Economic & Social Impact Assessment:

West of Ireland Creative Sector

a creative momentum project

Northern Periphery and Arctic Programme 2014–2020

EUROPEAN UNION
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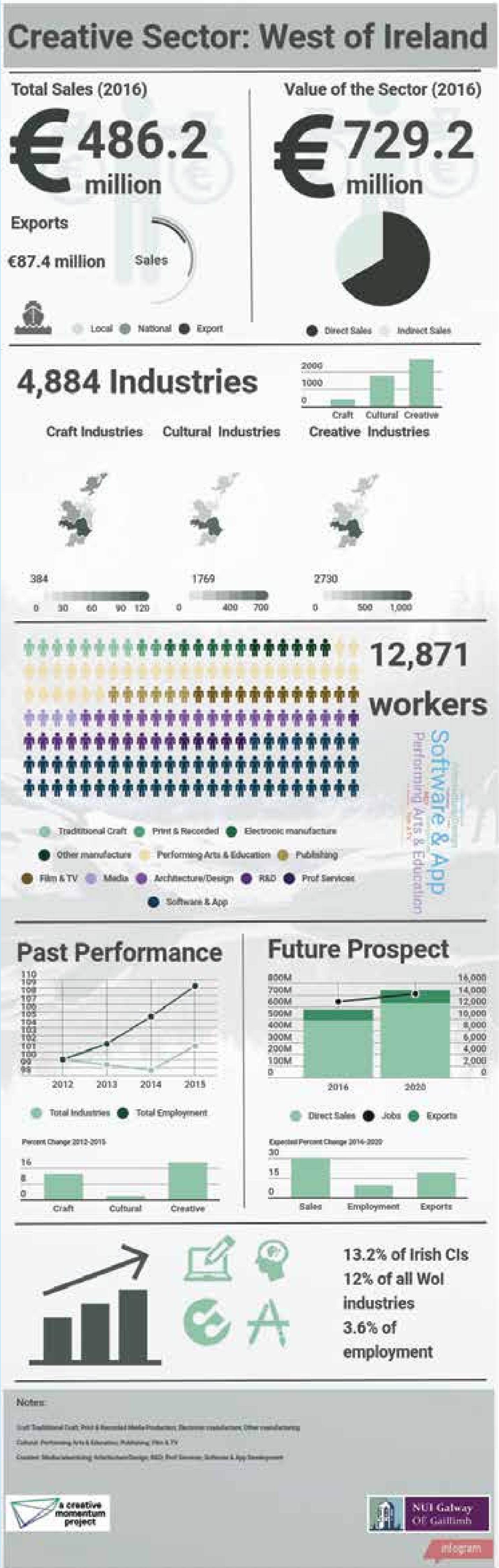
European Regional Development Fund

Whitaker Institute

OÉ Gaillimh
NUI Galway



a creative momentum project

research for:
a creative momentum project

ISBN: 978-1-9996826-1-3

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To cite this publication: Collins, P., Murtagh, A., Breen, B. and Commins, V. 2018. Economic and Social Impact Assessment: West of Ireland Creative Sector. Whitaker Institute, National University of Ireland, Galway.

Acknowledgements

The Whitaker Institute and Discipline of Geography at the National University of Ireland, Galway wishes to extend thanks to the organisations and businesses that gave their time generously to assist with data collection for this report. Their role has been invaluable. We also wish to thank our lead project partner the Western Development Commission, project coordinator Pauline White, our project partners South East Economic Development, Technichus Mid Sweden, Lapland University of Applied Sciences and the North East Iceland Cultural Council, our associate partners and industry advisory group on a creative momentum project. Funding support was provided by the Northern Periphery and Arctic Programme 2014-2020 under the European Regional Development Fund.

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 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/

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"It is possible to argue that the longer-term dynamic effects of culture – such as the creation of a favourable milieu that attracts people, companies and investments – are more important than economic impact"
Extract from 'Understanding the value of arts & culture: The AHRC Cultural Value Project', Crossick and Kaszynska (2016) p.99.

1. Introduction and overview

Assessing the value of the creative sector* 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, but perhaps more importantly, 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 survey data and in-depth interviews with creative sector entrepreneurs from the western region of Ireland**.

1.1 Creative sector impact

Total direct sales of craft, cultural and creative produce amounted to €486.2 million in 2016. Average company sales differ across the sub-sectors. The creative industries reported average sales close to twice that of their craft and cultural counterparts. Close to 5,000 companies employ nearly 13,000 people in this sector in the west of Ireland.

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

- Place-based impacts
  - o The creative sector is locally embedded, facilitating strong local economy value capture. But it is also internationally and globally focused, supporting economic growth.
  - o The creative sector can contribute to re-inventing perceptions of peripheral regions as attractive, creative places to live, work and visit.
  - o The qualities of creative sector entrepreneurs are an asset that facilitate harnessing of local opportunities, such as from place-based resources such as culture, traditions, landscape and heritage.
- Human and social capital impacts
  - o 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.
  - o The open and collaborative approach of creative sector entrepreneurs builds a supportive entrepreneurial environment aligned with the concept of 'coopetition'.
  - o Creative sector entrepreneurs also contribute to positive social and community impacts.

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*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.
**See Appendix 1 for more details on the methodology applied.

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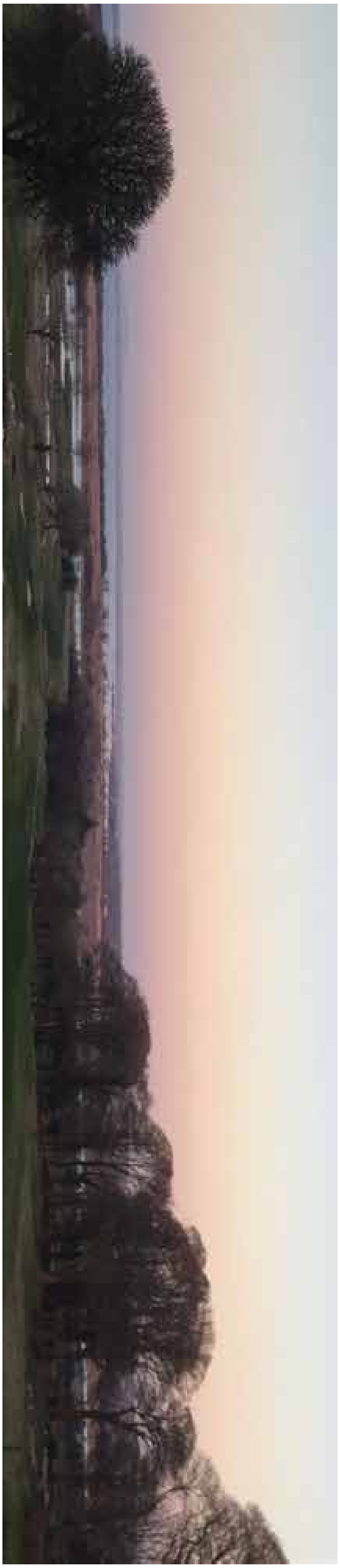
1.2 The western region of Ireland

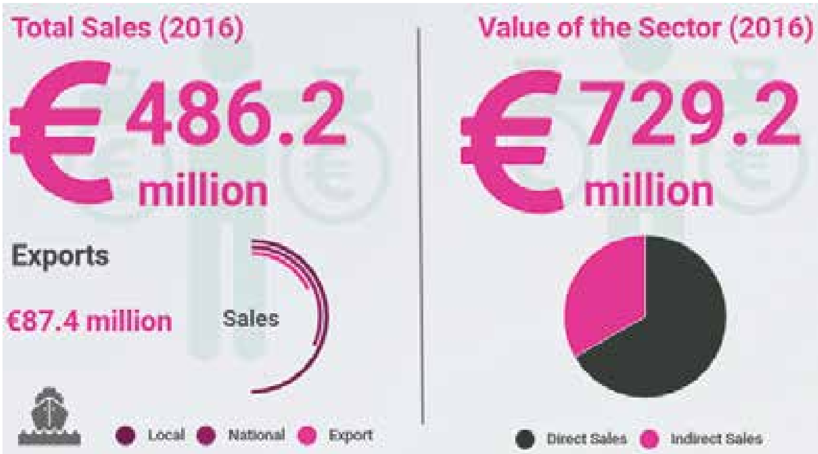


In this report, the western region encompasses counties Donegal, Leitrim, Sligo, Mayo, Roscommon, Galway and Clare. The region is predominantly rural, with an average of 63% living in rural areas. Overall in Ireland 37% of the population live in rural areas (CSO, 2017).

Business statistics for the region show a weakening enterprise base. There has been a greater decline in enterprises in the region compared to the rest of Ireland, declining by 8.6% compared to 1% elsewhere from 2008 to 2014. Decline in enterprise numbers were greatest in more rural counties and lowest in counties with significant urban areas such as Sligo and Galway. There is also a reliance on declining sectors, such as traditional and service sectors (e.g. construction, wholesale, retail, food service). Information and communications is growing in the western region, as well as in the rest of Ireland (White, 2016).

Human capital levels in peripheral regions are impacted by the movement of people skills to core regions attracted by available opportunities (Hall, 2007). From 2011 to 2016 more people moved out of western region counties than into them. Latest Census figures show negative net migration for all western region counties. On the national level two western region counties (Donegal (-8.4 per 1,000 population) and Sligo (-6.2 per 1,000 population)) had the highest rates of net migration (McHenry, 2016).

2. Industry Characteristics.



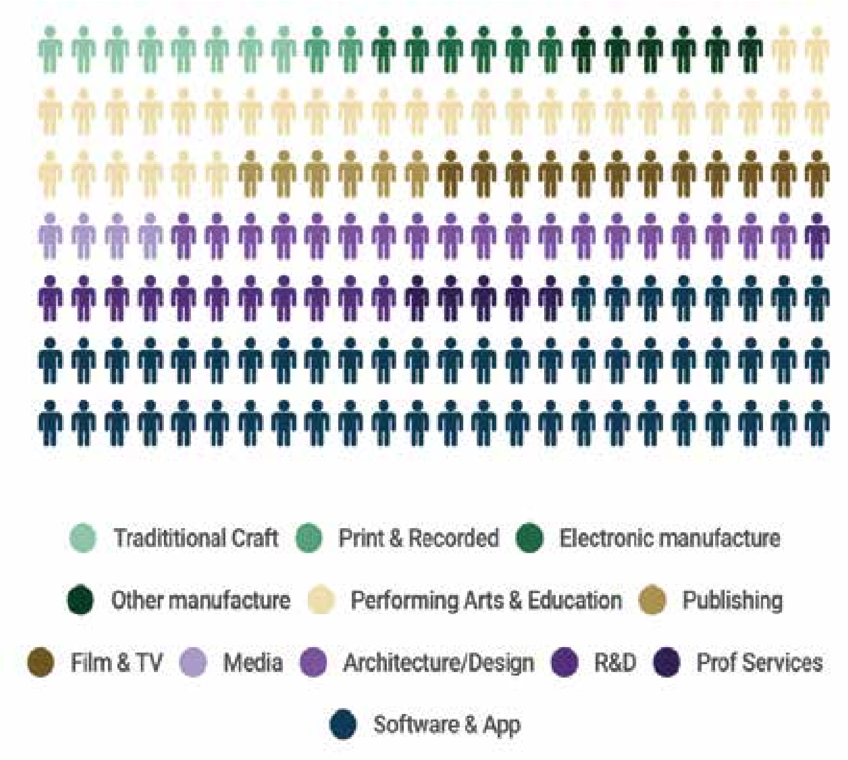
The creative sector in the west of Ireland consists of a large number of small and micro enterprises. The average number of employees per firm equals 2.6 persons. This differs slightly between the sub sectors of craft, cultural and creative industries. The craft industries have the highest number of single person operations. The creative subsector is also a young set of industries, more than half of all operations surveyed are less than five years old. Close to 10% of operations are in existence for less than one year. The relative youth and size of the sector can help explain that 28% do not work in the creative sector full-time (two thirds of these in engaged in other paid employment). One final defining aspect of the sector is the relatively tight geography of spend. On average, 52% of spend on goods and services by creative sector industries took place within the western region.

2.1 Sales

Total direct sales of craft, cultural and creative produce amounted to €486.2 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 west of Ireland as €729.2 million. Average company sales differ across the subsectors. The creative industries report average sales close to twice that of their craft and cultural counterparts.

2.2 Exports

46% of survey respondents derived a portion of their sales from exports. Across the sector this accounts for 18% of direct sales or €87.4million. Again there are differences across the sectors, but more notable is the 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 the issues of scale and stage of product development.



2.3 Employment

Official statistics from the CSO indicate that a total of approx. 13,000 (12,871) people were employed in creative, cultural and craft enterprises in the western region in 2015. A greater proportion of employment is concentrated in creative (57.3%, 7,380) rather than cultural and craft industries (30%, 3,847; 12.7%, 1,644 respectively). Geographically, employment is concentrated in counties Galway (22%), and Donegal (18%). Craft industries are the most geographically diffuse of the creative sector. The results of the survey suggest that employment in the overall creative sector has experienced healthy growth in recent years. With variations at the county level, employment in cultural industries increased by 2.3% in the western region from 2012 to 2015. There was a greater increase in creative industry employment in the western region with a 15.8% increase from 2012 to 2015, figures for craft industries showed no significant change.

2.4 Future prospects

Combined with employment growth for the craft industries of 13% between 2012 and 2015 we see the overall level of growth in jobs for the four years equating to 9.1%. Future prospects reported by survey respondents predict that this rate of growth will continue up to 2020. On this basis, employment in the creative sector of the west of Ireland could reach 14,132 by the end of the decade. Predicted future sales growth reflects a more positive rate of change, reaching €632 million in direct sales for the region by 2020 with exports touching €105million in the same year.

Social Impacts

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

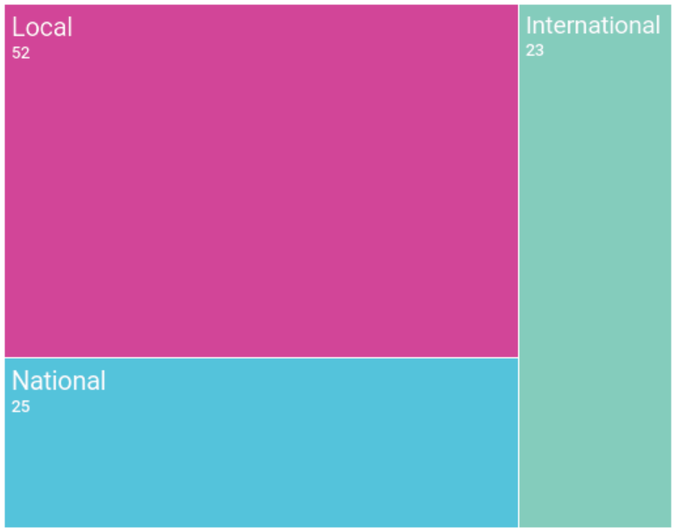
ADAPTABLE MULTI-SKILLED ENTREPRENEURS AND WORKFORCE EXISTS IN THE CREATIVE SECTOR

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.



Percentage spend on goods and services by region (excluding labour)

3.1 Place-based impacts

3.1.1 Locally embedded

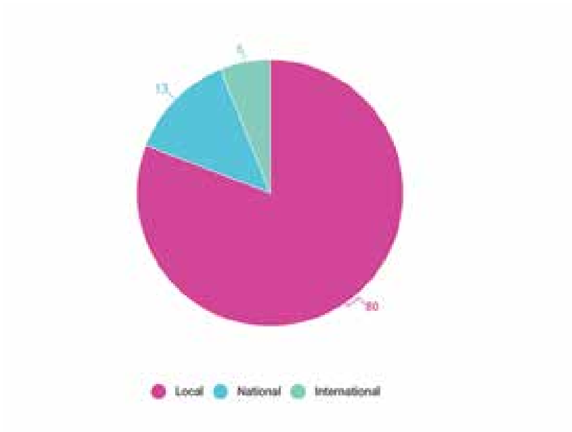
The western region's creative sector is strongly embedded in the local economy. The majority of spend by creative sector enterprises on goods and services takes place in the local economy. Strong internal connections within economies facilitate greater local value capture from the flow of goods and services.

Building linkages in local and national supply chains also emerges as part of the values underpinning creative sector businesses interviewed in the western region. Creative sector businesses want to develop and support local employment. Local labour sourcing emerged as a strong driver:

"One thing I want is to…give local employment to people who are talented" (Interview 6).

"I want to create jobs…most of the people we employ here are pretty much straight out of college. Some of them have been with us two years now and I feel quite confident in sending them to different events…I think you have to delegate and you have to let people make mistakes" (Interview 9).

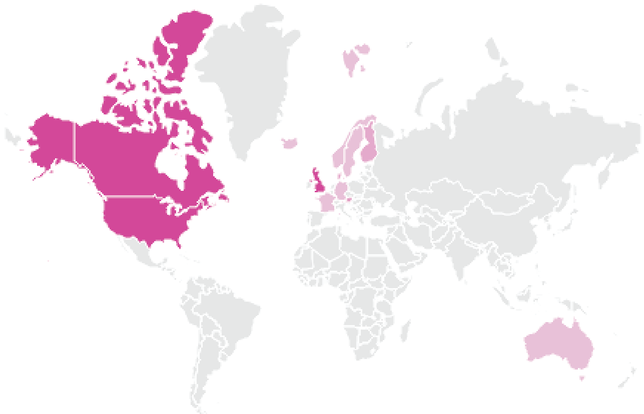
This observation is also supported by our survey finding where the vast majority of labour is locally sourced.



Percentage of labour sourced by region

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 it is estimated while 50% of sales occur in the local market, 32% are national and 18% international. Almost half of creative sector enterprises we surveyed said they exported (46%). Export destinations were diverse, but the UK was the most significant export region (34%). Survey respondents reported a pattern of increasing exports in recent years.



Main export regions - creative sector enterprises in the west of Ireland.

3.1.3 Positive place perception

Our survey results show respondents have strong appreciation for the place-based qualities of the western region. It was found that 75% indicated quality of life and 91% indicated the natural environment was either good or very good. Interviews also help to illustrate this point. For example:

"If I wanted to have a workshop and a living place...in Dublin I could forget about it. I would be living somewhere you can't swing a cat...The cost of living is definitely more affordable around here...as well the beautiful landscape, being outdoors...the creation of community" (Interview 6).

Creative sector entrepreneurs are also strong advocates of the talent and potential within their region. For example, the following comments help to illustrate:

"I think the expertise is here, there are plenty of really talented people...what is missing...is getting it out there...be able to reach wider audiences" (Interview 6).

"There is some pretty great stuff happening in this region, people might just not know about it" (Interview 7).

Creative sector entrepreneurs contribute to positioning the region as a creative place with a reliable talent base, strengthening regional competitiveness.

3.1.4 Unlock local resources

Creative sector entrepreneurs harness value from place-based resources such as culture, traditions, landscape and heritage. This can be for example to inform their own branding or as inspiration for creative content. For example:
"I am trying to use our location to our advantage…use Irish mythology…draw on where we are" (Interview 5, paraphrased).

Creative sector entrepreneurs show determination as well as an ability to change direction and adapt to serve new market demands. They are innovative and try new things, but take a measured approach to change and investment. The western 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:
"Business is people working with people. We have got a lot of work through that, where we've done jobs for people and they would recommend us to others". (Interview 1).

"A good word goes a long way. You need to deliver to be able to go forward" (Interview 2, paraphrased).

The qualities of creative sector entrepreneurs are also an asset that facilitate harnessing of local opportunities.

3.2 Human and social capital impacts

3.2.1 Dynamic, flexible entrepreneurs and workforce

Based on our survey, the majority of west of Ireland respondents (72%) indicated that their work in the creative sector was their full-time occupation. However for those (28%) where creative sector work was not a full-time occupation 69% engaged in other paid employment. Other occupations included work in sectors such as education, retail and care work. The results indicate an adaptable multi-skilled workforce exists in the creative sector, not reliant on one sector of employment and is flexible with regard to inter-sectoral mobility. Interviews also help to illustrate:
"We decided to reinvent ourselves…It was a risk, but it didn't feel like we had another option. It looks like it worked out" (Interview 2, paraphrased).

"You have to keep going and changing, doing different stuff. That is what we have found. You just don't stick to one thing" (Interview 1).

Wider research has identified creative sector 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 sector workforce mobility is 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 western region and contribute to skills development. More than half (55%) of respondents indicated that they were involved in education, mentoring and training activities. The type of activities most common (46%) were giving talks, training or workshops to the public or students (in schools, colleges or universities). Creative sector enterprises are also engaged with the education sector to help update and shape courses in line with current needs. Based on our findings, 15% are involved in these activities. Entrepreneurs also actively share knowledge with other businesses and emerging talent. According to our survey, 13% had provided mentoring or advice to other businesses and 14% had provided internships. More than 50 hours were devoted to education and training activities in the past year by 44% of respondents.

Evidence from interviews helps to shed light on the motivations for involvement in education and training. Western region creative sector entrepreneurs want to develop local talent not just for the benefit to their business, but also for its social impact.

"We take kids from college...doing work experience. I quite enjoy that, being able to give back" (Interview 9).
"We like the idea of an apprenticeship...getting them early in their career...training them up...the idea that they would stay on for maybe two years afterwards, like the old apprenticeship" (Interview 1).

3.2.3 Culture of collaboration

Cooperative relationships between creative sector enterprises are common in the creative sector and important to its functioning. Competition and cooperation can co-exist. In the western region, creative sector entrepreneurs interviewed displayed a positive attitude towards competition and collaboration with competitors. This culture of collaboration strengthens the business environment for entrepreneurs. Creative sector entrepreneurs share talent and knowledge. For example:

"A lot of business people will help you and give you advice" (Interview 1).
"In my preparation for approaching publishers, I will run through things with them. They give me notes, it's great. They have introduced me to people that would not have taken me seriously" (Interview 5, paraphrased).

Our survey evidence suggests that the creative sector in the western region is dominated by micro businesses and self-employed. Evidence from interviews shows that this structure also breeds a culture of cooperation among entrepreneurs. For example, cooperation gives companies the capacity to bid for larger scale projects:

"There are ways for us as creatives to help other creatives, to market them and ourselves at the same time....We bid for the same jobs often. If you have a big job that you can't handle yourself it's always good to have some other crew that can help you out and vice-versa" (Interview 1).

3.2.4 Community engagement

The western region's creative sector does not just contribute to the local economy, but is also socially embedded in communities. More than half (57%) of survey respondents indicated they were involved in voluntary activities that support social and community development. Voluntary activities were identified across the sub-sectors of the creative economy. The type of activity most common (41%) were projects with their local community where they had voluntary involvement. Support for non-profit organisations was also significant, 23% worked on projects with these types of organisations and 23% provided support through donations or sponsorship. The amount of time devoted to these activities was also significant – 46% indicated they spent more than 50 hours on voluntary activities in the past year.

4.1 Festival impacts: Willie Clancy Summer School

Founded in 1973, the Willie Clancy Summer School (WCSS) is regarded as the foremost summer school in the Irish traditional music calendar and serves as a template on which many other contemporary summer schools and festivals are subsequently modelled.

- Supporting the revival of Irish traditional music, song and dance as a living tradition -

Taking place annually during the first week in July, WCSS offers a ten-day long experience and engagement with Irish traditional music. Miltown Malbay, where WCSS is located, is a small coastal village on the west coast of county Clare. Workshop style classes in the core instruments of Irish traditional music, song and dance are given by experts to the approximately 1,000 participants who attend annually. These classes take place in intense three-hour periods every morning (Monday to Saturday) and recitals, lectures, concerts and céilís are scheduled for the afternoons and evenings of each day.

- Facilitating national and international visitors across all age-groups -

Both children and adult learners from throughout Ireland and overseas attend workshops, engaging in a week-long apprenticeship from which they emerge with an enhanced knowledge of the tradition. The WCSS also attracts a further 20,000 visitors annually. Whilst not directly involved in the more formal elements of the schedule, they are attracted to the musical and mythical qualities perceived to inhere to Miltown, on account of the WCSS.

- Developing symbolic, cultural and social capital -

Irish traditional music, like most cultural markers, has become inseparable from economic activity. However, there is an inherent difficulty in approaching festivals and music-making as economic systems as it excludes a vast part of their cultural assessment, such as the role of qualitative phenomenon in the production of symbolic, cultural and social capital. While economic benefits accrue to many sectors of Miltown's population and its outlying areas, tangible economic outcomes are not pursued by the organisers of the WCSS itself and therefore do not influence, in any direct way at least, its organisation, ethos or delivery. Furthermore, it accrues additional symbolic value by not emphasising economic generation as a core principle. The large numbers that attend, however, boost its reputation, conferring additional cultural authority onto both Miltown Malbay and county Clare as key Irish traditional music sites.

- Developing economic capital -

The school charges a fee for the week-long workshops (€140), however, the additional influx of visitors has significant economic corollaries for businesses and householders in this small town. Based on Census 2016 results, it has a normal population of just 829 people. Bed spaces are at a premium and countless householders have become adept at creating additional bed-spaces, converting their houses into B&Bs for the ten-day duration of the festival. Likewise every pub, eating establishment and vendor within a ten mile radius of Miltown can expect brisk business during the week.

- Supporting local economies through cultural capacity building -

An interesting feature of the WCSS is that it never instigated a capital development investment programme to create either office space or art-spaces. Instead, it has intrinsically binded and bounded music transmission, commemoration and performance into the community facilities ordinarily present in the town. This cultural capacity building yields repercussive positive social benefits. Tangible benefits include the development of a network of expertise and skills within the community, reinvigorating the resource potential embodied in local people. The benefits of the festive reconfiguration of the town of Miltown reinvigorates community-based cultural and social capital demonstrated by the intensity with which the success of the WCSS is tied to place.

- Local intangible cultural heritage, creating impacts at a national level -

The WCSS has transformed Miltown, and like other high profile festival locations, Miltown has become synonymous with the event itself. Such is the strength of the Willie Clancy brand, it has transcended other agencies of memory to establish the Irish traditional music heritage of Miltown as a key signifier within the wider tradition of Irish music not just locally, but more significantly at a national level, feeding into the wider image of Ireland as a destination for live music performance.

4.2 Arts impacts: Gaeltacht areas in the western region

Creativity is an important resource supporting economic, social and cultural development in the Gaeltacht region. In these areas for a significant amount of the local population Irish is, or was until recently, the dominant language. Three of Ireland's largest Gaeltacht areas are in Ireland's western region, in counties Donegal, Mayo and Galway. Arts and culture have long been recognised as part of the competitive advantage of Gaeltacht areas. Impact plays out in a variety of ways and economic value has been documented by Ní Chríocháin (2010). Here we highlight just a few of the wider benefits of arts in Gaeltacht areas of the western region.

- Gaeltacht culture attracts funding to help celebrate and preserve its distinctiveness -

The arts are a resource that can attract significant funding to a region. Established in 1997 Ealaín na Gaeltachta, a subsidiary of the state development agency Údarás na Gaeltachta, plays an important role, facilitating, enabling and developing the creative sector in Gaeltacht areas. Its core funding is from the Arts Council of Ireland and Údarás na Gaeltachta. Ealaín na Gaeltachta aims to tap into other relevant public funding sources and build funding partnerships to leverage increased resources for Gaeltacht arts development. For example recent collaborations include with Creative Ireland and the Centre Culturel Irlandais in Paris. Artists supported by Ealaín na Gaeltachta also source funding from a mix of channels such as the Arts Council of Ireland, Foras na Gaelige, Culture Ireland and local arts offices (Ní Chríocháin, 2010; Ealaín na Gaeltachta and Arts Council of Ireland, 2012).

- Resource development: Arts infrastructure and human capital skills -

In recent decades, multi-disciplinary arts centres and venues have increased in the Gaeltacht region acting as local hubs of cultural activity. For example, in 2000, Áras Éanna opened on Inis Oírr, county Galway and in 2007 Áras Inis Gluaire opened in Belmullet, county Mayo. One of Ealaín na Gaeltachta's strategic aims is to build capacity and increase skills of creative professionals. It runs seminars, training workshops and wider programmes to support this objective.

- Arts and culture support growth in other sectors -

Cultural tourism is an important driver of growth in Gaeltacht regions which can capitalise on the region's strong traditional and contemporary Irish culture (Ealaín na Gaeltachta and Arts Council of Ireland, 2012). The most recent available data indicates over 30 main festivals take place in the region annually (Ní Chríocháin, 2010). Wider events also attract significant additional visitors. For example in county Donegal, An Cosán Glas produce an illuminated sculpture trail at Magheraroarty beach, which has also featured as part of other local events in Letterkenny and Gweedore.

- Innovative international cultural collaborations -

Celtic Neighbours supports cultural collaboration in the Celtic regions. The network facilitates collaborations between minority language communities, such as Ireland's Gaeltacht and other similar regions. Llewellyn and Mahon (2013) assessed the impacts of the three-day gathering 'Tional' organised by Celtic Neighbours on the Isle of Skye in June 2013. Among the 9 successful projects emerging from this was a partnership between primary schools in the Mayo Gaeltacht and New Zealand exploring place identity. The outputs were not just artistic, but also a series of innovative approaches to teaching and learning through Irish. More broadly the impact of projects initiated at Tional were found to enhance language use, skills and confidence in these communities.

4.3 Tourism impacts: Creative and cultural assets

Culture and creativity are also important to attract tourists to a region and an important factor in supporting tourism growth in recent decades (OECD, 2014). Fáilte Ireland data finds 85% of overseas holidaymakers to Ireland rated interesting history and culture as an important issue in their choice of Ireland as a holiday destination (Fáilte Ireland, 2017).

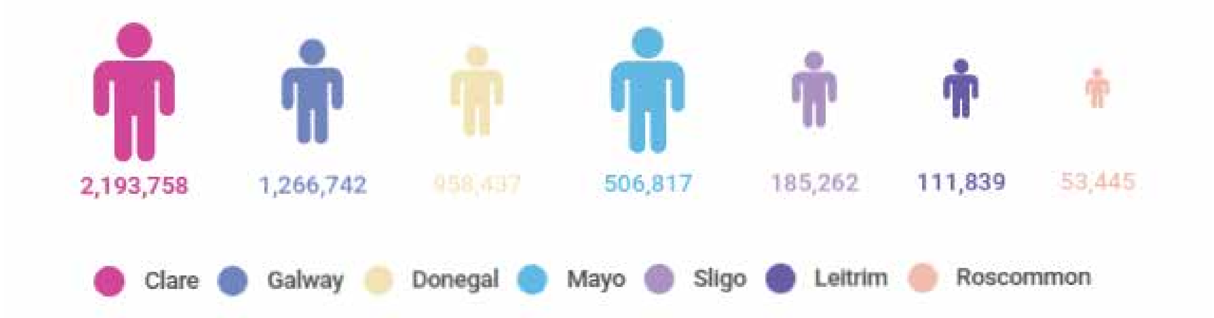
- Cultural landscape and heritage assets attract significant visitor numbers -

Cultural assets in the western region attract large numbers of visitors. For example, the Cliffs of Moher visitor experience in county Clare was visited by over 1.42 million people in 2016, the second highest fee paying attraction in Ireland. Where figures are available, other attractions in the west of Ireland also attract significant visitor numbers. These sites have significant cultural value. They include iconic parts of our cultural landscapes, as well as wider natural, human and built heritage. Visitors generate significant revenue for the local economy. Overseas tourists spend on average €68 per day and domestic travellers on overnight trips €71 per day (Fáilte Ireland, 2017). The strong visitor numbers to cultural tourism sites in the west of Ireland, alongside wider creative industries can further strengthen revenues generated from tourism in the western region. OECD (2014) find that broader creativity is becoming increasingly important as part of cultural tourism, moving away from more traditional manifestations focused on cultural heritage.

- Creativity an increasingly important resource for cultural tourism -

Opportunities exist for creative sector enterprises to directly engage with tourism markets as a revenue stream. They can provide tourism experiences, such as Sligo based A Studio Near the Sea workshops and Breeogue Pottery's Economusée. Creative content generation, such as literature, film, television and games, with links to the region also have a legacy and spill-over value boosting tourism. For example, film tourism in the western region has and will continue to be boosted by Ireland's Star Wars journey. The most recent film, Star Wars: The Last Jedi featured locations from county Donegal and Ireland's most northerly point, Malin Head. Star Wars film locations across the Wild Atlantic Way are being leveraged by Tourism Ireland to grow Ireland's already strong tourism industry by implementing a global marketing campaign reaching markets such as the US, Nordic countries, Australia, Japan and India (Tourism Ireland, 2018). Further potential to develop screen tourism is also present in the western region. Potential film productions that could be harnessed include the Quiet Man and The Field, more recently The Guard, Calvary and Jimmy's Hall. Broader assets also exist, such as Galway's audio-visual production cluster, designation as a UNESCO City of Film and the international film festival the Galway Film Fleadh.

Visitor numbers to west of Ireland attractions



Data source: Fáilte Ireland Visitor Attractions Survey, 2016

5. Conclusion

Our analysis suggests the creative sector has significant economic and social value in the western region of Ireland. However, the most important impacts created by the creative sector are perhaps not solely economic, but its interlinked socio-economic impacts that contribute 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. For example, the western region's positive place attributes can play a role in attracting, retaining and building creative human capital. Creative sector entrepreneurs that move into the region bring not only their business and skills to the region, but also their networks and connections. As enterprises develop, this can increase the profile of the sector and potentially attract new talent. 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).

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. 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 rural 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).

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). 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 sub-sectors so local agencies can focus on sectors that support and address specific local development needs. To more fully capture the value and needs of the creative sector we need regularly published official statistics measuring key socio-economic indicators by region and creative sector.

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. Debates around the best way to evaluate the diverse creative sector is ongoing (see for example: Crossick and Kaszynska, 2016). That said, our impact assessments provide a comprehensive overview of 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 291 creative businesses in the west of Ireland on March 10th 2017. A follow up reminder email was sent on March 21st 2017. Wider promotion of the survey resulted in 152 respondents engaging with the survey using an anonymous link. The greatest number of observations to any question was 117, but responses varied across the survey. Where the response rate is lowest is often on the more detailed questions because of this burden on respondents (Bryan et al., 2000). We do not rely solely on the online survey for our economic impact analysis (section 2) and supplement the survey data with other available statistics from the Central Statistics Office (CSO). We present descriptive statistics from the survey in our socio-economic (section 3) impact analysis. Craft is the most dominant sub-sector represented, followed by visual arts, design and performing arts. TV, radio and publishing are not represented in the survey results*. Interviews with 9 creative professionals to gain insights on the wider social impacts of the creative sector in the western region also inform the findings.

*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 ; 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; Canada, 2016	1.64
Momer, 2010; Canada, 2010	1.36
Nesta, 2017; Wales, UK	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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