more we can do to help the buildings and our tenants/users to have less impact on the environment."

The capacity to maximise environmentally sustainable practice was noted by some as a challenge, while others noted the opportunity to join hubs up to continue to develop their practice in this area.

"Our environmental and sustainability work is vital. We won't have a future without it. Being able to access a support role with the right expertise for creative hubs. Maybe we could jointly fund one?"

A few hubs noted that their users operated businesses with a very low environmental impact, highlighting creative industries microbusinesses and freelancers as low-impact champions. There is a potential opportunity for this community to be celebrated and integrated into Cornwall Council's strategic narrative about sustainable development.

"Most of our tenants (especially the creatives) have such a low impact on the environment that they should be rewarded and supported for this."

4. Meeting future needs

A. Engaging graduates and addressing skills shortages in creative sectors

Many hubs are already supporting graduates and saw this as an opportunity for closer partnership working with Falmouth University through sponsored studios or hub memberships. Existing programmes such as Cultivator's Graduate Support Programme serve those that are ready to start a business well; graduates seeking entry level employment opportunities or support developing a business idea appear to be less well served.

"There are plenty of other graduates who need something in the interim to help them along."

Others were concerned about attracting and keeping talent in the area and recognised that a visible and vibrant creative community, as well as entry level work opportunities would be vital to both attract talent and help address skills shortages.

"How do we attract talent to what might be seen as an unstable industry post Covid-19?"

B. Serving the needs of emerging subsectors

The rise in flexible and remote working was recognised as an opportunity, especially for co-working hubs. Increasing the visibility of hubs, their offers and available spaces was noted as a challenge for some, however.

"Practitioners returning to Cornwall or relocating here – how to engage them in our network when things are so dispersed?"

"We are off the beaten track. Most advertising [is] too expensive for the return."

A dedicated post-production space was noted as an opportunity to meet the needs of the growing screen industry sub sector. A feasibility study into this and specific space and facility requirements of screen businesses was thought to be a priority by stakeholders in this field. Video Games was cited by stakeholders as an area of particular potential in Cornwall and the Isles of Scilly that might benefit from additional sector specific support.

C. Grassroots hubs development

Empty, disused and vacant spaces in town centres and high streets were noted as a key opportunity for emerging micro hubs and grassroots hubs. The Towns Fund and High Street Vitalisation Fund both offer opportunities to support grassroots hubs who have the potential to reanimate and reimagine high streets.

"New hubs need to ensure they have a viable business model in the long-term, so these initiatives could help with demand support and advice from people who know what they are doing - and at the same time support a new breed of independent hubs."

Collaboration between established, larger hubs and micro hubs were also cited as potential ways for hubs to spread risk, share investment and increase reach and impact.

"Large hubs could offer small hubs capacity support – such as programming expertise, interns, access to their social media channels, equipment. Micro-hubs could deliver 'on the ground' projects in their local villages"

D. Support for businesses wishing to scale up

While the creative sector is largely made up of micro businesses, there was a perceived need and desire for growth by businesses in some fields, but a perceived lack of dedicated scale up support, and challenges in accessing finance for growth.

Hubs have the potential to support ambitious businesses to grow, improve productivity and create new jobs and could create a cohort of businesses on the same trajectory.

For each of these four areas of challenge and opportunity for hubs in Cornwall and Isles of Scilly (CIoS), we have framed 'How might we?' questions to help prompt the formulation of priority recommendations and offer areas for further research.

Collaboration	Data and influence	Models and resources	Meeting future needs
• How might we better **collaborate with each other, and with key partners such as universities** to address key challenges collaboratively? • How might we enable **greater collaboration between our communities?** • How might we better capitalise on **Cornwall's Superfast Broadband** to build networks and markets?	• How might we better **measure our impact and communicate our value?** • How might we better **gather, use, and share data about user needs** to develop our services? • How might we better connect with and **inform the development of relevant spaces** and opportunities?	• How might we **adapt funding models** and engage funders to **increase financial sustainability?** • How might we **test new models** to increase our impact and reach? • How might we enable hub leaders to **build capacity and leadership?** • How might we **be more environmentally sustainable,** and share insights into developing environmentally sustainable creative spaces?	• How might we better **work together with further and higher education to attract and retain graduates** and address sector skills shortages? • How might we **anticipate and meet the future needs of creative businesses** in CIoS? • How might we play a role in **revitalising high streets?** • How might we better **enable businesses to scale up?**

Insights into the needs of hub users

Investing in hubs is a strategic way to invest in and support the individual microbusinesses and freelancers that use hubs.

Creative hubs are close to their users and have valuable day-to-day insights into their needs, although they often lack more formal data that could help hubs to collaborate and evolve their services.

What challenges and barriers do hub users face?

In the context of the long list of opportunities and challenges facing creative hubs in CIoS, hub leaders shared their observations about the challenges and barriers to progress that they were noticing among their users.

Awareness	Access
"[People's engagement with our hub limited by] awareness of the activities we can offer" • Lack of awareness of hub activities and how to access them • Lack of hub engagement activity • Hub promotion via social media not necessarily finding users • Finding collaboration partners/connecting with networks • Finding and making use of business support • How to access professional development	*"Many potential users have no or little budget for space hire"* • Affordable workspace especially for emerging creatives • Access costs for users versus programme costs and fair artist fees • Limited transport options • Physically not able to come to a hub • Some hubs having to turn people away due to lack of space • Limited virtual hub networks • Hub choice of digital platforms that aren't always mobile friendly or aren't the platforms users are comfortable with
Financial	**Covid-specific**
"We gave a rent-free period during the first lockdown to a shared studio" *"As Cornwall becomes completely unaffordable [in terms of housing], will the current creatives move to somewhere even more remote?"* • Limited access to markets • Finding and accessing clients • Money to keep businesses going • Access to funding and grants • Concerns about sustainability • Support to help scale up • Cost of workspaces • Affordable living space	*"Certain users can't continue their work digitally…desire for physical meet-ups"* *"Covid has hit emerging creatives/crew particularly - not only lost… money but also confidence"* • Changing digital needs and expectations of hybrid working • Lost income • Loss of momentum and motivation • Social anxiety amongst people who have been isolating • The lack of activity over last year has made people uncertain about planning/moving their work forward

One of the gaps that could be addressed to help hubs better support and attract users, is for hubs to gather and make use of data about the needs of their users and potential users such as creative freelancers.

Some hubs have gathered some data about the needs of their users, including;

- Jubilee Wharf & Jubilee Warehouse in Penryn conducted a **Travel Survey** of 50 tenants to understand their users' travel patterns, distances, service needs, and expected working patterns post-lockdown

- Fish Factory in Penryn conducted a **Community Survey** to explore their users' engagement with their space and with contemporary arts in Cornwall

- Creative Kernow were commissioned by Cornwall Council to prepare' a **Workspace Demand Study** for Penzance and Liskeard in 2019

- Cultivator undertook a **survey about the impact of Covid-19 on the creative and cultural sectors** in Cornwall and the Isles of Scilly (CIoS), between April and July 2020. The resulting baseline report includes insights into the pandemic's impact on the finances, mental health, and creative workspace needs of 216 people (including 134 sole traders)

A note on housing

The challenge of affordable housing arose several times during the consultation:

"The housing issue is only going to get more difficult with Cornwall now being the most-searched for place to move to, overtaking London – so we do need to think of innovative solutions/opportunities."

Redwing is seeking to address this challenge through The Redwing Housing Co-operative. They propose 'shared facilities alongside affordable, long-term rented live-work studio accommodation for artists, writers and musicians as well as land set aside for nature' and are currently issuing loanstock to raise finance for their first property.

Although this report does not seek to address the housing issue, policymakers may wish to consider this specific challenge alongside support interventions for hubs and their users.

Future needs: what might users need from creative hubs in Cornwall?

When asked to consider what they would want from a hub in order to join it, and what priorities their hub users were coming to them with, the 51 people who took part in the April 2021 consultation conversation with Cornwall Council suggested four types of needs, related to people, place, space, and services.

These checklists offer a starting point to test and evidence through any future hub user needs and market demand research.

People	Place
- A diverse community of people - An inspiring leadership - Collaborative working - Shared values - Peer support and feedback - Networking opportunities - Motivation - Supports mental wellbeing - Willingness to share with others - An open door for all people - Sharing ideas and debate - Variety of creative practices - Confidence - Friendly	- Affordable (e.g. tiered memberships, 'easy in, easy out' contracts) - Sustainable and ethical - Good green credentials - Living space in/nearby - Town location - Flexibility (of space, usage) - Sense of place - Connectivity to other hubs and to the needs of the community - A thriving ecosystem - Aspirational for younger people - Meanwhile use of vacated shops - Supporting business in the community
Space	**Services**
- Range of space options (e.g. microspaces) and flexibility to change spaces as businesses develop - Characterful buildings - Studio space - Co-working space - Meeting rooms - Rehearsal rooms - Gallery/exhibition space - Ability to customise/personalise workspace - Access to basic tech (e.g. printing) and specialist equipment (e.g. technology for live streaming, photography light box, industrial sewing machines) - A cafe/coffee bar and beer on tap - Secure 24-hour access	- Outstanding broadband - Video conferencing and/or good sound proofing for video calls and meetings - Workshops - Learning - Professional development opportunities - Mentoring - Networking - Support to increase visibility for artists - Support to enhance creative practice - Start-up finance and resources - Funding for projects - Access to freelance work - Connections to commercial skills - Events and social opportunities

This section sets out four headline recommendations for amplifying the role and potential of creative hubs in Cornwall and the Isles of Scilly (CIoS), together with suggestions for further research and enquiry. These have been developed considering alignment with key policy priorities, the distinctive strengths of the hub model in Cornwall and the opportunities, challenges and needs highlighted through the consultation process. Tailoring our recommendations and best practice examples to respond to these questions will ensure they are relevant to the challenges and opportunities for creative hubs in CIoS.

With almost 50 active hubs and 10 more in development across CIoS, one might argue that further investment in the ecology is not needed. However, many of the hubs and stakeholders we spoke with reported that financial sustainability was a key challenge and specifically cited access to flexible revenue funding as a priority. Furthermore, a lack of capacity restricts hubs from growing impact – whether that be artistic, social, economic or environmental.

Visible and vibrant creative communities act as both magnets, attracting creative talent and ideas, and as beacons, building critical mass and signalling to global audiences. The ability to connect otherwise dispersed freelancers and microbusiness to each other is what makes creative hubs in rural areas such an essential part of flourishing creative industries and why they are worthy of investment.

Across all recommendations, we propose that strategic partners including Cornwall Council and Falmouth University should aim to take a facilitative role, enabling hubs to take the lead, creating a culture of collaboration rather than competition between the public and private hub sector.

Central to our four recommendations is revenue funding, highlighting the crucial role of the hub leader/ organisation or business. We recognise that investment in buildings is important for enabling physical co-location of businesses and providing access to specialist facilities for instance. We would also argue that any capital investment needs to be accompanied by a sustainable revenue stream that invests in people, to ensure that those buildings are animated and succeed in convening and connecting communities, reaping the highest return on investment in the longer-term.

We also therefore recommend that the community building for the hubs in development (Penzance, Launchpad+ and Liskeard Cattle Market) is prioritised and begins now, in order to inform the space specification, facilities and services of each hub. Potential contractors, who can engage with specific creative communities, should be consulted and contracted at the earliest opportunity. We also suggest that Cornwall Council could also play an active enabling role, in influencing Town Council's on the value and potential of creative hubs in their area.

The central idea is investment in the creation of a formal network of creative hubs – a 'hub of hubs' – enabled through a digital platform that fosters collaboration between hubs and their communities. The notes under each recommendation are intended as a starting point for how each recommendation might be actioned. We believe that once a well-funded network is active, it could lead to the delivery of some of the other recommendations. We have included some examples of best practice under each recommendation – some of which build on the existing strengths in CIoS and some of which are national or global examples – to help make the recommendations more tangible.

Cornwall is well placed to be a test bed and pioneer in the development of a successful rurally dispersed model. This approach and set of ingredients could then be shared and add value to many other rural regions across the UK and the globe.

Investing in the creative hub ecology

1. Cornwall creatives connect

Collaboration

Data and influence

Concept: Create a hub of hubs – a network connecting creative hubs and their communities, enabled by an interactive digital platform.

Purpose	Delivery
• To enable hubs to identify, connect and share best practice • To act as a conduit for universities to support micro creative industries through activities such as research, innovation and knowledge exchange • To create tangible and value-added opportunities for hubs (and their communities) to experiment, collaborate and create together • To increase the visibility of hubs and their communities across Cornwall and the Isles of Scilly (CIoS), illustrating the critical mass and enabling stronger advocacy around the value and potential of creative hubs	A steering group/consortium that is representative of the diversity of hubs in Cornwall; one of the members should have the capacity to host the network coordinator(s) and champions (see below) with experience of • Open and inclusive recruitment practices • Managing the delivery of digital platforms • Network development • Managing programme budgets • Programme evaluation and impact assessment Cornwall Council (and potentially other strategic partners) to play the role of commissioner and facilitator. Resulting in tangible value for network members in the form of collaborative project activities and opportunities, knowledge exchange as well as opportunities to meet and connect. This could take the form of a series of Challenge Funds to address cited opportunities around graduate retention, scale up support and hub users accessing new markets through digital channels.

Features

- Industry/sector led with a high degree of autonomy
- Fleet of foot, responsive and agile, reflected in the governance and operating model
- At least one full time network manager/community curator to coordinate activities, activate the membership, build partnerships, research and develop the future operating and business model and/or 'boots on the ground' in North, East, Mid and West Cornwall
- A steering group with a budget available for hub managers not on a full-time salary to allow them to engage
- Employ champions for strategic priorities such as environmental sustainability, Research, Development and Innovation (RD&I) and e-commerce to offer hubs support and guidance, highlight and celebrate good practice and provide an advocacy role

Features

- A digital platform to include
  - a visual and interactive map of hubs
  - searchable by hub type, location, community served
  - resources for hubs pooled by the membership
  - In the longer-term could include
    - functionality for businesses to search for available space with hubs across CIoS
    - capture, hold and communicate data relating to the impact of hubs and the needs of existing and potential users (see Recommendation 2: Hubs Data Challenge)
- Seed funding over a period of 3-6 years for the network coordinator(s) (potentially fully funded in year 1-3 and on a sliding scale in years 4-6) allowing the network to research and develop a self-sustaining business model
- Programming budget for years 1-3

Best practice examples for reference

European Creative Hubs Network (Europe)
The European Creative Hubs Network is a peer-led network with a mission to enhance the creative, economic and social impact of hubs around Europe and neighbouring countries. The platform includes a searchable database of hubs, useful tools and publications as well as access to collaborative projects and opportunities. Notable current projects include The CORAL project which will offer specialised and tailor-made training to 15 Early Career Researchers, helping them to better understand and support the development processes of collaborative work spaces in rural and peripheral areas.

The Network has very few rural hubs, however it is an interesting model in terms of receiving initial seed-funding for three years (2015-2018) from the British Council and EU – and now it exists independently.

- Seed funding allowed space and time to develop and grow the Network. An integral part of the project was to develop a sustainable business plan - funds were specifically allocated to go towards a consultant who worked with hub managers to produce a plan that allowed for the retention of one full-time staff member. This consistent member of staff coordinates the Network and is key to its success. The Network now also has one part-time community manager who pro-actively engages hub members with opportunities

- It operates a hybrid model of funding with grants and sliding-scale membership fees

- The Network offers capacity building; peer to peer mentoring; networking opportunities; mobility grants etc. It also produces research and reports such as 'How Work Works'

MakerTour (Lyon, France)
Started in 2015 in the city of Lyon, MakerTour is a French non-profit organisation exploring, sharing and connecting community workshops and makers around the world. They are a remote team of volunteers enabling the maker movement to connect and share. It features a searchable database and map of workshops tagged by space type (FabLab, makerspace, creative hub etc.) as well as profiling maker projects.

Hubs for Good (Malaysia)
Hubs For Good is a British Council supported initiative across five countries in south east Asia and supports creative hubs as key drivers and catalysts for good in cities. The programme focuses on enhancing the positive role of creative hubs in an urban context for socioeconomic, political and cultural change. In Malaysia, the three-year programme involved several interrelated projects; country-wide mapping and research, a toolkit for the use of creative hub leaders and creative practitioners, a digital platform, and capacity building activities to address skill and knowledge needs of local creative hub leaders.

2. Creative hub data: gather, analyse and share

Data and influence

Meeting future needs

Concept: A challenge to the sector in Cornwall and the Isles of Scilly (CIoS) to develop a solution for data collection, analysis and communication that addresses some of the challenges identified in this report namely the lack of impact data, challenges in collating timely, real-time data on the needs of hub users, survey fatigue among users and a lack of a fit for purpose impact framework for creative hubs.

Purpose	Delivery
• To build a user led, real-time body of evidence on the impact of creative hubs in CIoS and the current/emerging needs of hub users (creative businesses), presenting an aggregated picture and data on individual hubs and their communities • Enable hubs to make timely, data driven decisions; help hubs define their services, connect around shared programming needs, develop relevant support services and funding bids • Allow hubs to benchmark themselves against each other where appropriate and useful • To co-create and test a fit for purpose impact measurement framework which could be co-designed by hubs for hubs to capture and communicate data on cultural, social, environmental, and economic impact such as resilience, wellbeing, inclusion and agency through creative practice • To create a user-friendly solution for data collection enabling users to answer questions and share insights that are relevant to them and their individual experience/practice	The Challenge Fund could be managed either by a university or the Cornwall Creatives Connect network once in place. The solution would be delivered by an interdisciplinary team in CIoS comprising creative technologists, hubs, data experts, digital content creators capable of building and testing a relevant solution. Resulting in the creation of actionable intelligence, information and insight that benefits and provides impact evidence (economic, social, cultural, and environmental) for Cornwall's creative sector.

Features

- Challenge Fund made available to research, develop and prototype a solution
- User-friendly data collection, removing barriers for hubs and their users
- Incentives for users to engage such as visual summaries of the data they supply, visualisation of key trends that are relevant to them and their business
- Facility to create an on-going conversation between hubs and their users
- Data and analysis that meets the needs of hubs to report to funders and other stakeholders

Best practice examples for reference

Cockpit Arts (London)
Cockpit Arts is London's leading studio for contemporary crafts and the UK's only business incubator for makers and designers. Over the last ten years they have developed a robust impact measurement framework which includes conducting annual 'partnership reviews' with their studio holders to gather data. The result is their annual Cockpit Effect report, which illustrates the cultural, social and economic impact of the hub using longitudinal quantitative analysis alongside rich case studies.

In the Loop (Cornwall)
In the Loop is a platform creating better feedback loops between audiences and cultural organisations in the rural context of Cornwall. It is a flexible data collection and analytics platform using the Cornwall 365 website and brand as the interface between audiences and cultural producers. It manages an ongoing conversation about what people do in Cornwall, finding new ways to illustrate how culture is valued by audiences. Key features include user-centred means of capturing data (including video, audio, social media) allowing audiences to speak in their own words whilst also supplying cultural institutions with rich and real time data to inform future programming decisions and demonstrate impact.

In the Loop is a partnership between Cornwall 365, Creative Kernow and Controlled Frenzy, with support from Counting What Counts, i-DAT and Venn Creative, supported by the South West Creative Technology Network (SWCTN) as one of the Data Prototype Teams. The prototype at the Data Showcase in March 2021 and the team are now in the second phase of development with plans to launch a full version of the platform and services in late 2021.

3. Animate and amplify programme

Hub models and resources

Concept: A capacity building programme comprising revenue funding for infrastructure support, leadership development for emerging and established hub leaders and collaboration grants to boost the capacity of hub leaders and augment their vital role as animateurs.

Purpose	Delivery
• To unlock and boost the capacity of hub leaders to amplify their roles as animateurs among the community and enable potential to reach and engage creatives outside their immediate network • To enable greater financial security of hubs that require revenue over capital investment • To strengthen leadership capability of existing and emerging hub leaders, building a peer network • To increase the capacity of hubs to build collaborative partnerships with other hubs, enabling greater connectivity and knowledge exchange between hubs, their communities and key partners such as universities	A sector support organisation, or consortium of organisations in Cornwall and the Isles of Scilly (CIoS) with experience of: • Designing grant giving programmes, including assessing grant applications • Designing and delivering leadership development programmes in the creative and cultural sector including facilitating peer to peer learning and networking and delivering leadership coaching • Understanding of the specific needs of hub leaders in CIoS • Programme evaluation and impact measurement Resulting in more financially sustainable hubs as well as increased capacity of hub leaders to foster collaboration between dispersed hub communities.

Features

- A revenue fund for infrastructure supporting either
  - New roles or expand existing roles e.g. a Community Manager/Curator role or an administrative role to unlock the capacity of an existing hub leader/community manager
  - A high degree of flexibility in terms of which posts the revenue funding can cover that meet the needs of the individual hub
  - Bursaries for sole trading emerging hub leaders who may not yet be part of an organisation.
  - Small revenue grants for other infrastructure developments
  - Animate & Amplify Leadership Development programme
  - Year-long peer-led programme to be co-designed with the selected cohort(s)
  - Action focused e.g. collaborative action research projects for hub leaders to explore and address common challenges and opportunities together, with a particular focus on facilitating networking and collaboration between their communities
  - Coaching to support hub leaders to design a self-directed development programme that meets their specific needs, tapping into existing offers and resources were available

Features

- Animate & Amplify Grants for hubs to develop and test new ways of
  - Fostering collaboration between dispersed hub communities
  - Extending reach and impact with home-based creative businesses in different locations through digital and/or hybrid programming
  - Enabling enhanced partnership working and knowledge sharing with other hubs and other stakeholders

Best practice examples for reference

Cultivator Cultural Leadership Programme (CIoS)
This current programme supports the next generation of creative and cultural leaders in the creative economy of CIoS. The programme will take two cohorts of creative and cultural practitioners who have been drawn from a wide variety of backgrounds including freelancers and emerging leaders with different types of experience designed to reflect the makeup of the creative and cultural workforce across the region. Importantly, the programme includes an action research element that enables a collaborative approach to meet the challenges and opportunities of the future.

Creative Hubs Academy & Creative Hub Leader's Toolkit (Global)
The Creative Hub Leader's Toolkit is made up of 15 practical tools to help early stage creative hubs think about how they lead, connect and build their hub. The tools are interconnected and, as a collection, will help hub leaders chart their path, from defining their need through to the impact they want to create. The toolkit is the output of the global Creative Hub Academy programme developed with hubs across several countries by the British Council, Nesta and Hivos. The content is available on a creative commons license.

4. Hubs and high streets

Hub models and resources

Meeting future needs

Concept: A place-based, flexible programme of funding and consultancy support for new and existing hubs to test new models and revitalise high streets. Aimed at new and emerging hubs; existing hubs wishing to establish satellites or 'touring hubs' in new locations.

Purpose	Delivery
• To transform underused historic buildings and empty retail units into affordable, flexible workspaces and community hubs • To revitalise the highstreets of market towns and villages not already benefiting from the Towns Fund • To test new models of hubs on high streets such as pop ups, touring, satellite and micro hubs	Consortium of hubs in Cornwall and the Isles of Scilly (CIoS), CIoS based sector support organisations and/or business development consultants with the experience of: • Delivering application support (to the Town Centre Revitalisation Fund (TCRF) or similar – see below) • Delivering business development coaching and consultancy • Designing and managing grant giving programmes, including assessing grant applications • Evaluating programmes and assessing impact Aligned with the TCRF to bring forward available spaces for new and pop up hubs.

Features

- 'Boots on the ground' support for hub leaders to make applications to the TCRF and other relevant funding applications
- Funding made available via the TCRF for feasibility studies, conceptual designs, community/stakeholder engagement, demand studies, commissioning of professional/specialist expertise to provide technical advice and bid writing
- Revenue fund to provide pre and post business development consultancy from existing hub leaders to ensure that new hubs are equipped to develop a financially viable business model
- Seed Fund Grants to test new models of hubs, which could cover the cost of initial fit out as well as programming (hub leaders could also apply to Animate & Amplify to cover the cost of posts)
- Potential support for a digital platform that helps hubs search for available spaces in their community

Best practice examples for reference

Vacancy Atlas
Vacancy Atlas is a new platform for sourcing, listing, matching and occupying spaces. "We're here to unlock spaces and places for all the social entrepreneurs, trailblazers, creatives and positive change makers out there."
The platform supports space owners to identify ways in which their vacant spaces can be utilised, or find ways to increase the use of existing spaces on the one hand, while supporting communities to identify appropriate space and apply for funding to help realise their space ambitions.

Areas for further research

A number of additional needs and ideas were highlighted through this process that we felt would benefit from further research, but that his study did not create robust enough evidence for.

1. Production and post-production hub for screen industries

Meeting future needs

Both the Creative Manifesto, Saffrey's Screen Industries report and stakeholder interviews cited the need for flexible production hubs across Cornwall for the emerging and growing screen industries, equipped with industry standard facilities, post-production and superfast broadband. The hub should not only serve Cornwall and the Isles of Scilly (CIoS) based business needs, but also attract larger scale productions and companies to the region who are seeking additional talent and capacity. A detailed feasibility study to inform the development of a dedicated facility would be a welcome next step to develop and test this concept. The ideal delivery partner(s) would be CIoS based screen sector specialists with access to screen sector businesses and networks.

2. Video games cluster support

Meeting future needs

Retaining talent in Cornwall to support the growth of the games sector is challenging without bespoke provisions for this sector, both in terms of physical hub and sector support. Future research could therefore explore the specific needs of this growing sub sector and elements required to place Cornwall's games sector on an international map. The ideal delivery partner(s) will have access to CIoS gaming businesses and networks alongside research expertise.

3. Coordinated support for graduates and entry level creatives

Collaboration

Meeting future needs

Building on existing strengths and programmes such as Cultivator's Graduate Support Programme and the collaboration between Krowji and Cornwall College, a collaborative and coordinated approach to support for graduates would be welcome. For example, sponsored studio space within hubs funded by Falmouth University, the University of Plymouth, Plymouth College of Art and the University of Exeter. A detailed needs assessment and mapping of existing support for creative graduates would need to be undertaken to test the assumptions of this recommendation. The ideal delivery partner(s) would be CIoS based with access to graduates and networks of early career creatives alongside research expertise.

4. Rural creative pre-accelerator pilot

Meeting future needs

A pilot industry led Rural Creative Pre-Accelerator[104], delivered in partnership with existing providers, funders and investors (such as Falmouth University, Creative England, UKRI) could help boost the Research, Development and Innovation (RD&I) activity in CIoS which has been cited as a challenge. The target audience would be rural creative businesses seeking to test a concept and develop a working prototype product or service. Local industry experts and business leaders could be deployed as speakers and mentors, helping to build the local entrepreneurial ecosystem. The ideal delivery partners(s) would have track record in delivery of accelerator programmes (or similar) and be well networked within the local entrepreneurial eco-system.

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[104]A pre-accelerator focusses on developing ideas and/or early stage startups

"How might we"? questions	Recommendation	Further research
• How might we better **collaborate with each other, and with key partners such as universities** to address key challenges collaboratively?	• Creative Connect/Hubs of Hubs	
• How might we enable **greater collaboration between our communities?**	• Creative Connect/Hubs of Hubs	
• How might we enable **greater collaboration between our communities?**	• Creative Connect/Hubs of Hubs	
• How might we better **measure our impact and communicate our value?**	• Creative Hub Data Challenge	
• How might we better **gather, use, and share data about user needs** to develop our services?	• Creative Hub Data Challenge	
• How might we better connect with and **inform the development of relevant spaces** and opportunities?	• Creative Connect/Hubs of Hubs	• Video Games Cluster Support
• How might we **adapt funding models** and engage funders to **increase financial sustainability?**	• Animate & Amplify	
• How might we **test new models** to increase our impact and reach?	• Animate & Amplify • Hubs & High Streets	
• How might we **build capacity and leadership?**	• Animate & Amplify	
• How might we **be more environmentally sustainable,** and share insights into developing environmentally sustainable creative spaces?	• Creative Connect/Hubs of Hubs	
• How might we better **work together with further and higher education to attract and retain graduates** and address sector skills shortages?	• Creative Connect/Hubs of Hubs	• Coordinated Support for Graduates and Entry Level Creatives
• How might we **anticipate and meet the future needs of creative businesses** in CIoS?	• Creative Hub Data Challenge	• Video Games Cluster Support
• How might we play a role in **revitalising high streets?**	• Hubs & High Streets	
• How might we better **enable businesses to scale up?**	• Creative Connect/Hubs of Hubs	• Rural Creative Pre-Accelerator Pilot

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Appendix

A1 Creative hubs Cornwall and the Isles of Scilly

CIoS wide			
Hub name	**Location**	**Post code**	**Web address**
Creative Cornwall	Cornwall & Isles of Scilly	N/A	facebook.com/groups/creativecornwallofficial/?ref=share
Cornwall Games	Online	N/A	cornwall.games
Cultivator	Redruth	TR15 3AJ	cultivatorcornwall.org.uk
Digital Peninsula Network	Penzance	TR18 2SL	digitalpeninsula.org
Doorstep	Redruth	TR15 3GE	instagram.com/doorstep_cornwall
Cornwall Archive Network (CAN)	Redruth	TR15 1AS	kresenkernow.org/about-us/can
Cornwall Museum Partnership	Redruth/countywide remit	TR15 3GE	cornwallmuseumspartnership.org.uk
Software Cornwall	Online	TR15 3GF	softwarecornwall.org
Screen Cornwall	Redruth/countywide remit	TR15 GEE	screencornwall.com

	Summary		
	Active hubs		
Hub name	**Location**	**Area**	**Web address**
Creative Cornwall	Cornwall & Isles of Scilly	CIoS Wide	facebook.com/groups/creativecornwallofficial/?ref=share
Cultivator	Redruth	CIoS Wide	cultivatorcornwall.org.uk
Digital Peninsula Network	Pensance	CIoS Wide	digitalpeninsula.org
Doorstep	Redruth	CIoS Wide	instagram.com/doorstep_cornwall
Cornwall Archive Network (CAN)	Redruth	CIoS Wide	kresenkernow.org/about-us/can
Cornwall Museum Partnership	Redruth/ countywide remit	CIoS Wide	cornwallmuseumspartnership.org.uk
Software Cornwall	Online	CIoS Wide	softwarecornwall.org
Screen Cornwall	Redruth/ countywide remit	CIoS Wide	screencornwall.com
Into Bodmin	Bodmin	North	intobodmin.co.uk
The Pearl Exchange	Bude	North	thepearlexchange.org.uk
Wadebridge Creative Hub	Wadebridge	North	wadebridgecreativehub.co.uk
Drawn to the Valley	North Gunnislake	East	drawntothevalley.com
Liskerrett Centre	Liskeard	East	liskerrett.co.uk
Maker Heights	Millbrook	East	makerheights.org.uk/maker-heights
Rame Innovation Hub	Torpoint	East	rameinnovationhub.com/office-space-and-co-working-space
The AIR Building	Penryn	Mid	falmouth.ac.uk/research/academy-for-innovation-and-research
C-Space	Newquay	Mid	realideas.org/our-spaces/c-space
CAST	Helston	Mid	c-a-s-t.org.uk
Health & Wellbeing Innovation Centre	Truro	Mid	cornwallinnovation.co.uk/our-centres/#health-wellbeing-innovation-centre
Tremough Innovation Centre	Penryn	Mid	cornwallinnovation.co.uk/our-centres/#tremough-innovation-centre
Grays Wharf	Penryn	Mid	grayswharf.co.uk
Jubilee Warehouse	Penryn	Mid	jubileewharf.co.uk/jubileewarehouse
Jubilee Wharf	Penryn	Mid	jubileewharf.co.uk
Mor workspace	Newquay	Mid	morworkspace.co.uk
Newquay Orchard	Newquay	Mid	newquayorchard.co.uk
Old Bakery Studios	Truro	Mid	oldbakerystudios.co.uk
Our Distrikt	Truro	Mid	ourdistrikt.com/our-space
The Old Press Gallery	St Austell	Mid	theoldpress.co.uk
Fish Factory Art Space	Penryn	Mid	fishfactoryarts.space
WorkBox	Truro	Mid	theworkbox.com
Pool Innovation Centre	Redruth	West	cornwallinnovation.co.uk/our-centres/#pool-innovation-centre

Summary			
Active hubs			
Hub name	**Location**	**Area**	**Web address**
Garratt Studio	Isles of Scilly	West	garrattstudio.com
Glandore Gallery	Isles of Scilly	West	glandorescilly.info/gallery/index.htm
Harvey's Foundry Trust	Hayle	West	harveysfoundrytrust.org.uk
Higher Bussow Farm	St Ives	West	3lanes.com/artistsstudios.php
Krowji	Redruth	West	krowji.org.uk
Miracle Production Space	Redruth	West	miracletheatre.co.uk
Pheonix Craft Studios	Isles of Scilly	West	phoenixcrafts.moonfruit.com
Porthloo Studios	Isles of Scilly	West	visitislesofscilly.com/experience/things-to-do/porthloo-studios-p2600873
Porthmeor Studios	St Ives	West	bsjwtrust.co.uk/location/porthmeor-studios
The Island Hall	Isles of Scilly	West	stmartinsscilly.co.uk/the-island-hall.html
Redwing	Penzance	West	redwinggallery.co.uk
The Heartland	Redruth	West	heartlandscornwall.com
Trewarveneth and Anchor Studios	Newlyn	West	bsjwtrust.co.uk/artists-studios
Trewidden Studios	Newlyn	West	trewidden.co.uk/open-art-studios
WorkBox	Penzance	West	theworkbox.com
Writers' block (KEAP)	Redruth	West	keap.org.uk/the-writers-block

Summary			
Hubs in development			
Hub name	**Location**	**Area**	**Web address**
Liskeard Cattle Market	Liskeard	East	cornwall.gov.uk/business/economic-development/liskeard-cattle-market
Liskeard Library	Liskeard	East	
Husa (Hall for Cornwall)	Truro	Mid	hallforcornwall.co.uk/husa
Launchpad+	Truro	Mid	trurotownfund.com/projects/the-hive-at-pydar
FibreHub	Camborne	West	
Penzance Creative Cluster	Penzance	West	cornwallislesofscillygrowthprogramme.org.uk/projects/penzance-creative-cluster
The Buttermarket	Redruth	West	redruth-revival.org/the-project
Palais de Danse Skills Hub	St Ives	West	stivestowndeal.org.uk/wp-content/uploads/2021/02/FINAL-St-Ives-Town-Investment-Plan.pdf
Camborne Contemporary Crafts Hub	Camborne	West	cambornetowndeal.com/camborne-contemporary-crafts-hub
Workstation	St Ives	West	stivestowndeal.org.uk

North				
Active hubs				
Hub name	**Location**	**Post code**	**Area**	**Web address**
Into Bodmin	Bodmin	PL31 2JX	North	intobodmin.co.uk
The Pearl Exchange	Bude	EX23 8HN	North	thepearlexchange.org.uk
Wadebridge Creative Hub	Wadebridge	PL27 6AB	North	wadebridgecreativehub.co.uk

East				
Active hubs				
Hub name	**Location**	**Post code**	**Area**	**Web address**
Drawn to the Valley	North Gunnislake	PL18 9FE	East	drawntothevalley.com
Liskerrett Centre	Liskeard	PL14 4AP	East	liskerrett.co.uk
Maker Heights	Millbrook	PL10 1LA	East	makerheights.org.uk/maker-heights
Rame Innovation Hub	Torpoint	PL11 3AB	East	rameinnovationhub.com/office-space-and-co-working-space

East				
Hubs in development				
Hub name	**Location**	**Post code**	**Area**	**Web address**
Liskeard Cattle Market	Liskeard	TBC	East	cornwall.gov.uk/business/economic-development/liskeard-cattle-market
Liskeard Library	Liskeard	PL14 3DZ	East	realideas.org/our-spaces/liskeard-library

Mid				
Active hubs				
Hub name	**Location**	**Post code**	**Area**	**Web address**
The AIR Building	Penryn	TR10 3EZ	Mid	falmouth.ac.uk/research/academy-for-innovation-and-research
C-Space	Newquay	TR7 1DT	Mid	realideas.org/our-spaces/c-space
CAST	Helston	TR13 8TP	Mid	c-a-s-t.org.uk
Health & Wellbeing Innovation Centre	Truro	TR1 3FF	Mid	cornwallinnovation.co.uk/our-centres/#health-wellbeing-innovation-centre
Tremough Innovation Centre	Penryn	TR10 9TA	Mid	cornwallinnovation.co.uk/our-centres/#tremough-innovation-centre
Grays Wharf	Penryn	TR10 8AE	Mid	grayswharf.co.uk
Jubilee Warehouse	Penryn	TR10 8FG	Mid	jubileewharf.co.uk/jubileewarehouse
Jubilee Wharf	Penryn	TR10 8FG	Mid	jubileewharf.co.uk
Mor workspace	Newquay	TR7 2FP	Mid	morworkspace.co.uk
Newquay Orchard	Newquay	TR7 3BW	Mid	newquayorchard.co.uk
Old Bakery Studios	Truro	TR1 1QH	Mid	oldbakerystudios.co.uk
Our Distrikt	Truro	TR1 2XP	Mid	ourdistrikt.com/our-space
The Old Press Gallery	St Austell	PL25 5EW	Mid	theoldpress.co.uk
Fish Factory Art Space	Penryn	TR10 8AG	Mid	fishfactoryarts.space
WorkBox	Truro	TR18 4FG	Mid	theworkbox.com

Mid				
Hubs in development				
Hub name	**Location**	**Post code**	**Area**	**Web address**
Husa (Hall for Cornwall)	Truro	TR1 2LL	Mid	hallforcornwall.co.uk/husa
Launchpad+	Truro	TBC	Mid	trurotownfund.com/projects/the-hive-at-pydar

West				
Active hubs				
Hub name	**Location**	**Post code**	**Area**	**Web address**
Pool Innovation Centre	Redruth	TR15 3PL	West	cornwallinnovation.co.uk/our-centres/#pool-innovation-centre
Garratt Studio	Isles of Scilly	TR21 0NE	West	garrattstudio.com
Glandore Gallery	Isles of Scilly	TR21 0NE	West	glandorescilly.info/gallery/index.htm
Harvey's Foundry Trust	Hayle	TR27 4HH	West	harveysfoundrytrust.org.uk
Higher Bussow Farm	St Ives	TR26 3BB	West	3lanes.com/artistsstudios.php
Krowji	Redruth	TR15 3AJ	West	krowji.org.uk
Miracle Production Space	Redruth	TR16 4DE	West	miracletheatre.co.uk
Pheonix Craft Studios	Isles of Scilly	TR21 OJY	West	phoenixcrafts.moonfruit.com
Porthloo Studios	Isles of Scilly	TR21 0NF	West	visitislesofscilly.com/experience/things-to-do/porthloo-studios-p2600873
Porthmeor Studios	St Ives	TR26 1NL	West	bsjwtrust.co.uk/location/porthmeor-studios
The Island Hall	Isles of Scilly	TR25 0QW	West	stmartinsscilly.co.uk/the-island-hall.html
Redwing	Penzance	TR18 2HT	West	redwinggallery.co.uk
The Heartland	Redruth	TR15 3QY	West	heartlandscornwall.com
Trewarveneth and Anchor Studios	Newlyn	TR26 1NG	West	bsjwtrust.co.uk/artists-studios
Trewidden Studios	Newlyn	TR20 8TT	West	trewidden.co.uk/open-art-studios
WorkBox	Penzance	TR18 4FG	West	theworkbox.com
Writers' block (KEAP)	Redruth	TR15 3RD	West	keap.org.uk/the-writers-block

West				
Hubs in development				
Hub name	**Location**	**Post code**	**Area**	**Web address**
FibreHub	Camborne	TR15 3RD	West	
Penzance Creative Cluster	Penzance	N/A	West	cornwallislesofscillygrowthprogramme.org.uk/projects/penzance-creative-cluster
The Buttermarket	Redruth	TR15 2AU	West	redruth-revival.org/the-project
Palais de Danse Skills Hub	St Ives	TR26 1AD	West	stivestowndeal.org.uk/wp-content/uploads/2021/02/FINAL-St-Ives-Town-Investment-Plan.pdf
Camborne Contemporary Crafts Hub	Camborne	TR14 8EG	West	cambornetowndeal.com/camborne-contemporary-crafts-hub
Workstation	St Ives	TR26 2BH	West	stivestowndeal.org.uk

Consultation workshop 1 29 April AM

Welcome

Creative Hubs in Cornwall

Purpose of today's session

1. **Share insights into the needs of people who use hubs in Cornwall**, who else could benefit from hub services, and barriers to engagement
2. **Hear from you about the key opportunities** for creative hubs in Cornwall
3. **Discuss the challenges hubs in Cornwall are facing**, and how you are tackling these challenges
4. **Think together about the future needs of hubs**, including what post-Covid ways of working online and offline mean for hub services and facilities

Using Mural

- Double click to add sticky note
- Double click again to add text
- 1 idea per post-it!
- Use the Zoom chat for group discussion

Viewing options

Editing options

What 3 words would you use to describe creative hubs in Cornwall?

1. User Insights

Sharing what we know about the people who use creative hubs in Cornwall

What challenges are users coming to you with?

- Lack of connectivity with local art groups
- Indoor space and a place to gather/create
- if events are only promoted on social media it misses people who are not digitally literate
- Finding enough volunteers and bodies to help out with large events
- Unknown regulations regarding planning an event with long lead team .
- Connecting with bigger conversations
- Money/funding - to keep businesses resilient/retiaing their studios
- Limited acces to markets.
- Concerns about sustainability
- COVID has hit emerging creatives / crew particularly - not only lost momentum and money but also confidence / motivation
- afordable workspace for visual artists especially emerging

What priorities and interests are you noticing among your users?

- Hyper local interest - people want to stay local
- Creativity and wellbeing / mental health
- Funding for large projects and long term onging communit based projects.
- re-evaluating life priorities
- digital barriers for access to activities during
- Flexible spaces on short term lets
- Diversity is a solution with pop up market.
- Access to freelance work / funding
- Practioners returning to Cornwall or relocating here - how to engage them in our network when things are so dispersed
- Creating community
- Local Town Council has lockdown rooms to rent during Covid pandemic All stop.
- Connections to commercial / market ready skills i.e. producers

What limits people's engagement with your hub?

- Lack of staff resource to develop engagement activity
- Social anxiety amongst people who have been isolating
- cost of workspaces
- access costs for users like local audiences/members of the public versus programme costs and fair artist fees
- Physically not able to come here
- awareness of the activities we can offer
- communicating the purpose of the space following a change in use
- The lack of activity over last year - people uncertain about plans going forward
- Our hub - it's an old building with high windows. We will be spending more time creating pop up hubs in spaces that communities feel comfortable with
- We are only just 2 years old so need to get our brand out there and also make our digital spaces and networking easier to access. It's always hard to pick a platform that everyone will be happy to use and is mobile friendly
- Lack of resource to specifically develop virtual networks - it needs a much time energy as physical networking!
- Understanding our offer and how to access it - a comms issue for us
- Not having the right digital resources to reach beyond our four walls

What opportunities are you exploring?

I have been working on line with people all around Britain and networking in Bangaldesh, America and Europe mostly Germany. It's been great fun it was more about learning new things looking at new technology and how I would like to see it in my local rural town as visual art installaters and studios

For some, it's not possible to go digital

Digital / hybrid ways of working

requirement for people to diversify and means a more global audience

Huge opportunity for local companies to better to connect with national / international markets PLUS big push by broadcasters and funders to commission locally

It is helping to reduce our environmental impact which is key to our vision to be net zero carbon by 2030

Being able to network with hubs outside Cornwall

Delivery of skills and networking sessions and mentoring all now delivered online - far more efficient

Weekly Newsletters - reach is global

Increased flexibility

We've remotely delivered creative activities to volunteers asking them to pick up a slate on their daily exercise and paint and return to the orchard to create a Avenue of Hope

Digital marketing - very useful tool

Reuniting creatives

Pop-up interventions in public spaces rather than organising open studios etc - due to uncertainty around covid restrictions

Digital events help us reach across the region whereas previous dispersed geography made events tricky. But still important to meet face to face occasionally! If we could activate a network of flexible production hubs there would be a local space for each part of Cornwall to base from or drop into

people are a lot more comfortablw with digital / artists are moving more into digital media for reach and market

It's important to focus on hybrid rather than go fully digital so you don't miss people who aren't digitally literate. Posters and printed media are still very important to reach certain sections of the community.

challenge to reach non-local audiences with new use of digital

Certain users can't continue their work digitally - music, craft based work - desire for physical meet-ups

Recovery from Covid-19 Pandemic

Over 60% of those who work here either walk or cycle.

Walking groups and well-being group setting up craft workshops around recycled textiles Keeping incontact with my community and supporting them through the pandemic adhereing to guidlines, Looking to move back into holding workshops again once to rooms are opened up.

collaborating with health professionals to deliver creativity for mental health and wellbeing sessions

Concentrating on the local community is crucial

Town fund / creative hub developments potentially have provision for screen, however detail needs a lot of work and must be industry facing

opportunity to engage good quality talent to work in Cornwall and build our crew / creative offer. Also possible that companies will relocate so will need physical spaces

rethinking accessibility for neurodivergent artists and artists with other access needs to help shape programme and participate in opportunities

All our users have signed a covid agreement to be kind, basically

Other opportunities

pop market for makers - access to a new market

potential cost savings facilitating artist presentations / tals remotely - without travel/ accomodation

Political, seeking political help pushing for polices, the need for creativity and activity to help mental needs . Making it commercial the need is there. Lobbying government and pushing for this economy to be ringfenced.

New community hub has allowed us to reach more people - a new artist and volunteer art exhibition will take place in there soon creating an inclusive space to view art and building confidence in creative volunteers exhibiting.

What specific challenges are you facing in these areas?

Financial stability of hubs

unrestricted funding to respond to spontaneous need development

Public funding opportunities with very short deadlines and really hard outputs / timescales e.g CRF

Longer term funding model needs work in order to plan medium term rather than short term

Lower demand for larger spaces

Large admin burden on core staff (myself) to run the business. Business cannot afford to employ additional help.

as private landlord we have worked to support people individually

Long winded funding applications

Supporting member survival

acknowledging we have many different audiences, both with our hubs, and between us - see each other as friends rather than competition

Extra support for early career screen creatives needed

Treat each user as an individual

Learning the roles in your Hub to support long term surviavl of ongoing projects whem someone wants to step down

Capacity & wellbeing

Expansion would be good with the right support

mental health of directors when funding isn't stable or secure

We are missing the social and informal connections - lots of networking and learning missed in that year which has affected confidence and motivation especially in early career creatives

Security of tenure

Facing cliff edge as EU programmes come to an end and SPF not confirmed and likely to much smaller

We have demand, and have maintained our standard agreements, with flexibility where required

A lot of the funding is capital specific so sustaining salaries is challenging.

What is happening around the european funding?

Trying to get funding that stretched out over three to four years that helped to pay for artists and creators alike

Communicating the value of hubs

Keen to look for alternative ways to measure value that is not only economic

Hard to quantify the economic value of virtual netowrks - is there best practice we can look at from elsewhere

To local rural towns and Cornwall they are gold holding events seasonal bringing in money for towns supporting artist

OTHER CHALLENGES

Zero carbon footprint and climate change

Making sure our future is sustainable - zero carbon and socially engaged

sustainability is everything!

Slight nervousness of CC involvement in overarching strategy - does it leave enough room for innovation in private sector/social enterprise arena. Feeling hemmed in!

We need 100% occupancy, so nervous about impact of too much additional creative workspace

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Viewing options

Editing options

What 3 words would you use to describe creative hubs in Cornwall?

- Vibrant, eclectic, cold!
- much needed
- lively
- exciting, connecting,
- opportunity
- varied, vital, poor
- Collaborative, innovative, under funded!
- important
- Spread out Innovative Networked
- supportive
- Teresa, CAST. responsive, international
- Diverse, Exciting, Collaborative
- not big enough
- Hyper-local, Responsive, Collaborative

1. User Insights

Sharing what we know about the people who use creative hubs in Cornwall

What challenges are users coming to you with?

- Money, Access
- Financial Support
- technical issues, access to printing equipment
- professioal artists vs audiences vs community groups - all have very different needs
- superfast broadband and virus protection
- tech knowledge and equipment
- CAST - wider range of artist needs some common themes are - enhancing creative practice; conntection with other artists; national and international; artistic research and development
- challenge of funding affordable rental living accommodation

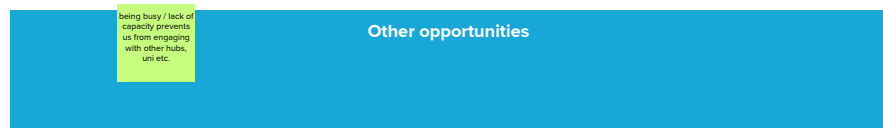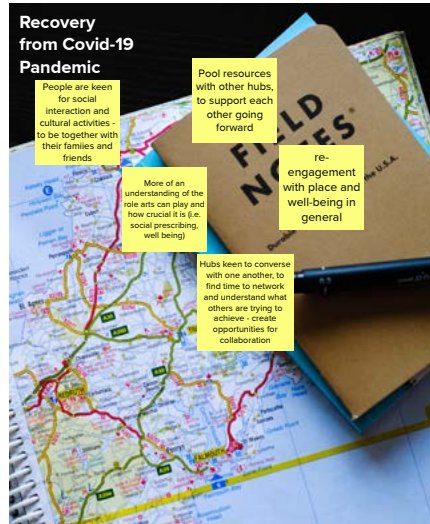**What ... and interests are you noticing among your users?**

- Developing connections - locally, but wider as well - nationally and internationally
- High demand for studio space for artists - hubs have to turn people away & have waiting lists
- technology to do live streams, access to digital
- Specialist spaces that cater for arts - allows users to focus on their practice without being distracted by various groups who might be using the shared space

What limits people's engagement with your hub?

- That we don't have enough spaces. We have outgrown our rented building.

What opportunities are you exploring?

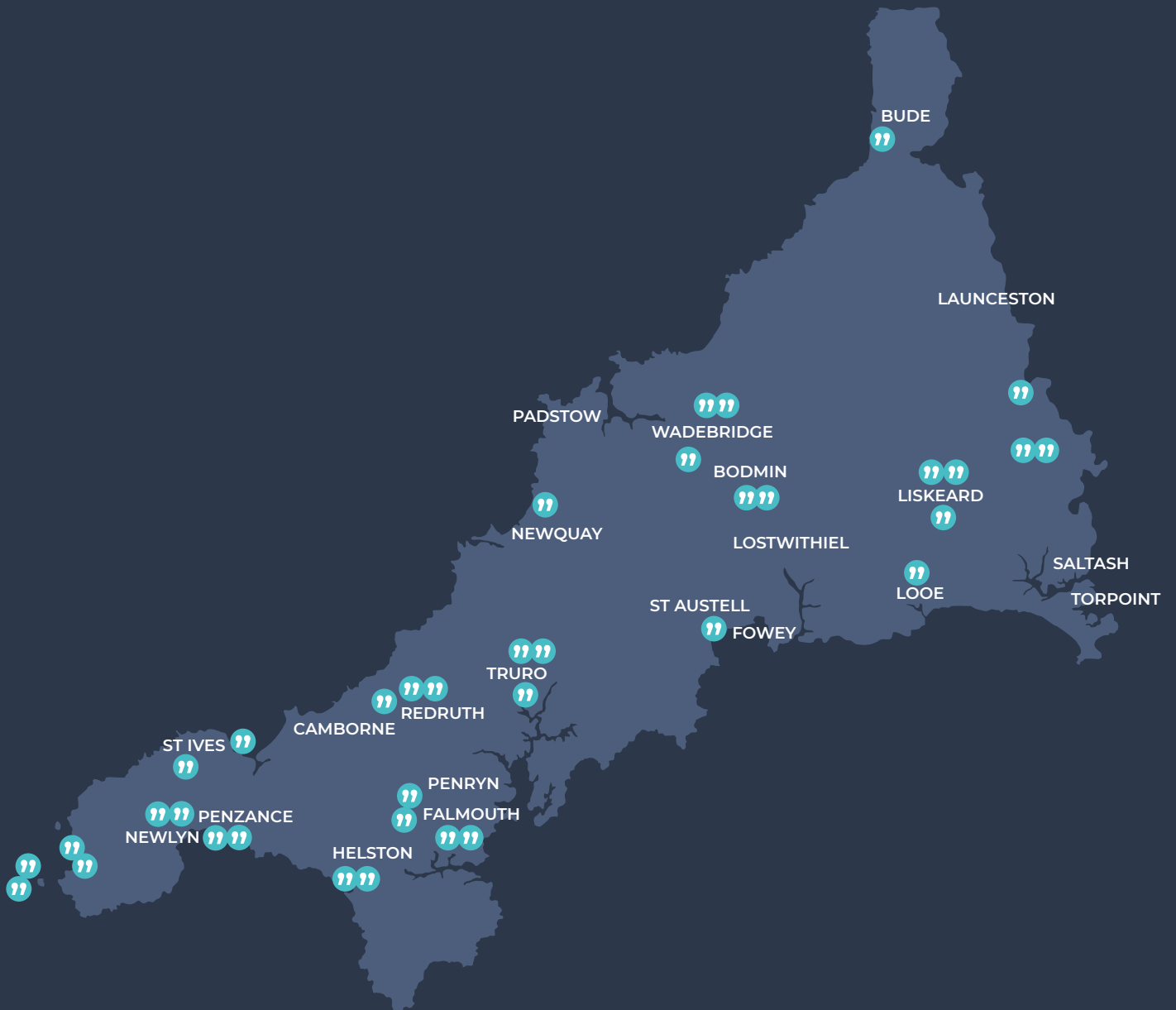**Digital / hybrid ways of working**

During lockdown - theatre projects have had to become digital projects to reach online audiences

Adapting spaces for digital users - sound proofing, blackout curtains etc

Increase virtual audiences

Most delivery pushed online, able to reach out to parts of the county that HUB wouldn't be abel to reach otherwise

Challenge of digital access

more opportunities to access creative tech - schools links with Falmouth?

Recovery from Covid-19 Pandemic

People are keen for social interaction and cultural activities - to be together with their families and friends

Pool resources with other hubs, to support each other going forward

More of an understanding of the role arts can play and how crucial it is (i.e. social prescribing, well being)

re-engagement with place and well-being in general

Hubs keen to converse with one another, to find time to network and understand what others are trying to achieve - create opportunities for collaboration

being busy / lack of capacity prevents us from engaging with other hubs, uni etc.

Other opportunities

What specific challenges are you facing in these areas?

Financial stability of hubs

Need for core funding as opposed to just project funding

It's the biggest challenge!!

applications take a long time but are unfunded

We survive on income from hire, cafe and events, rather than funding. Covid has impacted on this.

Many of the grants to which we can apply in Cornwall are very small, but still require a lot of work to apply, report etc.

Need for core funding is right - and continuity.

Not currently funded as a resource for others

Many potential users have no or little budget for space hire

Keeping studio spaces affordable for tenants

afford staff on a long-term basis

we need to deliver top quality at no cost to make it accessible

make things affordable for artists

steady income streams for freelance artists and creatives without huge applications

Supporting member survival

Ability to be flexible to changing studio tenant needs/ requirements

Professional development for exisiting and potential creative practitioners

Lot of artists not connected with creative hunbs

providing "added value" beyond just studio space

We gavea rent-free period duing first lockdown to shared studio

Project funding is very limited in allowing hubs to grow

Would be helpful to know what others are doing that is all in one space and easy to update

Capacity & wellbeing

Need to build a team and grow - resource for this

Need for a mentor and other professional support

Every hire or loan takes up staff time and capacity while not bringing in much income

able to have a long term relaationship with specialist vulnerable groups rather than than a one off short project

If a member of staff got ill then it would really affect the org when there is only one staff member or sometimes two.

I have been running our creative hub for 10 years, mainly as a volunteer. It has now grown so that it really needs paid staff.

Security of tenure

Short term hires potentially need more facilities support

This enables us to offer flexible tenancies

It's difficult to ensure turnover because artists like to settle into their work spaces.

We are lucky that we are no longer a pop-up and do have some security of tenure.

We operate easy in easy out terms of agreements but our tenants still remain for long periods

Artist studio holders at CAST also stay for a long time.

It is not our tenants that are most active in delivering commuity arts

Communicating the value of hubs

Yes, and that we are a professional organisation. Still a bit of a sense that art is a 'nice to have' and we should all be volunteers.

We don't have a big budget for marketing

The level of professionalism required to run a successful 'hub' is very demanding, but mostly unrecognised.

We put so much energy into running the project we don't have time to put into evaluation.

It takes time to 'put it on social media'

OTHER CHALLENGES

Board members not embracing change - risk averse

funding for innovation and trying out new ideas

who are the gatekeepers and why?

support re insurance, governance,long-term vision

A3 Creative hubs consultation contributors

BUDE

LAUNCESTON

PADSTOW

WADEBRIDGE

BODMIN

NEWQUAY

LISKEARD

LOSTWITHIEL

SALTASH

ST AUSTELL

LOOE

TORPOINT

FOWEY

TRURO

REDRUTH

CAMBORNE

ST IVES

PENRYN

FALMOUTH

PENZANCE

NEWLYN

HELSTON

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Image credits

Images are listed from top to bottom, left to right.

Front cover: Falmouth seafront, *Falmouth University*; MA Screenwriting Face to Face Event, *Max Willcock/Mayn Creative;* The Brain of Brian, office barge, Jubilee Wharf, *Hugh Hastings 2014*; Jubilee Warehouse atrium light and shadows, *Mark Robinson 2014*; *Neal Megaw MAYN Creative*; Research Training Day 2018, *Falmouth University*.

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Page 33: Falmouth campus, Falmouth University, *Matt Jessop*; Jazmine Moast & Abbey AMATA, MA Screenwriting Face to Face Event, *Max Willcock/Mayn Creative.*

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Page 79: Creative VR, Games Academy, *Matt Jessop*.

Page 88: Illustrative indicative sketch – view along Pydar Street looking north towards the new neighbourhood, *PRP*; Liskeard Cattle Market, *JTP Architects 1.*

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