Economic & Social Impact Assessment:

a creative momentum project

South East Northern Ireland Creative Sector

Northern Periphery and Arctic Programme 2014-2020
EUROPEAN UNION
Investing in your future
European Regional Development Fund
Whitaker Institute
OÉ Gaillimh NUI Galway

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About *a creative momentum project*

A three year (2015-2018), transnational project co-funded by the EU Interreg Northern Periphery and Arctic Programme, *a creative momentum project* focused on the development of the creative industries sector in regions across Europe's Northern Edge. This report emerged from the 'Intelligence and Influence' aspect of *a creative momentum project.* For information more visit: https://mycreativeedge.eu/

Contents

1. Introduction and overview

Assessing the value of the creative sector[1] is a complex task. It not only has economic value, which in itself is difficult to measure, but in particular, its cultural sub-sectors strongly contribute to social and cultural development. This impact assessment presents key economic estimates of the value of the creative sector in the South East Economic Development (SEED) region of Northern Ireland. Our analysis goes beyond traditional economic measures to also encompass a wider socio-economic focus. To do this, we combine existing knowledge and statistics, with online survey data and in-depth interviews with creative sector entrepreneurs from the SEED region[2].

1.1 Creative sector impact

The economic contribution of the creative sector in the SEED region is significant:

- Total **direct sales** of craft, cultural and creative produce amounted to **£64.9 million** in 2016. Making use of a multiplier the **total value** is estimated at **£79.4 million**.
- A total of approx. **1,981** people were **employed** in the creative sector of the South East of Northern Ireland in 2015.
- **Employment** and **enterprise numbers** are **concentrated in creative sub-sectors**, such as design, architecture, software and media.
- **Future prospects** reported by survey respondents predict a **rate of growth in employment** numbers of **14%** up to 2020.
- The SEED region's creative sector is a **relatively young sector** with 40% of all operations surveyed in existence less than five years.

A range of wider socio-economic contributions from the creative sector in the SEED region of Northern Ireland, driven by its distinctive characteristics include:

- **Place-based impacts**
    - The creative sector is locally embedded, facilitating strong local economy value capture. But it is also internationally and globally focused, supporting economic growth.
    - The creative sector can contribute to re-inventing perceptions of peripheral regions as attractive, creative places to live, work and visit.
    - The qualities of creative sector entrepreneurs are an asset that facilitates harnessing of local opportunities, such as from place-based resources like culture, traditions, landscape and heritage.
- **Human and social capital impacts**
    - Inter-sectoral mobility of creative labour, as well as strong knowledge transfer to emerging talent and other entrepreneurs, strengthens the human resource capacity of the region.
    - The open and collaborative approach of creative sector entrepreneurs builds a supportive entrepreneurial environment.
    - Creative sector entrepreneurs also contribute to positive social and community impacts.

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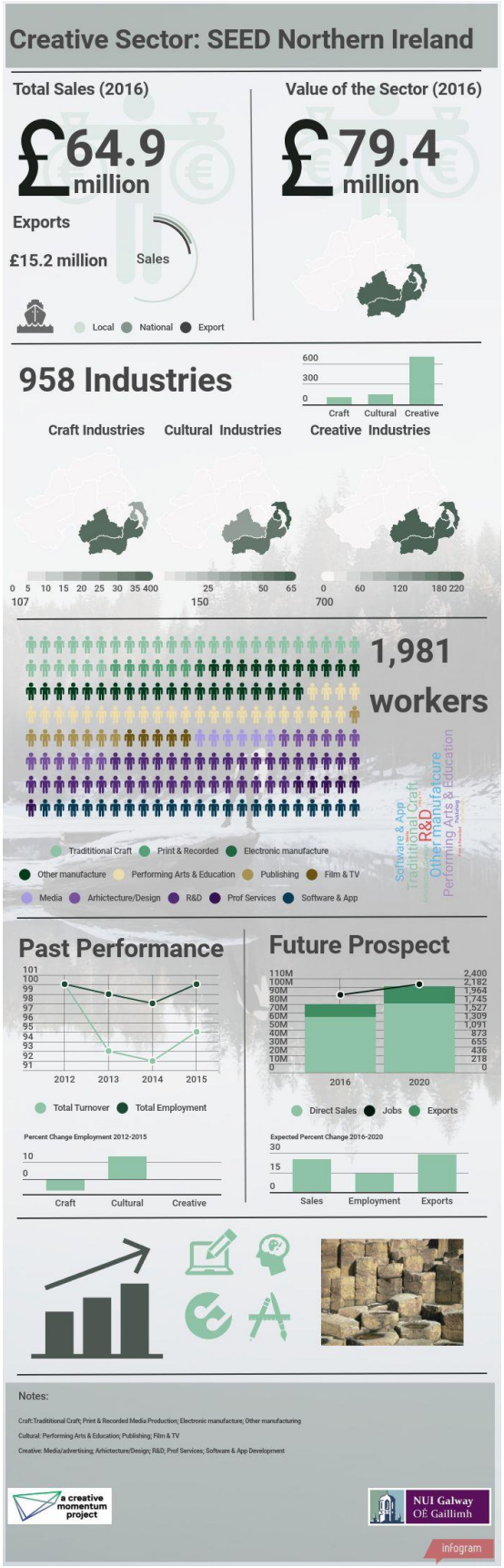
[1] Defined here as the following creative sub-sectors: Advertising, Animation, Architecture, Craft, Cultural Facilities, Design, Film, Games, IT and Computer Services, Marketing, Music, Performing Arts, Photography, Publishing, Radio, Software, TV and Visual Arts.

[2] See Appendix 1 for more details on the methodology applied.


Creative Sector: SEED Northern Ireland
Total Sales (2016)
£64.9 million
Exports
£15.2 million
Sales
Local
National
Export
Value of the Sector (2016)
£79.4 million
958 Industries
600
300
0
Craft
Cultural
Creative
Craft Industries
Cultural Industries
Creative Industries
0 5 10 15 20 25 30 35 400
107
25 50 65
150
0 60 120 180 220
700
1,981 workers
Traditional Craft
Print & Recorded
Electronic manufacture
Other manufacture
Performing Arts & Education
Publishing
Film & TV
Media
Arhictecture/Design
R&D
Prof Services
Software & App
Past Performance
101
100
99
98
97
96
95
94
93
92
91
2012
2013
2014
2015
Total Turnover
Total Employment
Percent Change Employment 2012-2015
10
0
Craft
Cultural
Creative
Future Prospect
110M
100M
90M
80M
70M
60M
50M
40M
30M
20M
10M
0
2,400
2,182
1,964
1,745
1,527
1,309
1,091
873
655
436
218
0
2016
2020
Direct Sales
Jobs
Exports
Expected Percent Change 2016-2020
30
15
0
Sales
Employment
Exports
Notes:
Craft: Traditional Craft; Print & Recorded Media Production; Electronic manufacture; Other manufacturing
Cultural: Performing Arts & Education; Publishing; Film & TV
Creative: Media/advertising; Arhictecture/Design; R&D; Prof Services; Software & App Development
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infogram

1.2 The South East Northern Ireland region

In this report, the South East Northern Ireland region encompasses three local government districts (LGDs), Armagh City, Banbridge & Craigavon Borough Council, Ards & North Down Borough Council and Newry, Mourne & Down District Council. The region has a population of almost 550,000 with the greatest proportion (38%) living in the Armagh City, Banbridge & Craigavon Borough Council area, followed by Newry, Mourne & Down District Council (32%) and Ards & North Down Borough Council (29%) (Invest NI 2017a; 2017b; 2017c). The population density varies across the LGDs with the Ards & North Down Borough Council area (349 per km^2) the most densely populated, followed by Armagh City, Banbridge & Craigavon Borough Council area (156.1 per km^2), and Newry, Mourne & Down District Council (109.8 per km^2) (NISRA, 2017).

The economy of the region is dominated by micro and small scale businesses. On average across the three LGDs 90% of businesses are micro (0-9 employees) and 9% small (10-49 employees) scale (Invest NI 2017a; 2017b; 2017c). Business numbers and employment is concentrated in the services sector, with the highest concentration in the Ards & North Down Borough Council area (see Figure 1 and 2).

Figure 1: Percentage of businesses by industry sector

	Ards & North Down Borough Council	Armagh City, Banbridge & Craigavon Borough Council	Newry, Mourne & Down District Council	Northern Ireland
Agriculture	14%	30%	28%	25%
Construction	13%	13%	16%	13%
Production	7%	6%	6%	6%
Services	67%	51%	50%	55%

Source: Invest NI 2017a; 2017b; 2017c

Figure 2: Percentage of employment by sector

	Ards & North Down Borough Council	Armagh City, Banbridge & Craigavon Borough Council	Newry, Mourne & Down District Council	Northern Ireland
Industry sectors				
Construction	3%	5%	7%	4%
Manufacturing	7%	17%	13%	11%
Services	89%	77%	78%	83%
Other	1%	2%	2%	1%
Public and private sector				
Public sector	24%	27%	26%	28%
Private sector	76%	73%	74%	72%

Source: Invest NI 2017a; 2017b; 2017c

Figures on education levels of the SEED area population show that on average across the three LGDs 31% are educated to NVQ level 4 or above and 54% below this level, while 14% have no qualifications. Long term and youth unemployment data for the region shows that of the 3% of the population claiming unemployment benefit, on average 25% are aged between 18 and 24 and 36% are long term unemployed (Invest NI 2017a; 2017b; 2017c).

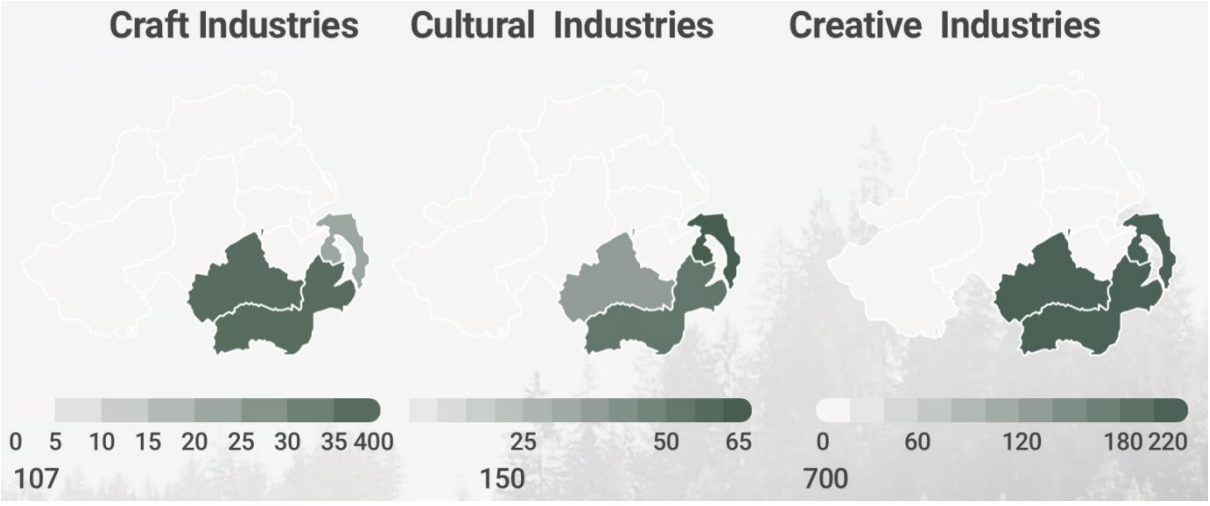
2. Economic impact

2.1 Industry characteristics

The creative sector in the SEED region of Northern Ireland consists of a large number of small and micro enterprises. The average number of employees per firm equals 2.06 persons. This differs slightly between the sub-sectors of craft, cultural and creative industries. The craft sector has the highest number of single person operations.

The SEED region's creative sector is a relatively young sector with 40% of all operations surveyed in existence less than five years. Some 13% of operations were less than one year old. The relative youth of the sector can help explain that 21% of survey respondents do not work in the creative sector full-time and all of these respondents engaged in other paid employment. One final defining aspect of the sector is the relatively tight geography of spend. On average, 59% of spend on goods and services by creative sector enterprises took place within the local market (a further 25% was spent nationally).

Figure 3: Creative sector enterprises South East Northern Ireland



2.2 Sales

Total direct sales of craft, cultural and creative produce amounted to £64.9 million in 2016. Making use of a multiplier to derive the total value of the sector to the region we see the value of the creative sector to the SEED region Northern Ireland as £79.4 million. Average company sales differ across the sub-sectors. The creative industries reported average sales close to twice that of their craft and cultural counterparts.

2.3 Exports

67% of survey respondents derived a portion of their sales from exports. Across the sector this accounts for 24% of direct sales or £15.2 million. Again there are differences across the sectors, but there is a notable difference in organisation size with smaller and younger companies least likely to export their produce. When questioned as to the main reasons for not exporting respondents referred to issues of scale and stage of product development.

2.4 Employment

Data from the Northern Ireland Statistics and Research Agency Inter-Departmental Business Register indicate that a total of approx. 1,981 people were employed in the creative sector of the South East of Northern Ireland in 2015. Geographically, employment is relatively well dispersed across the region with the highest numbers recorded in Armagh City, Banbridge and Craigavon Borough Council area (781). Craft industries are the most geographically diffuse of the creative sector while Ards and North Down Borough Council had the highest share of creative industry employment.

The results of the survey suggest that employment in the creative (17% increase) and cultural (13% increase) industries has experienced healthy growth in recent years. The craft industries suffered a significant decline in numbers over from 2012 to 2015 (fall of 30%). With variations at the sub-regional level, overall employment in the creative sector remained stable from 2012 to 2015.

Figure 4: Creative sector employment breakdown South East Northern Ireland

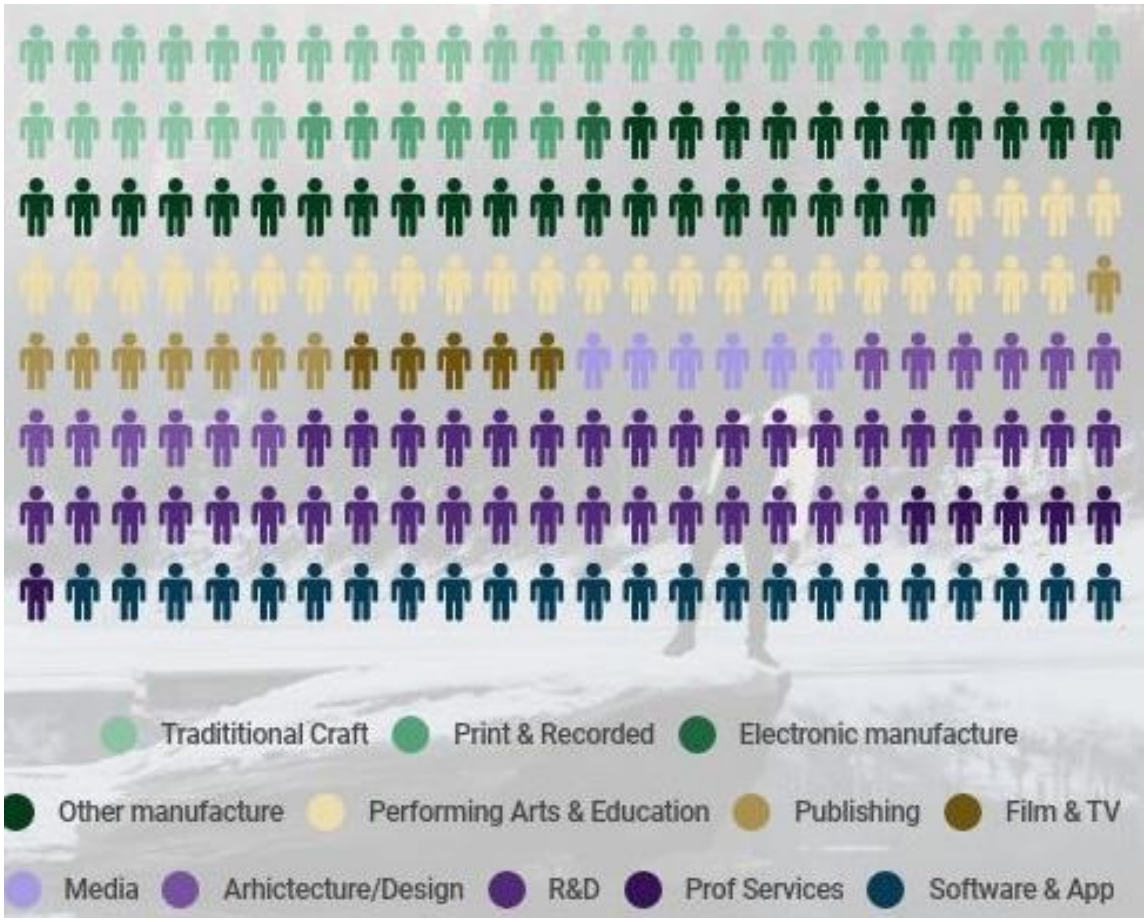


Figure 5: Craft turnover and employment 2012-2015

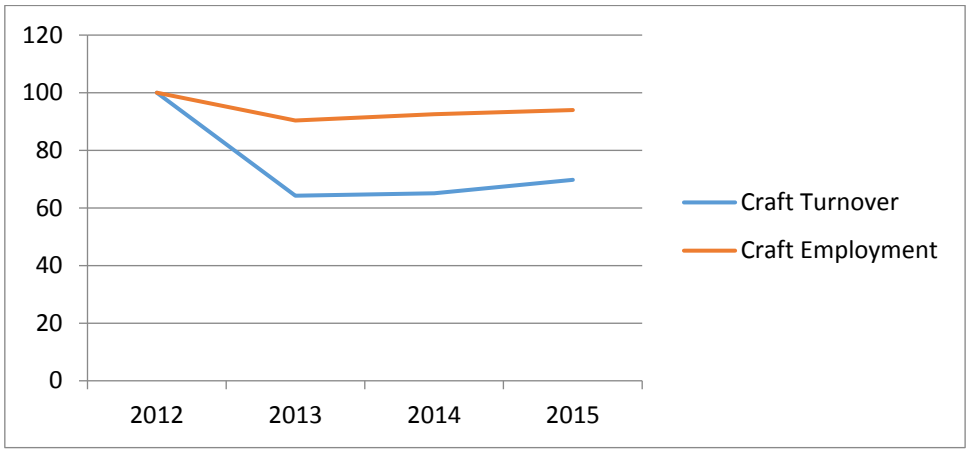


Figure 6: Cultural turnover and employment 2012-2015

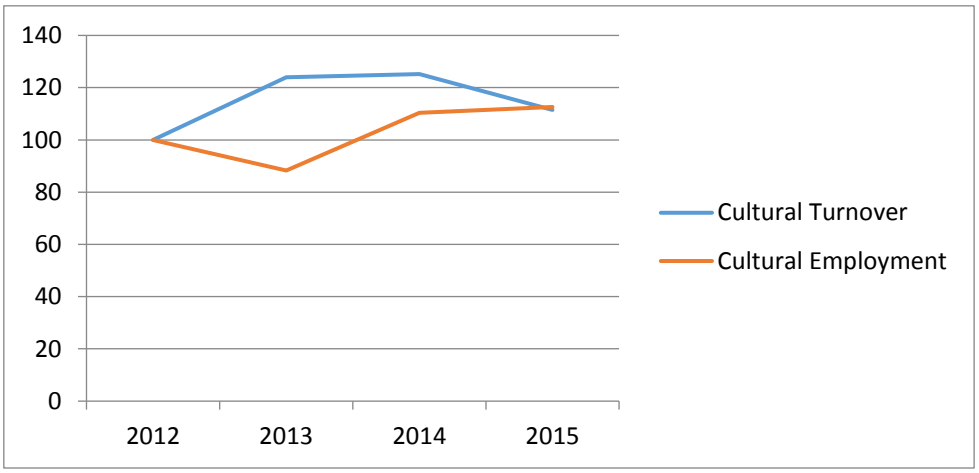
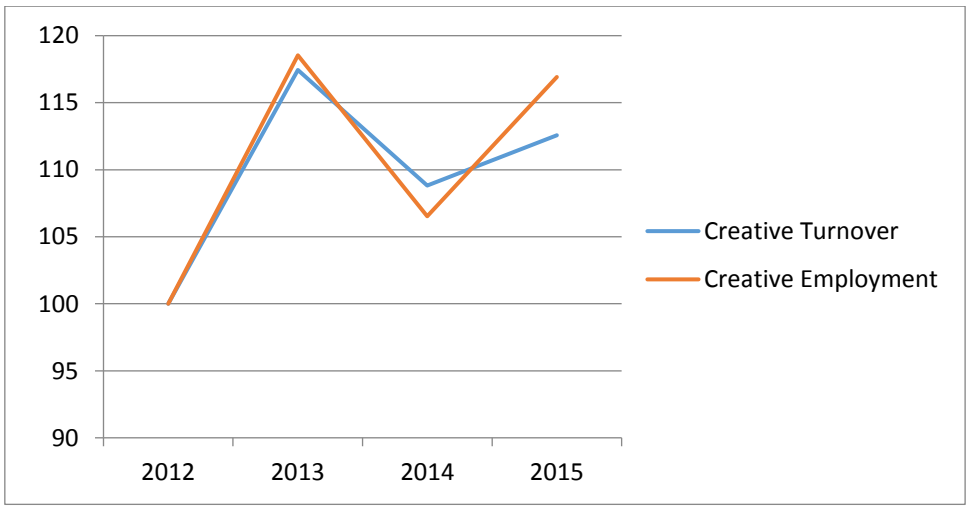


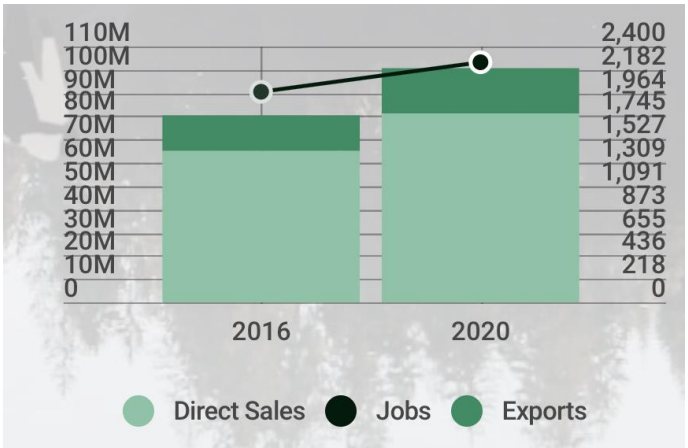
Figure 7: Creative turnover and employment 2012-2015



2.5 Future prospects

Based on our analysis, both the creative and cultural sub-sectors saw significant increases in employment and this holds true for future levels of predicted growth. Future prospects reported by survey respondents predict a rate of growth in employment numbers for the whole sector of 14% up to 2020. On this basis, employment in the creative sector of the SEED region could reach 2,258 by the end of the decade. Predicted future sales growth reflects a more positive rate of change, reaching £81 million in direct sales for the region by 2020 with exports touching £19.6 million in the same year.

Figure 8: Future prospects



SOCIO-ECONOMIC IMPACTS OF THE CREATIVE SECTOR IN PERIPHERAL REGIONS

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GLOBALLY ENGAGED

CO-EXISTENCE OF LOCAL EMBEDDEDNESS AND GLOBAL ENGAGEMENT THROUGH EXPORTS

LOCALLY EMBEDDED

EMBEDDED IN THE LOCAL ECONOMY THROUGH LABOUR SOURCING AND SPEND ON GOODS AND SERVICES

CULTURE OF COLLABORATION

ENTREPRENEUR COLLABORATION STRENGTHENS THE BUSINESS ENVIRONMENT

KNOWLEDGE TRANSFER

TRANSFER OF KNOWLEDGE STRENGTHENS THE HUMAN RESOURCE CAPACITY OF THE REGION

UNLOCK LOCAL RESOURCES

CREATIVE ENTREPRENEURS VALUE, HARNESS AND STRENGTHEN PLACE-BASED RESOURCES SUCH AS LANDSCAPE AND TRADITION

POSITIVE PLACE PERCEPTION

RE-INVENT PERCEPTIONS OF PERIPHERAL REGIONS AS ATTRACTIVE, CREATIVE PLACES

DYNAMIC & FLEXIBLE

ADAPTABLE MULTI-SKILLED ENTREPRENEURS AND WORKFORCE EXISTS IN THE CREATIVE SECTOR

COMMUNITY ENGAGEMENT

ENTERPRISES INVOLVED IN VOLUNTARY ACTIVITIES SUPPORTING SOCIAL AND COMMUNITY DEVELOPMENT

3. Socio-economic contribution

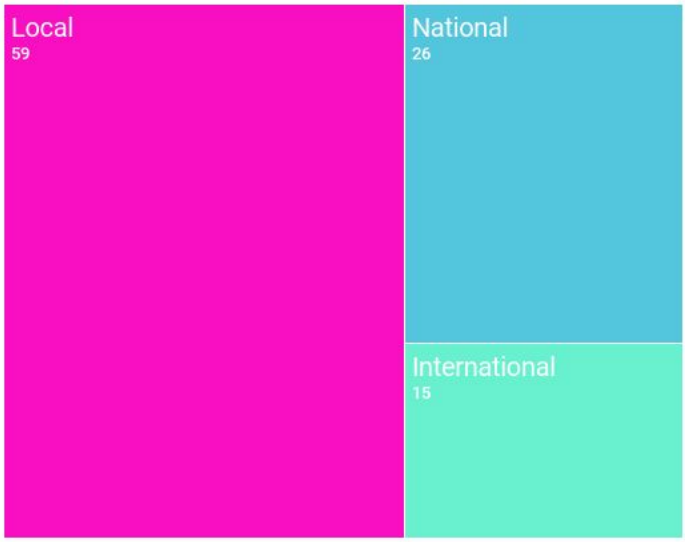
Beyond what is traditionally understood as economic impact, studies have found the creative sector has a range of wider benefits and spill-over impacts (Tom Fleming Creative Consultancy, 2015; Crossick and Kaszynska, 2016). Such benefits are difficult to measure precisely, but our assessment suggests their contribution is significant. These impacts have important positive implications for regional development.

3.1 Place-based impacts

3.1.1 Locally embedded

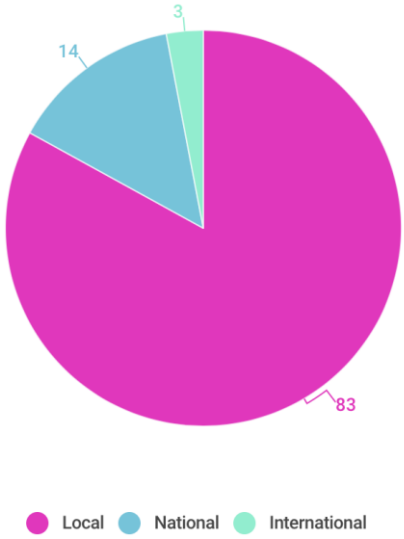
Sectors that have greater levels of embeddedness in the local economy support stronger regional development. Our findings suggest the SEED region's creative sector is strongly embedded in the local economy. The majority of spend by creative sector enterprises on goods and services is local (see Figure 9). Strong internal connections within regional economies facilitate capturing greater value from the flow of goods and services.

Figure 9: Percentage spend on goods and services (excluding labour costs) by location



Creative sector businesses are also focused strongly on local employment. This observation is supported by our survey findings where the vast majority of labour is locally sourced (see Figure 10).

Figure 10: Percentage of labour sourced from different locations



Supporting employment of local talent can also be part of the approach underpinning creative businesses in the SEED region. Keeping people with creative talent in the region is important to support the broader creative ecosystem. Interviews help to illustrate this point:

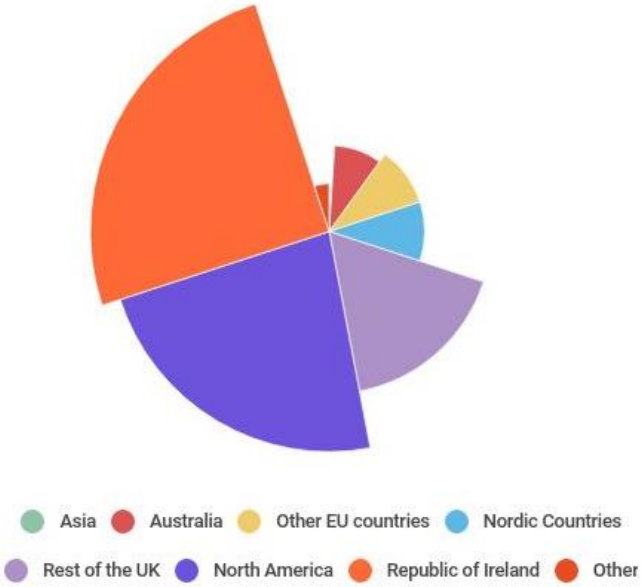
> *"One of our jobs is to employ more people in the cultural sector" (Interview 4).*

> *"I think we would be the only…organisation that employs people in the…area, you know in this type of work. A lot…leave and go to work in Belfast, Derry, across to England. It's a big issue. If people leave you can't develop…you don't have that human capital" (Interview 5).*

3.1.2 Globally engaged

The co-existence of local embeddedness and global engagement is important for the development of companies in peripheral regions (Dubois and Hedström, 2015). Small local markets limit enterprise growth. Based on our survey findings from the SEED region it is estimated while 57% of sales occur in the local market, 20% are national and 24% international. Two thirds of the creative sector enterprises we surveyed said they exported (67%). Export destinations were diverse, but the Republic of Ireland was the most significant export region (see Figure 11). Most survey respondents (63%) reported a pattern of increasing exports in recent years.

Figure 11: Main export regions – creative sector enterprises in the South East Northern Ireland region



The activities of individual creative sector entrepreneurs further illustrate the local embeddedness but international focus of creative sector enterprises. For example:

> *"I have broadened my client base. I do much less work for clients in Northern Ireland and I work a lot more for clients in Dublin and London" (Interview 1).*

> *"We went to England which was brilliant, we started networking and establishing connections with companies…from that we got to be part of an EU culture programme" (Interview 5).*

3.1.3 Positive place perception

Creative sector entrepreneurs view the SEED region positively and appreciate its qualities. Our survey found that 85% indicated quality of life and 97% indicated that the natural environment was either good or very good. Creative sector entrepreneurs can be attracted to live and work in the SEED region because of these characteristics, but they also have an important role in shaping the region's image The 'Regeneration Impacts' case study (see section 4.1) further illustrates this, as well as interviews with creative sector entrepreneurs, for example:

> *"Good roads, friendly people, clean air, why wouldn't you want to move up here" (Interview 1).*

> *"There is not a lot happening culturally…a small town…in terms of the resources and facilities…you can see that as a disadvantage…limited venues…but you can also look at it as an opportunity to find unusual venues that you can quickly transform….we still managed to programme an international festival with maybe 14 countries" (Interview 5).*

The SEED region is already strong in terms of quality of life and natural environment. Creative sector entrepreneurs contribute an additional dimension to the region's attractiveness and help to position it as a creative place, further strengthening regional competitiveness.

3.1.4 Unlock local resources

Creative, cultural and craft entrepreneurs can harness value from cultural place-based features of the location itself, such as heritage, traditions, landscape and nature, which inspire and fuel creativity. Cultural resources also attract visitors to places (see case study, section 4.2). Wider interview evidence from the SEED region also finds this pattern.

> *"I used an archive resource…this incredible social history that nobody had ever seen" (Interview 1).*

> *"The old rituals…to carry on the…tradition…We have worked as an encourager and an inspiration" (Interview 4).*

Creative sector entrepreneurs show an ability to change direction and adapt to serve new market demands. They are innovative and try new things, as well as being tolerant of uncertainty and have determination to succeed. Interviews help to illustrate this point:

> *"I think it is about self-belief and perseverance…if you are willing to work very hard for very little for quite a while you'll get somewhere. If you expect it to be handed to you on a plate then you are not going to get anywhere" (Interview 1).*

In the cultural sector a visionary quality is identified, where entrepreneurs identify unmet social and cultural needs. For example:

> *"We saw a need to bring communities together here…for social cohesion" (Interview 4).*

The SEED region's creative sector entrepreneurs are also aware of the importance of building strong relationships to success in the creative sector. Entrepreneurs know the value of being adaptable, personable and reliable. This helps to build new business opportunities and unlock local resources. For example:

> *"It doesn't really matter what my company is called. It's me and my service that people are looking for…one thing follows on to the next…you work with somebody, they recommend you to someone else, they give you a call, you do a job with them. It is kind of word of mouth really" (Interview 1).*

> *"Networks, building your participants, your audience…your customers. Listening to what they want" (Interview 5).*

This evidence highlights how the qualities of creative sector entrepreneurs are also an asset that facilitates harnessing of local opportunities.

3.2 Human and social capital impacts

3.2.1 Dynamic, flexible entrepreneurs and workforce

Developing human capital is important to regional development. Based on our survey, the majority of respondents from the SEED region (79%) indicated that their work in the creative sector was their full-

time occupation. However for those (21%) where creative sector work was not a full-time occupation, all engaged in other paid employment. Other occupations included work in sectors such as agriculture, education and sales. The results indicate an adaptable multi-skilled workforce exists in the creative, craft and cultural industries, not reliant on one sector of employment and is flexible with regard to inter-sectoral mobility. Interviews also help to illustrate this point:

> *"I have…worked in various areas…all sorts of things…working part-time in unrelated areas" (Interview 2).*

Wider research has identified creative industries, and the skills of creative professionals, as an important source of innovative ideas, as well as distinct qualities such as imagination and intuition. Creative workforce mobility is also important to increase the innovation potential within the wider economy (Crossick and Kaszynska, 2016; Kimpeler and Georgieff, 2009; KEA European Affairs, 2009).

3.2.2 Knowledge transfer

Businesses operating in the creative sector actively transfer knowledge to others in the SEED region and contribute to skills development. Over two thirds (65%) of respondents indicated that they were involved in education, mentoring and training activities. The type of activities most common (49%) were giving talks, training or workshops to the public and students. Creative sector enterprises were also engaged with the education sector to help update and shape courses in line with current needs. Based on our findings, 13% were involved in these activities. Entrepreneurs also actively share knowledge with other businesses and emerging talent. According to our survey, 12% had provided mentoring or advice to other businesses and 9% had provided internships. More than 50 hours were devoted to education and training activities in the past year by 33% of respondents.

Evidence from interviews helps to shed light on the motivations for involvement in education and training. SEED region creative sector entrepreneurs want to develop local talent not just for the benefit to their business, but also as a response to social need. For example:

> *"We worked with them a few years ago to run a training programme where we would go into very rural communities…we noticed there was an access problem" (Interview 5).*

> *"We have done training courses with high school students through a youth centre…we are very interested as a company in inspiring young people to consider a creative career…sometimes schools don't see the opportunities that are out there" (Interview 6).*

3.2.3 Culture of collaboration

Cooperative relationships between creative sector enterprises are common in the creative sector and important to its functioning. This culture of collaboration strengthens the business environment for entrepreneurs. Our survey evidence suggests the creative sector in the SEED region is dominated by micro businesses and self-employed entrepreneurs. Evidence from interviews shows that this structure also breeds a culture of cooperation among entrepreneurs. Collaboration can happen at the local or international level. For example:

> *"I began talking with a couple of other (local) artists…we started talking about setting up a studio group" (Interview 3).*

"It leads to a lot of collaborations. At the moment we are collaborating with Poland on a co-production" (Interview 5).

3.2.4 Community engagement

The SEED region's creative sector does not just contribute to the local economy, but is also socially embedded in communities. Almost a third (31%) of survey respondents indicated they were involved in voluntary activities that support social and community development. Voluntary activities were identified in the craft, design, IT, performing and visual arts sub-sectors of the creative industries. The type of activity most common (31%) were projects with their local community where they had voluntary involvement. Support for non-profit organisations is also significant, 27% worked on projects with these types of organisations, while 19% provided support through donations or sponsorship. The amount of time devoted to these activities was also significant – 56% indicated they spent more than 50 hours on voluntary activities in the past year.

Cultural organisations also show strong civic engagement, such as being active in local committees and organisations. This results in these organisations having a role in shaping the political agenda and ensuring issues relevant to the organisation's goals are pushed forward. For example:

"I would be quite active in networking. I am involved in our local Chamber of Commerce. I sit on our Council's Arts and Heritage panel" (Interview 3).

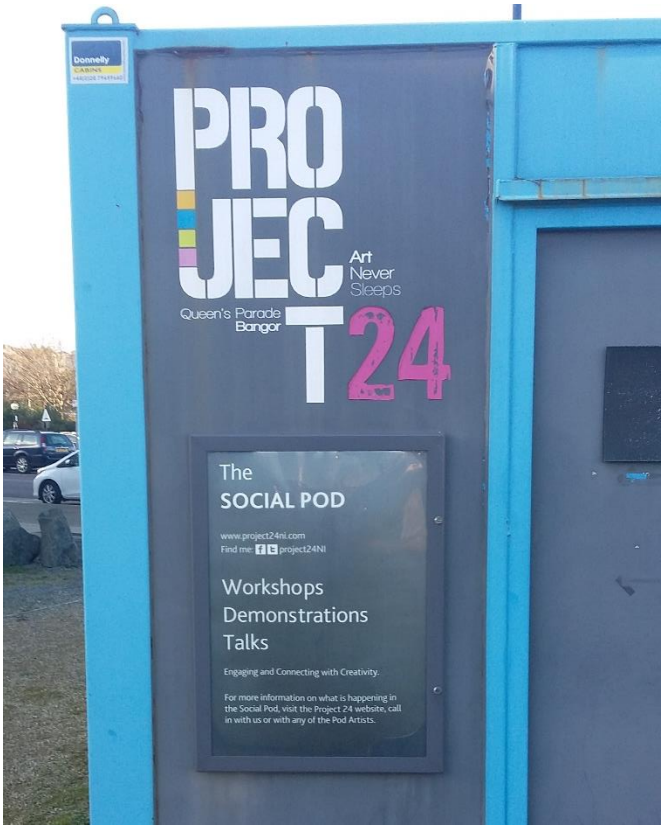
"We have many functions, one is political…We have been at the forefront of lobbying in Stormont…more recently in Westminster, and in Europe" (Interview 5).

4. Case studies

In this section we develop a number of case studies to help illustrate specific impacts of particular sub-sectors and cultural entities within the broader creative sector.

4.1 Regeneration impacts: Bangor, arts and culture

On the north end of Ards Peninsula, Bangor is a seaside town just over 10 miles from Belfast. A once popular holiday destination, its recreation trade has declined significantly in the last 30 or more years. The Bangor of more recent decades has experienced economic decline. New retail spaces were developed in the 1990s, but with economic downturn of mid to late 2000 vacant units became a common sight. Arts and cultural activities play a part in the town's rejuvenation. Development plans for the town centre include a vision to celebrate culture and creativity (Ards and North Down Borough Council and URS Scott Wilson, 2011).



Project 24

On a derelict site on Queen's Parade, Bangor, just along the seafront, converted shipping container-like structures house artist studios. Project 24 brings artists and their work out into the community, forming part of regeneration efforts by the local council. Artists working across a variety of mediums, such as painting, printmaking, sculpture, photography and crafts, are resident. A glass wall acts like a shop-front, making artists at work visible to those passing by. An important aspect of the project is that artists have a regular presence in their studio. Members of Project 24 should work in their studios at least 6 hours a day, 6 days a week. The community garden and event hub that also form part of Project 24 opens the site up to use by the wider community. The project also helps artists to connect, which has led to its own impacts and collaborations, one of which is Boom! Studios. Ards and North Down Borough Council initially planned for the project to run for 24 months. While this is a temporary project on a site planned for re-development, Project 24 continues.

Boom! Studios

In a town without a dedicated arts and cultural centre Boom! Studios makes a fitting addition to the cultural infrastructure of Bangor. Founded by three post-Project 24 artists, Boom! Studios comprises workspaces and artist studios, as well as a community arts venue. It brought life back into the vacant top floor of a building in Bangor town centre, and has since also expanded to the first floor. As a social enterprise one of its strategic aims is to have social impact. Because of its low cost model, it provides affordable workspaces and studios to creative professionals, most of who would otherwise work

alone, disconnected from their peers. The studios provide a place to work, but also be part of a creative community. A monthly 'Trade Forum', open to studio residents and non-residents, provides and informal setting for discussion of issues facing creative sector entrepreneurs. Outreach to the wider community is also important. Its arts venue hosts a range of workshops and classes, targeting a variety of interests and age groups. It hosts a monthly 'Late Night Studio' open evening where the public can visit artist studios to discuss and observe their work. All of these activities form part of a self-sustaining revenue model. Boom! Studios applies for public funding for specific purposes, for example supporting community projects, but aims to build resilient and self-sufficient revenue streams so the organisation is not dependent on public funds.

Festivals

Bangor is also becoming a town of festivals. Annual festivals include the music and arts festival Open House, the literary festival Aspects and the Ulster Fleadh. In the wider Ards Peninsula, 'Creative Peninsula' includes a more than week-long summer celebration of art and craft comprising demonstrations, tours, workshops and open studios. As part of the 2017 programme, Project 24 featured as part of its 'Creative Coach Tour'. Boom! Studios also has connections to these arts and culture events. In 2017, Boom! Studios collaborated with the Open House festival developing evening art walks comprising guided tours of cultural spaces in the town centre.

4.2 Tourism impacts: Creative and cultural assets

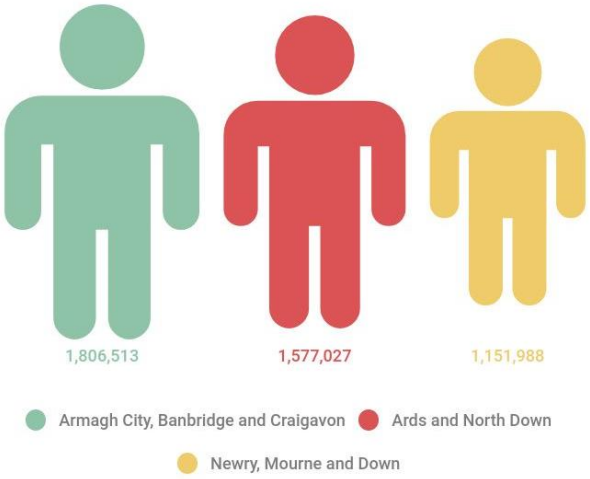
Culture and creativity are also important to attract tourists to a region and an important factor in recent decades' tourism growth (OECD, 2014). Factors driven by the creative sector, and wider cultural assets, influence external visitor numbers to Northern Ireland. Of those who attended for leisure, 13% said that Game of Thrones influenced their decision to visit Northern Ireland. While in Northern Ireland, the top activity of external visitors was experiencing local traditions such as food, craft, literature, music and dance, which 40% said they engaged in (NISRA, 2017c).

Civil unrest associated with the Northern Ireland Troubles continues to associate a negative image with Northern Ireland. Cultural assets and activities within the creative economy, such as Game of Thrones, have helped to create a different narrative for Northern Ireland (NISRA, 2017b).

Cultural landscape and heritage assets attract significant visitor numbers

Cultural assets attract large numbers of visitors to the SEED region. For example Slieve Gullion Forest park, which features the children's art and story trail the Giant's Lair, attracted 387,936 visitors in 2016. Where figures are available, other attractions in the region also attract significant visitor numbers (see Figure 12). These sites have significant cultural value. They include iconic parts of cultural landscapes, as well as wider natural, human and built heritage. Visitors generate significant revenue for the local economy. Across Northern Ireland, overnight trips, both domestic and external, generated an estimated £851 million in expenditure. In Gross Value Added terms, this equates to an estimated 2% of the local economy (NISRA, 2017b). Of total expenditure, this was concentrated in the Belfast areas (39%), however £132.4 million (16%) was concentrated in the SEED region (£45.9 million Ards and North Down, £60.9 million Newry, Mourne and Down; £25.5 million Armagh City, Banbridge and Craigavon) (NISRA, 2017c). The strong visitor numbers to cultural tourism sites in the SEED region, alongside wider creative sector industries can further strengthen revenues generated from tourism. OECD (2014) have found that broader creativity is becoming increasingly important as part of cultural tourism, moving away from more traditional manifestations focused on cultural heritage.

Figure 12: 2016 visitor numbers to SEED attractions



Source: Visitor attractions and their number of visitors by Local Government District (NISRA, 2017a).

Creativity an increasingly important resource for creative tourism

Opportunities exist for creative sector enterprises to directly engage with tourism markets as a revenue stream. They can provide visitor experiences, such as Moneypenny's Blacksmith Workshop and Ballydougan Pottery, who both feature on Armagh trail as part of the Northern Ireland Creative Trail app[3].

Creative content generation, such as literature, film, television and games, with links to the region also has a legacy and spill-over value boosting tourism. For example, screen tourism in Northern Ireland has been boosted by the epic TV series Game of Thrones making use of locations and studio space. As HBO's largest European TV drama production agencies such as Northern Ireland Screen, Northern Ireland Tourist Board and Tourism Ireland are working together to maximise these opportunities (Northern Ireland Screen, 2014). Tourism Ireland has in recent years invested in a series of marketing campaigns in collaboration with HBO aiming to reach millions of fans. One of its 2016 campaigns 'Doors of Thrones' reached an estimated 126 million worldwide. Short films developed have over 17 million views, generating coverage worth about £11.3 million (Tourism Ireland, 2017). A number of locations from Game of Thrones are in the SEED region such as Castle Ward, Audley's Field and Tollymore Forest Park.

The SEED region is also home to the 'Brontë Homeland'. This is birthplace of Patrick Brontë, father of the Brontë sisters of literary fame, responsible for works such as Jane Eyre and Wuthering Heights. The Brontë Homeland Interpretive Centre in county Down focuses on the heritage surrounding the family's roots in the area. A 10km signposted drive takes you to local built heritage sites with links to the family (Tourism Northern Ireland, 2018).

[3] This Armagh and Down Creative Trail's app was developed through *a creative momentum project* and is available for download for Android here or Apple here.

5. Conclusion

Our analysis suggests the creative sector has significant economic and social value in the SEED region of Northern Ireland. Placing the creative sector as part of a regional development strategy can support a move away from reliance on service and primary sectors and towards a more diversified economy focusing on new sources of economic competitiveness (e.g. as argued by Petrov, 2014). Primary sectors such as agriculture, forestry and fishing are a vital part of the rural economy, but these areas can improve competitiveness by developing a variety of industry sectors, exploitation of local assets and previously under or unused resources for increased sustainability (OECD, 2012). Synergies between the burgeoning creative sector and other indigenous industry sectors, such as agriculture, the marine and tourism, provide avenues for exploration to support future sustainable growth (OMC-EWG-CCI, 2012). Tourism has been identified to have significant potential, by capitalising on existing tourism markets, but also generating new tourism demand (OECD, 2014). Our findings also highlight the importance of creative tourism development in the SEED region.

Impacts created by the creative sector are also socio-economic contributing wider benefits to regions. The socio-economic impacts of the creative sector appear to be mutually reinforcing supporting a creative sector ecosystem in the region (see Figure 13). Wider evidence also suggests the creative sector must be understood as an ecosystem, with sub-sectors closely connected and interdependent. The relationships and patterns within the overall system enable it to function (Crossick and Kaszynska, 2016).

Figure 13: Mutually reinforcing impacts build a creative sector ecosystem

The evidence we present here highlights the important role of the creative sector in supporting more balanced, sustainable development in peripheral and rural regions. Its structure, composed of small locally engaged businesses, is also an important part of its value, enabling the creative sector ecosystem to function. Regional competitiveness is no longer just measured on factors such as rent levels, office space and accessibility. The importance of soft factors such as amenities, cultural scene and tolerance levels of the population are increasingly recognised (Bontje and Musterd, 2009). Creative sector entrepreneurs recognise this and play an important role in shaping soft factors influencing the SEED region's image and competitiveness.

This is a one off report based on limited evidence. Across the EU, available data and the complexity of measuring creative sector value mean impact studies have limitations and likely underestimate value (KEA European Affairs, 2015). The Department for Culture, Arts and Leisure in Northern Ireland have published creative industries economic estimates. Similar annually published estimates at the both at the national and local government district level would have a strong value for regional development. Stakeholders need evidence to make comparisons, observe trends over time and design interventions that meet local needs. Better evidence can also help to identify benefits of particular creative sector industry sub-sectors so local agencies can focus on sectors that support and address specific local development needs, such as job creation or small town regeneration.

Appendix 1: Methods and data

Our primary research for this report takes a mixed methods approach, using quantitative and qualitative data. This combined research interviews and an online survey of the creative sector. We also draw on relevant, existing statistics and research. This approach allowed us to combine the strengths of both, deriving traditional economic indicators and broad statistical observations, as well as measures of impact illustrated by individual experience. Debate and research is ongoing around methods to evaluate the complete value of the creative sector (see for example: Crossick and Kaszynska, 2016). That said, our impact assessments provide a comprehensive overview of estimated creative sector impacts in *a creative momentum project* regions.

The online survey was carried out between March and August 2017. Respondents were gained through a combination of direct email requests and wider promotion through *a creative momentum project* mailing lists and social media. A request to complete the survey was sent by email to 409 creative businesses in the SEED region on April 5th 2017. A follow up reminder email was sent on April 19th 2017. Wider promotion of the survey resulted in 34 respondents engaging with the survey using an anonymous link. The greatest number of observations to any question was 40, but respondent numbers vary across the survey. Low response rates are not unusual in surveys of this nature requiring detailed information. They tend to be low because of this burden on respondents (Bryan et al., 2000).

We do not rely on the survey for our economic impact analysis (section 2) and supplement the survey data with other available statistics from the Northern Ireland Statistics and Research Agency (NISRA). We present descriptive statistics from the online survey in our socio-economic (section 3) analysis. While based on a low number of respondents, these findings include observations from creative and cultural sub-sectors of the creative industries[4]. However, media (film and TV) is lacking and craft is the most dominant sub-sector represented. Interviews with six creative professionals to gain insights on the wider socio-economic impacts of the creative sector in the SEED region also inform the findings.

[4] Respondents were asked to identify themselves as part of one of 18 main creative sub-sectors (Advertising, Animation, Architecture, Craft, Cultural Facilities, Design, Film, Games, IT and Computer Services, Marketing, Music, Performing Arts, Photography, Publishing, Radio, Software, TV and Visual Arts)

Appendix 2: Multiplier

The multipliers chosen for the analysis stemmed from a review of several analyses and economic impact assessments related to the creative sector in several (both European and non-European) countries. These included:

Bryan et al., (2000) work off of the approach of DiNoto and Merk (1993). This latter analysis examined the economic importance of non-profit arts organisations in Idaho by using the US Department of Commerce's Regional Input Output Modelling System (RIMS II) supplemented by survey-based data from approximately 100 organisations, including general arts organisations, performing groups (both opera and theatre), and visual arts groups, which included museums and galleries. They estimated an arts output multiplier of 1.7, i.e., for a dollar of new output a further 70 cents of output would be required in other sectors through multiplier effects. Gazel and Schwer (1997) also use an input output model approach to estimate the economic impact of a series of theatre performances in the Las Vegas region; this produced several sector output multipliers from just under 1.6 for bars, restaurants, and stadium food and beverages, to just over 1.8 for gifts, souvenirs, and gas stations. Within Europe, Senior and Danson (1998) use a multiplier of 1.25 to estimate the economic benefit generated by a once off convert event in a region of the UK. Bryan et al. (2000: 1398) find that multipliers "vary considerably by arts and cultural sector and reflect the level and nature of direct and indirect local purchases and labour intensities". For various arts and cultural sectors they calculated multipliers ranging from 1.31 to 2.47.

Often in the UK, the multiplier impacts of the arts and culture are estimated using input output models. These can be used to find out which sectors arts and culture industries purchase their inputs from, identifying its economic impact through supply chain relationships. However, the data or resources required to carry out this procedure are limited, it is typical for a multiplier value to be approximated through reference to multiplier values evident in the literature. In this study, we cite several analyses which calculate a multiplier value for the creative sector of a given region. Our multiplier is decided with these in mind. Below is a table of multipliers calculated by different studies. In cases where more than one multiplier value is shown, this indicates a range of different multipliers calculated for different creative sectors in the region.

Study	Country & Year	Multiplier
UK Arts Council Study	UK, 2013	2.43
An Approach to the Economic Assessment of the Arts and Creative Industries in Scotland	Scotland, 2012	1.24-2
Dunlop et al 2004	Scotland, 2004	1.43-2.8
Assessment of Economic Impact of the Arts in Ireland	Ireland, 2009	1.28
Kunin, 2016	Nainaimo, Canada, 2016	1.64
Momer, 2010	BC, Canada, 2010	1.36
Nesta, 2017	Wales,	1.99

For the regions in our study, we chose to apply a blanket multiplier of 1.5. This represents a conservative value but one which is not contrary to the general findings of other studies in the literature. A more detailed input-output multiplier calculation for each region would of course be a superior approximation, but given the capacity for variation in multipliers across time, regions and sectors, a general and conservative aggregate figure, based on several other studies, is a reasonable approach to take.

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