BRITISH COUNCIL

Máté Miklós Fodor, Marlen Komorowski & Sara Pepper

—

Mapping Creative Hubs in Wales

October 2022

Table of Contents

Foreword

Since 2014, the British Council has been working with over one thousand creative hubs globally. We see creative hubs as communities of support for creative professionals, as well as catalyst platforms that contribute to an inclusive and sustainable creative economy.

Our definition of a creative hub is 'a physical or virtual place that brings enterprising people together who work in the creative and cultural industries'. However, we acknowledge that in practice there are many definitions of creative hubs, and numerous organisations around the world might not resonate with the "creative hub" designation.

Over the last eight years, the British Council has developed a plethora of programmes, research and tools that have creative hubs at heart. From the Creative HubKit (developed by Creative Edinburgh and Creative Dundee) which has been translated into numerous languages globally; and the Creative Hub Leaders Toolkit (developed by British Council, Hivos and Nesta) published in 2020 which provides practical tools to develop your hub's business model; to programmes like Hubs for Good in Southeast Asia which supported creative hubs as key drivers and catalysts for good in cities or Hubs as Hosts, which brought creative hubs from across the globe to the UK to connect, collaborate and exchange learnings with a variety of UK hubs. You can read more about our work in this area here: creativeconomy.britishcouncil.org/

Before the COVID-19 pandemic, we planned to carry out mappings of creative hubs across all four UK nations, in an effort to refresh the body of knowledge on creative hubs and their ecosystems. These mapping exercises are for us a substantial source of information, helping understand how the sector has evolved, what kind of impact creative hubs generate, and what are the current trends. They also offer a valuable resource for our international work, highlighting the richness and diversity of the creative hubs landscape in the UK.

3

This report is an introductory exercise in Wales, aiming to develop a baseline understanding of where creative hubs are situated and what their successes, needs and challenges are. It also considers social and economic impacts of hubs and their ability to respond to global challenges. It complements the Mappings of Creative Hubs we published in 2020 for Scotland, in 2021 for England, and earlier in 2022 for Northern Ireland.

We wish to extend our thanks and appreciation to the creative community across Wales, who were generous with their time and input for this research exercise and to the team at the Creative Economy Unit at Cardiff University who carried out this research with enthusiasm and sensitivity, navigating the difficult pandemic context seamlessly.

British Council

Creative Economy & Wales

Executive summary

This report is part of a series of creative hub mapping projects taking place across the UK nations commissioned by the British Council. In our study, we identified 147 Welsh creative hubs (analysing survey data of 34 hubs). A creative hub is a physical or virtual place that brings enterprising people together who work in the creative and cultural industries. They are communities of support for creative professionals, as well as platforms that contribute to an inclusive and sustainable creative economy. This definition already illustrates that creative hubs encompass a wide range of organisations and networks with different support mechanisms for the creative industries. We have found that creative hubs in Wales include a wide range of diverse and evolving organisations offering a range of support services to their communities.

Geography

The majority of creative hubs in Wales are located in South-East Wales, most specifically in the Cardiff Capital Region (CCR), a region made up of the 10 local authorities from Merthyr in the west to Monmouthshire in the east. CCR also has the highest level of creative industries agglomeration in Wales. There is also non-negligible creative hub presence in North Wales. Welsh creative hubs cater – most typically – to creatives in their immediate vicinities (at the neighbourhood or municipal level).

Profile

In terms of diversity of organisation, we found that most Welsh creative hubs are well-established organisations with 10 or more years of operation longevity. In terms of membership sizes, two opposites prevail. Many hubs have more than 1,000 members, while approximately the same proportion of creative hubs have more than 10, but less than 50 members.

www.britishcouncil.org

Activities and mission

Welsh creative hubs offer a wide range of services, typically various facilities, or amenities, ranging from studio space to business support. Most Welsh creative hubs have links to performing arts, crafts, and film, while their involvement with the IT sectors is so far limited. Regarding social impact, we find that most creative hubs (roughly 90%) take concrete and articulate measures towards numerous sustainable development goals as defined by the UN. The most important goals for Welsh creative hubs include: No poverty, Good health and wellbeing, Quality education and Gender equality. Only a minority (between 20-30% of Welsh creative hubs) take concrete measures towards: Responsible consumption and production, Reduced inequality, Sustainable cities and communities. With regards to other societal and economic goals, most Welsh creative hubs (60-90%) report that education and training, strengthening collaboration, and the promotion of creative industries, are very important ambitions for them.

Outlook and challenges

Most of the Welsh creative hubs report that the uncertainty of funding and the size of the workload are major challenges that they face daily. In addition, most hubs believe that proving value or facing the lack of external understanding of value, reaching, or attracting new creative businesses, day-to-day management and internationalisation are less prominent, albeit non-negligible challenges, except for internationalisation. Generally, creative hubs in Wales share an optimistic outlook on future challenges including membership numbers, developing relationships and networks, working with the local community, increasing or sustaining services, programmes, and products and adopting an innovative approach. Creative hubs in Wales are slightly less optimistic about financial sustainability and about the local or national political influence of their organisations. We also find that creative hubs have suffered negative fallout from both Brexit and Covid-19. Around 80% of all respondents report having suffered serious or mild negative consequences from these two shocks. At the same time however, almost 15% of Welsh creative hubs

www.britishcouncil.org

have seen some or a great deal of benefit from Covid-19, due to the digitisation and the restructuring of their services.

Conclusion

The creative hub landscape in Wales has become well-established in the last decade driven by a range of diverse organisations and networks. Due to the limitations creative hubs faced during Covid-19, new digitization and restructuring of services changed the way hubs work in Wales. However, Welsh creative hubs still face a number of challenges including insecure financial sustainability and limited recognition by policy makers even though they take an important role in creating concrete measures for societal development goals. Brexit has had a severe impact on creative hubs in Wales which could has impacted the international outreach work of Welsh hubs. Our research showed that there is still room for new ambitions in the creative hub landscape in Wales, which can play an evolving and more significant role in innovation, inequality, sustainability and internationalisation in the local creative industries.

www.britishcouncil.org

1 Introduction

This research was conducted by the Creative Economy Unit at Cardiff University[1], who were commissioned by the British Council to map creative hubs in Wales. This report is part of a wider piece of work for the British Council, to map creative hubs across all four UK nations. Their aim was to refresh their body of knowledge on creative hubs and their ecosystems. In 2020 and 2021, the Mapping of Creative Hubs in Scotland report[2] and the Mapping of Creative Hubs in England report[3] were published.

The main objective of this report is to contribute to this body of work by providing a record of creative hubs in Wales. This report is an update to a study that was conducted in 2017-2018. The initial research report focused primarily on the economic impact of creative hubs. The ambition of the British Council is to extend this approach and recognise a need for a more holistic resource that analyses other areas of impact, both for the sector and stakeholders outside the sector.

1.1 Objectives

This report is intended to be an up-to-date resource for advocating to partners, funders, policy makers, etc. It also serves as a tool for Welsh creative hubs themselves, facilitating their understanding of who their peers are and what their

---

[1] The Creative Economy Unit was established in 2014 to support the city's creative economy and encourage people to work together to raise the city's ambitions in this area: https://www.cardiff.ac.uk/creative-economy

[2] Available online at https://creativeconomy.britishcouncil.org/media/resources/Mapping_Creative_Hubs_In_England_.pdf

[3] Available online at https://creativeconomy.britishcouncil.org/media/resources/Mapping_Creative_Hubs_Scotland_report.pdf

shared experiences or challenges look like. The concrete objectives of this research were to:

- Understand where creative hubs are situated across Wales,
- Characterise the baseline attributes of Welsh creative hubs,
- Understand how hubs operate,
- Understand the challenges that they face,
- Characterise how they collaborate internationally,
- Understand their cultural, social, and economic impacts.

The report also aims to be a means of promoting the Welsh creative economy to a wider audience, as well as a tool for comparing general trends within creative hubs, across all the UK's nations.

1.2 Methodology

Using the above definition,[4] we have identified 148 creative hubs across Wales, of which we have managed to obtain contact information for 121. We acknowledge that the total number of creative hubs presented in this report might be incomplete and suspect that many emerging and smaller hubs may not have been identified in the research process.

We surveyed the identified hubs.[5] We devised a short and simple online survey with 25 questions of substance which we sent out in two waves. The first one was in

---

[4] The definition of a creative hub is 'a physical or virtual place that brings enterprising people together who work in the creative and cultural industries'. See British Council: Creative Hubs and Communities, or nesta: The value of creative hubs, 16 August 2018.

[5] Note that we were unable to contact 15 of the hubs mapped. It is possible that some of these hubs have ceased their activity, which may partly be attributable to the onset of the Covid-19 crisis. Nevertheless, we have been unable to reach a conclusion about their current state of operations, which is why we have not removed them from the sample.

www.britishcouncil.org

April-May 2022 and the second in June 2022. We received responses from 34 creative hubs.

Given the relatively small number of responses, we are not always able to report exact percentage breakdowns of the answers. Therefore, we have aggregated answers in these cases, and prepared approximate percentage breakdowns. To conduct a robustness check of our work, we attempted to juxtapose the map in Figure 1 below with the geographic distribution of employment in the Welsh creative sectors, as identified by the DCMS.[6] The two maps appear to be very similar, especially with regards to large concentrations in South Wales (Cardiff, Newport and Swansea), significant activity in North Wales and relatively little creative employment and few creative hubs in Mid Wales. This similarity indicates that there is no systematic over- or underrepresentation of any particular area in our identification of creative hubs.

Overall, we aimed to identify with this data set and the emerging themes, structures and relevant topics that can help us to describe the current creative hub landscape in Wales.

---

[6] To see the map, please consult Fodor, M. M., Komorowski, M. & Lewis, J. (2021). Clwstwr Creative Industries Report No 1.2 – REPORT UPDATE: THE SIZE AND COMPOSITION OF THE CREATIVE INDUSTRIES IN WALES IN 2019. Clwstwr publication series, Cardiff, Clwstwr. (p. 12.) Online available via https://clwstwr.org.uk/sites/default/files/2022-02/Creative%20Industries%20Report%20No%201.2_Final_compressed.pdf

2 The creative hub landscape in Wales

2.1 Geography

**Figure 1: Location of creative hubs in Wales**

www.britishcouncil.org

A large majority of all the Welsh creative hubs that we identified are in either South-East or in Northern Wales. 51% percent of the hubs that were contacted for this study are in Cardiff and Newport, while 15% of them are in Swansea. 25% of Welsh creative hubs are in Northern Wales, mostly in Llandudno, the northern tip of Wales and Anglesey. There are few creative hubs in Mid Wales. Most of the Mid Welsh hubs that we have identified are in Aberystwyth. A cartographical overview of Welsh creative hubs' geographical positions is given in Figure 1 above.[7] We provide a list of the creative hubs on the map in the Appendix to this report.

The reach of Welsh creative hubs appears not to be too broad as Figure 2 shows. Around a third of all hubs operate with office and creative spaces at the local (neighbourhood) level, congregating creatives residing in the immediate vicinity of the hub. Around a fifth of all respondents boast a city-wide reach, while approximately 29% have a broader, regional scope. Only less than 20% of all creative hubs cater to members or partners at the national or international levels.

**Figure 2: Welsh creative hubs' reach**

---
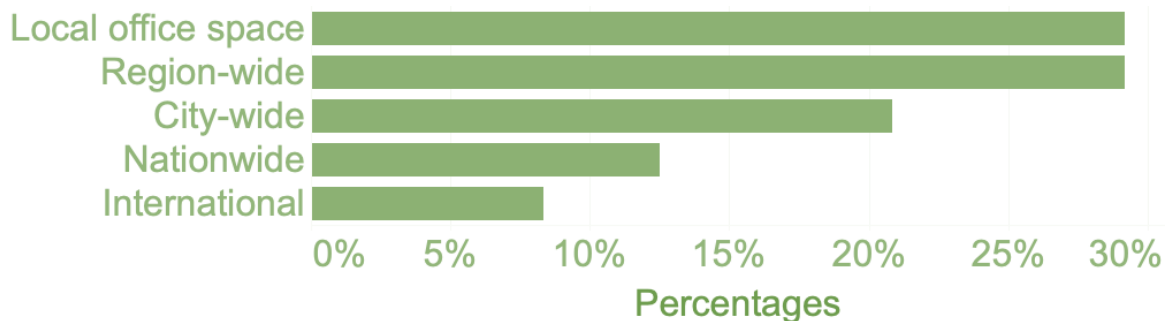
[7] Please note that the geographic localisations of the 34 hubs that have been surveyed are quite representative of the entire population of creative hubs that we have contacted for this study. Roughly 50% of our respondents operate in South-East Wales and 30% in North Wales. The remaining portion of respondents are in Mid Wales.

www.britishcouncil.org

Even though only less than 10% of Welsh creative hubs delineate their scope as international, their cross-border collaboration efforts are not negligible. Naturally, hubs with a local focus can branch out internationally on occasion.

More than a third of all respondents report having established international agreements and partnerships with individual creatives, organisations, or other hubs (see Figure 3 below). A quarter of Welsh creative hubs have advanced beyond this level and report co-creating new products and methodologies with international partners or produce output that has an international reach. Approximately one fifth of all respondents report co-organising events with hubs from other countries or nations. At the same time, the total absence of international collaboration (or the presence of only a very loose form of international partnership) is relatively rare and applies to roughly one sixth of Welsh creative hubs.

**Figure 3: International collaboration emanating from Welsh creative hubs[8]**

---
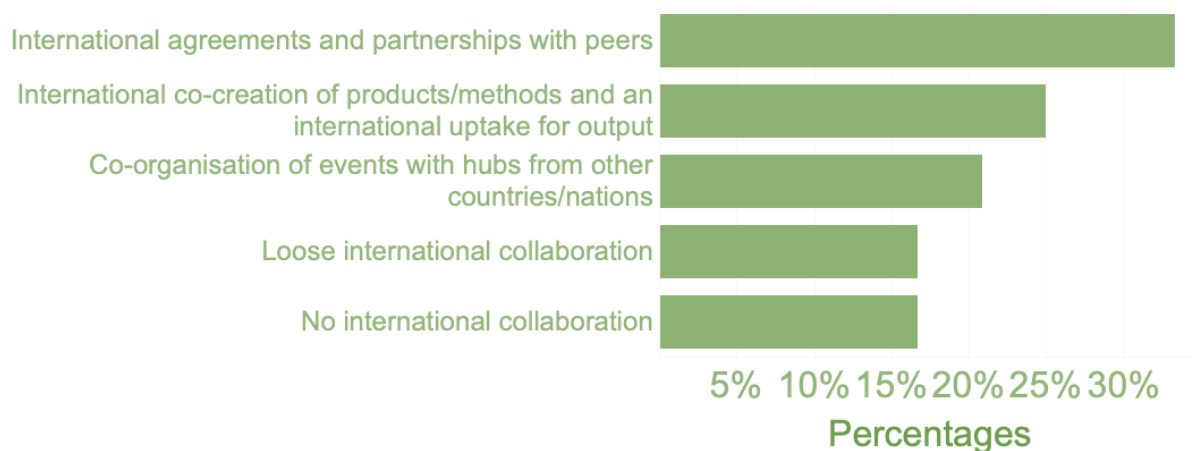
[8] Note: Percentages may sum up to more than 100, as respondents had the opportunity to tick more than one box.

www.britishcouncil.org

2.2 Profile

2.2.1 Modes of operation and attributes

As shown in Figure 4 below, a significant portion of the respondents to our survey (almost 50%) are well-established hubs that have been operating for 15 years or more. Somewhat surprisingly, roughly 12% of respondents have been established since 2019, despite Covid-19. Approximately a third of respondents have been operating for more than 6, but for less than 15 years.

**Figure 4: Operation longevities of creative hubs in Wales**
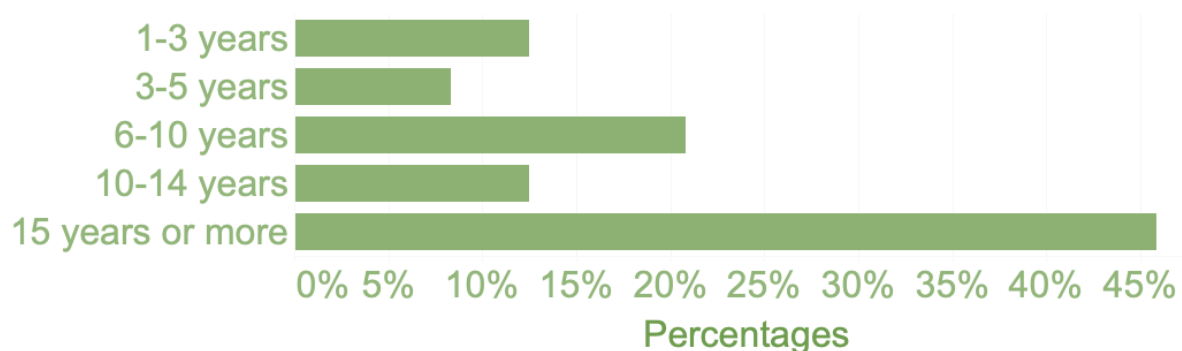
As Figure 5 below indicates, most creative hubs in Wales are physical centres, hosting various amenities and providing a shared space for the creative process. Roughly 50% of all respondents identified as such a centre. Around a sixth of all creative hubs answering our survey identify as a studio space, which has a broad definition in our study. This definition does not only include recording or filming studios, but small-scale co-working spaces as well.

Roughly 10% of respondents identify their hub as a network, which is a collective of dispersed individuals and businesses. Such networks do not necessarily possess a physical space but may organise face-to-face events on a regular basis. Another roughly 10% of our respondents fit in the "alternative" category. This includes hubs focusing on R&D, experimentation, and research, developing, and sharing best practices or new products both within and outside of their boundaries.

14

Approximately 20% of creative hubs do not identify themselves as belonging to any of these pre-defined categories. These hubs generally report that they focus on training, education, virtual co-creation and on the organisation of collective work done by dispersed studios.

Figure 5: Types of Welsh creative hubs
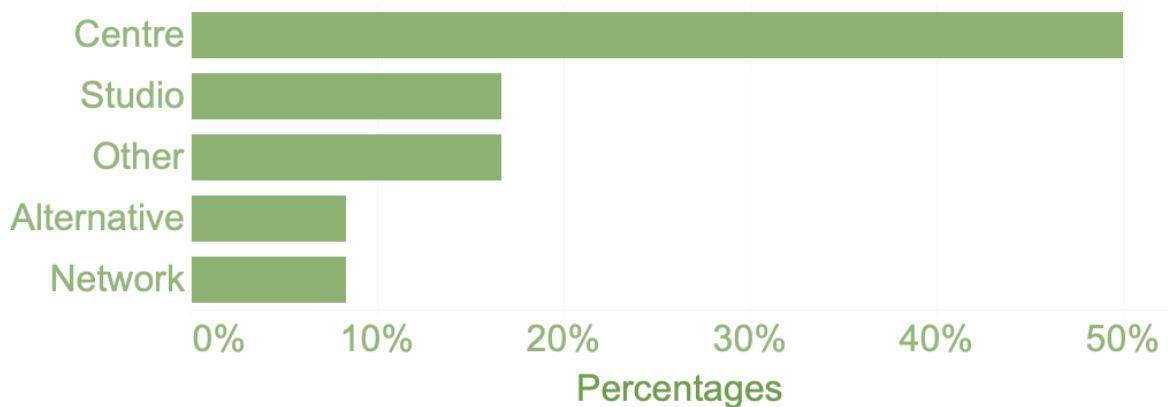
As Figures 6 and 7 indicate, most creative hubs in Wales are non-profit organisations in one way or another. Roughly 37% of all respondents report having a charitable aim, while another 25% are non-profit organisations, social ventures or operate as a unit within a university. Approximately 16% of hubs report to be operating for profit. The remaining hubs have other financing forms, such as public subsidies or being integral units within local authorities.

**Figure 6: Operating forms of Welsh creative hubs**

www.britishcouncil.org
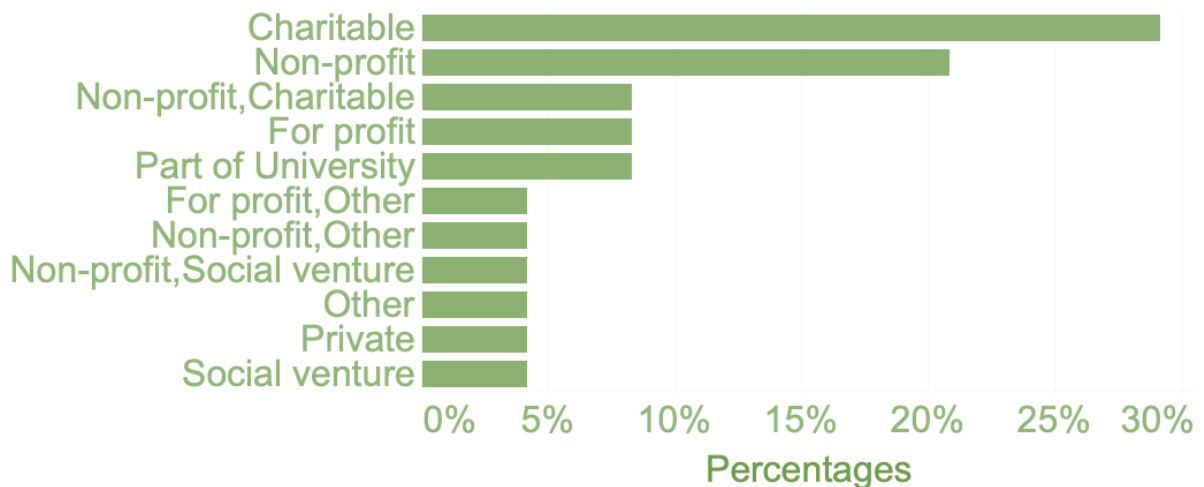
Even though most Welsh creative hubs are non-profit organisations, more than 70% report receiving earned income for their services, while only around half of all respondents receive public funding. As Figure 7 shows, a majority (roughly 58%) of creative hubs benefit from project-related, sporadic funding. Only 16% of our respondents claim that they receive private investment, which is in line with the findings reported in Figure 4 (that roughly 16% of all creative hubs are for-profit organisations). Around 30% of hubs benefit from other sources of funding, such as team investment, crowdfunding, trust funds and grants, etc.

**Figure 7: Financing sources for Welsh creative hubs**
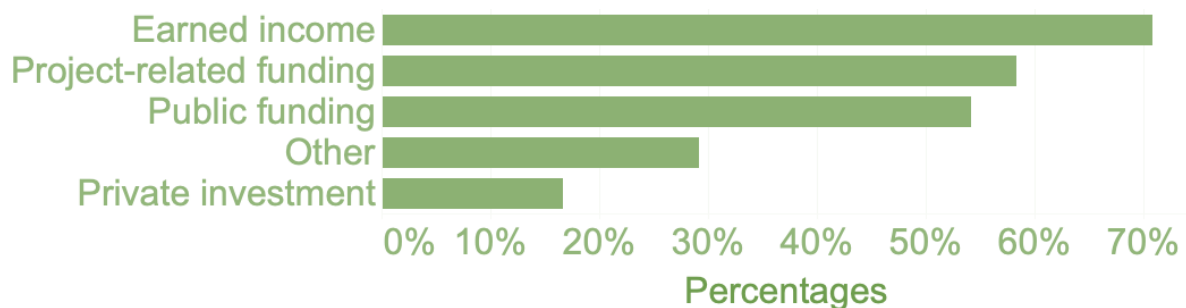
Most Welsh creative hubs cater to individuals or organisations active in music, performing and visual arts, see Figure 8. Around three quarters of all respondents have reported involvement with this sector. Approximately 55% of creative hubs reach the crafts sector, which is quite surprising, given that crafts only account for a very small percentage of all creative activity in Wales (0.4% of total creative industries employment in Wales). This is visible on Figure 9 below.

Around one third of all respondents work with individuals or organisations in the design, motion picture, and television/radio sectors. Roughly 30% of all hubs are active in advertising and another 30% in publishing. Links to software development, gaming (interactive leisure software) and architecture are relatively rare. On average, each creative hub reaches 5 sectors.
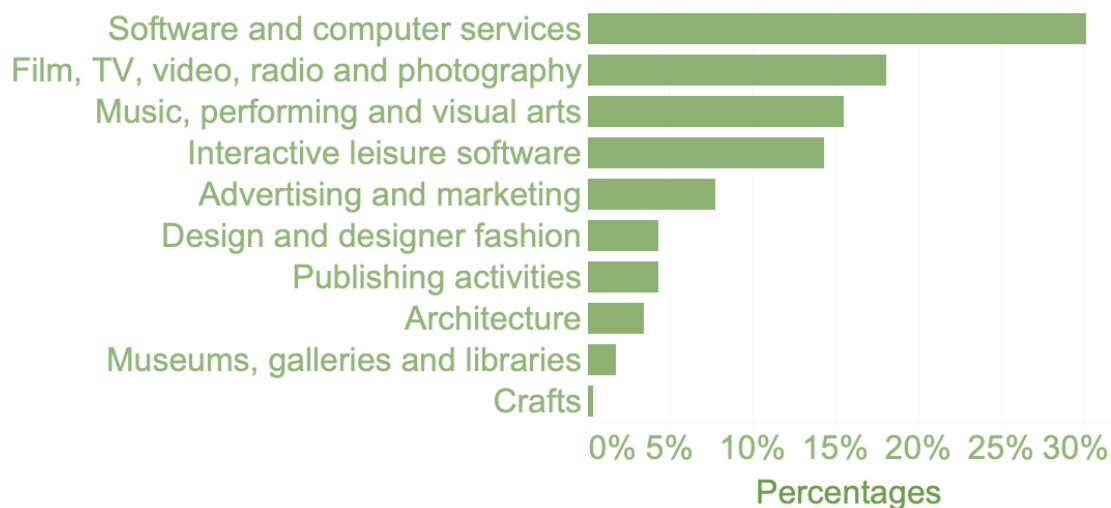
www.britishcouncil.org

Figure 8: Welsh creative hubs' sectoral reach

Percentages
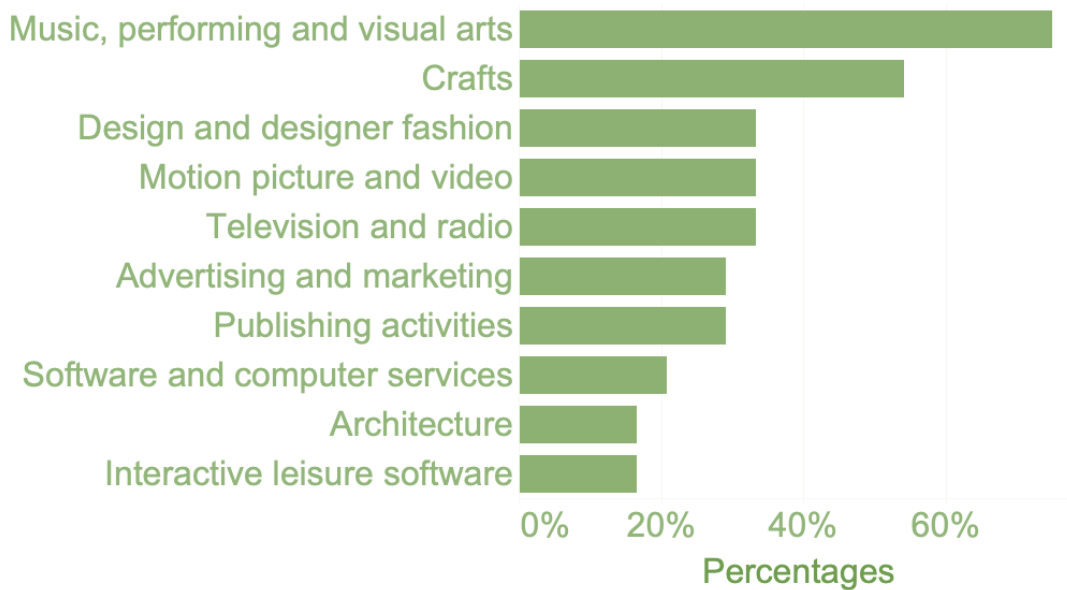
**Figure 9: Distribution of creative employment in Wales[9]**

Percentages

---

[9] Source: Fodor, M. M., Komorowski, M. & Lewis, J. (2021). Clwstwr Creative Industries Report No 1.2 – REPORT UPDATE: THE SIZE AND COMPOSITION OF THE CREATIVE INDUSTRIES IN WALES IN 2019. Clwstwr publication series, Cardiff, Clwstwr. (p. 8) Online available via https://clwstwr.org.uk/sites/default/files/2022-02/Creative%20Industries%20Report%20No%201.2_Final_compressed.pdf

17

2.2.2 Welsh creative hubs' members

All surveyed Welsh creative hubs employ full-time workers for organising and coordinating their operations, as Figure 10 shows. Around half of our respondents report employing more than 8, but less than 17 FTE workers. Roughly 40% of Welsh creative hubs employ less than 8 people. At the same time, more than 10% of them employ 17 or more people, some even exceeding the 50-employee mark based on the survey data.

Figure 10: Number of FTEs employed by Welsh creative hubs
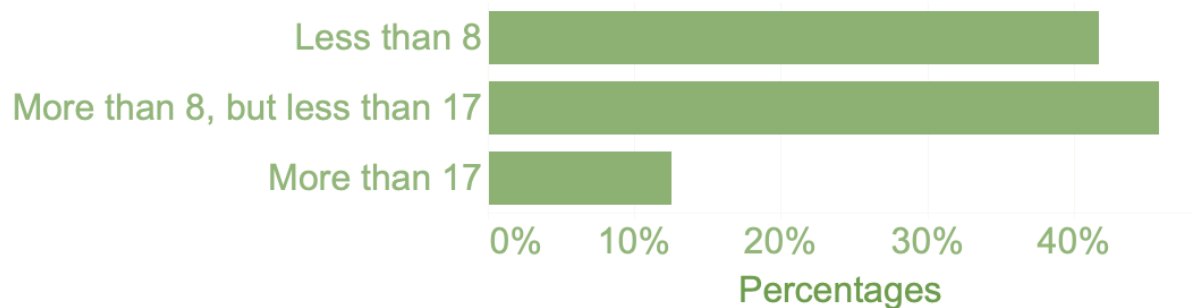
In terms of hub membership, the distribution appears to be bimodal, meaning that two polar opposites are the norm simultaneously. This finding is visible in Figure 11 below. Welsh creative hubs either have a relatively small number of members (between 10 and 50), or many of them (more than 1000). Roughly a third of hubs fall in the former category and a quarter in the latter. Very small hubs are also not uncommon, with membership sizes not even exceeding 10. Roughly 13% of respondents report to be such small (niche) hubs. Overall, about 27% of Welsh creative hubs have more than 50, but less than 1001 members.

Figure 11: The number of members that Welsh creative hubs have
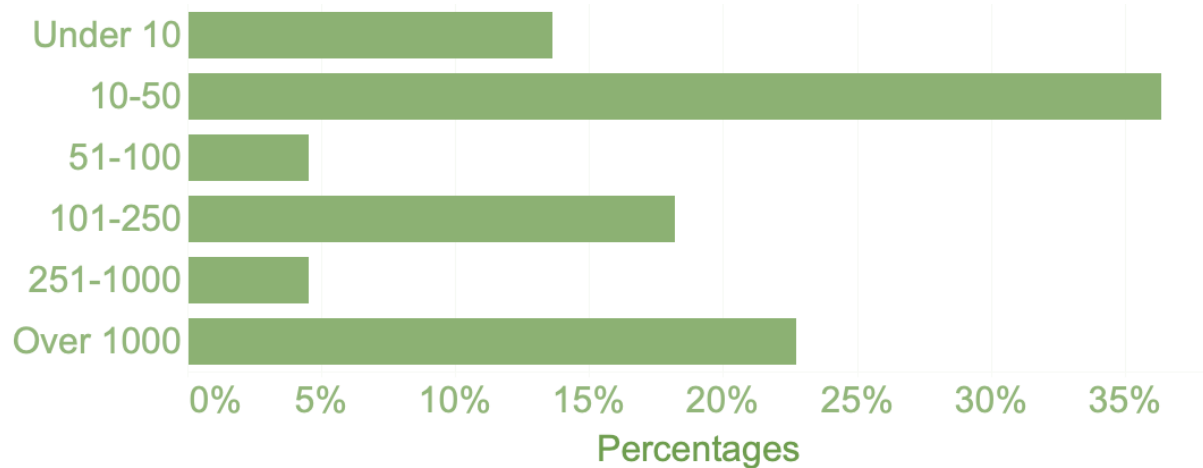
More than 75% of Welsh creative hubs state that their typical members are between 31 and 50 years of age. Hubs catering to a very young (18-30), or a more senior (61 or over) membership population are also not uncommon. This applies to roughly 25% of all Welsh creative hubs, as Figure 12 shows.

**Figure 12: Average age of Welsh creative hubs' members**
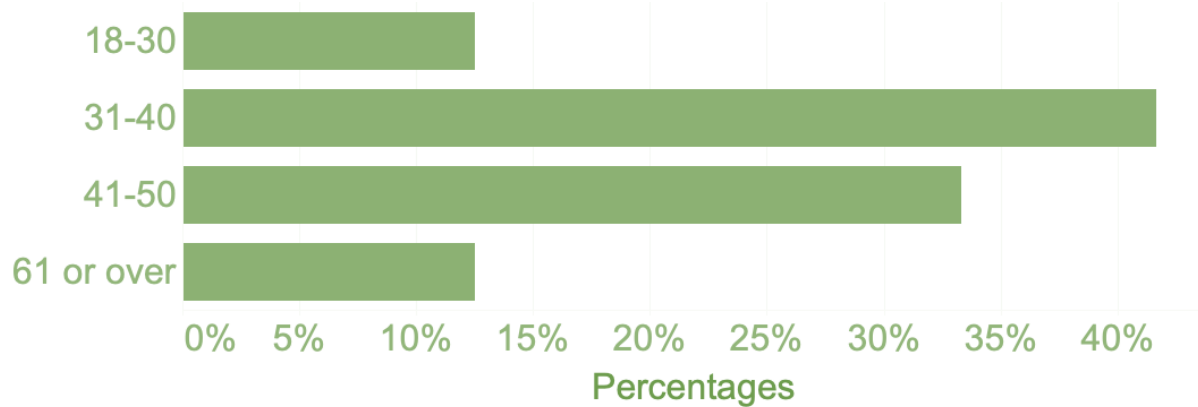
We asked Welsh creative hubs how they would characterise the diversity of their members compared to local demographics. This question operates under the

www.britishcouncil.org

assumption that respondents have a good grasp on local demographics in terms of ethnicity, nationality, sexual orientation, religion, etc.[10]

The results of our inquiry seem to suggest that Welsh creative hubs do not consider themselves to have particularly diverse members. Only 25% of all respondents consider the composition of their membership bodies to be either diverse or very diverse, as Figure 13 shows. It might be the case that hubs that report being "not diverse at all" or "not particularly diverse" overestimate diversity within their local demographics, or that there is inherently little to no interest in the hub's activity from diverse individuals locally. In any case, around 37% of respondents estimate that their membership compositions are not diverse.

Figure 13: How diverse are Welsh creative hubs' members?
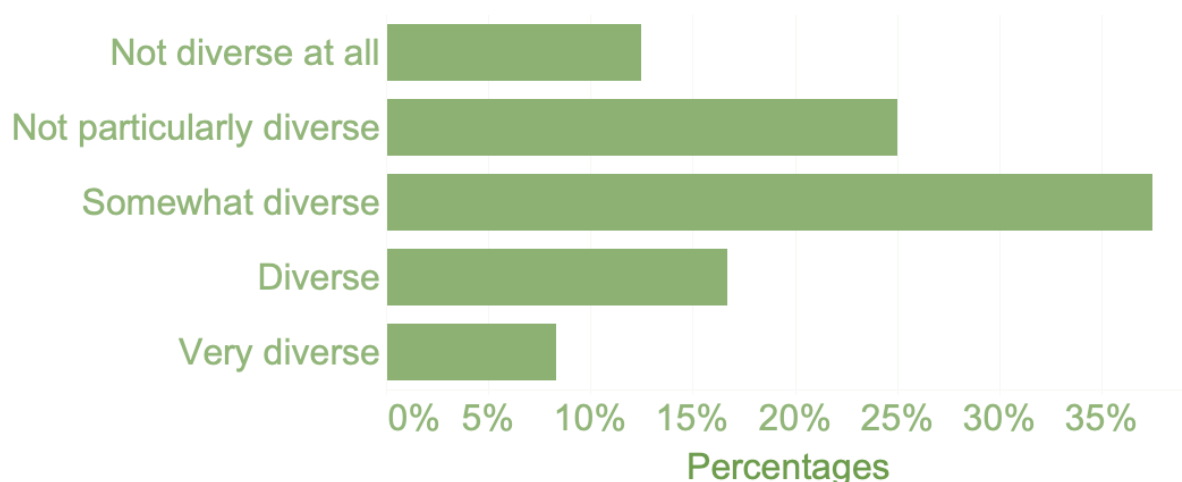
Creative hubs reach people beyond the confines of their respective membership groups. We asked hubs how many people they reach on a yearly basis. The results of this inquiry are shown in Figure 14 below. All external collaborators are included in

[10] Even if this is not the case, we expect errors in judgement to asymptotically cancel each other out across the sample. This means that over- or underestimations of particular characteristics within local populations happen at the same time, bringing the expected total error close to zero. Naturally, there is a chance that this assumption does not hold true for our sample.

www.britishcouncil.org

this number, as well as workshop and event attendees. We find that more than 75% of all Welsh creative hubs reach more than 200 people and almost a half of them interact with more than 5000 individuals.

Figure 14: The number of individuals reached by Welsh creative hubs during a typical year (includes event attendees and external partners).
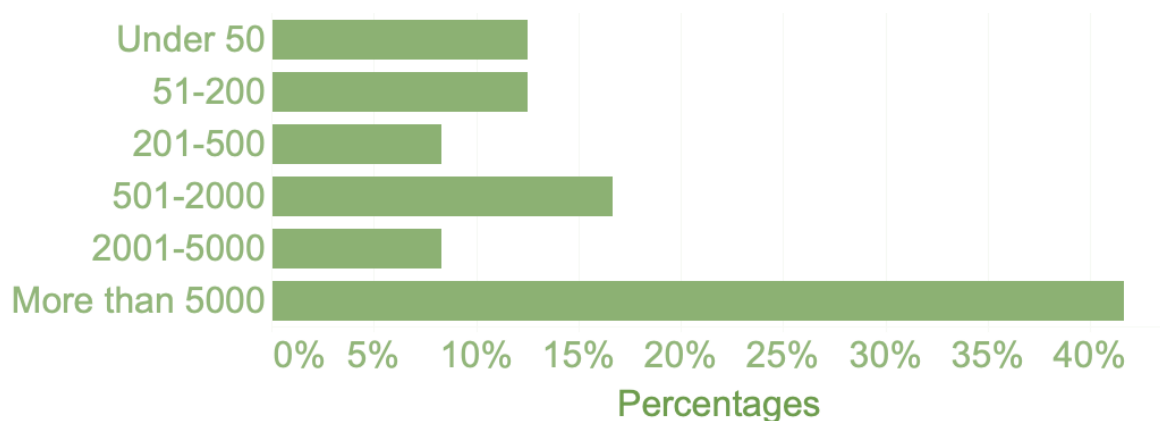
3 Activities and mission

## 3.1 Facilities and amenities

Creative hubs in Wales offer a wide range of facilities and amenities. Each of them offers approximately 6-7 services from the set listed below in Figure 15. Roughly two thirds of all creative hubs in Wales offer opportunities for showcasing events, studio spaces and training/workshops. Almost 60% of all respondents have venue hire services. Around a half of all respondents operate cafes, offer networking events and online resources. Approximately 45% of Welsh creative hubs have rehearsal space at disposal, but only 40% of them offer open membership that is not based on invitation or project involvement.

Around a third of all respondents feature co-working spaces, access to academic institutions, or to equipment. More than a quarter of hubs provide retail opportunities for new products and one-to-one business support (consultancy, mentoring or coaching). More than 10% of all respondents offer grants to creative incubation for

21

start-ups, bookshop, and promotion opportunities (most often via online listings). Less than 10% of hubs provide loans to creatives.

Figure 15: Facilities and services provided by Welsh creative hubs
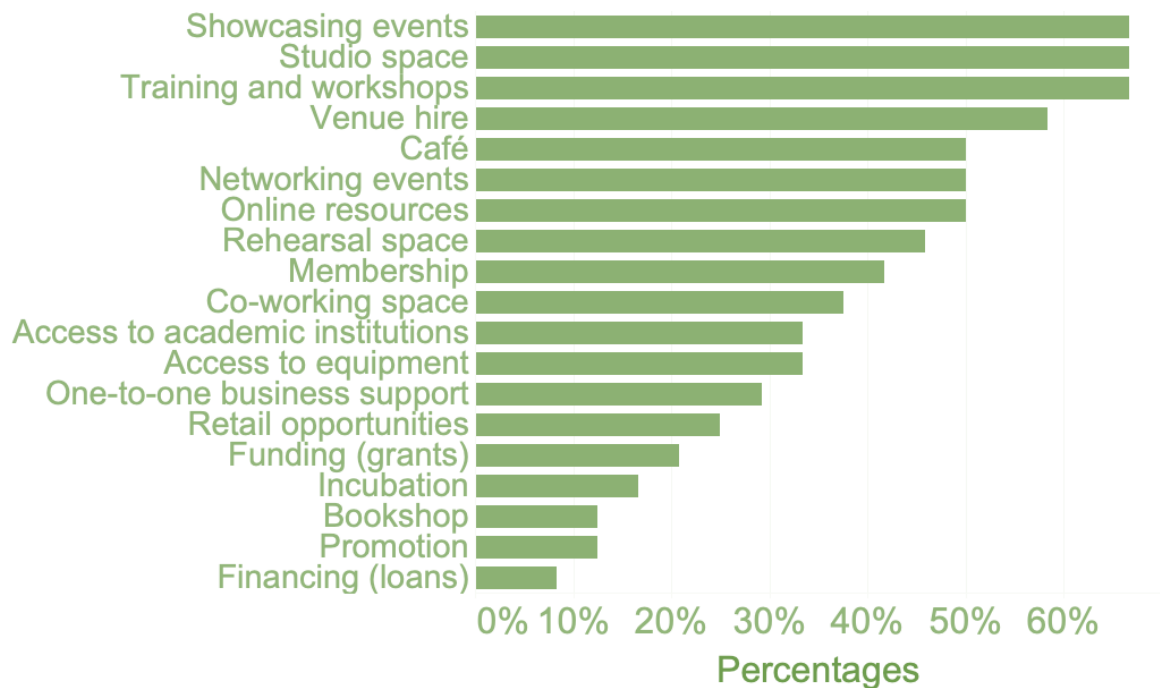
3.2 Commitments to the UN Sustainable Development Goals

We asked Welsh creative hubs about their commitments to those of the UN's Sustainable Development Goals that are most relevant for creative industries in general. We identified 9 such goals. These include:

- No poverty,
- Good health and wellbeing,
- Quality education,
- Gender equality,
- Decent work and economic growth,
- Industry, innovation and infrastructure,
- Reduced inequality,

www.britishcouncil.org

- Sustainable cities and communities,
- Responsible consumption and production.

We found that more than 83% of all Welsh creative hubs take active measures towards at least one of these goals and on average, each hub takes concrete steps towards 5-6 of them. Respondents have also identified the nature of these measures. We report the quantitative and qualitative findings of our survey below.

No poverty

50% of Welsh creative hubs report making active efforts to contribute to the UN's "no poverty" agenda. Such efforts include free membership statuses to creatives in need, paying living wages to employees, sourcing inputs from local purveyors exclusively. Other hubs report organising events and spectacles without admittance fees, which are accessible not just to members, but for the general public as well.

Good health and wellbeing

Roughly 75% of creative hubs report some level of commitment to this sustainable development goal. Many of these hubs report serving healthy food on their premises, providing community allotments, organising mental health workshops and nature walks or sporting events.

Quality education and training

Approximately 60% of respondents report organising activities or providing aid and resources to contribute to training and education locally. Some creative hubs work together with local schools to aid with their curriculum design and to provide online resources. Other hubs organise training workshops to help creatives market and sell their work. A number of hubs report organising apprenticeships and internships.

Gender equality

www.britishcouncil.org

Roughly half of Welsh creative hubs are taking active steps towards ensuring gender equality. Numerous hubs report ensuring gender parity in employment and the elimination of a gender pay gap. Some hubs provide truly equal opportunities to all members and employees, while others take pride in the high incidence of female studio occupancy. Numerous hubs aim to balance the genders of invited speakers and strive for gender parity in leadership positions as well.

Decent work and economic growth

Almost 75% of Welsh creative hubs are committed towards this goal. Numerous hubs mention paying living wages or being members of the Living Wage Foundation and paying according to their guidelines. Numerous hubs believe that their pay rates are in line with industry standards. Some hubs provide job placements for their volunteers. A number of hubs engage in improving employee wellbeing by cutting long commutes and by providing upskilling opportunities.

Industry, innovation, and infrastructure

Approximately 40% of our respondents report making strides towards this goal. Some of these hubs have invested in state-of-the-art infrastructure, such as ultra-high-speed internet. Others take steps towards ensuring that newest technologies are adapted in a timely manner. Numerous hubs report fostering R&D. Others are committed to developing innovative methods and ideas.

Reduced inequality

A third of our respondents make practical steps towards this goal. Numerous hubs boast diverse direction boards and audience bases. Others are making strides towards increasing the diversity of staff. Some hubs are using grant funding to support the inclusion of marginalised communities making strides towards this goal.

Sustainable cities and communities

www.britishcouncil.org

Approximately 30% of Welsh creative hubs take steps towards the development of sustainable cities and communities. Numerous hubs monitor their carbon footprints. Others have devised green statements for their operations. Some hubs organise sustainable events and workshops.

Responsible consumption and production

Roughly 20% of Welsh creative hubs are engaged towards this goal. Some contribute towards it by encouraging small, sustainable business start-ups in their local neighbourhoods. Others have eco-friendly production policies in place. Some hubs engage in recycling, reusing, and reducing (waste). A large number of hubs report a commitment to fair trade and to sourcing from local suppliers.

3.2 Impact

3.2.1 Equality, diversity, and inclusion

We asked Welsh creative hubs how they articulate their goals towards ensuring equality, diversity, and inclusion ("EDI" henceforth). Any given hub was given the chance to specify more than one instrument. As shown in Figure 16, more than 70% of them explicitly define measures towards ensuing EDI in their mission statements. Roughly a third of them include EDI-related goals in their behavioural conduct statements. Only less than 10% of Welsh creative hubs report not articulating EDI-related goals and measures explicitly.

These results are somewhat contradictory to what we have introduced in subsection 3.1.7 above. Only one third of our respondents claim to make concrete steps towards reducing inequality, yet almost all creative hubs have some articulate EDI goal or commitment as Figure 16 suggests. There may be a disconnect between ambition and steps taken. A lack of resources could potentially stop certain ambitions from turning into concrete measures.

Figure 16: Welsh creative hubs' commitment and the means of their commitment towards equality, diversity, and inclusion
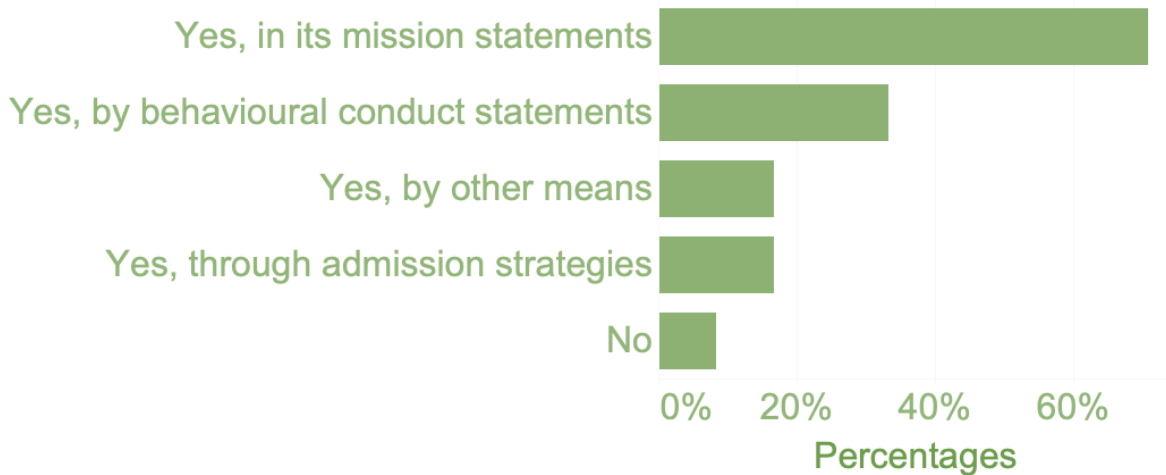

3.2.2 Goals

The respondents to our survey were given the chance to judge how important various, potentially relevant work areas are to them. These domains included:

- Enabling innovation and technological development,
- Education and training,
- Strengthening collaboration,
- Inclusiveness and diversity,
- Promoting the creative industries,
- Creating new firms and industry growth.

As Figure 17 below shows, almost all Welsh creative hubs attach some importance to enabling innovation and technological development. Roughly 50% of all respondents find this work area to be "extremely" or "very" important to them.

Figure 17: The importance of enabling innovation and technological development to Welsh creative hubs
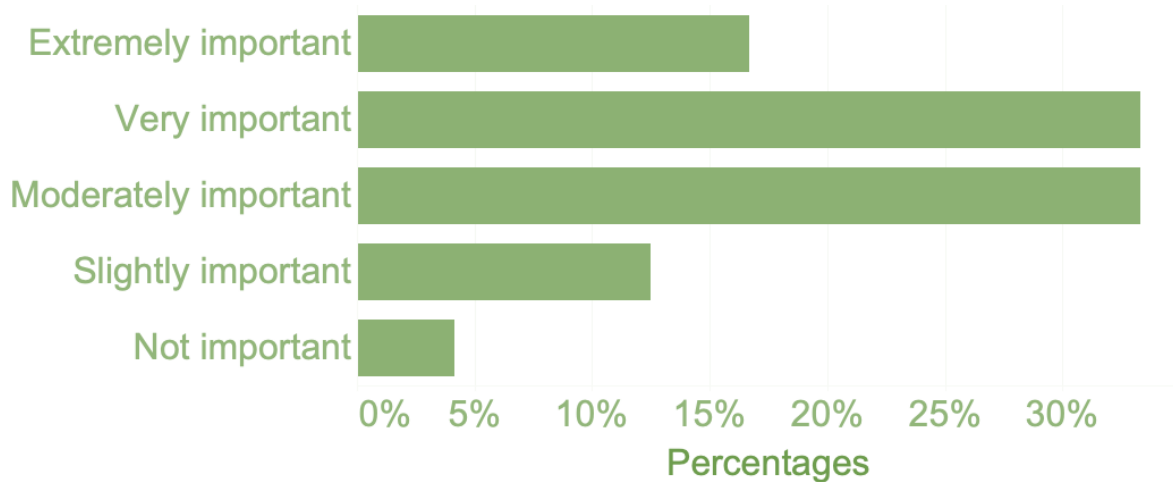
The importance of education and training is more preponderant for Welsh creative hubs, with almost 80% of them classifying this work area as "extremely" or "very" important. Less than 5% of all respondents do not attach any importance to the issue. These results are shown in Figure 18 below.

**Figure 18: The importance of education and training to Welsh creative hubs**
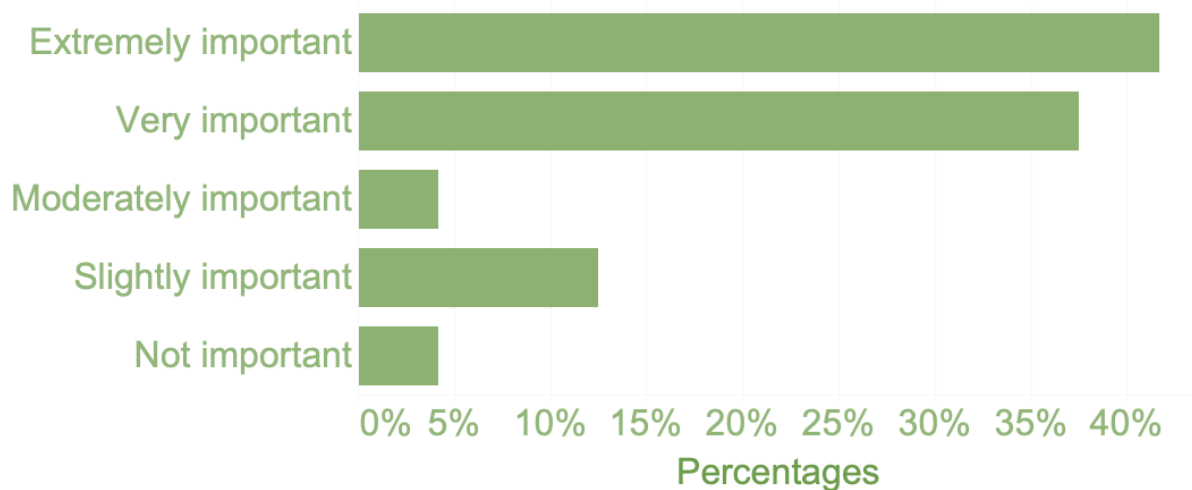
There is a strong consensus within the set of Welsh creative hubs that strengthening collaboration is important. All hubs report that this aim has at least moderate

www.britishcouncil.org

importance, but 95% of them classify it as either "very" or "extremely" important. This is shown in Figure 19 below.

Figure 19: The importance of strengthening collaboration to Welsh creative hubs
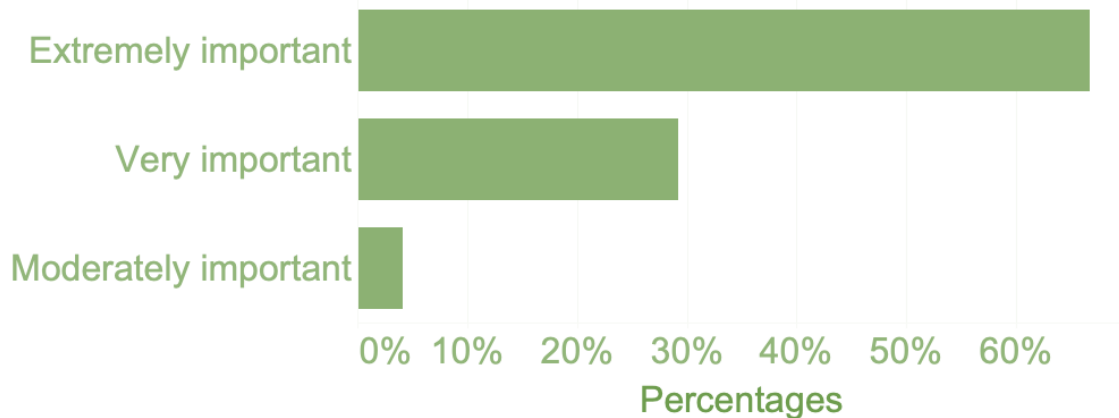

The results regarding the importance of the EDI work area are almost identical to the findings above on strengthening collaboration. However, even more hubs (more than 70% of them) have classified EDI as an "extremely" important domain. This finding is consistent with what is shown in subsection 3.2.1 regarding Welsh creative hubs' commitments towards EDI in their mission statements.

All Welsh creative hubs find the promotion of creative industries to be at least moderately important, with 80% of all respondents classifying it as "extremely" or "very" important. This is shown in Figure 20 below.

Figure 20: The importance of promoting the creative industries to Welsh creative hubs
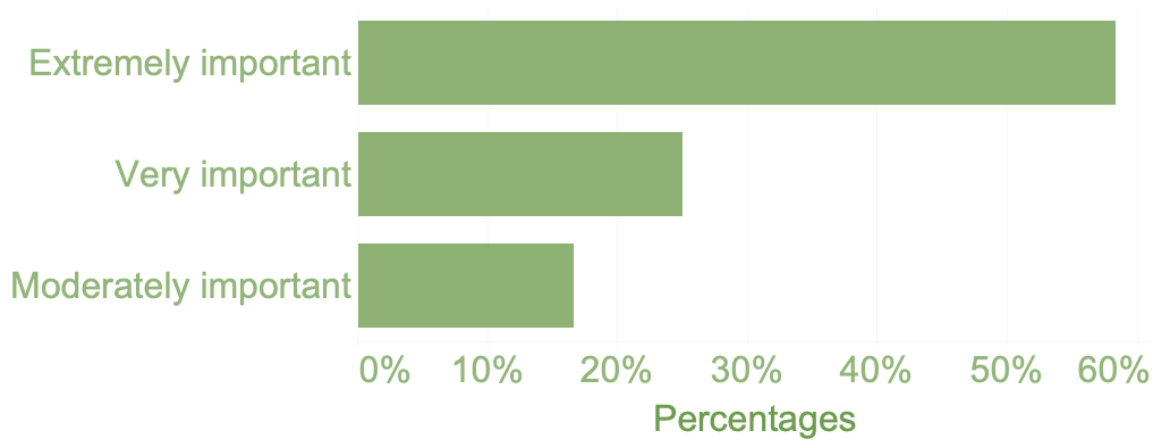
The creation of new firms and industry growth is the least important work area for Welsh creative hubs. Less than 30% of all respondents classify it as either "very" or "extremely" important. While only less than 10% of creative hubs attach no importance at all to this domain, the enthusiasm about this work area is clearly much smaller than for all the others above. This is shown in Figure 21 below.

Figure 21: The importance of creating new firms and industry growth to Welsh creative hubs

www.britishcouncil.org
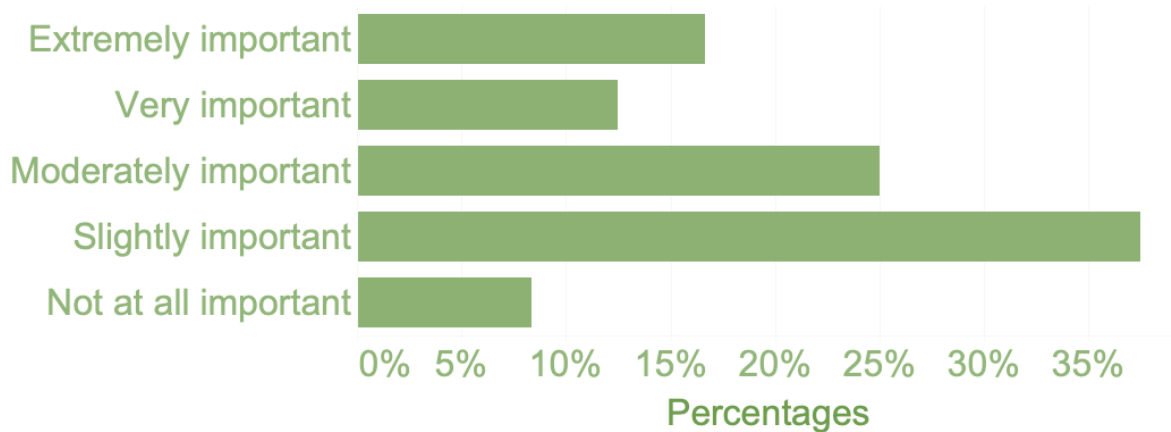
4 Outlook towards the future

4.1 Challenges

We have asked Welsh creative hubs about how they feel with regards to various challenges that may be relevant to them. These challenges include:

- Uncertainty of funding,
- The size of the workload,
- Proving value or facing the lack of external understanding of value,
- Reaching or attracting new creative businesses,
- Day-to-day management, and
- Internationalisation.

More than half of all Welsh creative hubs find the uncertainty of funding to be either a "very" or an "extremely" challenging problem, while only around 10% of all respondents do not find the issue challenging at all. This is shown in Figure 22 below.

Figure 22: The opinion of Welsh creative hubs regarding the potential issue of funding uncertainty

www.britishcouncil.org
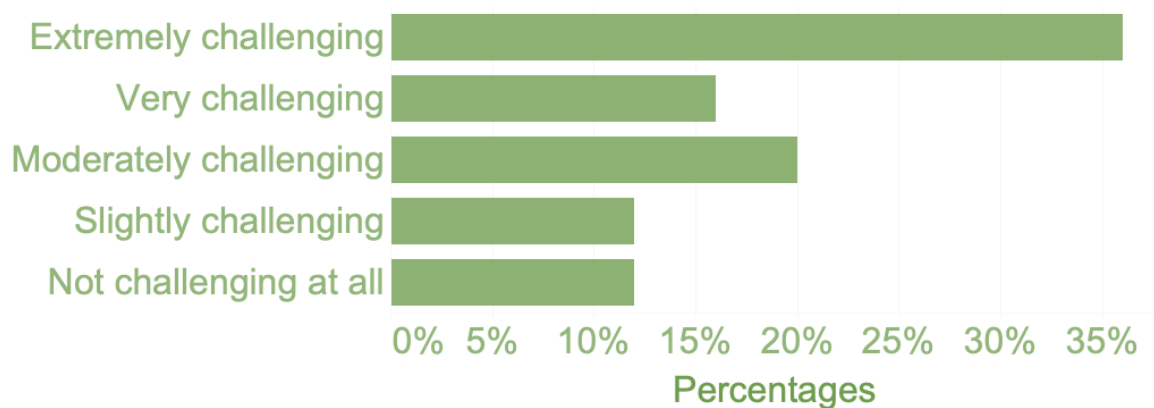
The size of the workload seems to be an even greater issue for Welsh creative hubs, with almost 60% of them finding it either "very" or "extremely" important. All hubs find this issue to be at least slightly challenging. This is shown in Figure 23 below.

Figure 23: The opinion of Welsh creative hubs regarding the issue of the size of the workload that they face
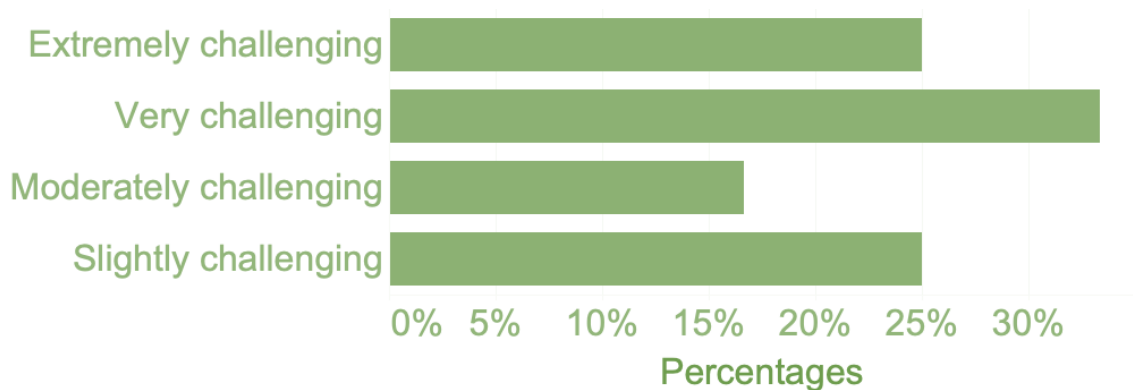
Roughly one third of all hubs find proving value to others to be "very" or "extremely" challenging. This is a lower percentage than for the other issues thus far. At the same time, less than 10% of all hubs find this issue not to be challenging at all, meaning that most hubs do face some degree of difficulty in this domain. The results are shown in Figure 24 below.

Figure 24: The opinion of Welsh creative hubs regarding the issue of proving value or facing a lack of understanding about purpose and value

www.britishcouncil.org
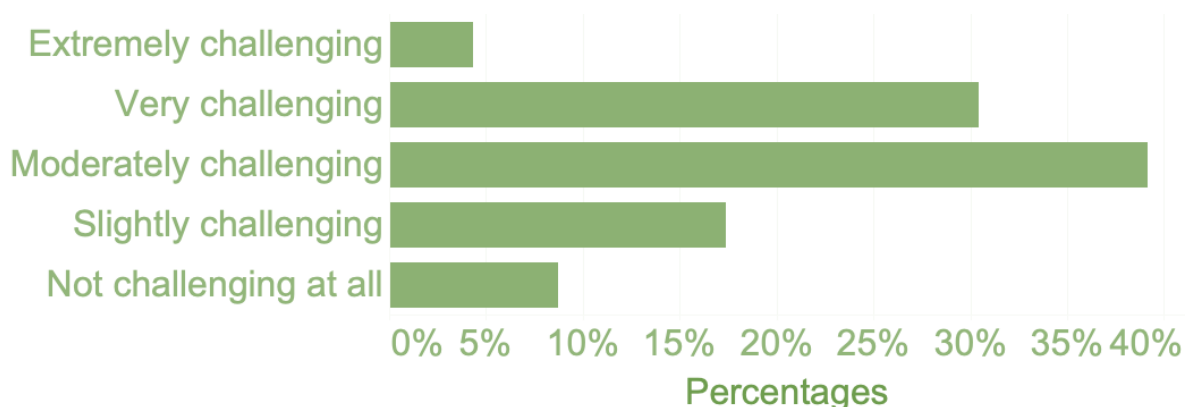
Reaching and attracting new businesses appear to be one of the smallest of Welsh creative hubs' challenges. In fact, not a single respondent found this issue to be "extremely" challenging. Around 15% of respondents reported that reaching new businesses is "very" challenging. Still, the issue is not negligible, as only slightly more than 10% of Welsh creative hubs find attracting new businesses not to be challenging at all. The results of this inquiry are shown in Figure 25 below.

Figure 25: The opinion of Welsh creative hubs regarding the issue of attracting or reaching new businesses
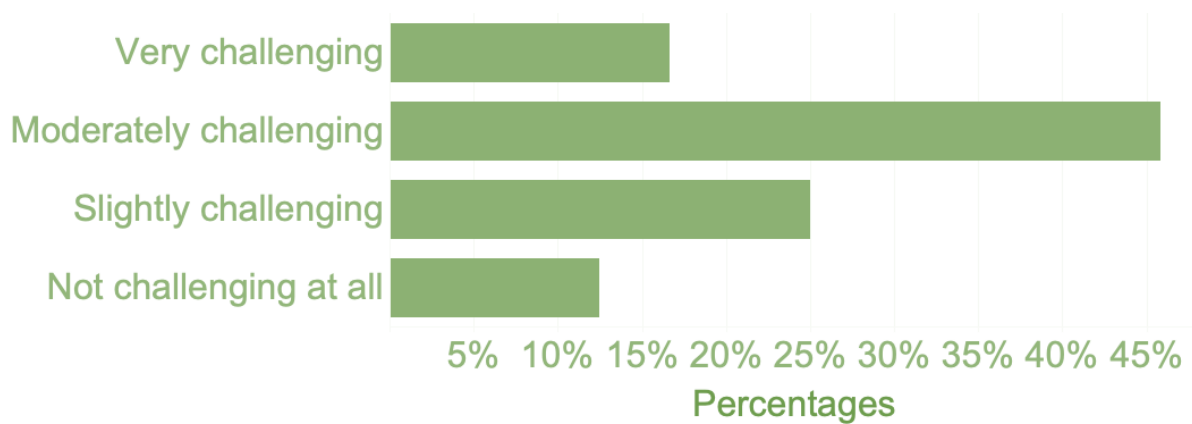
The day-to-day management of the hub seems to be an even smaller issue to Welsh creative hubs. Only slightly more than 10% of them think of it as a "very" challenging issue, while 20% of all respondents do not find it challenging at all. These results are shown in Figure 26 below.

Figure 26: The opinion of Welsh creative hubs regarding the issue of day-to-day management

www.britishcouncil.org
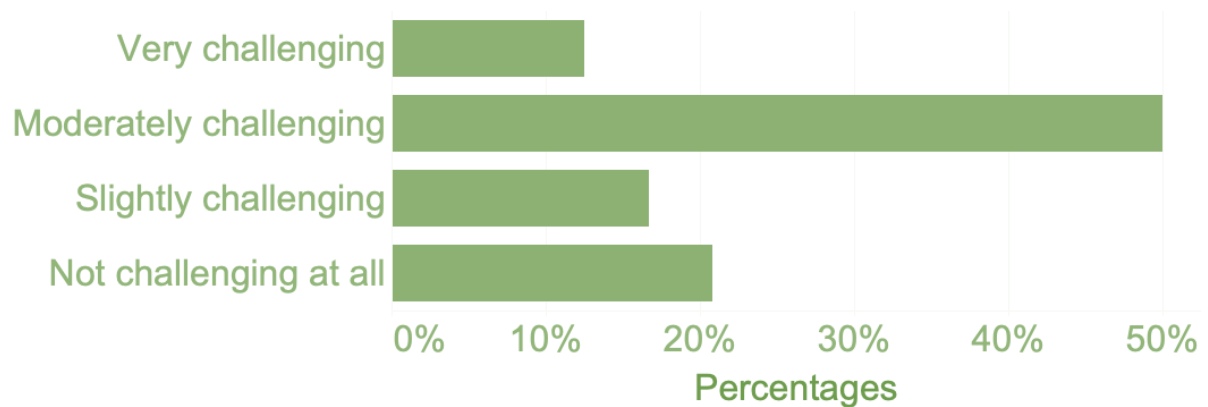
The results are similar regarding the issue of internationalisation, although around 15% of all respondents feel that the issue does not apply to them at all. This may be due to the localised nature of their activities and focus. Only slightly more than 10% of all respondents find the problem to be either "very" or "extremely" challenging. More than 20% of all Welsh hubs do not think that internationalisation is a challenging problem. The percentage breakdown of the answers to this question are shown in Figure 27 below.

Figure 27: The opinion of Welsh creative hubs regarding the issue of internationalisation

www.britishcouncil.org
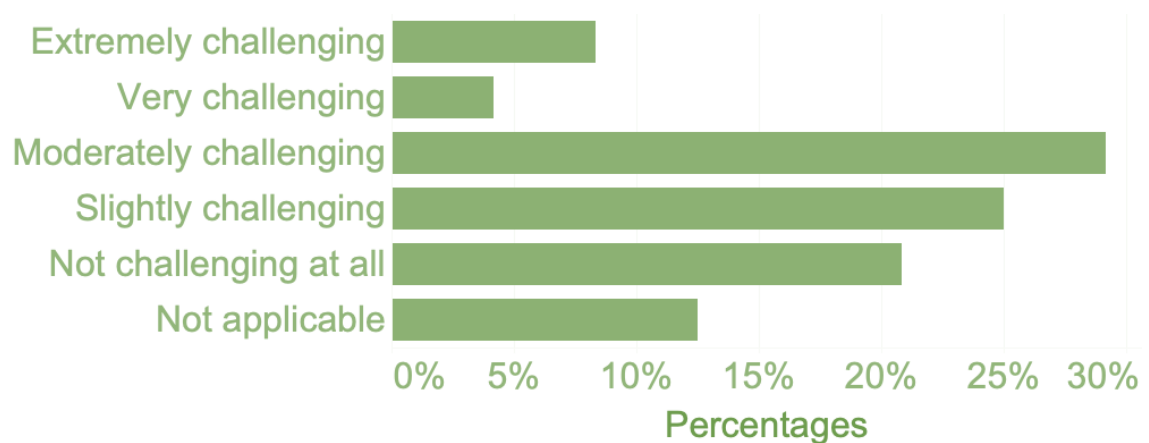
4.2 Confidence about future work

When asked about how confident Welsh hubs feel with regards to various challenges in the future, they identified the following:

- Increasing or sustaining membership numbers,

- Financial sustainability,

- Developing relationships and networks,

- Local or national political influence,

- Working with the local community,

- Increasing or sustaining services, programmes, and products and

- Adopting an innovative approach.

Roughly 80% of Welsh creative hubs feel either very confident or simply confident about increasing or sustaining membership numbers. This indicates strong growth potential for hubs in terms of membership reach. Only slightly more than 10% of all respondents feel more insecure or confident about this challenge. The results of this inquiry are shown in Figure 28 below.

Figure 28: The degrees of confidence that Welsh creative hubs have expressed regarding the challenge of growing/sustaining membership
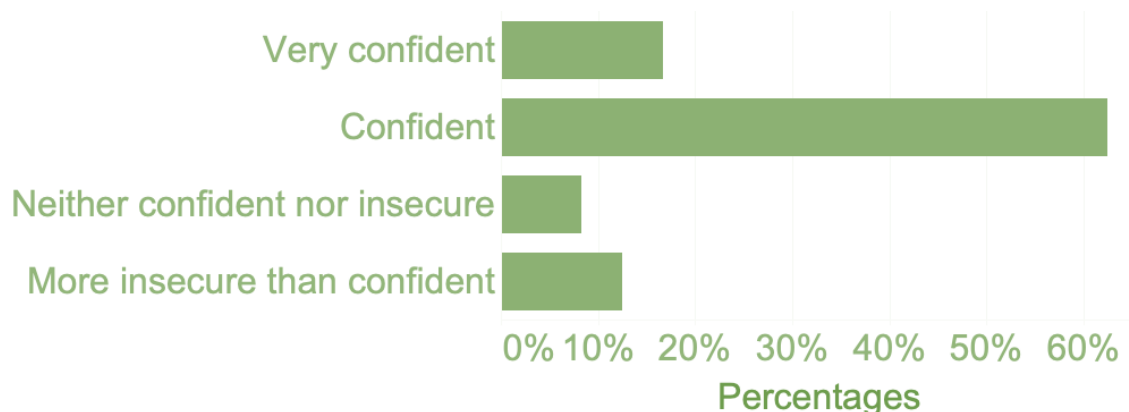

Creative hubs feel less confident, however, about financial sustainability as Figure 29 indicates. Around half of them feel at least somewhat confident about this

www.britishcouncil.org

challenge, but around a quarter of hubs feel more insecure than confident when it comes to finances. This is consistent with the findings shown in Figure 22, indicating that around half of all Welsh creative hubs find funding uncertainty to be a challenging issue.

Figure 29: The degrees of confidence that Welsh creative hubs have expressed regarding the challenge of financial sustainability
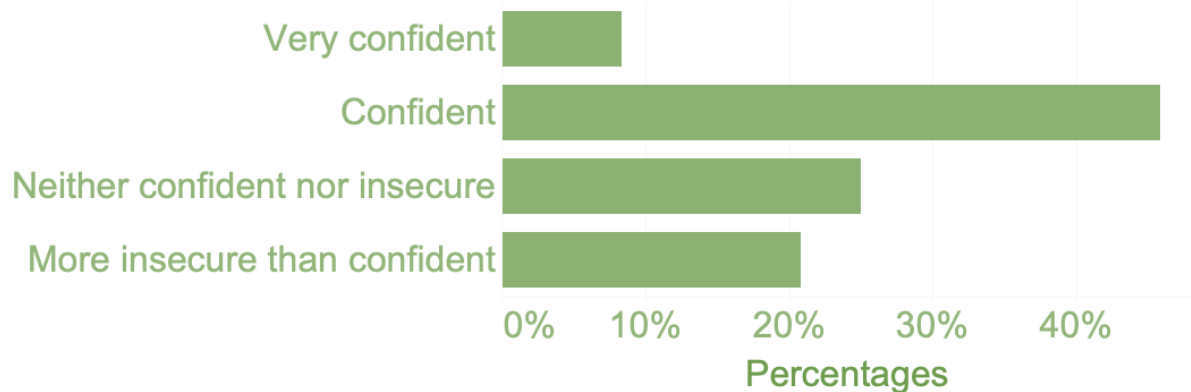
Almost all respondents are either confident or very confident about developing relationships or networks. In fact, no hub has expressed any insecurity about this issue. This is shown in Figure 30 below.

Figure 30: The degrees of confidence that Welsh creative hubs have expressed regarding the challenge of developing relationships and networks
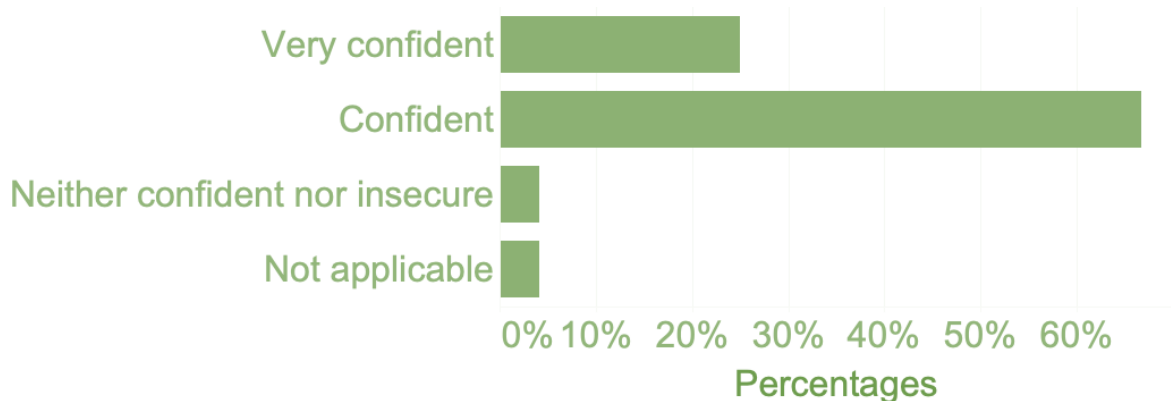
Welsh creative hubs feel slightly less confident about their local or national political influence. 50% of all hubs feel insecure about this challenge, or they have expressed

35

that they felt neither confident nor insecure about it. These findings are shown in Figure 31 below.

Figure 31: The degrees of confidence that Welsh creative hubs have expressed regarding their local or national political influence
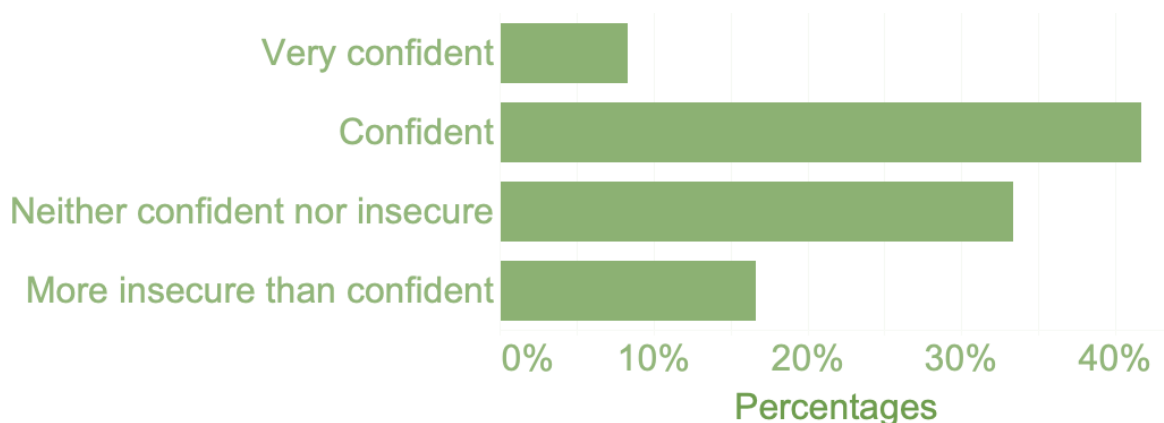
Working with the local community does not seem to be a concern for Welsh creative hubs. Almost all of them feel either confident or very confident about it, while no hubs have indicated feeling insecure about the challenge. These results are shown in Figure 32 below.

Figure 32: The degrees of confidence that Welsh creative hubs have expressed about working with their local communities

www.britishcouncil.org
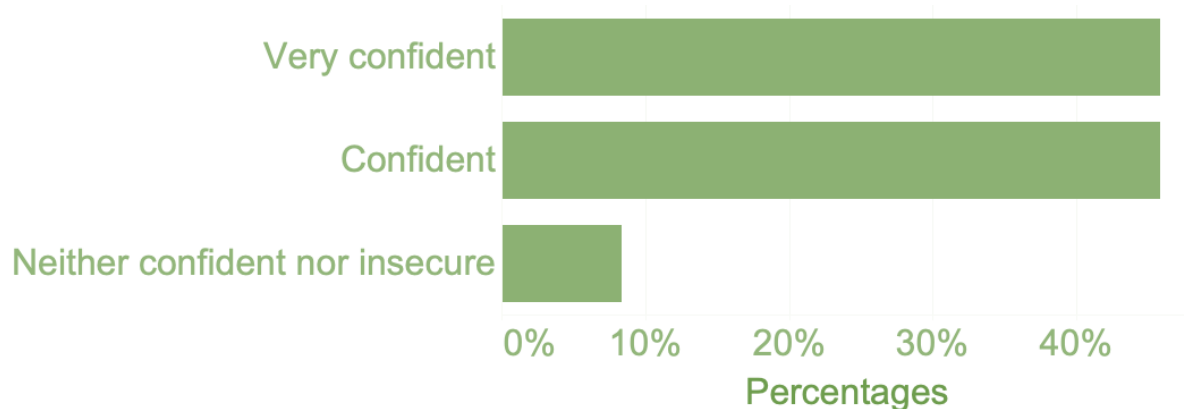
Welsh creative hubs seem somewhat less confident about increasing or sustaining the prevalence of new products, services, and programmes. That being said, insecurity about this challenge is relatively rare and occurs in less than 5% of all answers. At the same time, only a quarter of all respondents feel very confident about the issue. These results are shown in Figure 33.

Figure 33: The degrees of confidence that Welsh creative hubs have expressed about the challenge of increasing or sustaining services, programmes, and products
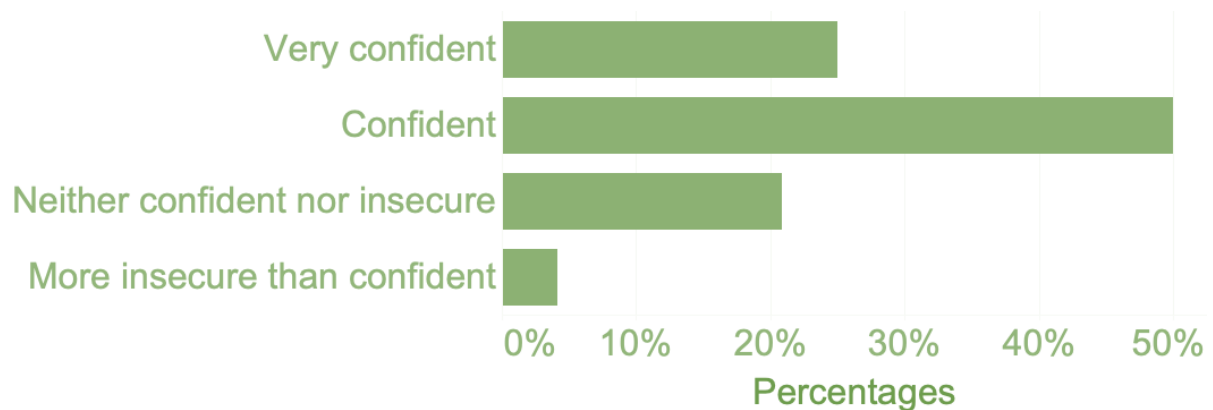
Roughly three quarters of respondents feel confident about being able to adopt innovative approaches to their operations. Only less than 5% of hubs feel more insecure than confident about this issue, as Figure 34 shows.

**Figure 34: The degrees of confidence that Welsh creative hubs have expressed about the challenge of adopting innovative approaches**

www.britishcouncil.org
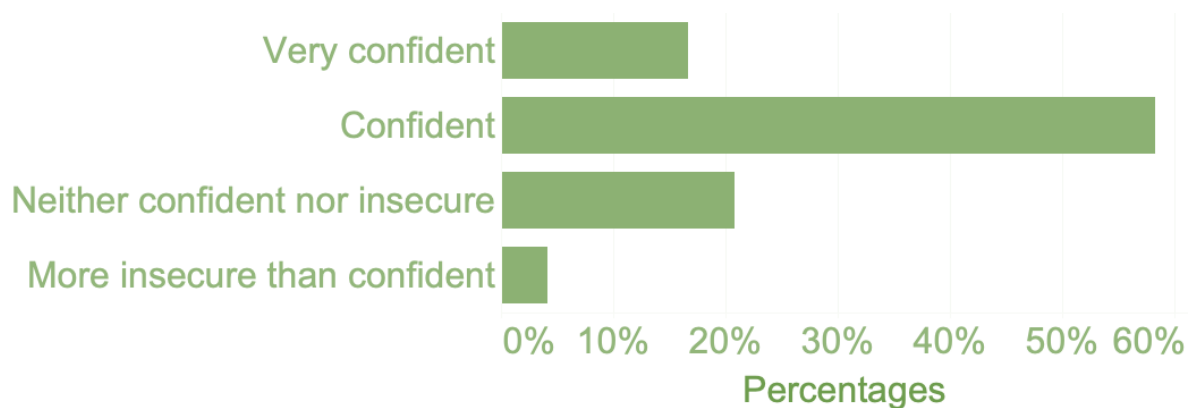
4.3 Resilience to shocks

We asked Welsh creative hubs about the impact that Brexit and Covid-19 have had on them. Around 20% of all respondents feel that Brexit has not impacted their operations, while 80% feel that they have experienced at least some negative fallout from it. Almost 30% of creative hubs feel like they have suffered strong adverse effects from Brexit. These results are shown in Figure 35 below.

Figure 35: The impact of Brexit on Welsh creative hubs
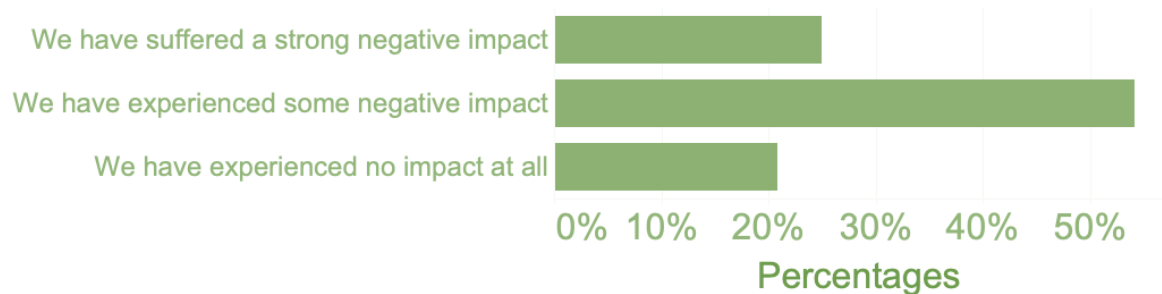
These results are in line with previous research on the topic. A study from 2020 found that around 80% of creative businesses in Wales were concerned or very concerned about the fallout from Brexit.[11] This number aligns with the results shown in Figure 35.

Even the global pandemic has been less devastating to Welsh creative hubs than Brexit, with roughly 15% of respondents claiming that if anything, Covid-19 has had a beneficial impact on their operations.[12] While responding in this way was an option

---

[11] Komorowski, M. and Lewis, J. (2020). Clwstwr Policy Brief No 1 - The (potential) impact of Brexit on creative businesses: Implications for policy and businesses in Wales. Clwstwr publication series, Cardiff, Clwstwr. Available via: https://clwstwr.org.uk/sites/default/files/2020-07/Clwstwr%20Policy%20Brief%20No%201_FINAL.pdf

[12] Donnelly, S. and Komorowski M. (2022). Road to Recovery? Cultural Freelancers Wales Report 2022, Cultural Freelancers Wales, available online at https://www.creativecardiff.org.uk/sites/default/files/CFW%20Report%20Final.pdf

www.britishcouncil.org

for the Brexit question as well, no hubs chose to report that they saw benefits to Brexit. As Figure 26 shows, the proportion of creative hubs experiencing negative fallout from Covid-19 is about the same as above, approximately 80%.

Figure 36: The impact of Covid-19 on Welsh creative hubs

www.britishcouncil.org
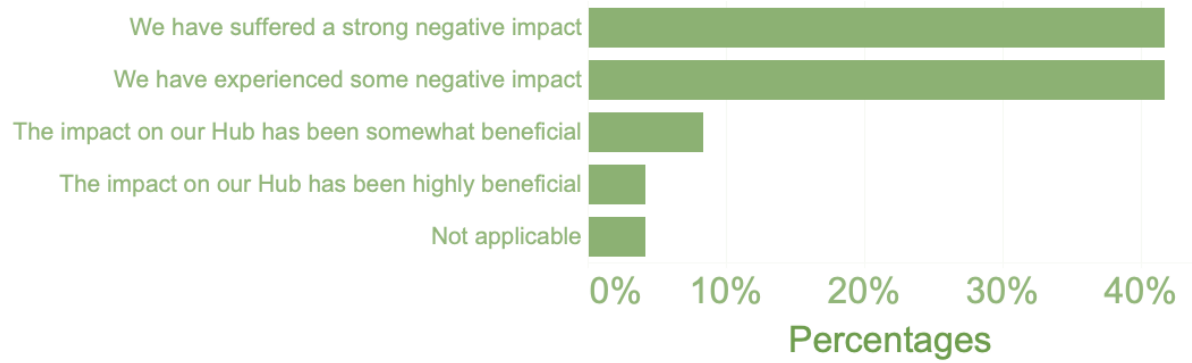
5 Examples of Welsh creative hubs

5.1 Creative Cardiff

Structure: part of university

Full time employees: 1

Geographical scope: city-wide

Location: Cardiff

Age of hub: 6+ years

Website: creativecardiff.org.uk

Number of members: 1000+

Creative Cardiff was launched in October 2015 to create a network connecting creative organisations and freelancers across the full spectrum of the city's creative economy, from dancers to architects to coders. By encouraging people to work together we believe that we can help to make Cardiff the most creative place it can be. A key objective was to promote creative collaborations that would spur innovation, creativity and sectoral growth; and to conduct and curate research to support and shape that growth. The network connects people working in any creative organisation, business or job in the Cardiff region and now has thousands of members. Creative Cardiff has organised and delivered more than 70 events and undertaken a number of significant research and engagement projects.

5.2 TAPE community music & film

Structure: charitable

Geographical scope: national

Age of hub: 10+ years

Number of members: 250-1000

Full time employees: 20

Location: Old Colwyn

Web: tapemusicandfilm.co.uk

TAPE offers a broad range of creative opportunities for groups and individuals in inclusive, safe and supportive environments. TAPE is a charity that is open to everyone. TAPE's team and facilities support hands-on experiences and opportunities in areas such as filmmaking, audio production, music, photography, VR, design, creative writing, podcasting and more. TAPE's timetable includes weekly workshop sessions such as the Backstage Youth Clubs, Writer's Room, Ghostbuskers and Animation Club, as well as events, cinema screenings, bespoke projects, training and much more. Activities take place at the TAPE Community Arts

Centre and as outreach projects across North Wales. TAPE supports accredited learning and is an Agored Approved Centre.

5.3 elysium

Structure: non-profit

Geographical scope: city-wide

Age of hub: 15+ years

Number of members: 100-250

Full time employees: 12

Location: Swansea

Web: elysiumgallery.com

www.britishcouncil.org

elysium gallery is a non-profit contemporary arts and studios provider that fosters education and engagement between artists and communities to create positive social change. Founded in 2007, elysium was created to support and promote the arts in Swansea and beyond with an emphasis on collaboration and community. elysium is Wales's largest studio provider serving as an incubator for a thriving group of Swansea artists providing workspaces, community engagement opportunities, and professional development. elysium is an artist led organisation that encourages pride and participation in local visual and performing arts in an environment that promotes education, participation, experimentation, freedom, and appreciation in all creative practices. Historically elysium has never been rooted to one building, inhabiting 9 buildings, and instigating many offsite projects throughout the years.

5.4 ProMo-Cymru

Structure: non-profit

Geographical scope: regional

Age of hub: 3+ years

Engagement: 5000+ people

Full time employees: 12

Location: Cardiff

Web: promo.cymru

ProMo-Cymru works to ensure young people and communities are informed, engaged, connected and heard. ProMo-Cymru supports the third and public sector to create better services. Enabling youth and community voice through creativity and digital. ProMo-Cymru is innovative, techno savvy and places the views of young people and communities at the centre of thinking. ProMo works collaboratively to

make links between people and services using creativity and digital technology. Supporting the third and public sectors to imagine, test and create better services. ProMo works with communities through communications, advocacy, cultural engagement, digital and media production. ProMo's work is informed by over 20 years of delivering digital youth information projects. ProMo shares this knowledge through training and consultancy, forming long term partnerships to benefit people and organisations. ProMo is a registered charity and social enterprise; its profits are invested back into its community projects.

5.5 NoFit State

Structure: charitable

Geographical scope: regional

Age of hub: 6+ years

Number of members: 100-250

Full time employees: 6

Location: Cardiff

web: nofitstate.org

In the last 30 years, NoFit State focussed on contemporary circus combining live music, dance, stage design, text, and film with traditional circus skills. It is rooted in the travelling community who turn up, pitch a tent, drum up an audience, and then leave with only flattened grass and a memory to show they were ever there. Today, NoFit State is the UK's leading large-scale contemporary circus company, producing

professional touring productions and a wide variety of community, training, and education projects for people of all ages. Over the last ten years NoFit State's touring productions have visited 19 different countries, played to audiences of over 460,000, as well as receiving critical acclaim and winning numerous prestigious international arts awards.

6 Conclusions

As we have shown, the impact that Welsh creative hubs exert on the industry and wider creative ecosystem is unequivocal. Typically, a hub in Wales will engage more than 5000 creatives in its activities (courses, workshops, showcasing, etc). Creative hubs in Wales primarily support creative activities with an artistic component to their activities. These include the performing arts, film TV, crafts, and music.

Creative hubs equip creatives with a wide range of facilities and infrastructure, such as studios and rehearsal spaces, training and workshops, mentoring, financing, and promotion opportunities. Moreover, more than 90% of creative hubs work towards a wider societal and cultural impact, by contributing to at least one of the UN's sustainable development goals.

Despite this economic and societal impact, Welsh creative hubs are most concerned about keeping afloat financially. The uncertainty of funding appears to be a significant challenge for them. Most creative hubs rely on earned income and on project-related funding, which may be seasonal or unreliable income streams. Furthermore, these funding sources may also be quite vulnerable to economic recessions and crises. Consequently, the provision of reliable income sources is a major challenge to the creative hubs themselves and to policymakers in Wales.

The time is "right" for action in this domain, following the fallout from Brexit. No Welsh creative hub has reported any benefit from the UK leaving the Common Market. Still, Covid-19, as devastating as it has been, exerted some beneficial

impact on more than 20% of Welsh creative hubs, by allowing them to digitise and to reorganise their operations.

Against this background, finding international partners, investors and income sources will likely become more difficult in the future. These difficulties appear to put a constraint on Welsh creative hubs' ambitions. While they are willing to branch out internationally, with more than 80% of hubs fostering international collaborations and partnerships, only 10% of Welsh creative hubs consider that they have international scope.

Consequently, creative hubs can benefit greatly from any policy instrument that aims to offset the harmful impact of Brexit. Such policy measures are especially important, if Wales is to become a global centre of competitiveness in highly dynamic creative subsectors, such as film and high-end TV. Creative hubs can be at the forefront of this transformation, through their wide reach and expertise. Nevertheless, the financial uncertainties and the restrained number of international opportunities may be serious obstacles for Welsh creative hubs. Consequently, the design of targeted policy that removes these obstacles appears to be a priority.

Appendix: List of Welsh creative hubs

Name of the creative hub	Localisation
Indycube, Abergelle	Abergelle
Indycube, Abertillery	Abertillery
The Metropole	Abertillery
Aberystwyth Arts Centre	Aberystwyth
Aberystwyth University	Aberystwyth
Creu Cymru	Aberystwyth
Indycube, Aberystwyth	Aberystwyth
M-Sparc Anglesey	Anglesey
Hendre Hall	Bangor
Pontio	Bangor
Ty Gwydr	The Greenhouse	Bangor
indycube Banwen at Dove Workshop	Banwen
Art Central Gallery	Barry
Neuadd Ogwen	Bethesda
Flicks in the Sticks/Arts Alive	Bishops Castle
Blackwood Miners' Institute	Blackwood
Cell B	Blaenau Ffestiniog
Plas Tan y Bwlch	Blaenau Ffestiniog
Yr Ysgwrn	Blaenau Ffestiniog
indycube Brecon	Brecon
Theatr Brycheiniog	Brecon
Business Wales Pencoed	Bridgend
Indycube Bridgend	Bridgend
Innovation Centre	Bridgend
Pyle enterprise Centre	Bridgend
Sony Incubation Centre	Bridgend
Tondu Enterprise Centre	Bridgend
Wyeside Arts Centre	Buith Wells
Galeri	Caernarfon
Welsh ICE	Caerphilly
4π Productions UK Ltd	Cardiff
Chapter Arts	Cardiff
Clwstwr	Cardiff

Coreo Cymru	Cardiff
Creative Cardiff	Cardiff
Creative Quarter	Cardiff
Frazer Building, Cardiff	Cardiff
G39	Cardiff
Gloworks	Cardiff
Grassroots	Cardiff
Groundwork Pro	Cardiff
Hijinx Theatre	Cardiff
Indycube Fab Lab	Cardiff
Indycube Fox Lane	Cardiff
Indycube, St Mary Street	Cardiff
Indycube, The Bay	Cardiff
Indycube, Trade Street	Cardiff
Meanwhile Cardiff	Cardiff
Mercury Theatre Wales	Cardiff
Nat West Entrepreneur Accelerator hub	Cardiff
National Theatre Wales	Cardiff
No Fit State Circus	Cardiff
Omidaze, Cardiff	Cardiff
One Fox Lane	Cardiff
Producers Place	Cardiff
Promo Cymru	Cardiff
Rabble, 103 Bute Street	Cardiff
Something Creatives	Cardiff
Space 2B, The Maltings	Cardiff
Spit and Sawdust	Cardiff
Sustainable Studio	Cardiff
The Boiler House	Cardiff
The Bone Yard	Cardiff
The Printhaus	Cardiff
The Sherman	Cardiff
Tramshed, Pendyris Street	Cardiff
W20, Wellington House	Cardiff
Wales Millennium Centre	Cardiff
What Next Cardiff	Cardiff
King Street Gallery	Carmarthen
Oriel Myrddin Gallery	Carmarthen
indycube Chepstow	Chepstow

Bodnant craft centre	Colwyn Bay
TAPE	Colwyn Bay
Craft Cymru	Conwy
Congress Theatre	Cwmbran
indycube Cwmbran	Cwmbran
Llantarnam Grange Arts Centre	Cwmbran
The Carriage Works	Denbigh
Tŷ Siamas	Dolgellau
EVI, Church Street,	Ebbw Vale
Indycube, Ferndale	Ferndale
Menai Science Park	Gaerwen
Confluence Group	Haverfordwest
Indycube, Haverfordwest	Haverfordwest
Canolfan Ucheldre	Holyhead
Caban Cyf	Llanberis
Y Festri	Llanberis
Powys Dance - the Dance Centre	Llandrindod Wells
Creative Conwy	Llandudno
Culture Action Llandudno (Haus of Helfa)	Llandudno
HAUS Studios	Llandudno
Mostyn Gallery	Llandudno
No 16 Trinity Square	Llandudno
The Ffwrnes	Llanelli
Oriel Ynys Môn	Llangefni
Indycube, Llanrwst	Llanrwst
Maesteg Enterprise centre	Maesteg
Cwmni'r Fran Wen	Menai Bridge
Hwyl Hub	Merthyr Tydfil
Red House	Merthyr Tydfil
Theatr Clwyd	Mold
Indycube, Narbeth	Narberth
Gwyn Hall	Neath
Barnabas Arts House	Newport
Dolman	Newport
Indycube, Newport Central	Newport
Indycube, Royal Chambers	Newport
Innovation Point Ltd	Newport
Le Public Space	Newport
Riverfront Theatre	Newport

The Alacrity Foundation	Newport
indycube Newtown | Enterprise Hub	Newtown
The Hafren, Newtown	Newtown
Indycube, Bridge IC	Pembroke Dock
Tec Marina	Penarth
ADDO	Pontypridd
Muni Arts Centre	Pontypridd
Pontypridd YMCA	Pontypridd
The Old Courthouse (@CAT)	Pontypridd
Indycube, Porth	Porth
The Factory, Jenkin Str	Porth
indycube Porthmadog	Porthmadog
Neuadd Dwyfor	Pwllheli
Clwyd Chambers, Rhyl	Rhyl
indycube Rhyl	Rhyl
Ruthin Craft Centre	Ruthin
The Gate - Y Gat	Saint Clears
Indycube, TYF, Saint David's	Saint David's
Oriel y Parc, St Davids	Saint David's
AXIS 13	Swansea
Elysium Gallery	Swansea
Indycube, Swansea	Swansea
LOCWS International	Swansea
Swansea Device Lab	Swansea
Swansea University	Swansea
Taliesin Arts Centre	Swansea
Tech Hub Swansea	Swansea
Volcano	Swansea
The Sprout	Talbot Green
indycube Treharris	Treharris
Indycube, Treharris	Treharris
Park & Dare Theatre (+ The Coliseum)	Treorchy
Indycube, Upper Boat	Upper Boat
The Foundry	Wrexham
Tŷ Pawb	Wrexham
Un Deg Un	Wrexham
Wrexham Enterprise Hub	Wrexham