

# UNLEASHING THE POTENTIAL

A CREATIVE INDUSTRIES VISION  
FOR GREATER BRIGHTON AND  
COASTAL WEST SUSSEX



**GREATER  
BRIGHTON**



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# EXECUTIVE SUMMARY

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## UNLEASHING THE POTENTIAL: A Creative Industries Vision For Greater Brighton and Coastal West Sussex

The Creative Industries are one of the most significant and visible economic sectors in the Greater Brighton and Coastal West Sussex region. From major technology and software companies to the extensive community of creative freelancers, businesses based here are world-leaders, innovators and major employers, and their creativity is an indelible part of the region's character and profile on the national and global stage.

This vision document, *Unleashing the Potential*, outlines how policy and strategy leaders can support and grow the Creative Industries in Greater Brighton and Coastal West Sussex. Following the announcement of the UK National Government's Industrial Strategy in 2025, which highlighted the Creative Industries as one of eight sectors that will drive national economic growth, there is an unprecedented opportunity for the region to position itself as a centre for innovation and a magnet for new investment.

This is the first regional vision of its kind, highlighting the sector's strengths and suggesting ways to retain talent, attract creative entrepreneurs and innovators and ensure everyone benefits from the sector's economic, social and cultural impact. It also recognises the challenges and opportunities faced by the region and emphasises the importance of leveraging the existing assets, talent and high-quality skills provision available.

It's publication in 2025 is timely, with a new Mayoral Strategic Authority for Sussex in the process of being established. We have seen elsewhere in the country that devolution has empowered regions to tailor cultural and creative sector development to local needs, unlocking economic and social value. Devolution will bring new opportunities to coordinate and collaborate across the region. It is also a time of transformation within the Creative Industries themselves, with new technologies such as AI reshaping innovation and ways of working.

Responding to this rapidly evolving context, this vision outlines a simple but ambitious goal for the region, to make it the best place in the UK for anyone, whatever their background, to build a fulfilling career in the Creative Industries. We call this *Putting Talent First*.

To achieve this, people need to know of the opportunities that the Creative Industries offer, have ongoing access to the training and skills required to be successful, and have support to start and grow their own creative businesses in the region.

Unleashing the Potential identifies three integrated areas of focus for growing the creative ecosystem, aligned to national government strategy and priorities and the potentials of devolution:

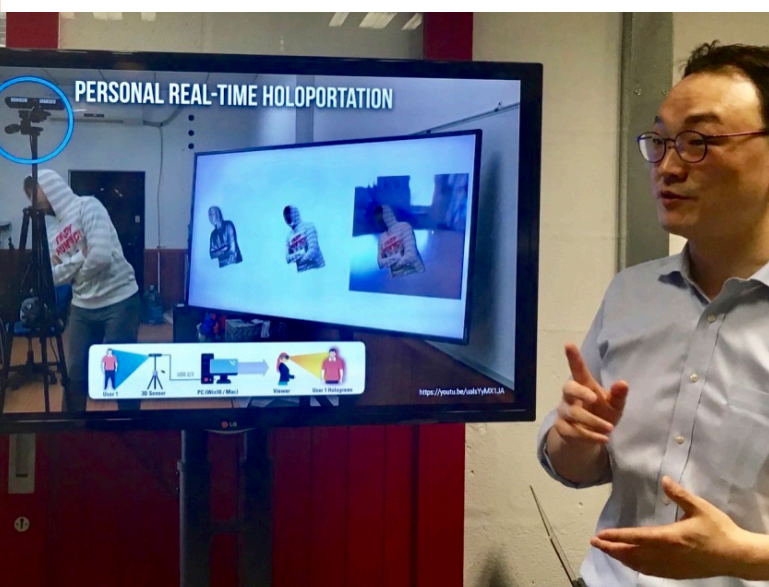
- Creative Corridors reflects the geography of the sector in the region, which operates economically and socially along two broad corridors: one north from Brighton & Hove to Gatwick Airport and beyond to London, and one east and west along the Sussex coast.
- Clusters of Excellence focuses on scaling existing sub-sectors in towns, cities, and rural areas and attracting talent and investment.
- Open Boundaries emphasises the importance of working with partners outside Greater Brighton and Coastal West Sussex to realise growth and innovation ambitions.

Creative Technology, or 'Createch', is referenced throughout the vision as a case

study, illustrating an area of existing strength and outlining routes for businesses to compete more effectively, scale up, attract investment, and create value and employment for the region.

Recommendations within Unleashing the Potential include:

- Developing a pan-regional ecosystem for the Creative Industries by enhancing our two creative corridors.
- Empowering stakeholders at a local level to connect across individual sub-sectors (e.g. film, television & media content).
- Identifying 'tentpole' investments in programmes, activities or capital investments to leverage or combine existing assets.
- Developing partnerships with existing successful and growing businesses to deliver on their needs and shape the pipeline to sustainable careers in the regional sector.
- Establishing shared learning goals across education and training providers, focused on working with industry and their needs, creating an inclusive sector and supporting freelance career pathways.



This vision document serves as a call to action for stakeholders and an advocacy tool. Its comprehensive picture of the Creative Industries in the region highlights the importance of the sector, its potential and the need for targeted and coordinated support. By integrating this vision into future policy and leveraging its data, future investment and economic growth will ensure that Greater Brighton and Coastal West Sussex will continue to be recognised as a centre for the Creative Industries, and one of the best places in the country to build and grow a business or career in this vital and dynamic sector.

# 1. OUR POTENTIAL

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**This document presents a strategic vision to support and grow the Creative Industries in the Greater Brighton and Coastal West Sussex region. It is the first regional vision of its kind, based on research commissioned by the Greater Brighton Economic Board (GBEB) and the Coastal West Sussex partnership from the Fifth Sector consultancy. The vision document aims to support those working in the Creative Industries, strengthen routes into the sector, and enable a successful and inclusive economy in the region.**

The vision outlines the importance of the Creative Industries, particularly in the context of the Government's ambitious national Industrial Strategy launched in June 2025 and subsequent creative industries sector plan launched in August 2025. It highlights the sector's strengths in the region and suggests ways to retain talent, attract creative entrepreneurs and innovators, provide residents with skills and opportunities for meaningful careers, and ensure everyone benefits from the sector's economic, social, and cultural impact. The document also recognises the challenges and opportunities faced by the region, emphasises the importance of leveraging creative talent and sets out a vision for the region to be recognised as the best place in the UK for creative talent to succeed.

The vision emphasises the need for coordinated support for the Creative Industries, leveraging existing regional assets to address geographic inequalities and support local progressive missions. Research shows that the region already has many resources, organisations, and infrastructure needed for a successful Creative Industries sector, but they are often unrecognised, unevenly distributed, and not sufficiently coordinated or promoted. The document explains how to leverage these assets more effectively and support additional initiatives to enhance the sector.

The vision identifies three integrated elements for growing the creative economy ecosystem: Creative Corridors, Clusters of Excellence, and Open Boundaries. Creative Corridors operate economically and socially along two broad corridors: one running north from Brighton & Hove to Gatwick Airport and beyond to London, and one running east and west along the Sussex coast. Clusters of Excellence focus on scaling existing sub-sectors in towns, cities, and rural areas, attracting talent and investment. Open Boundaries emphasise the importance of working with partners outside the region to realise Createch ambitions as a particular case study for the region.

The vision aims to enable creative businesses to compete more effectively, scale up, attract investment, and create value and

employment. It also seeks to highlight the best interventions for growth, the contribution of Further and Higher Education Institutions, and to promote strategic collaboration. It emphasises the importance of Equalities, Diversity & Inclusion and making the case for support and investment at local, regional, and national levels. The document serves as a call to action for stakeholders, an advocacy tool, and a means to unlock funding and support.

Finally, the vision sets out the call to action for the Greater Brighton Economic Board and economic stakeholders to develop this vision for the creative identity and ambition for the region into a detailed strategic action plan for delivery, including identifying routes to investment.



## 2. SETTING OUR VISION

**This document presents the strategic vision to support and grow the Creative Industries in the Greater Brighton and Coastal West Sussex region. It is designed to support those working in the Creative Industries and to strengthen routes into the sector, and be a valuable reference document for those in publicly funded roles with a responsibility for enabling a successful and inclusive economy in our region.**

**Unleashing the Potential** is based on various research reports, of which the most important is that commissioned by Greater Brighton Economic Board (GBEB) and the Coastal West Sussex partnership from the Fifth Sector consultancy. The data that informs this vision comes from the Fifth Sector research undertaken in 2023 unless otherwise stated.

This vision outlines why the Creative Industries are important, particularly in the context of the Government's positioning of the creative industries at the centre of growth ambitions regionally, nationally and internationally. This was first outlined through the launch of an ambitious national strategy for the sector in March 2024, and was further reinforced by the Government's



Invest 2035 green paper in October 2024, which highlighted the important role of the sector across regions and nations, through creative clusters and corridors.

The Government's Industrial Strategy published in June 2025 included the Creative Industries as one of the 8 priority high-growth sectors, referencing existing strengths and opportunities to further develop the UK's position as a world leader for creative innovation. The detailed Creative Industries Sector Plan 2025 further clarifies the approach being taken by the Government, promising targeted interventions to boost innovation, enhance skills development, improve access to finance, increase exports and support regional growth, particularly in areas with existing strength in the Creative Industries.

Research shows that our region already has many of the resources, organisations and infrastructure that are needed to build a successful Creative Industries sector. However, they often go unrecognised, are unevenly distributed and not sufficiently coordinated. This is the opportunity to put that right. This document explains how we might leverage these existing assets in a much more effective way, and support additional initiatives that will help that to happen. Greater Brighton and Coastal West Sussex have a real advantage in this context from the creative talent in the region, which we can leverage through the putting-talent-first approach outlined here. Our ambition is to be recognised as the best place in the United Kingdom for creative talent to succeed.

This vision document also acknowledges the continued strategic focus on the Creative Industries in the region and aligns closely with more local, place-based aspirations to help

drive regional economic growth, including through devolution. It details the sector's strengths and suggests ways that we can work together to ensure that we continue to be attractive to creative entrepreneurs and innovators, that our residents have the skills and opportunities to build meaningful careers in the Creative Industries, and that everyone can benefit from their economic, social and cultural impact. It recognises the challenges our region faces, as well as the opportunities posed by devolution and local government reorganisation.

At a time when resources everywhere are limited, it is more important than ever that we coordinate our Creative Industries support effectively and leverage existing regional assets for the benefit of the sector and our communities and helping to address geographic inequalities. By articulating a vision to create the right scale and identity for supporting our creative and cultural industries we can meet the identity, ambition and evolution of these innovative sectors to support local progressive missions.

This is a broad and diverse area, but one with economic coherence and a network of established and emerging clusters, where greater strategic collaboration has the potential to unlock further growth. The region therefore needs a joined-up plan with collective goals and ambition, but also a clear recognition that the Creative Industries are present in a range of different places across Greater Brighton and Coastal West Sussex, and local stakeholders need to be empowered and enabled to respond with their own locally appropriate activity.

By adopting such an interlaced approach, we can help accelerate the growth of a world class Creative Industries sector across our region.

# The Creative Industries: why they are important to us

**The Creative Industries are a defined industrial category for a range of economic activities that are concerned with the generation and commercialisation of creative ideas, knowledge and information.**

This includes the music industry, the games sector, film, radio & television, software programming, publishing, architecture, design, fashion and textiles, digital design, photography, media, makeup and hair, marketing services, and the performing arts.

The Creative Industries are a success story for the United Kingdom. Over the past decade **they have grown at 1.5 times the rate of the wider economy. They currently contribute over £125bn per annum to the UK economy. That makes them bigger than the UK's life sciences, automobile and aeronautical sectors combined. For the former Coast to Capital LEP region which covers the geographies of this vision, the GVA of the arts, entertainment and recreation sectors increased by 44% from 2012 to 2022 with a value of £797m.**

Creative businesses typically fall into one of two categories. They are either IP-based (i.e. they generate or own intellectual assets that they can leverage) or are project-based (i.e. they have a small core team which they supplement when they are commissioned). Project-based businesses typically rely on a strong and skilled freelance community to supplement their key team.

There is significant government recognition of the economic importance of the creative industries sector in helping to drive national economic growth. This is outlined in the Government's 2025 Industrial Strategy and Creative Industries Sector Plan. In this strategy they commit to backing 8 industry sectors which are already world-leading, including the Creative Industries. The overall defining economic mission is articulated as bringing growth, good jobs and improved productivity to every part of the country, aiming to achieve the highest sustained growth in the G7. Success in the Creative Industries lies within a thriving technology sector, a brilliant and talented workforce, the universality of the English language, and the space for creative businesses to grow.

The national industrial strategy and the previous green paper Invest 2035 highlights the Government's ambitions to 'leverage UK creative industries' global comparative advantages by unlocking private investment, boosting exports, and developing its highly skilled workforce. The sector plays an important role in driving growth across regions and nations, through creative clusters and corridors across the country that spread opportunity and prosperity in communities, as well as driving growth by enhancing access to skills, spillovers, and knowledge sharing'. Strong Creative Industries clusters have additional benefits beyond the sector itself, with a significant multiplier effect trackable across regions. **Research shows that for every Creative Industry role two additional jobs are generated in the local economy.**

Photo: Rosie Powell



The Creative Industries are primarily businesses that leverage their intellectual property for profit and growth, typically beyond their own locality. Skills and techniques developed in the Creative Industries also engender innovation and growth in other economic sectors. For instance, techniques originally developed for video games have since been utilised in the health sector for medical imaging and at airports (including Gatwick) to manage passenger flows. The Creative Industries also have the ability to enrich our lives. They generate social value for the places where they are located. In particular, they encourage the growth of (and participation in) cultural activity.

Organisations in the cultural sector rely more heavily on public funding for ideas and IP

development (a test bed) and usually focus on educational and altruistic goals and are less likely to be able to scale. However, there is clearly a symbiotic relationship between the two. Individuals and their skills traverse the divide, pioneering new ideas and building new routes to the future, as do many organisations. Crucially a thriving Creative Industries presence will support a successful cultural offer, and vice versa.

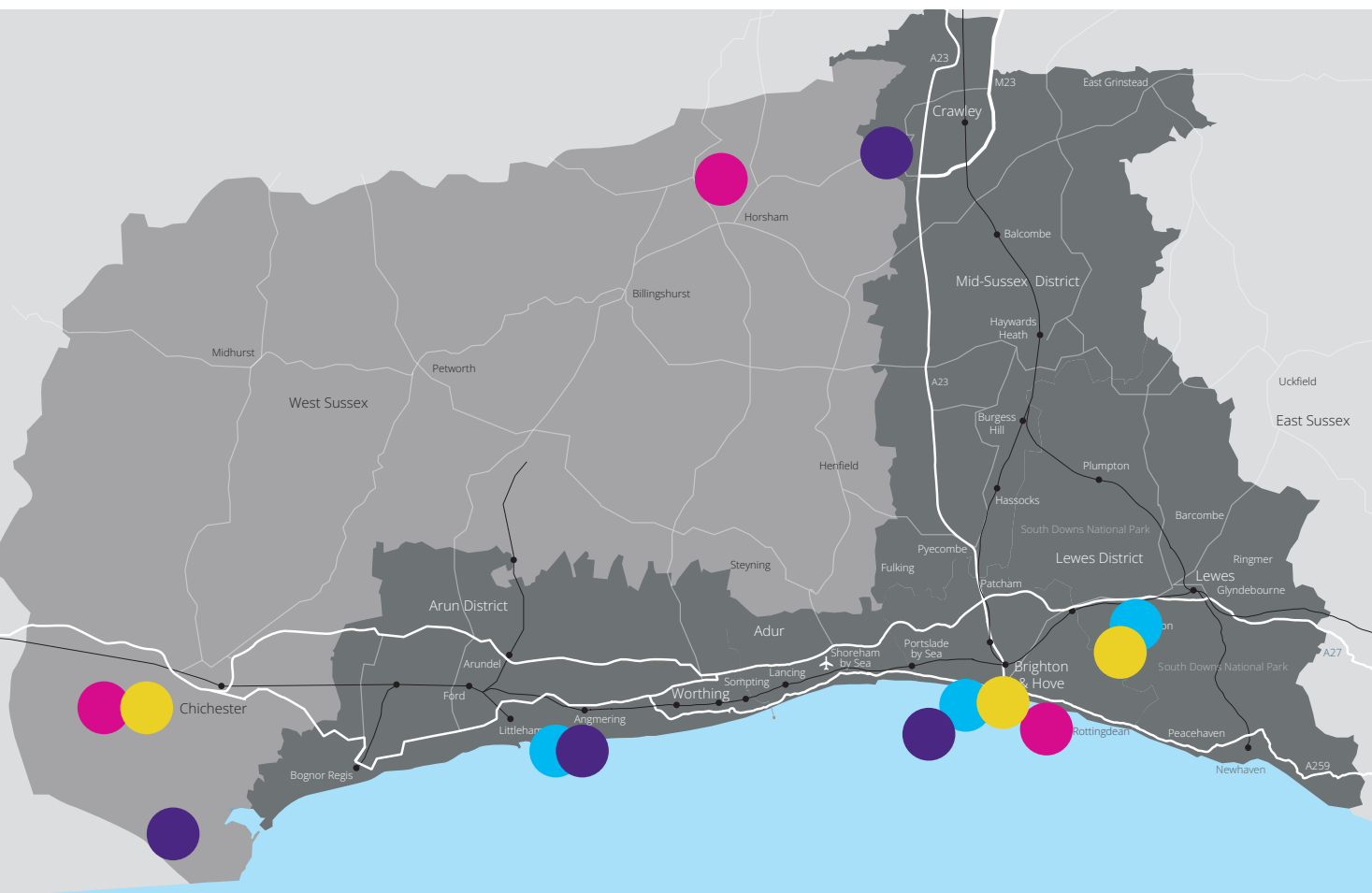
**By building strong and successful Creative Industries clusters we will make our urban centres better places in which to live, visit, work and study.** We will sustain and strengthen their cultural identity, boosting civic pride and ensuring that our local communities experience the economic and social benefits that a strong creative industries sector can provide.

## Our Region - overview

**Greater Brighton and Coastal West Sussex's creative industries comprise 10,225 companies and a workforce of 54,428 people. In addition, around 21,000 creative freelancers live and work in our region.**

The vision area demonstrates existing or emerging strengths which respond to the differing identities and capabilities of each place. For example:

- **Brighton & Hove** can draw on the work of the ABCD plan and Culture Alliance as experience of cross-sector collaboration around emergency Covid response to forge stronger creative networks and a more inclusive future plan for the freelance workforce. Although the number of creative, cultural, and digital businesses appears to have decreased slightly between 2015 and 2023 — by around 70 businesses, or -2% — the job count from 2015 to 2022 (latest available data) increased by 30%, a higher rate than jobs across the economy as a whole. These industries also saw some of the highest GVA growth over the past five years.
- **Crawley** already identified as a microcluster for creative businesses, investment opportunities exist around ACE Priority Place status, Towns Fund investment in developing cultural infrastructure and building on existing cultural networks (including the Creative People and Places partnership) to build a more strategic creative compact.
- **Worthing** demonstrates strong infrastructure (entertainment venues, flexible workspace, creative networks), an emerging microcluster of creative businesses and demand for location filming providing justification for investment in new studio facilities, supportive local Council and cultural organisations with appetite to convene their peers' neighbouring authorities in growing the coastal cultural and creative industries offer.
- **Adur** is an Arts Council England Levelling Up for Culture place and has seen growth in creative services sectors including advertising and architecture.
- **Arun** is an Arts Council England Levelling Up for Culture place and has University of Chichester Tech Park and a creative digital hub (Track) funded by the County Council in Bognor Regis. Bognor Regis has been awarded £13m for the regeneration of the Alexandra Theatre and support from Arts Council England to develop a Creative Vision for the town.
- **Chichester** is identified (along with Bognor) as one of Nesta's 47 creative clusters and boasts nationally significant cultural venues including Chichester Festival Theatre and Goodwood.
- **Horsham** is home to leading software businesses including Creative Assembly and Red River. It borders the Greater Brighton and Coastal West Sussex region, and the strength of the sector in Horsham reflects an opportunity to collaborate across boundaries to build the region as a powerhouse of creativity and culture.
- **Lewes** has a growing design and making sector, manifest in the highly visible presence of craft businesses in the town centre, is home to the internationally recognised Glyndebourne Festival and benefits from growing demand as a location for film and television location shoots.
- **Mid Sussex** has also seen sustained growth in creative services – advertising, architecture, and design – and an increasing presence of film and television production companies.



Research carried out pre-pandemic, including the four Fuse reports (2013-15) and the 2019 study of Creative Industries in Greater Brighton, pointed to a pattern of sustained growth of the creative economy, including a thriving freelance sector, at a rate faster than that of the regional economy and national creative industries. It also indicated growth in creative industries businesses in Crawley, Lewes and Worthing. These findings reflect strengths intrinsic to the growth of creative industries in the region, which include:

- Easy access to London markets
- Successful attraction and retention of skilled workforce drawn by quality of life, more affordable housing, range of opportunities and the appeal of Greater Brighton as a diverse, culturally vibrant city region

However, our research suggests that there has been over the last three years a fundamental change in economic conditions and competitive forces for which the region is ill-prepared. This has been accentuated by Covid-19, but new business growth had plateaued much earlier, around 2015, long before the impact of lockdowns.

Despite a range of imaginative interventions, mainly focused around the cultural sector, and particularly the Creative Industries in Brighton & Hove, the creative sector is still to fully recover: our analysis suggests that there have been 1,050 creative industries start-ups across the region since April 2022, below the trend for the last ten years.

This shift, which is now reflective across the region, has been brought about by factors including:

- Covid-19 pandemic, whose immediate acute impacts on the creative economy (in particular, cultural organisations and the 'live' sector) were somewhat mitigated by interventions such as the ABCD Cultural Recovery Plan for Brighton & Hove, but whose longer-term structural challenges still reverberate.
- Limitations on freedoms of movement and international trade (including touring) imposed by Brexit.
- Changing macro-economic conditions and the cost of living crisis depressing demand from audiences and businesses.
- Increasing costs of energy and pressure from redevelopment threaten sustainability of live venues.
- Acceleration of trends toward remote and 'hybrid' working – which result in greater competition for key skills and experienced workers, as well as increased costs and risks in bringing new entrants to the workforce and retaining them in the region.
- Pressure on local authority budgets – still the main source of investment in culture – resulting in underinvestment in capacity and workforce development.
- A challenging property market to support creative industries, dominated by increased demand for housing, resulting in loss of affordable workspace and lack of specialist facilities and 'grow on' spaces.



# Our Region: Its Strengths and Opportunities

**The Fifth Sector research shows that our region has these five key Creative Industry strengths on which to build:**

- 1. Our Assets:** A powerful array of distributed assets and resources that, if harnessed, can accelerate Creative Industry growth.
- 2. Our Talent:** An educated creative workforce and a region that is attractive to talent.
- 3. Our Entrepreneurs:** Significant entrepreneurial and start-up activity.
- 4. Our Innovation:** Proven innovative ability in integrating creative practices and technological innovation, and in commercialising the outputs.
- 5. Our Clusters:** Strong music, screen (TV /games), performance and making (in its various forms, including fashion design and manufacture, visual arts and crafts) sub-sectors that are distributed across the region.

## Creative ecosystem – the independent opportunity

Whilst there are some significant creative employers across the area, there is extraordinary value in the skills held within the freelance workforce. There are internationally award-winning individuals who work as creatives in the commercial side of the creative industries across games, TV, film and design, many of whom are not known by government funded agencies or public bodies as they rarely need their support or are not the producers seeking funding, yet the experience within the talent pool is phenomenal.

Much of the growth of the creative sector has been based on the reputation of Brighton & Hove (in particular) as a good place to live as a creative freelancer in the country. The Fusebox24 report identified a structured approach to interdisciplinary collaboration; despite investment from Digital Catapult, however, it has not been systematically applied across the area.

As demand factors shift and competition increases, a vision for the creative industries needs to reflect those changes and articulate

how this freelance workforce can then support a growing larger business ecology. That will require aligning support for the freelance and creative business community to funding allocations. Raising the profile of prominent freelancers to help both advocate for an increased understanding of the conditions in which freelancers can survive and thrive, will not only communicate the value they have in the creative sector, but also to help create role models, particularly for those from marginalised backgrounds who want a career but don't know where to start or sustain it.

Opportunities for growth include working across urban, coastal and rural districts and collaboratively with county partners in both East and West Sussex with partners to create programmes that address workforce entry and scaling up opportunities for creative businesses. This growth aspiration needs to be balanced with the needs and desires of the creative freelance workforce and the benefits they seek from their independent careers which may transcend the economic.

## Structural challenges

Public investment in risk-taking – including grant funding - can stimulate and help unlock far greater levels of private investment from retail banks, angel investors, venture capitalists.

One of the most significant challenges faced by local authorities and stakeholders is how to structure investment in the sector in a way which makes working capital available to support, encourage and develop those successful creative behaviours, rather than requiring security for those investments. If successful, this will:

- Ratchet up the knowledge intensity and innovation of individual creative entrepreneurs and microbusinesses,
- Seed the development of more dynamic clusters and supply chains
- Provide a spur to productivity, employment and business growth in the process.

Relative to other regions, including not only London but also the M10 'core cities' and other medium-sized, post-industrial cities across the North and Midlands, Brighton & Hove and Coastal West Sussex demonstrates a lack of specialist physical infrastructure; but more importantly, it means that the region is lacking in the 'soft' infrastructure to support collaboration, investment in skills and the perception amongst local people that creative industries represent a viable and worthwhile career choice.

Programmes have been delivered which support this work including the RISE project led by The University of Brighton in collaboration with The University of Sussex which was awarded funding from the European Regional Development Fund (ERDF), West Sussex County Council, and the seven West Sussex district and borough councils, to stimulate innovation-led growth, by providing targeted and intensive support for businesses.

In addition, Create South East is a consortium of businesses, agencies and local government bodies who have come together to work with national statutory agencies to deliver the South East part of the national Create Growth Programme. The programme supports creative businesses to develop the skills to secure investment to achieve growth ambitions. It is tailored to the needs of different creative disciplines, their respective markets, governance and distribution models.

This vision should be used to leverage continued opportunities to support development and growth of creative businesses across the region combined with a regional view on the access to creative workspace. Work has been undertaken in Brighton & Hove for instance through the Culture Alliance in identifying the opportunities and gaps in creative workspace provision of which the lessons from this could be reflected across the region.

## Our Talent

**Greater Brighton and Coastal West Sussex already has an excellent provision of formal creative qualifications. However, employers have identified skills gaps which could be addressed through greater collaboration between education and businesses which would benefit both the local economy and upskilling the local workforce**

Each of the three Universities has a distinctive offer to the sector:

- The University of Sussex is a leading research institution offering teaching and learning that addresses real world issues in innovative ways. The University is well connected to the local creative economy in the city and the region and its courses at undergraduate, master's and doctoral level range from creative writing, museum curatorship to media production.
- The University of Brighton has provided Arts educations in the region for over 150 years. Its internationally recognised research and innovation, created via longstanding partnerships with industry, institutions and communities, supports regional development in the creative industries and ensures courses from fashion design to animation and games, continue to equip students with skills and experiences valued by employers. Art and Design courses at the University of Brighton are ranked 1st in the South East for graduate prospects (Complete University Guide 2024).
- The University of Chichester offers a new tech park with a focus on the convergent skills of creativity, engineering and technology – including Createch. The Department of Creative Industries runs commercially viable spaces that include a 270 sqmt Sound Stage used for filming and orchestra recording, a dedicated Green Screen stage, numerous edit suites and a commercial Master Suite for grading and audio mixing, recording studio and live room, Motion Capture volumes, plus various computer labs for 3D Animation, VFX, Games Design and Esports. An Arri Accredited Film School with Avid and Black Magic Design Learning Partner status, the Department works closely with a number of industry partners including Creative Technologies, Sontronics and Scan Computers.

All three contribute to investment in the region via a range of methods from arts leadership and established creative partnerships (eg. University of Sussex has creative partnerships with Turner Prize, Glyndebourne and Brighton Dome & Brighton Festival) to offering degree apprenticeships and internships and there is support via the learning institutions to develop start-ups and support creative businesses, such as through the Sussex Innovation Centre and the Help to Grow programme at the University of Brighton.



In addition, specialist universities such as BIMM Music Institute and Water Bear College of Music both offer undergraduate and postgraduate degree courses which support the development of student's music industry careers.

In Further Education, the new collaborative formation of the Chichester College Group (CCG) now includes Northbrook College which has a long and established history of delivering numerous undergraduate and post graduate degree courses (validated by University of Arts London) within music, art and design and theatre studies. Furthermore progression ladders from L1 to L3 ensures effective progression pathways either into higher education, training or employment within the digital, gaming and creative industries sector

for the students. Beyond the CCG, there is an extensive offer in other colleges and Sixth Forms. There are also many training providers providing opportunities within the creative and digital sectors, including Creative Process and DV8. Telling the story of the high quality skills provision across the region should be a focus for advocacy and engagement with strategic partners.

However, the continual challenge for employers is to ensure they are attracting graduates from such institutions with both the specialised and transferable skills required for such a job market. Work has been undertaken to identify these needs and challenges for the Creative Industries sector through Future Skills Sussex .

## Our Assets

**Research shows that we already have many of the regional resources and assets required to support our vision, but they are unevenly distributed and sometimes disconnected, both from each other and from industry. That means they often have less impact. Core to our vision will be to leverage existing assets more effectively.**

This asset-based approach is one that builds on existing resources to strengthen local and regional economies. It focuses on a community's existing advantages and how these can be leveraged into sustained economic growth and productivity. It is about building capacity in communities and strengthening connections within regions.

This approach differs from needs (or 'gap') based economic development, which is focused on identifying deficiencies in the local economy and trying to address them. Capital investments in the sector (and these will still be needed) that connect up and scale existing activity are proven to be more sustainable.

Asset-based approaches require strong leadership at both the local and regional levels. They require innovation, collaboration, and, like any form of economic development, sources of financing.

The Fifth Sector research revealed a wide range of Creative Industry assets in the region, including the larger creative businesses, our universities, publicly-supported organisations and more.

Those larger and more established Creative Industry businesses in the region have the capacity and resources to support broader sector growth. They are particularly keen to help create a diverse and inclusive sector across the whole region, and their leaders want to provide mentoring support to new entrepreneurs.

The Universities of Sussex, Brighton and Chichester, along with other Higher Education providers, Further Education colleges and Specialist Universities are, collectively, a vital asset, supporting development of the people and the innovation that we require to succeed.

From venues to coworking, production, and innovation spaces, and festivals to ongoing programmes and projects, every place in the region has assets that could be galvanised and enhanced. Our strategy needs them to positively impact growth in our Creative Industries sector across the whole region, and to do that in a more coordinated way.

Clearly further work does need to be undertaken with local stakeholders to help identify all the assets that might be utilised to grow our region's creative economy. This will include identifying the value of developing a particular resource, understanding who the development of a particular asset (or collection of assets) would benefit, and ascertaining what additional inputs will be needed.



## Equity and inclusion in audiences and participation

Although Brighton & Hove is recognised as a place of opportunity that celebrates inclusivity, the creative industries in the region can appear to exhibit less ethnic, social and gender diversity. Social conditions, including rising property prices, the intersectionality of socio-economic background and the other characteristics assume particular importance, taking into account such factors as zero-hour contracts and gender-based care responsibilities.

Diversity in cultural leadership and identifying skilled diverse talent to grow the cultural and creative economy and assets correlates directly with diversifying audiences. Across Greater Brighton and Coastal West Sussex, there is a strong and urgent need to improve representation of people with other protected characteristics and in addition socio-economic background, so that the creative and cultural offer truly reflects the diversity of local, national and international audiences, visitors and consumers.

Other considerations also need to be balanced: cost of transport, access to kit, education and literacy equity, and equality of inclusive access. This could include access to work education for employers, multiple formats (easy read,

video etc) for inclusive recruitment and an understanding of embedded cultural and social perceptions which lead to 'imposter syndrome' in parallel with judgements on talent (education and experience) and what constitutes cultural value and taste.

As long as underrepresentation exists, however, the sector and its associated networks can feel exclusive and inhibiting. Simultaneously, this means the sector is not creating content which reflects diversity as the potential to address global audiences and missing the opportunity for Greater Brighton and Coastal West Sussex to be a market leader.

There is a role here for Greater Brighton and Coastal West Sussex partners to convene and hold space; to broker and facilitate. Working in this way can address equality, diversity and inclusion cohesively and collectively and in a way that is reflective of the populace of Greater Brighton and Coastal West Sussex as it is now and how it will be. Ensuring that equality, diversity and inclusion is an approach, not just an outcome, means it can flex and adapt as both local and national societal environments change.

## Case study for the region – The role and potential of Createch

‘Createch’ describes the combination of technology and creativity flagged as a driver of innovation and growth in the Fuse reports of the last decade. The rise in immersive and emerging technologies such as Virtual Reality (VR), Mixed Reality (MR) and Augmented Reality (AR), collectively known as XR, are changing not only what content is produced but how it is produced. We can observe this in the convergence of different parts of the creative industries, with film and TV businesses, games and animation companies and producers of live experiences all investigating and investing in new Virtual Production processes.

The Creative Industries are a sector that is primarily comprised of small and mid-sized businesses. However, there are a growing number of larger creative businesses operating in the region which perform substantially for the Creative Industries and in particular for Createch as a regional strength. These currently include:

- **Creative Assembly:** Multi-award-winning BAFTA UK games studio which houses over 600 staff in its Horsham HQ
- **Ricochet TV:** Part of the growing Warner Bros presence in the region as one of the UK’s leading TV companies based in Brighton & Hove. Producers of Repair Shop and Supernanny.
- **iCrossing:** International digital agency with Brighton & Hove offices. Originally a local start-up, it is now part of the Hearst Media Group which owns the Cosmo and Elle brands.
- **Mag Interactive:** Large Swedish mobile games developer with a strong regional presence based in Brighton & Hove since purchasing local start-up Delinquent Games.
- **Brandwatch:** B2B social media company employing 400+ staff regionally. Originally a local Brighton & Hove start-up and still remains in the city, it was sold in 2021 for over \$450m.
- **Unity Technologies:** Provides the underlying technology for a huge number of internationally successful digital media products including Super Mario and Pokemon Go with Brighton & Hove offices.
- **TT Games:** BAFTA award winning local Brighton & Hove-based start-up now a subsidiary of Warner Bros. Makes games for the Lego franchise.
- **Studio Gobo:** With 100+ staff based in Brighton & Hove, Gobo makes games for Disney-owned IP (Star Wars), and others.
- **Electric Square:** Headquartered in Brighton with a presence in Singapore and Malta, starting out in 2015 as the sibling studio to Studio Gobo, Electric Square is a leading video game studio, specialising in character action AAA console full and co-development.
- **Creative Technologies:** Crawley-based and backed by the global NEP Group, they are leader of technological innovation for live events including Eurovision and the FIFA World Cup.

These businesses are complemented by thousands of other businesses and freelancers, many of whom have strong growth aspirations of their own.

Growth in our region’s Creative Industries is uneven, but in overall terms, it has clearly slowed since 2016, particularly when compared to many other regions in the UK.



The Covid pandemic appears to have accelerated existing trends within the Creative Industries in our regional sector. These include:

- Consolidation within our games and our e-learning sub-sectors.
- Changes to working practices, led by remote working and the development of AI tools.
- A rapid growth in the utilisation of digital technologies to develop and distribute creative content.

**That integration of creative practices and technological innovation has been a real historic strength in our region and one which has supported the growth of Createch.**

It has included pioneering developments in ecommerce and video streaming, advancements in digital design and marketing, and more recent work in e-sports and advanced connectivity in the music industry.

Internationally influential, the Brighton Fuse report in 2013 was the first research to empirically demonstrate the added commercial value that innovation at the interface between creativity and technology delivers. Exploiting Createch represents a key economic opportunity for the region.

As creative technology rapidly advances, an increasing proportion of creative workers will need 'cross-over' or 'fusion' skills – creative and technical. Technologies including AI-led automation, robotics and sensor technology and 3D printing are disrupting traditional production processes and transforming jobs.

Brighton & Hove and the wider sub-region are already experiencing difficulties in meeting the demand for digital skills which relate both to the technology sector and the wider creative industries. It is essential that immediate steps are taken to boost supply in these cross-pollinating skills pathways if the creative sector is to maintain competitiveness over the medium to long term.

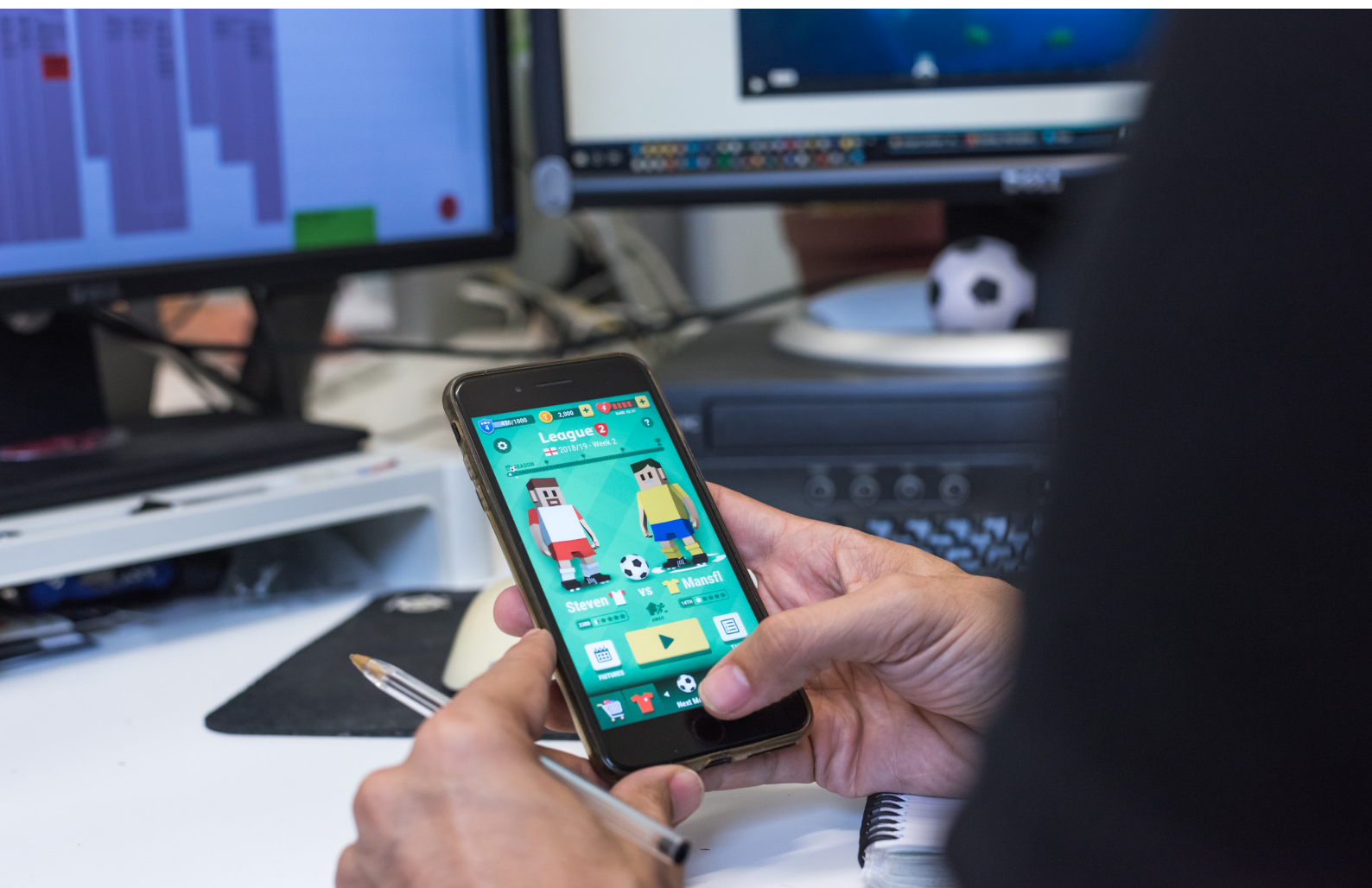
## Computer games and digital content

The Coastal West Sussex and Greater Brighton region has significant 'anchor' investors in computer games and wider areas of digital content and convergent media. The larger players generate significant demand for jobs and skills and contribute tens of millions of pounds to the regional economy each year. In turn, they support a supply chain of smaller digital creative businesses and skilled contractors essential to the region's capacity to respond in an agile way to future opportunities across games, film, television and short form content of all kinds.

Ukie (the national trade association for games developers) identifies more than 90 games companies in the vision area (with the majority in Brighton & Hove) and

13 specialist service providers to games companies and entrepreneurs offering services from media monitoring to investment advice, which differentiates the area from many competing UK regions.

Every region in the UK experiences skills gaps and shortages in games – in some cases coinciding with those in other high value creative and digital content sectors. The area's problems are exacerbated by wage inflation which results from a combination of competition for experienced professionals, including from London, itself made more significant as a result of an accelerating trend toward remote and hybrid working, and increased costs of living locally, driven by escalating property prices.



### 3. OUR VISION FOR THE CREATIVE INDUSTRIES

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**The value of the Creative Industries to the area is set out through this vision. The vision highlights those sub-sectors and how the acceleration of Createch as a case study, with targeted support and interventions, can deliver growth and generate economic value for the wider area and creative industries sector.**

The Creative Industries interconnection with the publicly funded arts and cultural sector is also acknowledged. So, whilst this is not a vision for the area's cultural sector, the work will include an understanding of its role in contributing to broader Creative Industries growth.

Though primarily concentrated in Brighton & Hove, the regional Creative Industries sector also has defined clusters in Chichester, Worthing, Horsham and Lewes. Additionally, there is measurable Creative Industry activity in the rural parts of our region. The outgrowth of creative industries from London has far reaching impact and potential in the region capitalising on the movement of creative businesses and supporting sectoral clusters. In September 2025, the Department for Science, Innovation and Technology included an area encompassing both Brighton & Hove and Worthing on its Innovation Clusters Map, clearly signposting the interconnectedness of the sector.

There is clearly significant potential in the region to develop a world-class Creative Industries sector, but the challenge is realising it given our complex economic geography. Without an appropriate and integrated vision and plan, we will fall short in delivering on that potential. Creative Industry economic strategies usually focus

on large urban centres where creative businesses aggregate. Such strategies then employ a "hub & spokes" model in which smaller places connect, not to each other, but directly into the main urban centre. For example, the economically similar post-industrial towns of Oldham, Rochdale, Bolton and Stockport would be the spokes to the Manchester hub.

In the Greater Brighton and Coastal West Sussex region, Brighton & Hove hosts the biggest Creative Industries cluster by far and, whilst it punches above its weight, its creative economy is not yet similar in size to Bristol, Manchester, Birmingham, Newcastle or Leeds. Additionally, our towns and places do not just connect economically to Brighton & Hove, and they are not uniform in their economic character.

There is also the impact – both positive and negative – of our region being within the economic orbit of London, Europe's largest single Creative Industry cluster. Consequently, employing a standard 'hub & spoke' model for our region is inappropriate.

Instead, the region's economic geography suggests growing a creative economy ecosystem around these three integrated elements:

## Creative Corridors



- **Creative Corridors:** Rather than a hub & spoke model, our region is better understood as operating economically and socially along two broad Creative Industry corridors. One running North from Brighton & Hove up to and including Gatwick Airport and beyond to London, and one running East and West along the Sussex coast. Recent research has shown that value in such corridors can “trickle across”, enhancing economic opportunities in the less successful areas within them. This is the rationale that underpins the recent national funding to support the formation of the Northern Creative Corridor project. London’s Creative Enterprise Zones (CEZ) model may be useful to consider as a way of enhancing the creative economy within and along these corridors.

- **Clusters of Excellence:** Not everywhere in our region can excel at every sub-sector within the Creative Industries. By focussing resources on scaling existing sub-sectors in our towns, cities and rural areas, the region can more effectively retain and attract the

talent and investment to grow them. Further, by connecting those places with similar sub-sectoral strengths, opportunities and expertise can be shared to mutual advantage.

- **Open Boundaries:** The Creative Industries in the region will not benefit by being artificially constrained by administrative boundaries. Identifying opportunities to work with others outside the region needs to be embedded into any vision. For instance, Surrey County Council and Surrey University should be considered partners not competitors in realising our Createch ambitions. Current work with the West Sussex, Brighton & Hove, Kent, Essex and East Sussex region and councils around building an investment ecosystem for the Creative Industries needs to continue, and the creative coastal corridor referenced above would benefit from including the East Sussex coast as well.

**This vision document, backed by supporting evidence, is intended for use as a call to action for stakeholders, as an advocacy tool, and to help unlock funding and support.**

## Objectives:

- Enable creative businesses in the area to compete more effectively, to scale-up, to attract investment, and to create value and employment.
- Identify what type and scale of intervention will best support growth for freelancers, organisations and clusters. Working with prime contractors in the industry who commission the freelancers as part of their supply chains.
- Review the multi-faceted role of Higher Education Institutions (the geography includes three leading universities) and other FE and HE educational organisations and skills providers in support of the sector.
- Identify opportunities for strategic collaboration around sharing knowledge, skills and talent, space for business growth and accessing investment.
- Consult with a range of industry and other stakeholders to ensure a diverse range of voices and experiences are represented, and that Equalities, Diversity & Inclusion are an integral part of future strategy.
- Make the case for support and investment locally, regionally and nationally, including with government.
- Setting a regional ambition for the future aligned to government's ambitions for sector-driven growth and devolution.

The project has been informed by research that identifies clusters around the Coastal West Sussex & Greater Brighton area where there is already comparative advantage. This vision seeks to build on these existing strengths and also on the potential areas for development and growth.



## Our Vision: Putting Talent First

**Ultimately, value in the Creative Industries is generated by individual creativity and imagination, and the skills and knowledge required to turn it into something with value.**

A core strength of our region is its creative talent – both homegrown and those that are attracted here from elsewhere. The region boasts above average educational attainment, and many high-profile creative industry leaders continue to make their home here.

But whilst talented people are everywhere across our region, the opportunities for them to succeed are not. Certain social groups are underrepresented in our Creative Industries and the sector is the poorer for that.

That needs to change. We will embrace a simple but ambitious vision for our region, to make it...

**The best place in the UK for anyone, whatever their background, to build a fulfilling career in the Creative Industries.**

We call this **Putting Talent First**.

To achieve this goal, Greater Brighton and Coastal West Sussex needs to commit to 3 clear targets:

**First, that everyone in our region gets a chance to understand and experience the opportunities in the Creative Industries.**

Content from the Creative Industries is a daily part of everyone's life. But the industries behind that content are not typically visible. You cannot be what you cannot see, and so many people are unaware of the broad range of opportunities the sector provides. To enable delivery of this goal Greater Brighton and

Coastal West Sussex should commit to support the following:

- Ensure that the Creative Industries are fully represented within the new regional Careers Hub, to promote opportunities to the Creative Industries Sector to support promotion of the wide range of opportunities available in the sector.
- Through the Careers hub to explore a partnership programme pairing secondary schools, 6th form and FE colleges with Creative Industry businesses
- Deliver a high-profile annual "Open Studios" week, coordinated with Creative Industry businesses and academic institutions across the region in which they open up their venues, studios and workspaces to the public.

**Second, that anyone in our region can access the training needed to start and grow a career in the Creative Industries.**

This ambition is also realised at national level through the government's plan for Arts, Culture and Creative Industries which will give talented people from all backgrounds the opportunity to benefit from a career in the creative industries.

We have many very well-regarded educational and training institutions across the region, including our established universities and further education colleges and specialist Creative Industry providers such as Chichester College Group, BHMA, BIMA, Water Bear, DV8 and Audio Active. Additionally, the region's creative businesses themselves play a vital role through on-the-job training.

They are all significant regional assets that should be supported to jointly deliver on these learning goals:

- **Equality, Diversity and Inclusivity:** We will build an inclusive sector, with no social barriers to a career in it.
- **With Industry:** We will continue to provide clear learning pathways into the industry, and they will be developed in partnership with industry.
- **Lifelong Learning:** We will assist those in-career to develop and expand their skill sets to become and remain relevant to the creative economy.
- **Freelancer Support:** We will ensure that those in our large and important creative freelancer community are supported in their skills development.

### **Third, that we support our creative entrepreneurs to build successful businesses and organisations.**

The vast majority of our region's successes come from local entrepreneurs starting and growing businesses. Often, as the Fifth Sector research demonstrates, because they have proved themselves adept at anticipating new trends and moving fast to mainstream them commercially. Many of the region's largest creative businesses including Warner, Epic, and Sega have a presence in the region through their acquisition of local start-ups who did just that.

This region's entrepreneurial energy and ambition is something we need to celebrate and enhance.

Our creative entrepreneurs that have growth aspirations should have ready access to the tools and resources to turn their ideas into successful businesses, developing new creative products or experiences and successfully taking them to market.

This means ensuring that they have opportunities to access the following:

- **Tailored Advice:** Our region needs to ensure that our creative entrepreneurs can benefit from mentoring, and that sector-specific legal and financial support is known and available to them. Support is currently offered through the BIPC (Business & IP Centre) in collaboration with the British Library in both Crawley and Brighton & Hove. Further support targeted specifically at Creative Industries could be developed through this vision.
- **Physical Infrastructure:** Local government will plan the right kind of buildings, spaces and associated infrastructure to help creative entrepreneurs start and scale businesses.
- **Market Opportunities:** Ensuring that existing market access & testing opportunities (such as cultural festivals) are utilised, and - working with visitor economy experts - significantly develop existing creative business tourism to bring markets and market-makers to the region.
- **Funding and Investment:** Creative entrepreneurs should have access to investors and funders who understand their sector. The existing Create Growth programme led by Create South East is a good platform on which to deliver this goal.

# Delivering Our Vision

## Supporting and Empowering Local Clusters

Creative clusters deliver agglomeration effects. They multiply investor, market and client engagement. They enable small businesses to share insights and opportunities with each other more easily. They encourage the growth of ancillary specialisms.

To aggregate resources and investment opportunities, our region requires a clear overarching vision for the geography as a whole. Putting Talent First delivers that.

However, it's also clear that different places within the region will have their own needs and opportunities. And industry stakeholders are much more likely to actively provide support to localised activity.

The Greater Brighton and Coastal West Sussex region will enable and empower local authorities, their stakeholders and creative communities to identify how to help deliver our Putting Talent First vision in a way that is appropriate to them, and will support them in doing this.

### Local, but not parochial: connecting clusters by sub-sector

The region will of course lose potential opportunities of scale if these creative clusters operate independently of each other.

In most cases sector businesses themselves do not recognise the formal Creative Industries classification but instead identify with their specific sub-sector within it. They will say they are in TV, the music industry, gaming, etc.

Clusters where there exist similar sub-sectoral strengths and ambitions need to be linked, strategically supporting their growth by enabling the sharing of relevant programmes, assets, skills and support.

Current identified sub-sectoral clusters:

- **The Music Industry** – Worthing, Brighton & Hove, Lewes
- **Games and Gaming** - Chichester, Brighton & Hove, Horsham, Worthing
- **Performing Arts** - Brighton & Hove, Lewes, Chichester, Worthing
- **Film, Radio & TV and media content** – Brighton & Hove, Bognor Regis, Worthing, Crawley
- **Architecture, Design, Craft and Fashion Design** – Brighton & Hove, Mid Sussex, Adur, Shoreham and Lewes
- **Advertising and Marketing** – Adur, Mid Sussex, Brighton & Hove

### Core Sub-Sectoral Requirements (this is an example using the Music Industry)

- High Profile Sector Advocates:  
e.g. Norman Cook, Celeste, etc.
- Education & Skills:  
e.g. Chichester College Group, BHMA, BIMM, Audio Active, etc
- Physical Infrastructure:  
Venues, recording and rehearsal studios, etc
- Support Services:  
Labels, promoters, specialist legal, investment & finance.
- Market access
- Consumer events (various concerts & festivals)
- Industry events (e.g. The Great Escape)

A region-wide vision, an adoption of creative corridors, an empowering of clusters within them, and support to connect localised sub-sectors together. Together these elements deliver the basis of a strong and relevant geographical approach.



## Innovation: A Pan-Regional Createch Vision

Across the political parties, the significance of Createch and its ability to revolutionise the sector is recognised. As expressed in the national strategic plan for the Creative Industries:

“To realise our ambitions for this sector, we need to play to our unique strengths. As technology increasingly infuses the creative industries, our competitive advantage in both sectors means this country has an unparalleled opportunity in the decades ahead.”

It is actively supporting the realisation of that opportunity with significant public investment into Createch innovation, including £80m for the Costar programme led by Royal Holloway University and Pinewood Studios. Other national Costar partners include Surrey County Council, York University, Abertay University and the National Film and TV School.

Data shows that currently the overwhelming majority of private equity funding into Creative Industry start-ups also goes to those with a Createch focus.

Createch is powering new content and markets for the Creative Industries and, over time, it will increase skills and salary levels in the sector.

As noted, this region already has a significant reputation for delivering value by fusing creativity and advanced technologies. It has been at the forefront of innovation utilising both virtual reality and advanced connectivity, including delivering the world’s first multi-location, immersive music festival to be powered by these new technologies.

Scaling our existing Createch activity is vital if we are to build a Creative Industries sector with longevity and value.

**Such is the level of resource-coordination required to enable businesses to innovate using Createch, it requires – as a minimum – an integrated regional approach.**

It needs the involvement of university research capacity, large scale creative industry organisations, local businesses, start-ups, and the investment community. Attracting funding to support Createch innovation requires partnerships of scale. For Greater Brighton and Coastal West Sussex, it means committing to a single regional facility where assets can be aggregated and partners can collaborate, and which is networked across the region and beyond.

## “Tentpoles”

Leveraging and combining our existing assets more effectively will require identifying specific programmes, activities or major capital investments that enable us to do that. These we refer to as our “Tentpoles”. Here are two examples of initiatives that would do just that:

**1.** Work is progressing on developing plans for a Virtual Production studio complex in West Sussex. **Shoreline Studios** has the potential to bring together regional partners – both public and private – to deliver large scale commercial activity, training and educational provision, and a createch innovation facility, giving our region a potential platform to take advantage of this acknowledged high growth part of the creative economy.

Shoreline Studios could aggregate Createch activity across the region, bringing university R&D into ongoing contact with commercial businesses, offer a place where regional creative businesses can adopt and benefit from new technology, and provide people with pathways into the industry through the engagement of education and training providers.

Shoreline Studios has the potential to headquarter a regional **Createch Open Innovation Network (COIN)**. Open Innovation is an approach that enables businesses and other organisations to innovate smarter and faster through collaborative activity. It is particularly relevant to the Creative Industries because it overcomes the capability and capacity challenges that smaller creative businesses would otherwise have when engaging in tech-based innovation.

COIN will ensure that all creative businesses in the region, of whatever size, have the opportunity to become part of its technology-led future.

**2.** The region has existing strengths around Industry Tourism in our Creative Industries sector. These include hosting Europe’s largest industry conferences for online marketing (Brighton SEO), for games developers (Develop), and for the music industry (The Great Escape).

These events benefit from the region’s attractiveness as a destination, our strong transport links (including Gatwick Airport and proximity to the capital), and our well-developed visitor economy infrastructure.

There is a real opportunity to scale industry tourism with a focus on the creative economy and to achieve this through the Local Visitor Economy Partnership and the Sussex Strategy for Growth. In so doing, we will grow our international profile, provide a way for creative businesses to access international partners and markets, connect with world class creative talent, and provide new opportunities for our visitor economy assets.



## 4. SUMMARY AND RECOMMENDATIONS

**Our goal is to realise the potential that this region clearly has to become home to a world-class Creative Industries sector.**

**Our vision is to be the best place in the UK at nurturing Creative Industry talent. We will ensure people from every town and every community get an opportunity to develop their capabilities to the full.**

To achieve this, people need to know of the opportunities that the Creative Industries offer, have ongoing access to the training and skills required to be successful, and have support to start and grow their own creative business, should they want to.

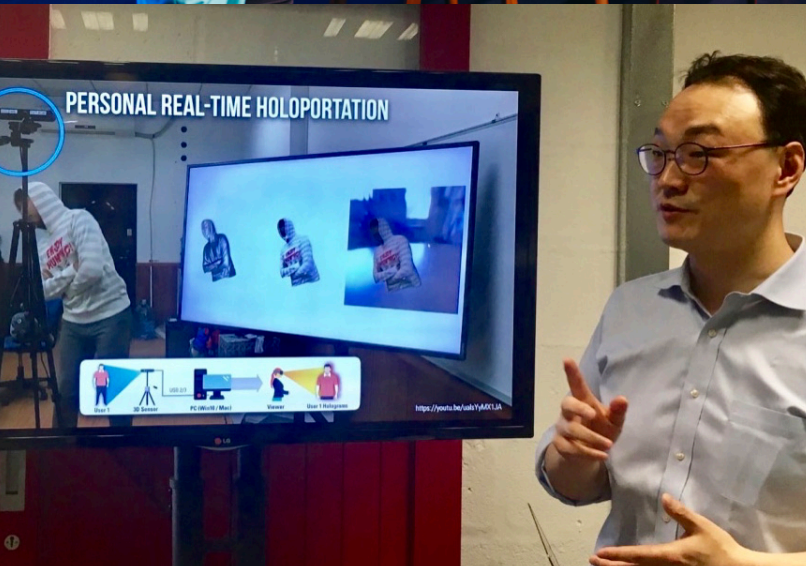
We know that we are not starting from scratch. The region already possesses much in terms of the organisations and infrastructure that we need, and has strength in key growth sub-sectors. We can go far by leveraging them more effectively and developing activity to strategically connect and enhance them.

We will complement those existing assets with key facilities and programmes, which will include a focus around developing a pan-regional innovation ecosystem for the Creative Industries.

We will work with our regional economic geography, not against it. This means enhancing our two existing creative corridors, empowering stakeholder communities at a local level, and connecting up those working in the same industry sub-sectors.

This is a strategy that is relevant, ambitious and achievable. It can secure local and national buy-in from both industry and government.

Deliver on it and Greater Brighton and West Sussex can re-energise our Creative industries, release this region's real creative potential and build a world-class economic powerhouse.



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