WESTERN DEVELOPMENT COMMISSION

NUI Galway
OÉ Gaillimh

REINFORCING the CREATIVE WEST

Risks and opportunities in the West of Ireland Creative Economy 2021

Contents

Cover images: *Two by Two Overboard!*, produced in Galway by Moetion Films and backed by the WRAP Fund and Éamonn O'Sullivan of HEWN makes wooden homewares from locally foraged hardwoods

Introduction

The creative and cultural sector has grown in importance in the West of Ireland in recent times. Through its people, words, images, and music it has contributed to a unique creative fabric which continues to enrich its communities and enhance its everyday life in many positive ways.

In 2010 the Western Development Commission (WDC), with the creative community in the region embarked on a journey to map and support the sector through its *Creative West*[1] work. This showed the potential of the Creative Economy (CE), in the region. A high proportion and number of our community often directly work in the creative economy (12,871 in 2017), and the direct value of the sector in the seven county West has grown from around €540M in 2010 to €729M[2] in 2017. Through engagement with the creative practitioners themselves, priorities for growth have been identified and the WDC has joined regional and national partners in working to use these insights to develop the sector in the last decade.

In the global context the creative economy continues to draw a focus for development. Recent analysis in the EU has shown that in 2019 the sector had a 4.4% share of EU-28 GDP, €663 Bn in turnover, and employed 7.6 million, more than the numbers employed in other sectors such as Automotive, Telecoms, and Chemicals[3].

In 2021 the sector has, in-line with wider society, been faced by the generational challenge of the global pandemic. In response, the WDC has sought to engage with elements of the regional creative community to gain insight to the needs emerging from them to maintain and if possible, grow their contribution to the wider society in all its forms. This summary report details the findings from the survey undertaken in Q4 2020 with 140 creative economy businesses, organisations, and practitioners in the **Galway, Mayo and Roscommon (GMR)**, areas of our Western Region. The survey was undertaken by Dr Patrick Collins (*School of Geography, Archaeology & Irish Studies and the Whitaker Institute, NUI Galway*), on behalf of the WDC and under the auspices of the West *Regional Enterprise Plan*[4].

1. https://www.wdc.ie/wp-content/uploads/reports_CreativeWest.pdf
2. https://westerndevelopment.ie/key-projects/the-creative-economy/
3. *EY Rebuilding Europe – The cultural and creative economy before and after the C-19 crisis*
4. https://dbei.gov.ie/en/Publications/Publication-files/West-Regional-Enterprise-Plan-to-2020.pdf

CREATIVE ECONOMY outline in The GMR Area

Creative economy definition

The report commissioned uses the following to define the nature of the creative economy practitioners engaged with in the GMR region:

Craft

Traditional Craft
Print & Recorded Media Production
Electronic manufacture
Other manufacturing

NACE Code Groups: 1_3_5_6

Cultural

Performing Arts & Education
Publishing
Film & TV

NACE Code Groups: 9_10_16

Creative

Media/advertising
Architecture/Design
R&D
Prof Services
Software & App Development

NACE Code Groups: 11_12_13_14_15

Fíbín performing *Pléasc*. The play is based on a tragedy that happened 100 years ago when a leftover WW1 mine exploded on a beach in Loughaun Beg, killing nine local men.

Éamonn O'Sullivan of Hewn makes wooden homewares from locally foraged hardwoods, using three tools — an axe, a knife and a crook knife.

Creative Economy outline

Here is a brief outline of the GMR creative economy undertaken as part of the survey preparation. Whilst geographically and sectorally varied, it nonetheless demonstrates a significant and growing, predominantly indigenous creative economy as we approached the pandemic challenge in 2020.

Creative Economy GMR Region 2018

Value	Sales
€478M	€319M

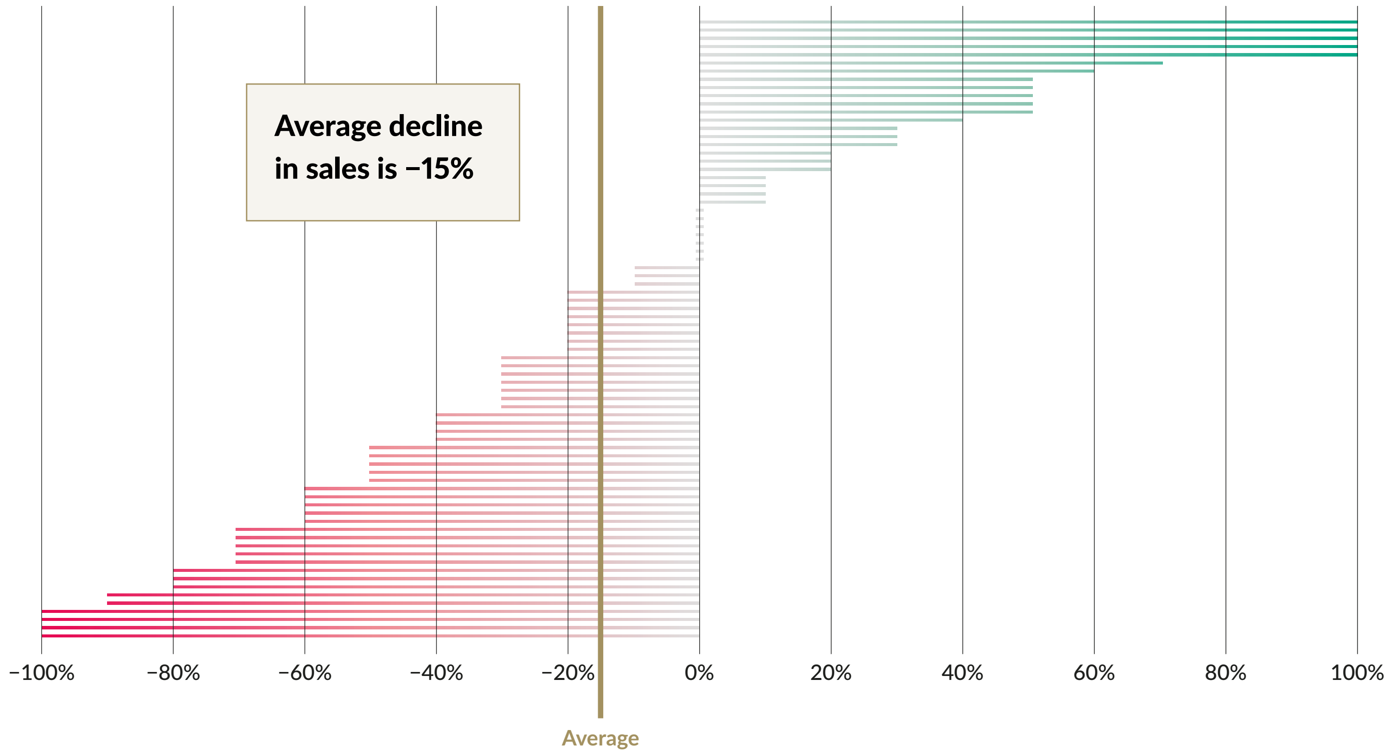
Exports	Workers	Companies
€57M	7,413	3,132

- CE employment grew from 5,122 to 7,413. An increase of 44.7% in five years.
- Galway county saw the biggest increase (1,100).
- In relative terms, Roscommon CE employment increased by 125% in the five years to 2018.
- Mayo also saw a more than doubling of their workforce to 1654 by 2018.
- Compared to the national average of 5.6% employed in the CE, Galway city exceeds the national average with Mayo at 3.2% and Roscommon at 2.3%.

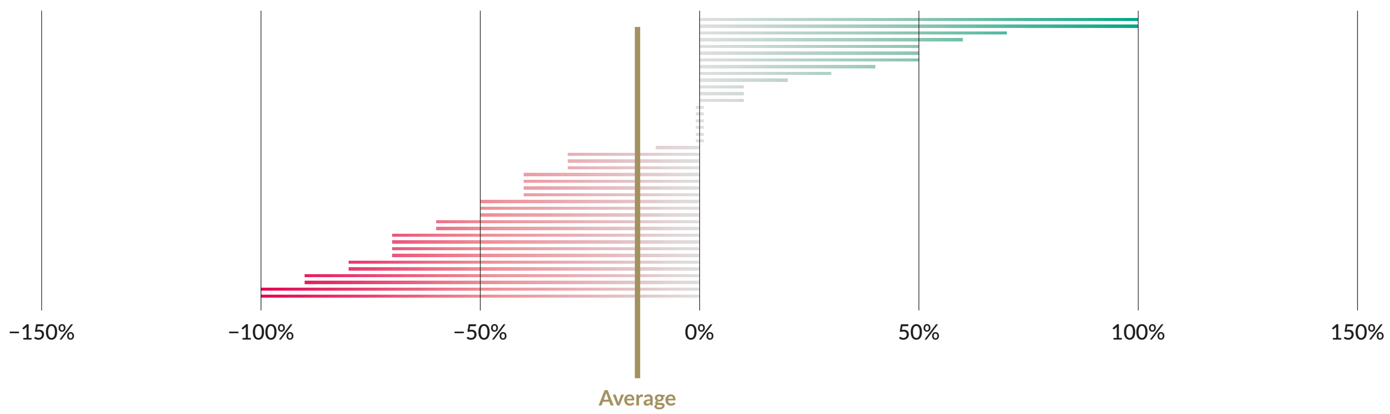
Survey Key Points

Predicted change in both sales and employment 2019 – 2020
As can bee seen the average is a net reduction in CE sales albeit in the immediate future. Similarly in employment we see an avg. reduction

Can you estimate the predicted difference in sales between 2019–2020



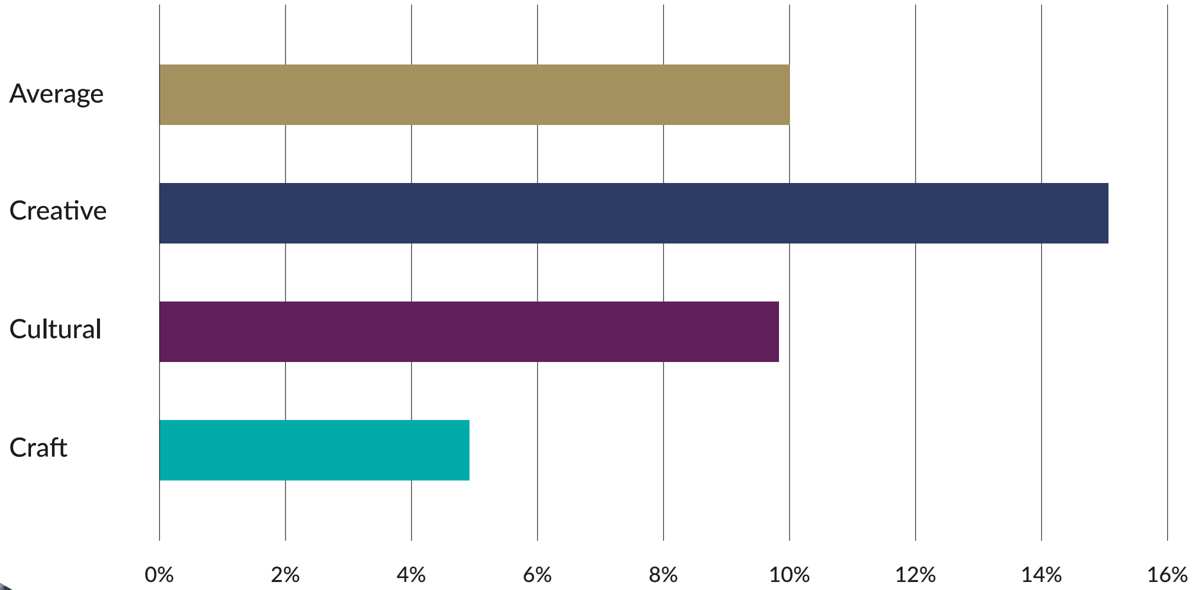
Can you estimate the predicted difference in employee numbers between 2019–2020

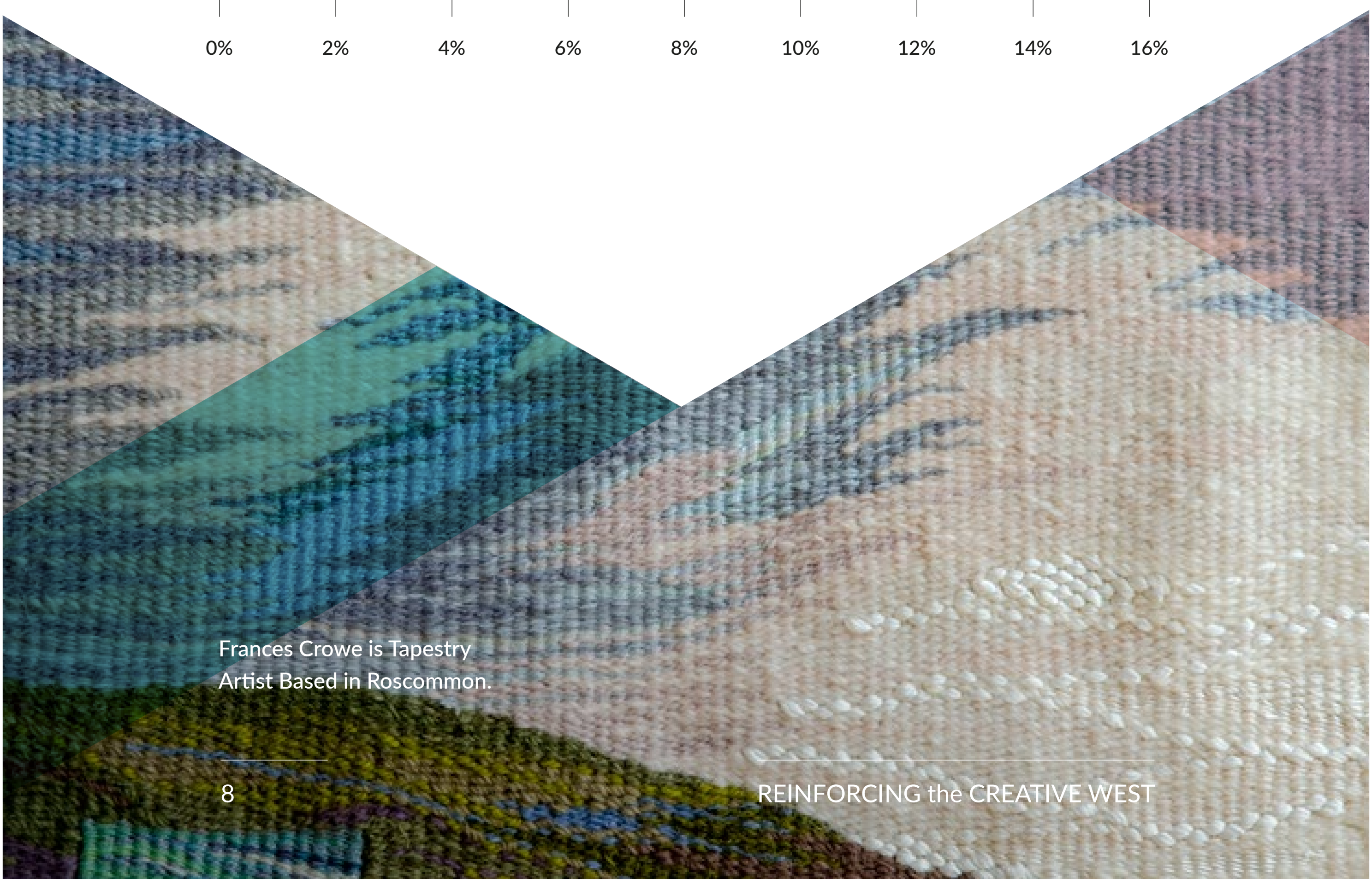


Predicted growth in employment over the next five years

SME's remain generally positive about future growth.
Over 2/3rds predict an increase in future employment

Predicted employment growth next 3 to 5 years





Frances Crowe is Tapestry Artist Based in Roscommon.

Behind the scenes of
the film Pilgrimage

Net estimated impact of the pandemic on the GMR Businesses

Estimated Impact of COVID 19

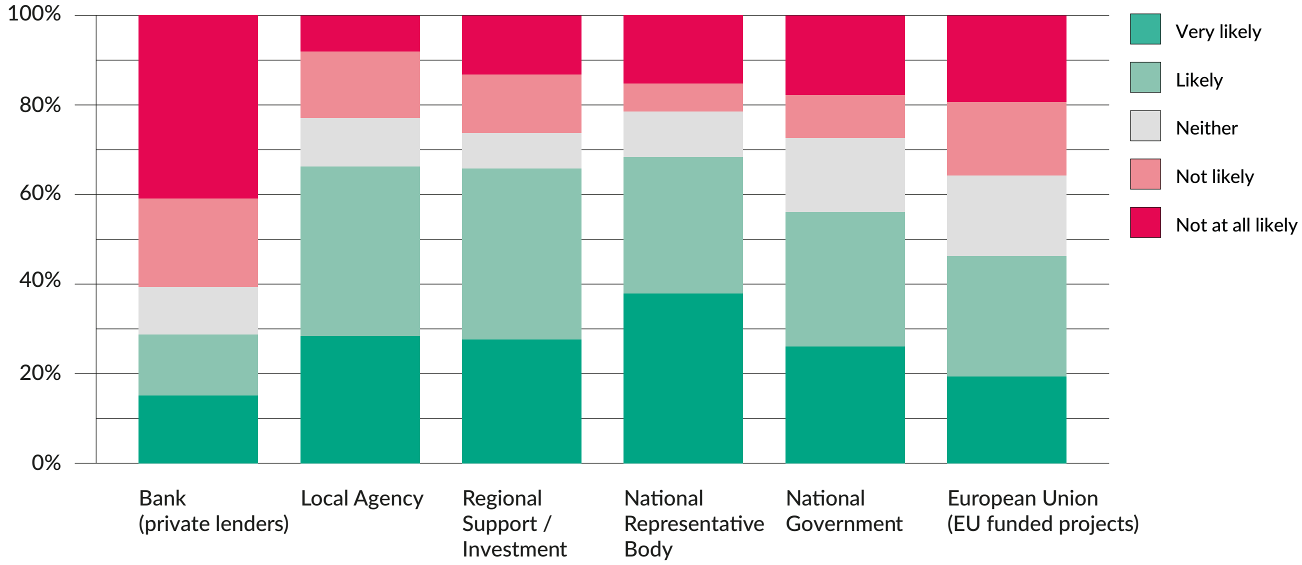
Value	Sales	Employees
–€69.6M	–€47.8M	–742

Little Gem Puppets based in Kilkelly, East Mayo

Who does the sector see as supporting their needs best

In general the SME's surveyed saw local, Regional, and National Agencies as best positioned to support them.

To whom would you consider turning to for support to help your organisation



	Very likely	Likely	Neither	Not likely	Not at all likely	Total	Weighted Average
Bank (private lenders)	15.15% 10	13.64% 9	10.61% 7	19.70% 13	40.91% 27	66	3.58
Local Agency (Arts Office, Enterprise Office)	28.38% 21	37.84% 28	10.81% 8	14.86% 11	8.11% 6	74	2.36
Regional Support / Investment Údarás na Gaeltachta, Western Development Commission, WRAP	27.63% 21	38.16% 29	7.89% 6	13.16% 10	13.16% 10	76	2.46
National Representative Body (Arts Council, Design and Crafts Council, Screen Ireland etc)	37.97% 30	30.38% 24	10.13% 8	6.33% 5	14.19% 12	79	2.30
National Government (Enterprise Ireland; IDA; Department of Enterprise; Department of Social Welfare; Department of Culture)	26.03% 19	30.14% 22	16.44% 12	9.59% 7	17.81% 13	73	2.63
European Union (EU funded projects; INTERREG, Horizon 2020, Erasmus etc)	19.40% 13	26.87% 18	17.91% 12	16.42% 11	19.40% 13	67	2.90

What would be most important in enabling sector growth

Responses from the SME's show the key requirements identified for growth. Areas of focus included: Funding, Space, Market Access, Technology etc.

Survey Key Points

Survey Conclusions

i. Risks are near term in nature and pandemic created – Whilst the CE SME's on average predict a 15% fall in Sales due to covid in 2020, over the next five years they predict a 10% rise.

ii. Certain SME's are growing even during the Pandemic challenge – mostly technology focussed ones with non audience facing products

iii. Challenges to audience facing practitioners are potentially catastrophic – resulting in an immediate and significant support consideration to ensure predicted longterm returns

iv. Innovation by the sector is deemed critical

v. Increased Investment is ranked the top future growth factor across all the creative economy subsectors

vi. Place is an immutable factor in the creative economy of the GMR area

vii. Possible generational shift in sector to new means of production and connecting with society/clients via technology

Recommendations
Short term

1. **Continued creative economy funding and supports** – Ensure the continued support of the creative economy that has been vital for the international reputation of the region

2. **Increased focus on “live” audience based supports to ensure continuation** of specific supports to the audience facing members of the sector such as the live performance support scheme and others tailored for specific subsectors.

3. **Digital Enabling of the creative economy** – Support immediate interventions in **technological support and provision**. A number of initiatives that support online trading as well as live streaming to help members of the sector engage audiences in the short term. (Includes the provision of photography vouchers to data hosting and streaming equipment and expertise). **Support the CE need to innovate now** to emerge better prepared in the post pandemic world.

4. **Facilitation of a COVID response toolkit**. Providing the most up to date information on funding and support packages available. Include the development of a forum for the exchange of views and experiences from those in the sector as they deal with the pandemic. This should also include technological solutions for **skills and mentoring that can be delivered remotely.**

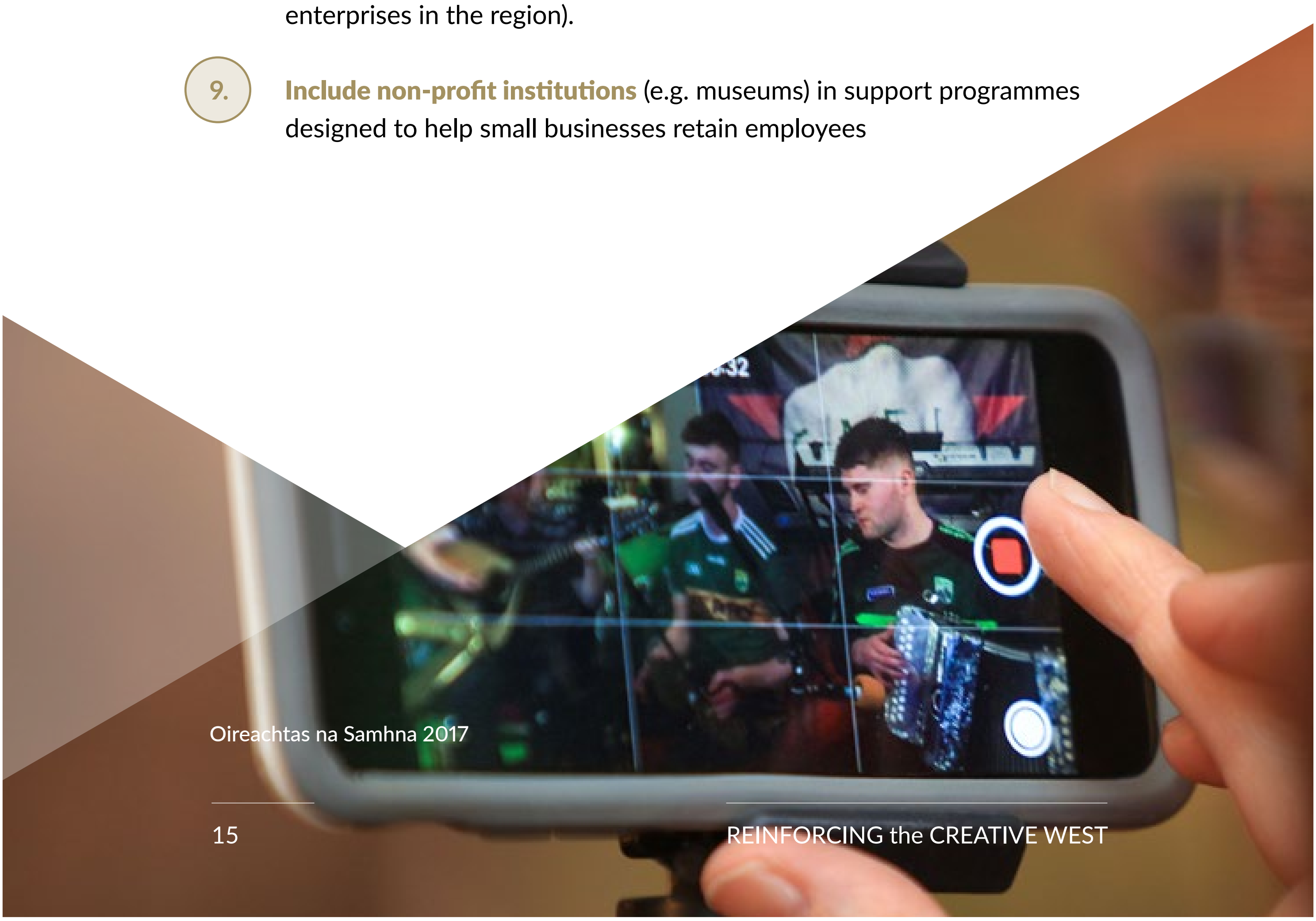
5. **Establish a regional Creative West showcase event**. This will be an opportunity to develop and host a digital fair of cultural and creative pursuits across the region. Hosted by the supporting agencies across the region, it would be an opportunity for creatives to promote their enterprise through the submission of a short video on their work / produce. Together with the support of some key institutions (TG4 and GFC) in the sector, combined with the right production values, this could also act as a branding and marketing tool for creativity in the west of Ireland and offer a vast audience reach.

6. **Cultural vouchers:** In line with ongoing efforts to encourage spending in the tourism sector (Staycation subsidy) a similar scheme could be developed for the outputs of the creative sector. This can be seen as a positive way to address the demand shock that the sector is experiencing.

7. **Acknowledge increased risk for audience facing creative enterprises in peripheral and Tourist centric regions** – Recognition on behalf of funders that creative economy enterprises are disproportionately impacted by the COVID 19 pandemic. International evidence has shown this is the case in cities from New York to Paris, at the smaller scale of the GMR region the impact is likely to be even stronger.

8. Obvious gaps exist **in recognising different business models** and supporting them appropriately. An example is simplifying eligibility criteria and making them accessible to hybrid forms of employment (e.g. those who have "other" jobs, circa 27% of the creative economy enterprises in the region).

9. **Include non-profit institutions** (e.g. museums) in support programmes designed to help small businesses retain employees



Oireachtas na Samhna 2017

Longer term

1. **Increased sectoral representation and engagement** in accurately evaluating the sectors impact on society and economy (Total Value) At a governmental level more progress needs to be made on gauging the non-economic impacts of industrial and entrepreneurial endeavour. One way that creative economy enterprises can help address this is through the development of a coherent voice.

2. **Development of a coherent brand for creativity in the West of Ireland.** We have had success with this before. The branding of a coastline that included rocky outcrops and coral beaches came together under the moniker Wild Atlantic Way, equally the diversity of talent and creative produce, that shares its unique location can also brand itself to an international audience. What is needed is a coordination of funding and supporting institutions at the regional level. A loose collection of these bodies, including local authority, local enterprises, other agencies (WDC, Údarás na Gaeltachta) that act to represent the creative economy ecosystem in the region. This is an opportunity to build the brand as well as becoming a go to point for information and support for the region.

3. **Support for the reinforcing of the creative ecosystem in the region.** It consists of a variety of actors and agencies that are connected strongly and weakly across the region. The connection of these nodes can be formalised through investment in a central node for the region. **A flagship cultural anchor**, a place for working, for co-producing, for cultural celebration, a place for learning, a place for sharing would concretise the place of the creative economy in the region.

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