



NUI Galway
OÉ Gaillimh



Whitaker
Institute

Creative Sectoral Overview



**Galway City and County Economic
and Industrial Baseline Study**

CREATIVE SECTORAL OVERVIEW

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Our Approach¹

Our approach in undertaking this overview of the creative sector was to take a global and national perspective before focusing on the regional and local level. One of the main limitations we faced preparing this sector review is the lack of quality and reliable data at the local level. The framing of the global and national level overviews against publicly available local data provides a basis and context to consider the future of the in Galway City and County.

¹ The information contained in this overview has been compiled from many sources that are not all controlled by the Whitaker Institute. While all reasonable care has been taken in the compilation and publication of the contents of this resource, Whitaker Institute makes no representations or warranties, whether express or implied, as to the accuracy or suitability of the information or materials contained in this resource.

Executive Summary Overview of the Creative Sector

Global Overview

- World exports of creative goods and services reached €624 billion in 2011.
- The creative industry of the EU accounts for 3.3% of GDP and employs 6.7 million people.
- Art crafts account for 6% of global value of the creative goods market in 2011.
- The global music industry has been in decline for 14 years and total music sales for 2013 were down 3.9% from 2012.
- Global sales for visual arts reached \$65.4 billion in 2014 up 8% from 2013.
- India was the leading film producing country in 2013 with 1,325 films with Ireland producing 22 in 2014.
- Major drivers of the global creative sector are technology, demand for creative goods and tourism.

National Overview

- The creative sector for Ireland is €4.6 billion, composing approximately 2.8% of GDP.
- Employment created by the creative industries amounts to 76,862 in Ireland.
- 3.7m overseas visitors engage in cultural/historical cultural activities.
- 2.3m Irish citizens engage in performing arts on an annual basis, which is 66% of the adult population.
- The Irish music industry decreased by €79 million between 2005 and 2010.
- The audio visual sector is estimated to be worth €550 million employing over 6,000, with over 560 SMEs.
- The design sector is valued at €465 million employing 5,100 with 37% of SMEs employing between 2 to 5 people.
- The animation sector generated €326.8 million in 2011 while employing 2,321 people.
- Tax incentives and art promotion charters are productive policies enhancing the sector.

Regional and Local Overview

- 3,878 people are employed in Galway in the Creative Sector accounting for 3.4% of total employment in the county.
- Some 12% of businesses have more than 10 employees, 49% have between 2 and 10 employees and 39% are sole traders.
- 1 in every 33 jobs in the Western Region is in the creative economy.
- Creative technology companies account for 7% of total number of business, 25% of turnover and 15% direct employment.
- There are 35 heritage sites, 32 museums, 10 art galleries in the city and county.
- There were 83 festivals and events hosted in Galway in 2012 bringing in an estimated €62 million in expenditure.
- €136 million plus is the estimated value of the Irish language, with €59 million accrued to Galway City.
- 25,000 domestic and foreign students attend Irish colleges in the Gaeltacht each summer and contribute €24.3 million in added value to GNP each year.
- Traditional Irish music is part of Galway's cultural identity.
- There is the potential for Galway to become the national flagship for contemporary visual arts.
- The Audio Visual sector is worth €72 million employing over 600 people.
- Connemara has a cluster of audio visual companies with the success of TG4 influencing the establishment of 40 companies.
- There are 162 design and craft businesses in Galway with the greatest concentration in textile making, wood working and jewellery.
- Galway is now one of five UNESCO's Creative Cities in the world.
- The sector generates an annual turnover of €534 million and contributes 3% towards employment within Galway.
- The West of Ireland has 2,466 creative companies.
- The Irish language is worth in excess of €136 million annually to the economy of Galway City and County.
- There are 162 design/craft businesses in Galway.
- Galway is now a City of Film and recognised as a standard of excellence.
- Galway has 50 production companies and its audio visual sector's employment rate is growing at 24.5%.

Global Overview of the Creative Sector

Global Overview

Introduction

Despite the global economic crisis of 2008, world exports of creative goods and services has continued to grow, reaching €624 billion in 2011, indicating an annual growth rate of 14% over six consecutive years. The creative industry accounts for approximately 2%-8% of the workforce of the economy (UNCTAD, 2010) as well as contributing to social development (UNESCO, 2013).

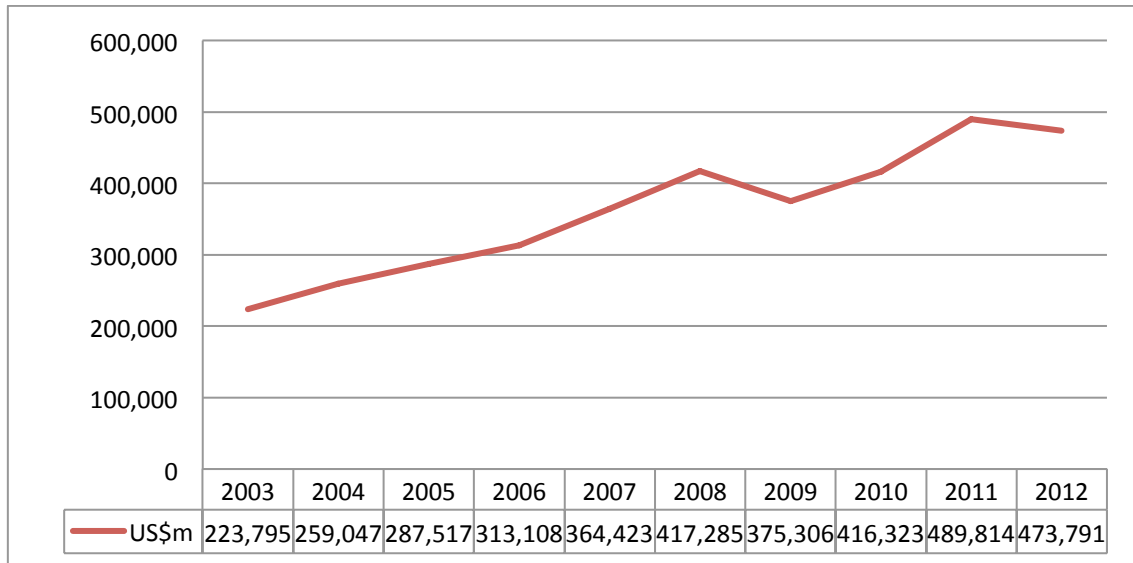
Global Overview

1.1 Global Market Size

While global exports account for €624 billion (UNCTAD, 2010), the majority of creative production and consumption takes place in Europe, the United States and Japan, followed by other OECD countries, then China, India and Brazil (light years IP, 2014). The creative industry of the EU accounts for 3.3% of GDP and employs 6.7 million people accounting for 3% of total employment (Epthinktank, 2013).

The main creative goods exports include interior design products, fashion, jewellery and new media products. Figure 1 illustrates the global values of exports from 2003 to 2012 (UNCTADSTAT, 2013b). China currently remains the leading exporter of creative goods, tripling in value from \$32 billion in 2002 to \$125 billion in 2011. The United States are the next largest exporters, followed by Hong Kong, Germany and then India (UNCTAD, 2014).

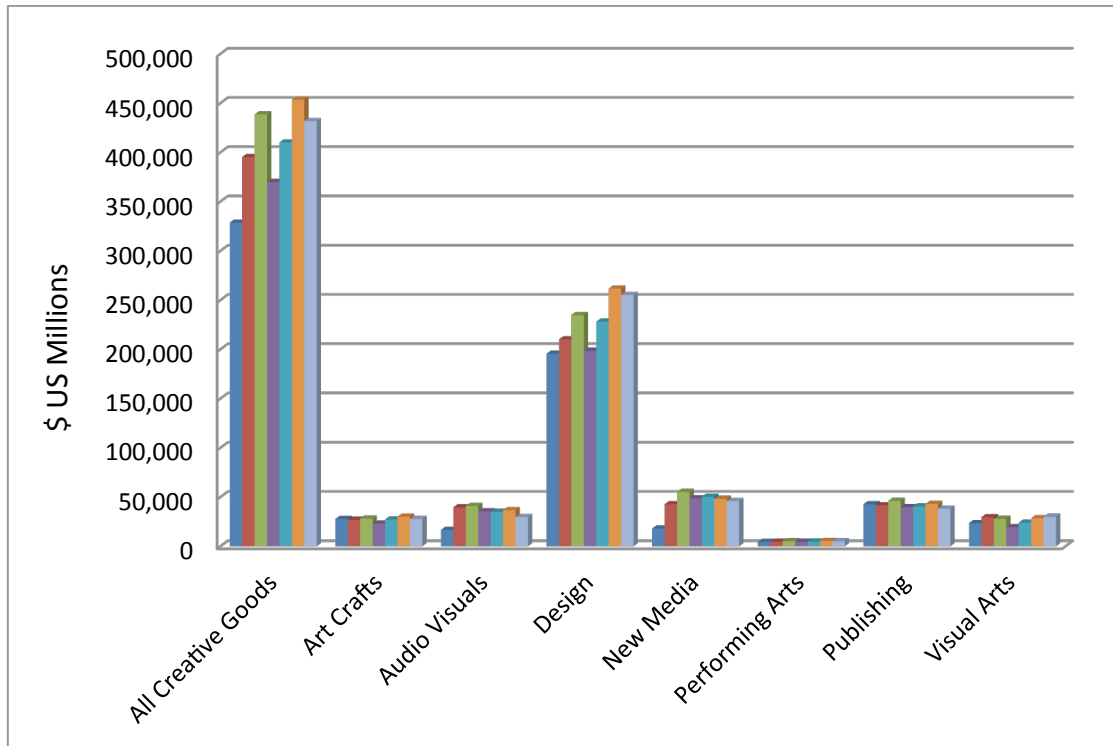
Figure 1:
Creative Goods, Global Export Value, 2003-2012



(Adapted from UNCTADSTAT, 2013b).

The value of all creative goods as of 2012 was \$431.703 billion. Figure 2 illustrates the global values of the various creative goods. Design goods, including architecture, fashion, glassware, interior, jewellery and toys have the greatest value, totalling \$255.077 billion in 2012. Fashion is worth \$71.137 billion as of 2012 followed by interior design products, jewellery and then toys. Art Crafts include carpets, celebration, paperware, wickerware and yarn products and is valued at \$27.741 billion. Audio Visuals include film, CD, DVD and tapes and is valued at \$29.748 billion. New Media includes recorded media and video games and is valued at \$45.905 billion. Performing Arts includes musical instruments and printed music and generates the global value of \$5.166 billion. Publishing, including books and newspapers is valued at \$38.132 billion and visual arts, including antiques, paintings, photography and sculptures is valued at \$29,933 billion (UNCTADSTAT, 2013).

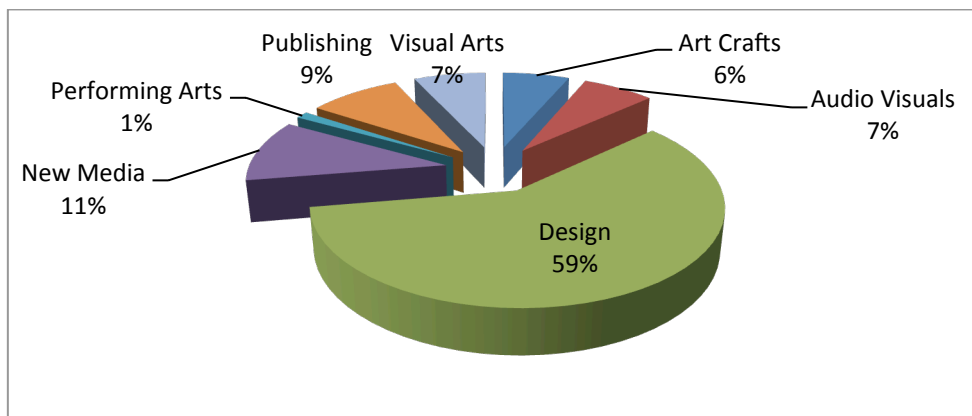
Figure 2:
Global Value of Creative Goods, 2006-2012



(Adapted from UNCTADSTAT, 2013).

Figure 3 illustrates the percentage value of the global creative goods. Design creative products account for 59% of all creative goods (UNCTADSTAT, 2013).

Figure 3:
Percentage Value of Global Creative Goods



(Adapted from UNCTADSTAT, 2013).

1.2 Classification of the Creative Industry

A number of different models have been developed in order to classify the creative industry. Figure 4 classifies the creative industry using the UK's Department of Culture Media and Sport (DCMS) model.

Figure 4:
Classification of the Creative Industry



(Adapted from UNESCO, 2013).

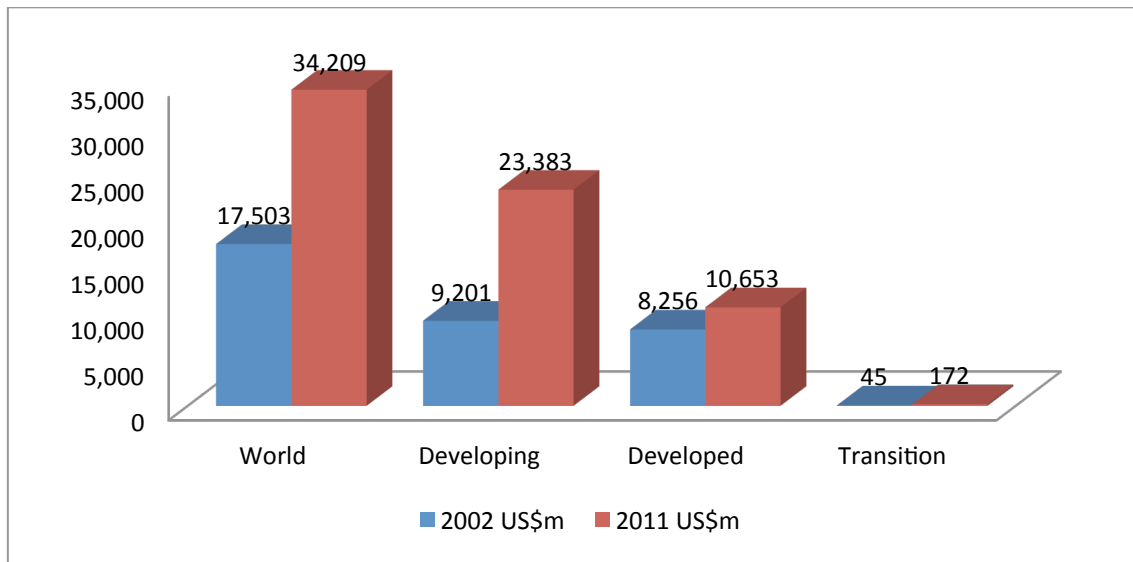
1.2.1 Heritage

Heritage sites are the focal attractions in cultural tourism worldwide. Heritage is also embedded within cultural celebrations, festivals and folklore. Many indigenous communities, such as the Mayas and the Incas reproduce their ancient crafts, using original designs, generating revenue. Heritage goods are such items as carpets, wickerwork and yarn products while heritage services include services associated with monuments, archaeological sites, museums and libraries. Global heritage services were valued at \$11.3 billion in 2008. Developing economies export almost twice as much heritage goods as developed economies (UNCTAD, 2010).

1.2.2 Art Crafts

Art Crafts accounts for 6% of the global value of the creative goods market. It generated \$34.2 billion in 2011 (UNESCO, 2013b). World exports increased 95% from \$17.5 billion during 2002 to 2011. Art Crafts are paramount for exporting earnings in developing countries. The main exporting regions for art crafts are Europe and Asia. Figure 5, illustrates the art and crafts exports for 2002 and 2011. The graph shows the global art crafts exports as well as exports for the developing, developed and transitions economies. In 2002 both the developing economies and the developed economies exported a similar amount. In 2011 there was a difference of \$12.7 billion, outlining the changed trend. The developing economies account for 64% of global exports, China being the largest exporter (UNCTAD, 2010).

Figure 5:
Art Crafts Exports by Economic Region, 2008



(Adapted from UNESCO, 2013b).

1.2.3 Performing Arts

The global market for performing arts is estimated at \$40 billion as of 2008. It is expressed as an intangible service which makes it difficult to quantify. The three largest markets for performing arts are the United States, the United Kingdom and France. Income from this sector is derived from box-office revenues, touring and performance royalties and taxation. Theatre, opera, poetry, dance, ballet, concerts, the circus and puppetry are all examples of performing arts. In developed countries, performing arts benefit from government grants or subsidies, while in developing countries, such funds are extremely limited. Intellectual property matters are

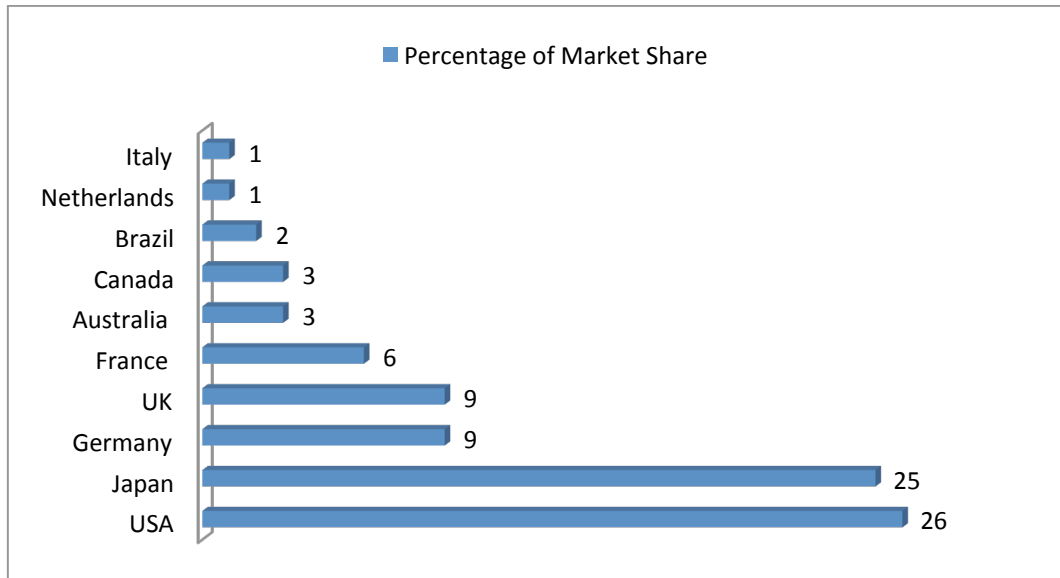
constant issues for performing artists as well as tax regulations and permit application procedures (UNCTAD, 2010).

1.2.4 Music

Digital technologies are changing the way in which music is created, produced, reproduced, commercialised and consumed in both national and global markets. Digital tools such as, internet peer-to-peer networks, mobile phones and mp3 players have impacted the music industry. Large transnational, vertically and horizontally integrated conglomerates dominate the global music industry. Even though more and more music is being consumed worldwide, songwriters, producers and performers' profits have been declining. This is due to issues with intellectual property rights and a lack of control of current ICT tools used for accessing the global music industry. In order for the music industry to maximise profits, governments and international treaties need to be approached in order to enforce the development of copyright legislation. Furthermore, the development of an alternative to illegal copyrighted music and the commercialisation of peer-to-peer file sharing and online distribution will enhance the global music industry (UNCTAD, 2010).

The recorded music market consists of consumer spending on music that is distributed in physical and digital format. Live performances and merchandising revenues are not included. Digital distribution includes, downloads by mobile devices, computers and wireless carriers via online licensed services. Although the market is fragmented with thousands of independent artists, producers and bands, four major labels dominate the market; Sony/BMG, Universal Music, EMI and Warner Music. These four labels command 80% of the global music market (UNCTAD, 2010). The USA and Japan are the largest markets for recorded music in the world. Figure 6 illustrates the leading markets for recorded music (Artfacts, 2014).

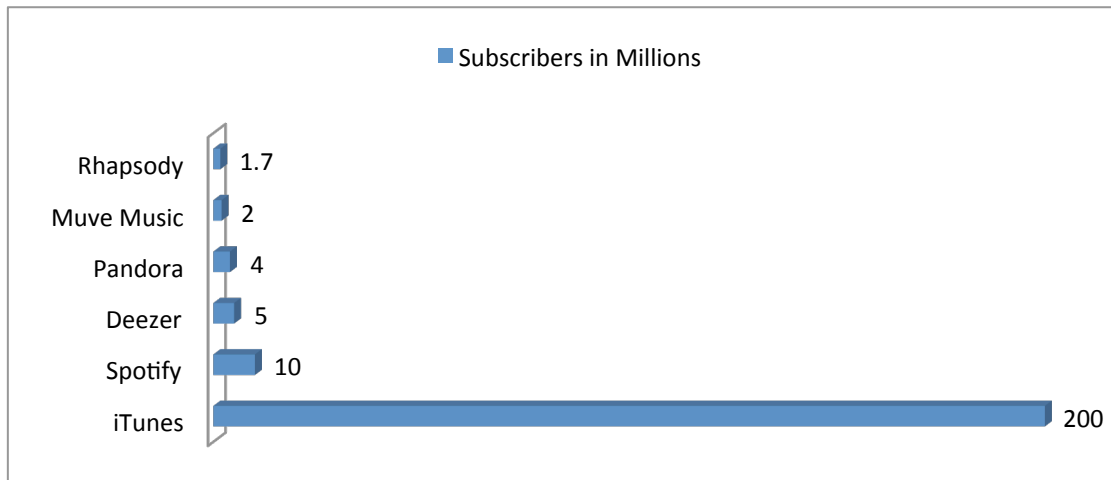
Figure 6:
Global Market Share of Top Ten Music Markets



(Adapted from Artfacts, 2014).

Total music sales for 2013 were down 3.9% from 2012 (IFPI, 2014). The global digital revenue for 2013 reached US\$5.9 billion. Digital sales account for 39% of total industry global revenues and in three of the top 10 markets, digital channels account for the majority of revenues. Global brands such as Deezer and Spotify are reaping the benefits of geographical expansion (IFPI, 2014). Subscriptions increased by 51% from 2012 making downloads the most significant digital tool. Figure 7 illustrates the top online music providers, with iTunes dominating the market with 200 million subscribers worldwide (IFPI, 2014).

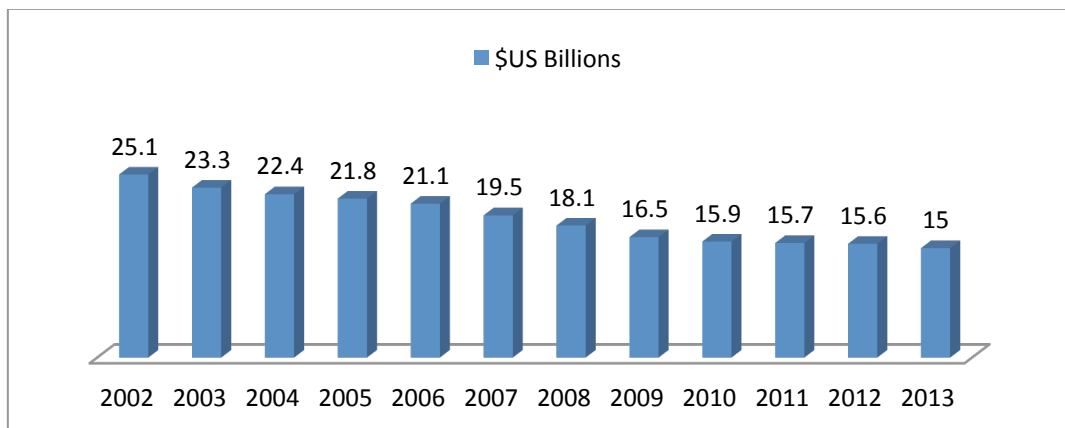
Figure 7:
Top Online Music Providers



(Adapted from Adegoke, 2014).

Due to decreasing CD sales, global music revenues have been decreasing since 2002, from \$US25.1 billion to \$US15 billion (See Figure 8) (Statista, 2014).

Figure 8:
The Declining Revenues of the Music Industry 2002-2013



(Adapted from Statista, 2014).

The music industry has been in decline with 2013 bringing about the 14th year of decline for the industry. The CD continues to decline the global market as well as a reduction of 9% in the world's second largest music market; Japan. Table 1 shows a decline of 3.9% between 2012 and 2013. Digital sales are expected to outpace physical sales by 2015. Physical revenue is

forecasted to decline by 44% by 2019, while streaming and subscriptions transition is expected to reduce download revenues by 39% (mediaresearch, 2014).

Table 1:

Global Recorded Music by Format, 2012 & 2013 (US\$ millions)

	2012 Share	2012 Value	2013 Share	2013 Value
Physical	56%	8,752	51%	7,730
Digital	36%	5,637	39%	5,872
Other	8%	1,263	10%	1,428
Total Market		15,652		15,029

(Adapted from IFPI, 2014).

International trade of recorded music is dominated by developed economies accounting for 90% of total global exports. The export and import of music CDs by developed countries accounted for 80%-90% of world trade in music goods in 2008. As music is created, recorded and commercialised by transnational companies, developing countries import both foreign music and their own music (UNCTAD, 2010).

1.2.5 Visual Arts

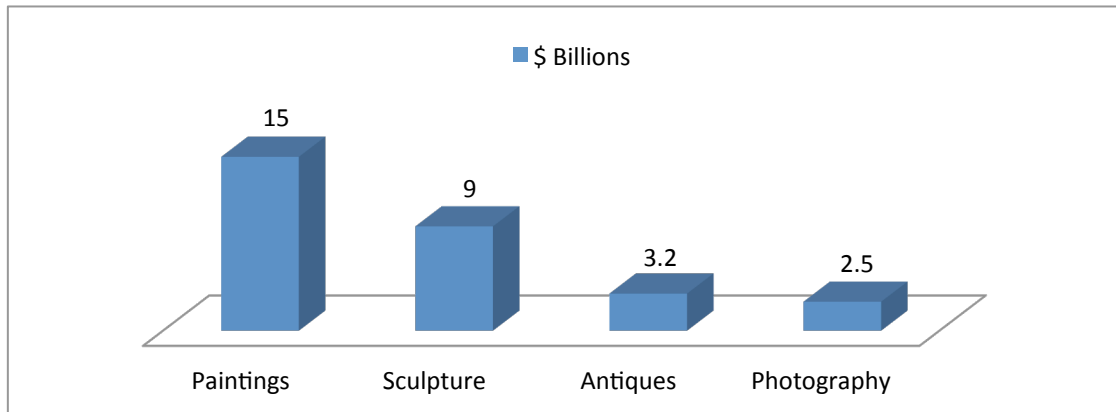
Visual arts comprises of antiques, paintings, sculptures and photography as well as engravings, carvings, lithographs and collages. The value of art is determined by the exclusivity and originality of the piece. The global sales of visual arts reached \$65.9 billion in 2014 which is an increase of 8% from 2013. The United States is the international art market leader, representing 38% of the market. China accounts for 24%, while the UK accounts for 20% (Kazakina, 2014).

Developed countries generally trade art via auction sales, galleries and museums, while developing countries typically trade informally in flea markets, targeting tourists. The largest marketplace is the auction houses, which can charge commission of up to 20% (UNCTAD, 2010). Global online sales generated €2.5 billion in 2013, with an estimated 25% per annum growth rate, with a forecasted €10 billion estimate for 2020 (Kazakina, 2014).

There are, like the music sector, issues regarding the intellectual property rights for the resale of original art works. The export value of visual arts increased from \$6.3 billion in 2002 to \$15

billion in 2008. Figure 9 illustrates the global export values of the different visual arts (UNCTAD, 2010).

Figure 9:
Global Export Value of the Visual Arts

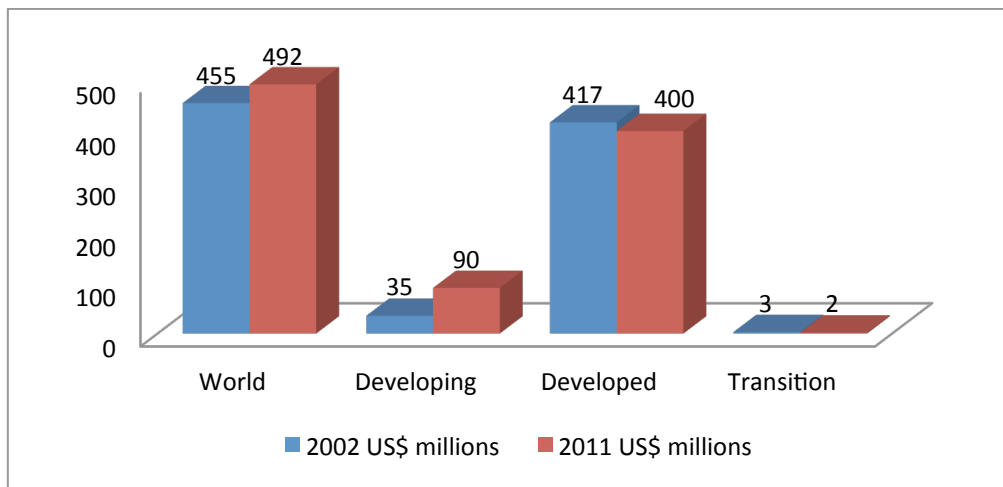


(Adapted from UNCTAD, 2010).

1.2.6 Audio Visuals

The audio visual sector comprises of motion pictures, television, radio and other forms of broadcasting. This industry poses challenges for governments, especially in developing countries due to low levels of investment as well as economic difficulties. The main issue for developing countries is the lack of domestic facilities and the difficulty in accessing global distribution channels (UNCTAD, 2010). The audio visuals sector has decreased within developed countries and the transition countries between 2002 and 2011. In contrast, due to increased levels of investment, an improving economic climate and with an expanding middle class the developing countries have seen a 157% increase in audio visuals exports between 2002 and 2011. Figure 10 illustrates the change in the audio visual sector between 2002 and 2011.

Figure 10:
Audio Visual Exports by Economic Group, 2002-2011

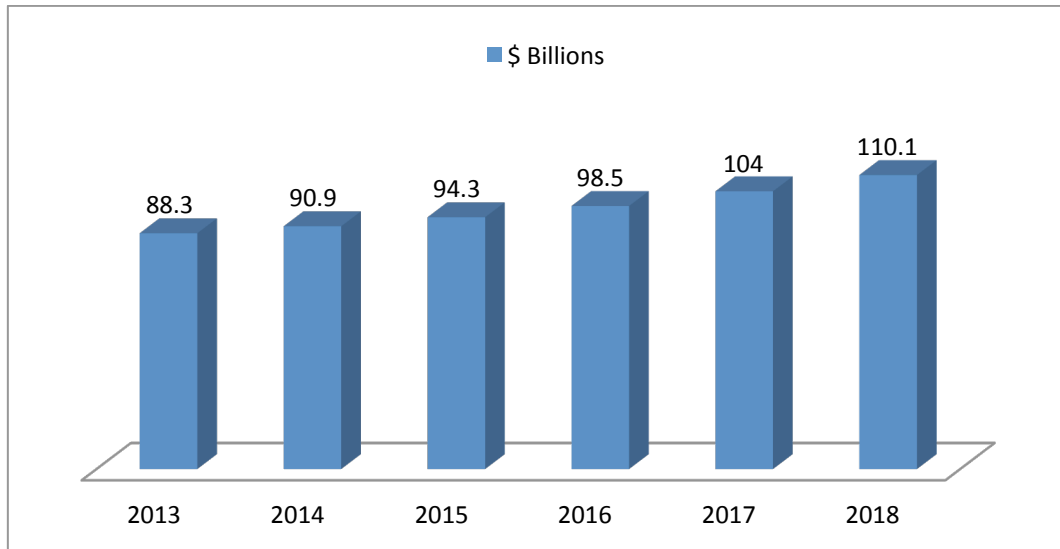


(Adapted from UNESCO, 2013b).

1.2.6.1 Film Industry

The making, distribution and exhibition of global films are dominated by a small number of vertically integrated groups. Film revenue for 2014 is \$90.9 billion. Figure 11 illustrates the forecasted global growth of the film industry.

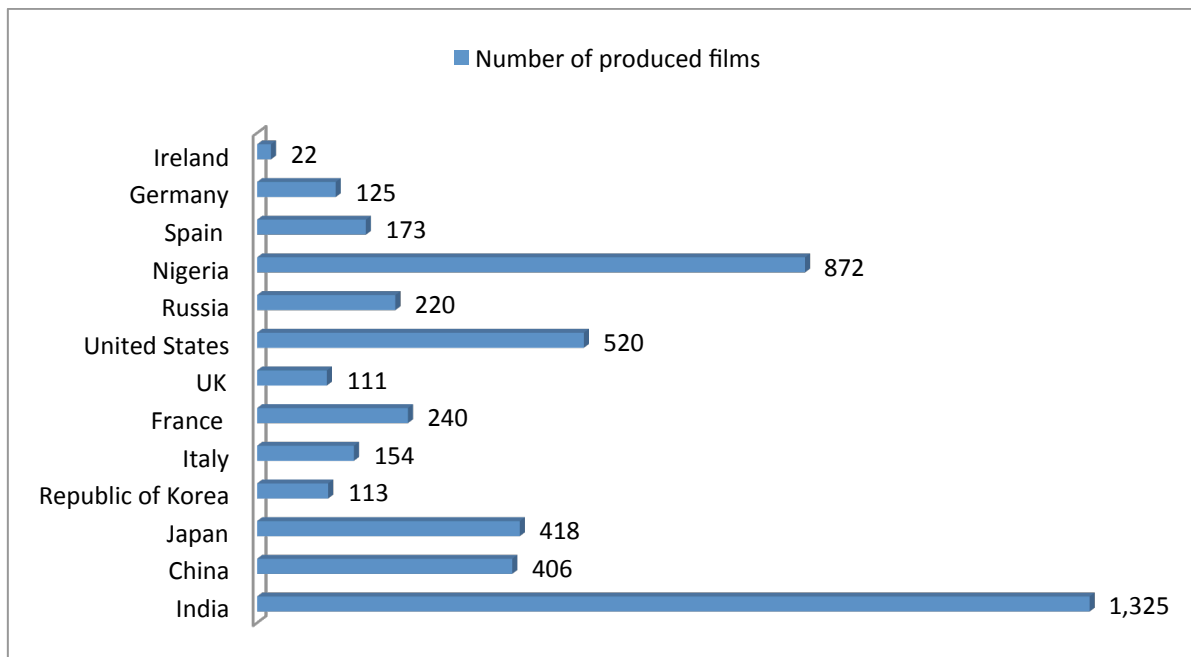
Figure 11:
Forecasted Growth of the Film Industry, 2013-2018



(Adapted from Statista, 2014b).

Global box office revenue for 2013 was \$38 billion with China being the leading box office market with revenue of \$3.6 billion in 2013 (Statista, 2014c). Developing countries' growth potential is limited due to high cinema admission costs, compared with GDP per capita as well as a shortage of venues. The majority of films are produced in India with 1,325 movies being produced in 2014. Nigeria produced the second most films with 872 followed by the United States with 520. Figure 12 shows the leading film producing countries in the world.

Figure 12:
Leading Film Producing Countries



(Adapted from Chartsbin, 2014).

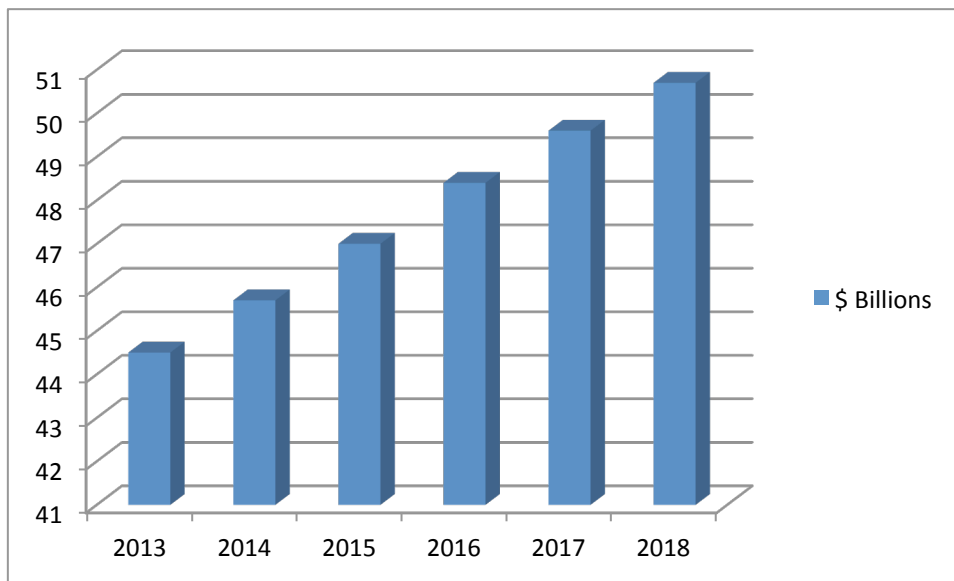
The increase in production of digital films allows for economies of scale and yields savings for film producers. Digital films are distributed as removable disks, over specialised networks and by satellite. Digital screens are growing in popularity, with the United States having 5,500 screens in 2008, 1,000 in the EU and 800 in China. Box office receipts rose in the United States in five out of the last seven recessions (UNCTAD, 2010).

1.2.6.2 Television and Radio

The television and radio sector generates income from copyrights, trademarks, advertising, subscriptions and viewer licences. The number of TV households worldwide is forecasted to reach 1.675 billion by 2018, with the number of digital TV households reaching 1.542 billion. Cable with 592.3 million subscribers is predicted to gradually lose ground to satellite and IPTV. Satellite will account for 32.9% and IPTV will account for 10.9% by 2018. Global TV industry's revenue is forecasted to reach €459.2 billion by 2018 with video-on-demand reaching €35.4 billion (Paoli-Lebailly, 2014). The majority of developing economies are net importers of television creative content (UNCTAD, 2010).

Radio, due to its broad coverage, is a major communication tool. Its main source of revenue is through advertising. The total radio advertising revenue is valued at \$17.6 billion (Plunkett Research, 2014). The global radio sector is currently valued at \$45.7 billion and is expected to increase to over \$50 billion by 2018. Figure 13 shows the forecasted increase in the global radio industry from 2013-2018.

Figure 13:
Global Radio Industry Revenue, 2013-2018



(Adapted from Statista, 2014d).

Most countries require radio broadcasters to provide a minimal domestic production, covering local news and national music. Exports of audio visual goods from developed countries reached \$706 million in 2008 while developing countries reached \$75 million (UNCTAD, 2010).

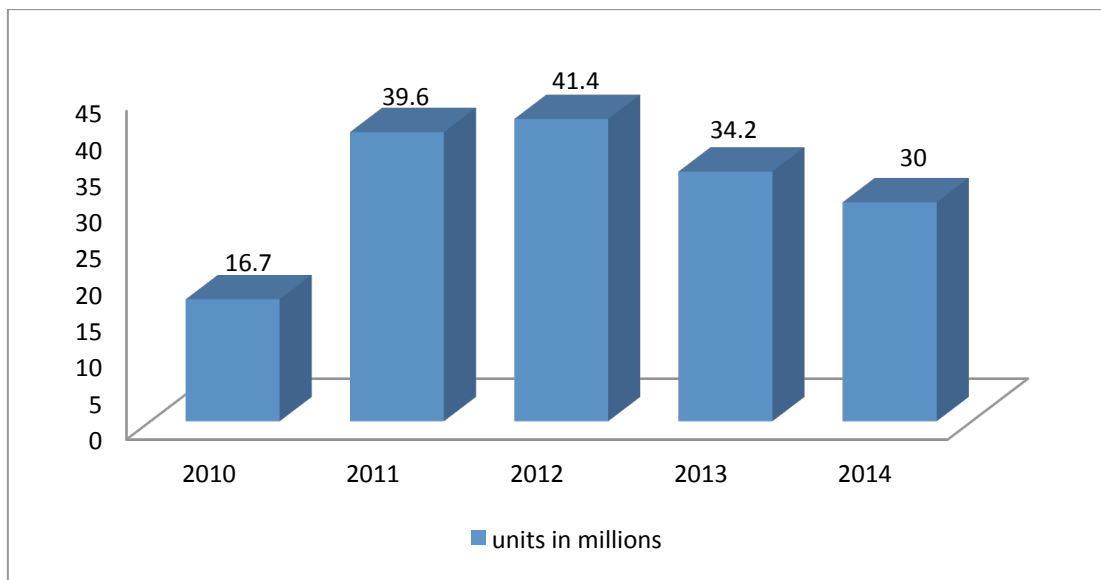
1.2.7 Publishing and Printed Media

Publishing and printed media is comprised of literacy production, including books, newspapers, magazines etc. This industry faces challenges due to the growing trend of electronic publishing. The industry is supported by advertising revenue. Consumer e-book revenue is estimated at US\$8.4 billion and is forecasted to increase to US\$18.9 billion by 2018 while global consumer books are forecasted to increase to US\$64.9 billion (Statista, 2014e). Tablet ownership is a major driver of the increase in global digital revenue. Figure 14 illustrates the global unit

shipment of e-readers from 2010 to 2014 with 30 million units being shipped in 2014 (Statista, 2015). China is forecasted to overtake Japan and become the second largest book market by 2017 with revenues of US\$13.2 billion, after the United States with revenue of US\$37 billion. Magazine revenue is predicted to reach US\$98.1 billion by 2018 with a 0.2% year-on-year growth as digital gains outweigh falling print revenue. The declining global newspaper industry is expected to cease its decline in 2015 as developing countries' newspaper revenue improves. While developing countries newspaper revenue increases, developed countries revenue will fall (PWC, 2014).

Figure 14:

Unit Sales of E-Readers Worldwide from 2010 to 2014 (millions)



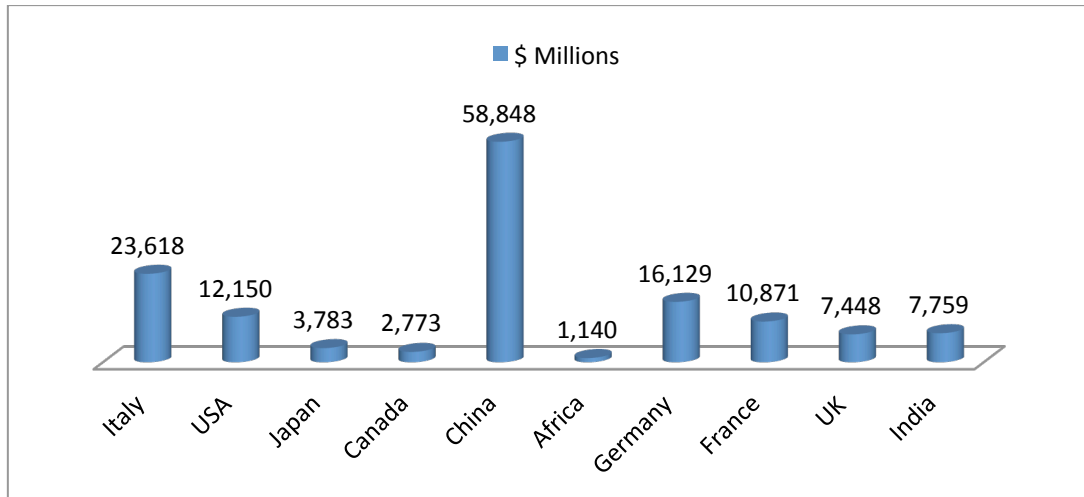
(Adapted from Statista, 2015).

1.2.8 Design

Creative design comprises of items such as jewellery, graphics, architectural plans, toys, glassware and fashion accessories as well as interior objects (UNCTAD, 2010). The global fashion industry is valued \$1.2 trillion annually, employing 4,200,000 people (Statisticbrain, 2014). Design is the leading subgroup for creative goods. Its value doubled from \$115 billion in 2002 to \$242 billion in 2008. China and Italy have become leading exporters of design goods (see Figure 15). Italy has a large share of the world market due to its renowned role in the

fields of interior design, fashion and architectural services. With developing economies, design is the third-largest creative sub-group, after art crafts and new media.

Figure 15:
Leading Design Goods Exporters, 2008



(Adapted from UNCTAD, 2010).

1.2.9 New Media

New media began in the 1990's due to the advances in ICTs. It is the newest group among the creative industries. As a creative product it comprises of software, cartoons and video games. It is also a distribution and marketing tool of other creative products like music, films, books or services such as advertising and architectural services (UNCTAD, 2010). The worldwide software revenue totalled \$407.3 billion in 2103, which was a 4.8% increase from 2012, with Microsoft retaining the leading spot, followed by Oracle (Gartner, 2014). The global video games revenue for 2013 was \$93 billion, with forecasted revenues of \$55 billion for 2015 (Gartner, 2014b).

Table 2 illustrates the top 5 countries in the world for creativity in advertising. As can be seen from Table 2, The United States ranks first in the world for creativity in advertising (Creative Industries, 2014).

Table 2:
Top Five Countries in the World for Creativity in Advertising

Rank	2008	2013
1	USA	USA
2	UK	Australia
3	Argentina	UK
4	Germany	Brazil
5	Japan	France

(Adapted from Creative Industries, 2014).

1.3 Major Drivers of the Global Creative Sector

The primary drivers of growth in the global creative sector are technology, demand and tourism (UNCTAD, 2010).

1.3.1 Technology

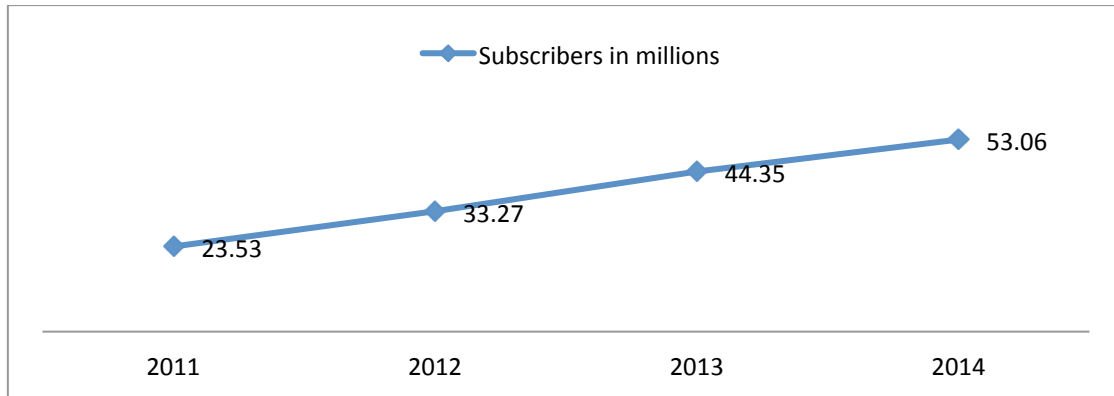
In order to improve the collaboration between academic and creative research, an increasing number of countries are building platforms to stimulate innovative projects that involve science and creativity and incorporate open-source technology. In the Netherlands, for example, an ICT innovation platform has been established to implement a strategic research agenda for the creative industries, helping to make creativity more visible (UNCTAD, 2010).

The manner in which creative content is produced, distributed and consumed has been impacted by the merging of multimedia and telecommunication technologies. A substantial growth in private-sector investment due to the deregulation of media and telecommunication industries and the privatisation of state-owned enterprises has improved output and employment (UNCTAD, 2010).

Due to digital technology, distribution channels and platforms have increased such as video-on-demand, music podcasting, streaming, computer games and TV services via cable, satellite and the internet (UNCTAD, 2010). Netflix, founded in 1997, for example is the global leader in internet television, with over 50 million customers in nearly 50 different countries. Customers access more than 2 billion hours of TV shows and movies per month. The company's annual

revenue in 2013 reached \$4.37 billion and employs 2,200 individuals (Netflix, 2014). Figure 16 illustrates the accumulating Netflix subscribers from 2011 to 2014.

Figure 16:
The Accumulation of Netflix Subscribers



(Adapted from Statista, 2014).

1.3.2 Demand for Creative Products

Another driver of growth within the global creative industries is the increase in demand for creative products. This increase in demand is influenced by technology advances, rising real incomes as well as the falling prices of creative products and their distribution channels. Demand-side interactions include DVD and MP3 players, which in turn depend on the quality of the films and music. The demand for video games requires innovative games and newer, cheaper games consoles. Demographics also influence demand, with the expected world population to grow to 9 billion by 2050 and the increasing average life expectancy generating an aging population with more leisure time (UNCTAD, 2010).

1.3.3 Tourism

The growth in worldwide tourism is a further driver of the global creative industry. Tourists are the primary consumers of recreational and cultural services as well as substantial purchasers of creative products like crafts and music. The growth in cultural tourism contributes substantially to growth of the creative industry which includes visits to cultural heritage sites, festivals, museums and galleries as well as music, dance, theatre, opera etc. The UNESCO World Heritage list contributes to the growth of this sector with 890 recommended heritage sites.

National Overview of the Creative Sector

National Overview

Introduction

Ireland has a strong international reputation for creativity and the creative industries of Ireland are gaining more and more recognition as a major sector of the economy (Collins et al., 2014). This sector is a large provider of employment and contribution to GNP (DKM, 2009).

2 National Overview

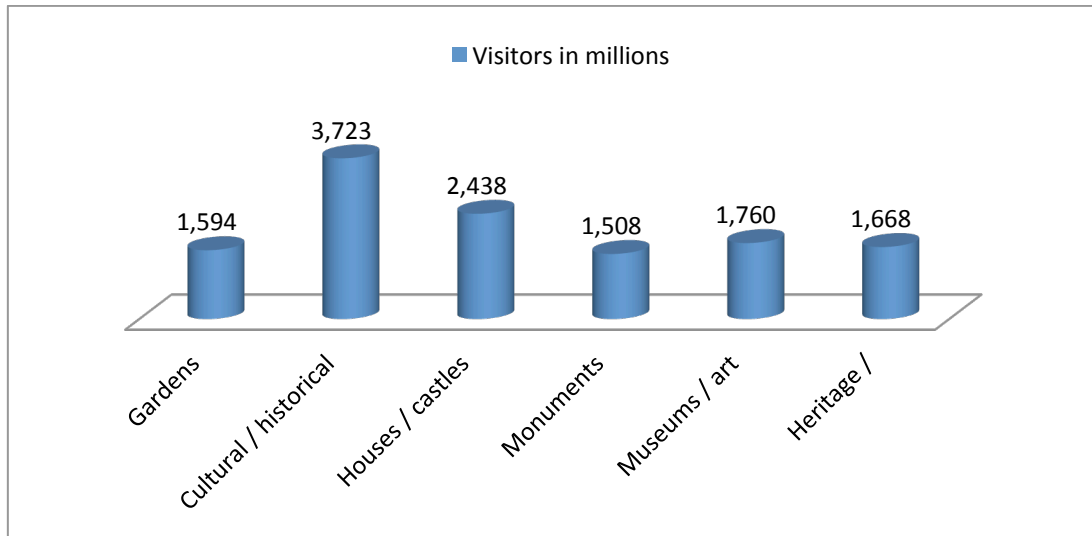
2.1 National Market Size

The last estimate of the value of the creative sector for Ireland was €4.6 billion, composing approximately 2.8% of GDP. Employment directly created by the creative industries amounts to 48,308 while all employment (direct, indirect and induced) amounts to 76,862. Ireland is highly ranked as 10th on the Global Innovation Index 2013 and 12th on the Global Creativity Index 2011. The largest sectors within Ireland's creative industries is software which makes up more than half of overall gross value added, followed by literature and publishing, radio and television and advertising.

2.1.1 Heritage

In 2008, 43% of all overseas visitors engaged in some historical/cultural activity, generating expenditure that represents 56% of the total overseas visitor expenditure in Ireland (DKM, 2009). Figure 17, illustrates the number of overseas visitors that visit heritage sites in Ireland.

Figure 17:
Number of Overseas Visitors Engaging in Cultural Activities

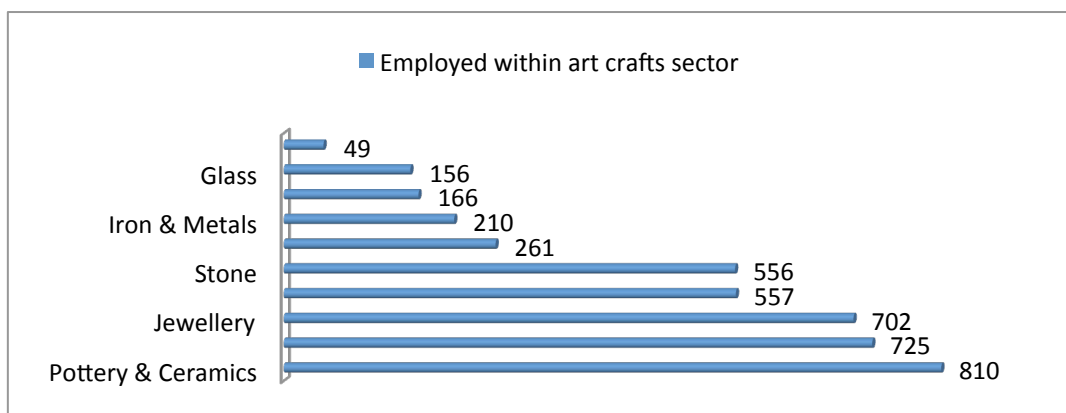


(Adapted from Fáilte Ireland, 2014).

2.1.2 Art Crafts

It is estimated that there are 5,771 individuals employed within the art crafts sector of Ireland. Within this sector there are 4,191 persons employed within enterprises that employ 3 or more people. The highest employing subsectors are pottery and ceramics, jewellery, graphic crafts, textiles and stone. Approximately €124.5 million is exported annually, while €373.5 million accounts for Irish sales. Figure 18, displays an estimation of craft employment in Ireland, with enterprises that employ 3 or more employees (Indecon, 2010).

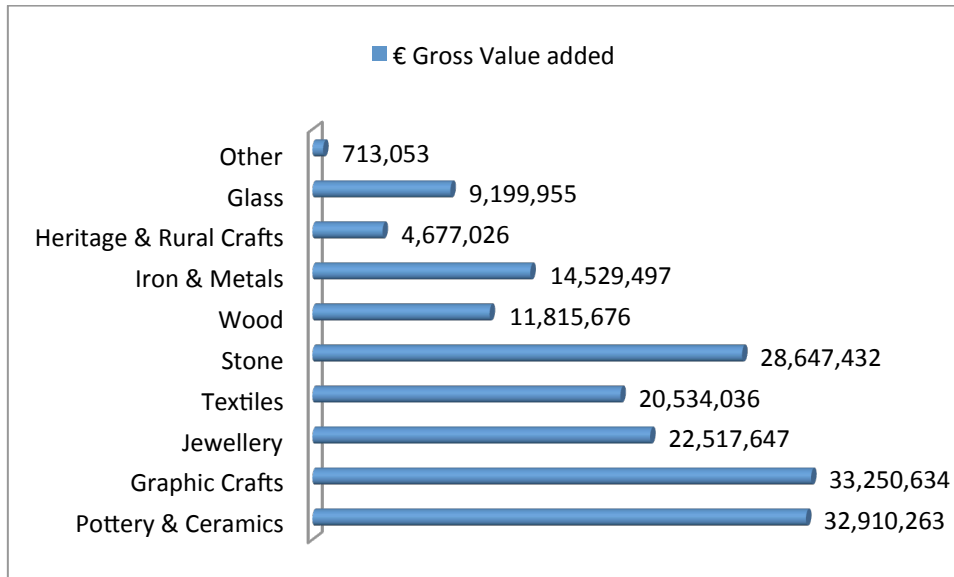
Figure 18:
Number of People Employed within Art Craft Sector in Ireland



(Adapted from Indecon, 2010).

Graphic Crafts generate the highest revenue, followed by pottery and ceramics then stone (Indecon, 2010). Figure 19 displays the gross value added of each subsector of the art craft sector, with enterprises employing more than 3 people.

Figure 19:
Gross Value Added of Art Craft Sector in Ireland



(Adapted from Indecon, 2010).

2.1.3 Performing Arts

The performing arts sector of Ireland engages with 2.3 million Irish citizens a year, which is 66% of the adult population. This sector however only modestly engages with visitor populations and is under integrated with the tourism sector (Gardiner, 2013). In 2010, revenues of performing arts activities in Ireland amounted to €12.8 million (Statista, 2014).

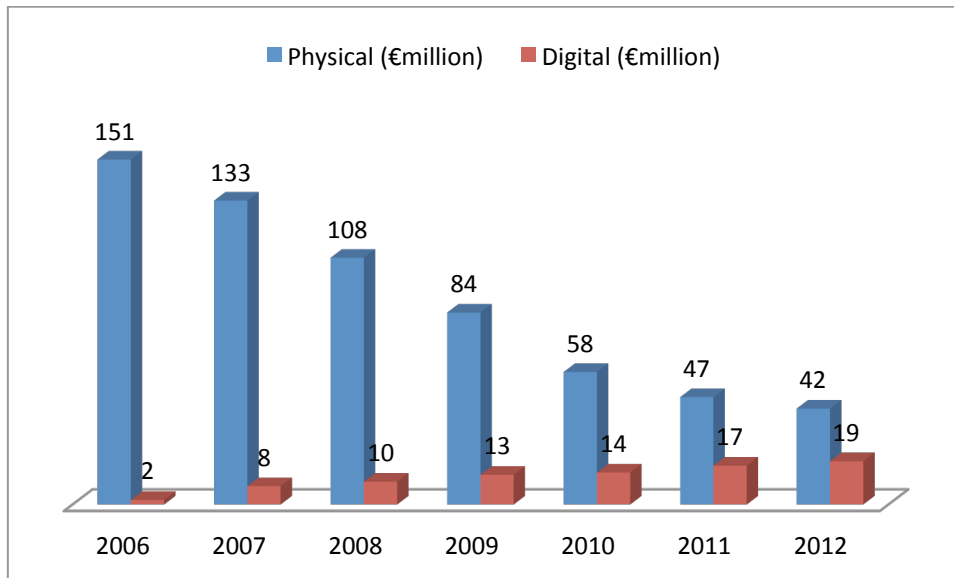
In 2009, 1.8 million theatre tickets were sold, valued at €35 million. Three of the largest theatre companies in Ireland are The Abbey Theatre, The Gate Theatre and The Druid. The Gate Theatre for example generated €5.4 million in 2009, employing 181 full time and part time individuals (Indecon, 2010). Over 500,000 people worldwide attended a theatre and/or dance performance by an Irish company in 2008.

2.1.4 Music

Like the global market, the value of physical music sales has decreased dramatically. The Irish music market decreased by €79 million between 2005 and 2010. Digital sales however during

this time increased by approximately €17 million (Grant Thornton, 2013). Figure 20 illustrates the value of the Irish music market between 2006 and 2012.

Figure 20:
Irish Music Market Value, Digital & Physical



(Adapted from Grant Thornton, 2013).

It is estimated that 770,000 people or one in six people in Ireland have engaged in illegal music or movie downloading, costing the exchequer €4.5 million (Retail Ireland, 2014).

In Ireland, there are over 20 licenced digital music outlets, including download stores, video streaming sites and subscription offerings. These combined offerings generated 34% of the recording industry's trade revenue, accounting for €14 million (IRMA & PPI, 2011).

Regarding the sales of recorded music, digital album sales in Ireland account for 34% of the industry's digital trade revenues. Subscription services accounted for 10% of record companies' trade revenue in 2011 (IRMA & PPI, 2011).

2.1.5 Audio Visual

The Irish audio visual sector is estimated to be worth over €550 million, employing in excess of 6,000 individuals, with over 560 small and medium enterprises. A target of creating 5,000 new jobs and increasing annual revenue to €1 billion by 2016 has been outlined in the Creative Capital – Building Ireland's Audio Visual Economy report prepared for the Minister of Arts, Heritage and the Gaeltacht by the Audiovisual Strategic Review Steering Group in April 2011.

Ireland has 110,000 square foot of industry standard studio space and would require an additional 100,000 square foot in order to reach this target. The cost of this space is estimated at €30 million. The Government have been called upon by the chairwoman of TG4 to establish a €15 million infrastructure fund to support the project (Coyle, 2014).

Table 3 displays the revenue generated by the different audio visual outputs in Ireland in 2010. As can be seen from table 3, the feature film and independent TV sectors show an increase of almost 100% from 2009 to 2010, while the animation sector experienced a drop of nearly 50% (IFTN, 2011).

Table 3:
Audio visual output 2007-2010

Audio visual Output	2007 €m	2008 €m	2009 €m	2010 €m
Feature Film	19.3	71.9	58.6	116.7
Independent TV	154.0	136.0	127.1	241.5
Animation	22.4	38.9	57.6	29.7

(Adapted from IFTN, 2011).

Ireland currently has 465 cinema screens with 72% of them being digital (IFB, 2014). It is estimated that 100,000 movies are downloaded illegally in Ireland each week (Grant Thornton, 2013).

Ireland has access to 558 TV stations, with 542 being foreign and 16 being local. Over 80% of Irish television viewers watch 25 services of which 17 are established in Ireland. There are 6 National stations, 5 regional stations and 26 local radio stations and 26 community stations (Shaw et al, 2010). The UK satellite packager BskyB has approximately 600,000 Irish subscribers, while the cable market is controlled by one operator, UPC Ireland, with 410,000 Irish customers. Two operators, Magnet Networks and Eircom provide IPTV, which take up only 2% of households (mavise, 2013).

2.1.6 Publishing and Printed Media

Ireland's newspaper industry generated €830 in revenue in 2011, employing 4,494 people. Some 5.2 million newspapers are sold each week in Ireland (NNI, 2013). This sector however is experiencing the highest rate of decline with a 7.1% contraction forecasted up to 2018. Publishers are investing in the digital elements of their business models and are experiencing

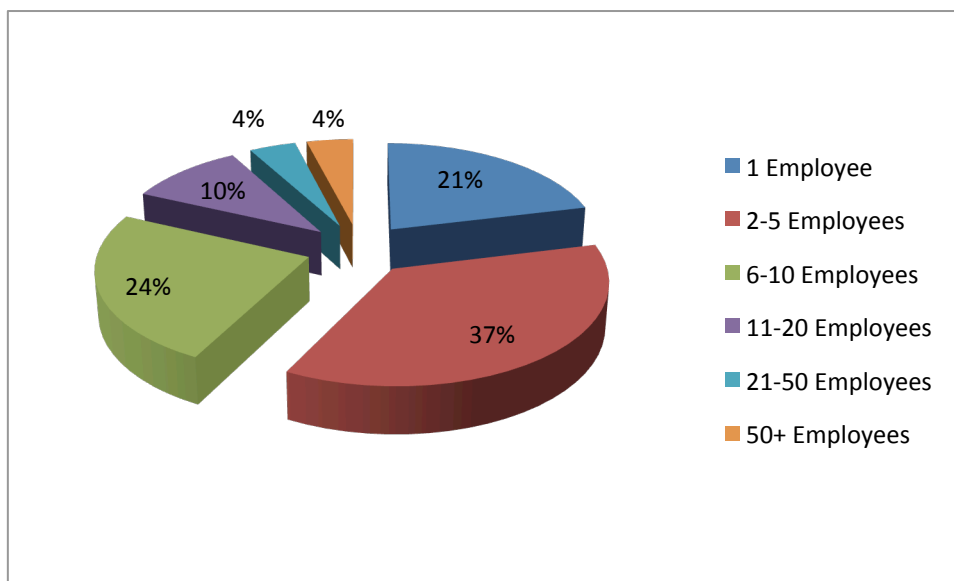
some growth with digital advertising revenues (PWC, 2014). Online advertising increased by 40% with Irish Times Ltd, earning €8 million in digital revenues in 2014, equating to 13% of total publishing revenues, which is up 8% from 2013 (Slattery, 2014).

EBooks are a very important and profitable part of the sales mix, yet if Irish readers want to buy an eBook, they typically have to purchase from a foreign retailer. Easons have improved their eBook listings, by offering 60% of the titles from the top ten list (Irish Publishing News, 2011).

2.1.7 Design

Ireland's design sector is valued at €465 million, employing 5,100 individuals. The design services sector is predominantly comprised of smaller organisations. The largest of these companies are those with employees of five or less. Figure 21, illustrates the size of design firms in Ireland by the number of employees (Intertradelreland, 2010).

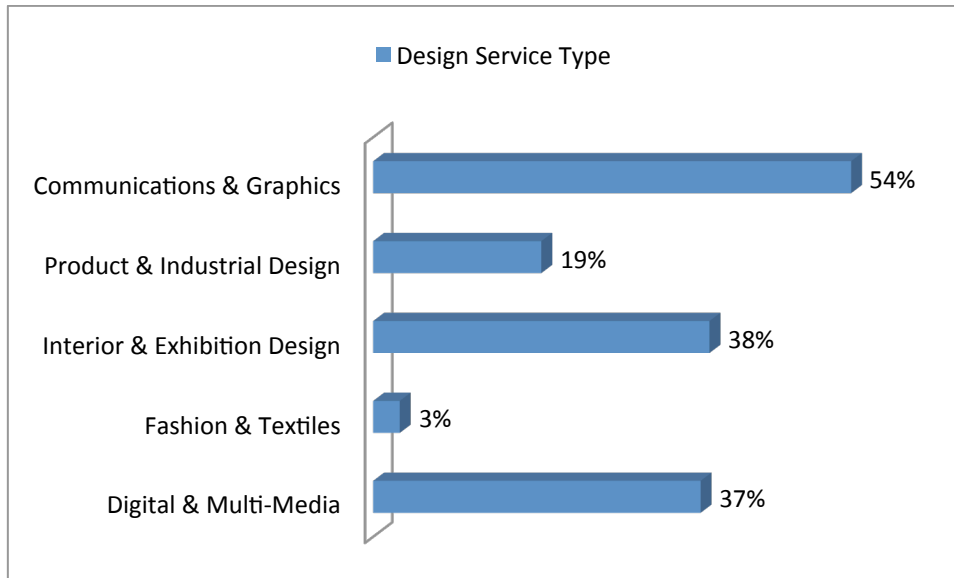
Figure 21:
Size of Design Firms in Ireland



(Adapted from Intertradelreland, 2010)

The types of services offered by Irish design firms are illustrated in Figure 22. Communications and graphic services account for 54% of all Irish design firms, followed by interior design and multi-media.

Figure 22:
Types of Services Provided by Irish Design Firms



(Adapted from IntertradeIreland, 2010)

The Design & Crafts Council of Ireland in collaboration with such organisations as Enterprise Ireland, the Department of Foreign Affairs and Trade and Enterprise & Innovation have organised 'Irish Design 2015'. The objective of Irish Design 2015 is to grow employment opportunities, sales and export potential for the Irish design sector (Design and Craft Council of Ireland OI, 2014).

2.1.8 New Media

Ireland has developed a strong global reputation as a centre for software excellence over the last 30 years, due to a strong multinational presence as well as a greater number of successful indigenous companies (Smyth, 2014). There are an estimated 806 indigenous software companies in Ireland, with total annual revenues of over €1.8 billion, employing over 10,000 individuals (ISA, 2014). Some 98% of Irish software companies are SMEs with over half of these employing between 5 and 20 individuals. Approximately one third of Irish software companies have a turnover of over €1 million and 75% have over €100,000 (ISA, 2014). The Irish software sector has challenges sourcing skilled candidates as there are more jobs than applicants, especially in all core programming areas, with 51% of Irish software companies stating that this is their main challenge (Smyth, 2014).

The Irish animation sector generated €326.8 million in 2011, employing 2,321 individuals. Irish animation companies are becoming more export orientated, providing content to such

companies as Disney, Nickelodeon and the BBC, accounting for 80% of overall sales. Enterprise Ireland is aiding the development of indigenous animation companies, and to help grow their businesses globally (Animation Ireland, 2012).

Another subsector of the new media sector is the video games sector. The video games market was valued at €248 million in 2012. This sector employs more than 2,800 individuals in 80 companies across Ireland (Ryan, 2013). The average video gamer is 32 years old, with 25% being over 50.

2.1.9 National Policies

The Department of Environment, Community and Local Government cooperate to fund local heritage projects through the Rural Development Programme. The Department of the Arts, Heritage and the Gaeltacht and the Department of Social Protection also cooperate to develop arts sector internships in conjunction with local authority arts offices. In 2013, The Department of Arts, Heritage and the Gaeltacht launched a charter which places responsibility on government departments and cultural institutions to promote the arts in schools. Tax incentives also exist to support cultural and creative industries (Collins et al., 2014).

Table 4:

Government Depts, Authorities, Agencies in Charge of Culture and Creative Industry Policy

Dept./Authority/Agency	Function
The Department of Arts, Heritage and the Gaeltacht	Responsible for the arts, culture, film, music, heritage, the Irish language and oversight of cultural institutions.
The Department of Communications, Energy and Natural Resources	Responsible for policy on broadcasting
The Department of Jobs, Enterprise and Innovation	Responsible for business development
The Department of Environment, Community and Local Government	Responsible for local government policy with a focus on culture and heritage.

(Adapted from Collins et al., 2014).

The Arts Act 2003 provides the national cultural institutions displayed in Table 5 with a degree of autonomy. The National Campaign for the Arts also provides autonomy and a degree of separation from the government bodies. There is collaboration however as Enterprise Ireland, who is funded by The Department of Jobs, Enterprise and Innovation in turn supports The Crafts Council. Funding cuts as a result of recession are a key issue for cultural policy in Ireland and private investment from well established businesses and multinationals are necessary (Collins et al., 2014).

Table 5:
National Cultural Institutions and their Functions

Cultural Institution	Function
The Irish Film Board	Responsible for the development of the film industry in Ireland
The Crafts Council	Supports Craft in Ireland
The Arts Council	Responsible for funding, developing and promoting the arts

(Adapted from Collins et al., 2014).

Regional and Local Overview of the Agriculture Sector

Regional and Local Overview

Introduction

Approximately 3% of total employment within the Western Region of Ireland is employed within the creative sectors. The sector generates an estimated annual turnover of €534 million and contributes to €270 million to the Gross Value Added of the region (White, 2013).

3 Regional and Local Overview

3.1 Regional Market Size

The creative sector in the West of Ireland is typically composed of self-employed individuals or micro-enterprises, with 12% of the businesses having more than 10 employees, 49% having between 2 and 10 employees and 39% being sole traders. Only one third of these businesses received more than 5% of their total turnover from exports. The West of Ireland has 2,466 creative companies (Collins et al., 2014), with 41% of all creative industries in the region based in Galway. Table 6 outlines the estimated number of people employed in the creative sector within the West of Ireland and the share of the county's total employment (White, 2013). It was announced in Budget 2015 that the threshold for the artists' exemption will be €50,000 for creative work with cultural or artistic merit such as books, plays, musical compositions, paintings and sculptures (Department of Finance, 2014).

Table 6:
Number and Share Employed in the Creative Sector in the West of Ireland

County	Employed	Share of Total Employment	Population
Galway	3,878	3.4%	250,653
Donegal	1,929	3.1%	161,137
Mayo	1,536	2.7%	130,638
Claire	1,303	2.3%	117,196
Sligo	1,265	4.2%	65,393
Leitrim	619	4.4%	31,798
Roscommon	478	1.7%	64,065

(Adapted from White, 2013).

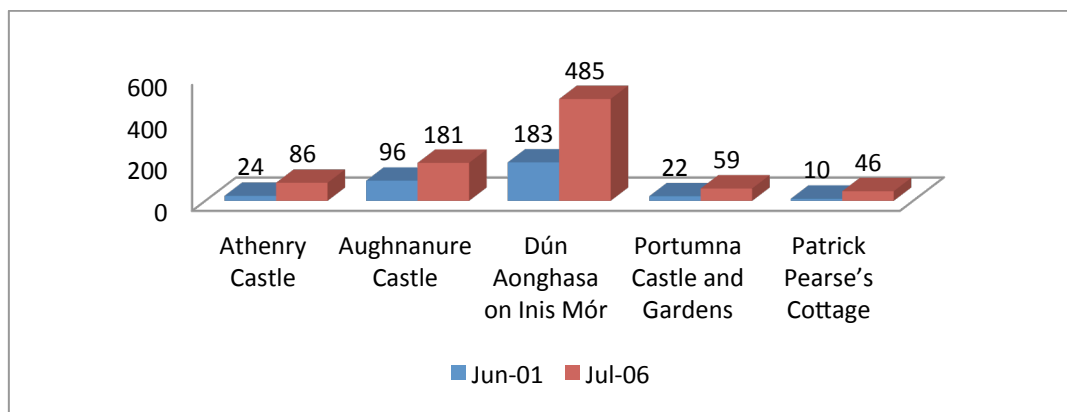
Galway has the largest number of individuals employed within the creative sector within the Western Region of Ireland. The city of Galway has an internationally recognised reputation for the arts as well as being a high-tech environment (White, 2013).

The creative sector accounts for 1 in every 33 jobs in the Western Region of Ireland. According to the most recent retrievable data the highest number of companies within the creative sector are in the music, visual and performing arts sectors, followed by craft, video, and film and photography businesses, accounting for 66% of total businesses. They account for 31% of total direct employment as well as 21% of turnover (Collins et al., 2014). Creative technology companies, including internet and software, digital media and design have the largest economic contribution, accounting for 7% of the total number of businesses, 25% of turnover and 15% direct employment. Creative industry clusters are present around Galway city in the form of a technology-based cluster. A digital media cluster is present on the outskirts of Galway city where TG4 has been a strong anchor (Collins et al., 2014)

3.1.1 Heritage

There are 35 heritage sites, 31 museums and 10 art galleries in Galway City and County. Galway's Dún Aonghasa, Aran Island heritage site was awarded the Silver Merit Award of Excellence 2013 (OPW, 2013). These sites attract many overseas visitors and generate income for the economy. An initiative granting all OPW heritage sites free access on the first Wednesday of every month has helped stimulate interest in Galway's and Ireland's built heritage. Figure 23 illustrates the benefits of this initiative showing June's visitors compared to July's in 2011 (Nee, 2011).

Figure 23:
Visitors to Galway's Heritage Sites Jun-July 2011



(Adapted from Nee, 2011).

As can be seen from Table 7, County Galway is home to an abundance of heritage sites.

Table 7:
Heritage Sites in County Galway

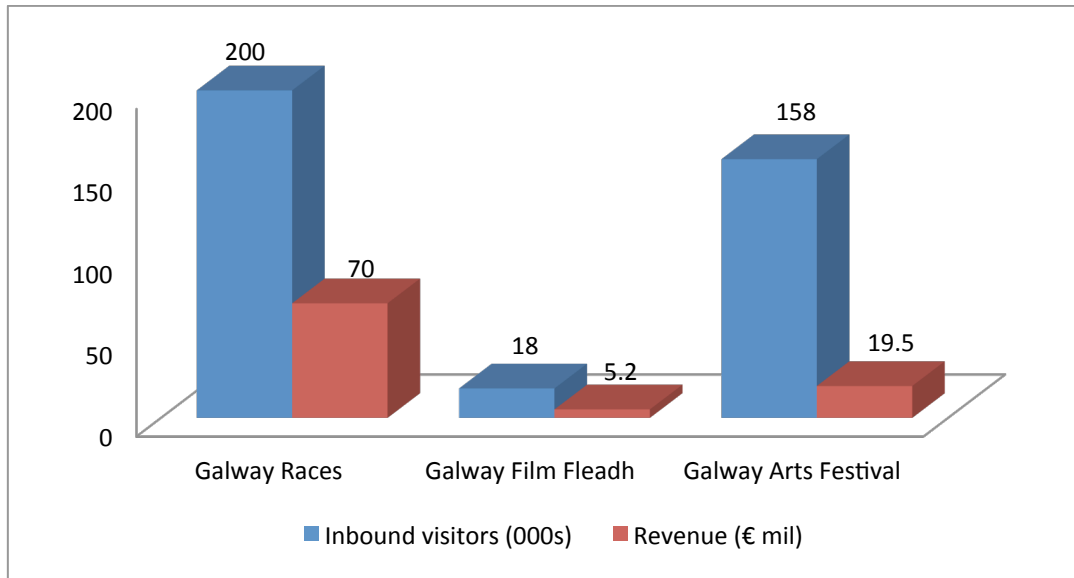
Heritage Sites	Museums	Art Galleries
Athenry Heritage Arts & Centre	Athenry Heritage Arts & Centre	The Whitethorn Gallery
Athenry Castle	Battle Of Aughrim Interpretative Centre	The Painter's Palette
Dunsandle Castle and Woods	Castleblakeney Heritage Centre	Stronach Gallery
Clonfert Cathedral	Coole Park Visitor Centre	Aras Eanna Arts Centre
Headford Friary	Gort Heritage Centre	Art House Gallery
Kilmacduagh Cathedral Churches and Round Tower	Thoor Ballylee Yeats Tower	Vanda Luddy Gallery
Dunguaire Castle	Kiltartan Gregory Museum	Galway Arts Centre
Cloghan Castle	Dartfield Horse Museum & Park	The Kenny Gallery
Oranmore Castle	Clonfert Diocesan Museum, St Brendans Cathedral	The Black Cat Gallery
Portumna Castle & Gardens	Mountbellew Forge Museum & Heritage Centre	Art Essence Gallery
Dominican Priory	Tuam, Regional Heritage Centre and Museum	
Regional Heritage Centre and Museum	Lackagh Museum & Heritage Centre, Lackagh	
Aughnanure Castle	Connemara Smokehouse Tours	
Clifden Castle	Connemara Pony Breeders Society Heritage Centre	
Station House Museum	Patrick Pearse's Cottage	
Ashford Castle	Leenane Sheep and Wool Centre	
Kylemore Abbey and Victorian Walled Gardens	Connemara Ocean and Country Museum	
Dún Aonghasa World Heritage Site	Lettermullen & Garumna Heritage Centre	
The Seven Churches	Connemara Heritage & History Centre	
Old Light House	Connemara Marble Visitor Centre	
Dún Eochla	Celtic Crystal Visitor Centre	
Dún Eoghanachta	Glengowla Silver & Lead Mines	
Dún Dúchathair (the Black Fort)	Áras Éanna Heritage Centre	
Teaghlach Einne (St. Enda's Household)	Inis Oirr Heritage House	
St Benan's Church	Synge's Cottage	

Dun Crocbhur (Conor's Fort)	Dún Aonghasa Visitor Centre	
Leaba Chinnderig - Saint Kenderig's grave	Aran Heritage Centre	
Dun Fearbhui (Ferboy's Fort)	Galway City Museum	
O'Brien's Castle	Galway Atlantaquaria	
Tiemphall Chaomha (Church of St Keevauns)	James Mitchell Geology Museum	
The Plassy	Nora Barnacle House Museum	
Saint Nicholas Collegiate Church of Ireland		
Galway Cathedral		
Spanish Arch		
Lynch Castle		

(Adapted from Galway County Council, 2014).

County Galway hosted 83 festivals and events in 2012, bringing in €62 million in expenditure. Such festivals include Galway Arts Festival, Galway Races, Galway Oyster Festival, Galway Early Music Festival, Barbaro International Arts Festival, Brazilian Festival, Cruinniú na mBád Boat Festival, The Cuckoo Festival, Tuam Arts Festival and the Connemara Pony Show. The Galway Races attracts between 170,000 and 200,000 people, generating €50 to €70 million for the local economy. Figure 24 displays the revenue generated by three of Galway's many annual festivals. In order to sustain these festivals, funding is necessary. The 2014 Galway International Arts Festival for example cost €2.5 million to produce. The festival received 28% of its funding from public sector grants, 37% from ticket sales, 27% from sponsorship and friends scheme and 8% from other sources (GIAF, 2014).

Figure 24:
Revenue and Visitors of Three Galway Festivals, 2010



(Adapted from Andrews, 2011).

The Irish language is worth in excess of €136 million annually to the economy of Galway City and County, of which approximately €59 million accrues to Galway City as well as directly and indirectly supporting over 5,000 jobs. Irish is a driver of tourism in Galway and generates €40 million annually. The Coláistí Gaeilge Samhraidh generates €14 million through tuition fees, pocket money and payments to those who host for students. 25,000 domestic and foreign young people attend Irish Colleges in the Gaeltacht each summer bringing significant economic benefits (Gaelport, 2014). Another source of employment and economic activity is the Irish language audio-visual sector. This sector contributes to €24.3 million in added value to GNP each year. Most of this money is reincorporated into the local economy through wages, salaries and local purchases. Galway Gaeltacht's labour force of 22,000 direct plus indirect plus induced contribution to GNP is 1.9% of the national GNP (NiFhlatharta, 2013b).

European Capital of Culture 2020

Galway City is set to place a bid to become the European Capital of Culture in 2020, the next time the international designation will be in Ireland. Galway is up against other potential contenders Limerick, Waterford, Sligo and Kilkenny. A team of experts from NUI Galway was appointed to prepare the bid which requires a budget of €20 million to host it. The team promise to consult extensively with the arts and cultural community in the city, as well as interested business and the public. The title of European Capital of Culture will be awarded to Irish and

Croatian cities in 2020. Galway City contested for the 2005 Capital of Culture designation in 2005 but lost out to Cork City.

3.1.2 Art Crafts

Galway has 145 craft enterprises out of a national total of 2,399 (Indecon, 2013). Galway hosts many art crafts markets such as The Róisín Dubh art and craft indoor market, which has an abundance of textiles, photography, wood, ceramics, jewellery, art and fashion. Other craft markets include the Galway Christmas market on Eyre Square and the craft fair in the Clayton Hotel, Galway. The Galway County Council & City Enterprise Board has designed workshops with the aim of supporting the growth and development of the crafts sector of Galway.

3.1.3 Infrastructure Performing Arts

Table 8:

Number of theatres, theatre companies, cinemas and performing arts spaces in Galway

Theatre	Theatre Companies	Cinemas	Performing Arts Spaces
Nun's Island	Blue Teapot	Eye Cinema	
The Bank of Ireland	Mephisto	IMC	
The Druid Lane	Fregoli	Omniplex	
The Black Box	Moonfish		
The Town Hall	Vagabond		
An Taibhdhearc	Croi		
Cube Theatre	Magnas		
	Zelig		
	Selkie		
	Dragonfly		

Galway has many theatres, catering for the performing arts sector, including Nun's Island Theatre, The Bank of Ireland Theatre, The Druid Lane Theatre, The Black Box Theatre and The Town Hall Theatre.

Nun's Island Theatre, situated in Galway City has a total capacity of 82 seats. It can be rented for various functions, including Theatre and Film (Galway Arts Centre, 2015).

The Town Hall Theatre is open 362 days a year and attracts over 100,000 people. It caters for theatre, concerts, musicals, dance, films, comedy and family shows (artsingalway, 2014).

The oldest theatre still in operation in Galway is the Taibhdhearc na Gaillimhe. It is an Irish speaking theatre providing a continued outlet for Irish playwrights (artsingalway, 2014).

The Druid Theatre Company was founded in 1975 and was the first theatre company to be founded in Ireland, outside of Dublin. It is recognised as one of the pioneers of the modern cultural development of Ireland (artsingalway, 2014).

Croi Theatre Company, Galway, established in 2008 is committed to the discovery, development and production of dramatic works for the Irish and international stage (artsingalway, 2014).

The recently established Moonfish Theatre is a Galway-based international theatre company. They are a bi-lingual theatre company performing in Irish and English (artsingalway, 2014).

Stagecoach Galway offer quality training in the performing arts to students of all ages and abilities. Another highly respected school is The Performing Arts School Galway, providing a high standard of professional training (artsingalway, 2014). Galway demonstrated its interest in the performing arts with a free concert in the Cathedral with The Galway Youth Orchestra Jazz Ensemble, together with The Greater Miami Youth Symphony Orchestra (Galway Cathedral, 2014).

3.1.4 Music

Traditional Irish music is central to Ireland and Galway's cultural identity, making Irish music internationally successful (Collins et al., 2014). Galway hosts traditional Irish music festivals, which attract music lovers from all over the country and the world. Tuam's three day Trad Festival is in its fourth year of operation. It features album launches, céilí dancing, workshops, busking and CD launches (Tierney, 2013). The festival attracts 100 musicians and generates approximately €500,000 for the local economy (NiFhlatharta, 2013c).

The Clifden Traditional Music Festival is also on its fourth year of operation. Although smaller than the Tuam Festival, it still generates interest, promotes Irish culture and attracts visitors (NiFhlatharta, 2013d).

The Galway Arts Festival is the largest traditional Irish music and arts festival in Galway. It hosts 250 shows in 25 venues over two weeks and is estimated to generate €20m for the city. It is in its 34th year of operation and attracts 150,000 people and generates up to 30,000 bed-nights (NiFhlatharta, 2013e).

Galway's local pubs host live Irish traditional music events regularly. The top five traditional music pubs in Galway City are, Taaffes Bar, The Crane Bar, Tigh Coili, An Pucan and Monroes Tavern (Galway Tourism, 2015).

'Galway Rehearsal Studios' is a recently established studio in Ballybane Industrial Estate, Galway. This facility provides musicians with 24/7 access, providing rehearsal space and equipment aimed at promoting and enhancing Galway's music sector (McDonnell, 2013). The Forge Rehearsal Rooms, Galway, is located in the heart of the City equipped with instruments and recording equipment. A full recording studio is also on site.

Busking is part of the fabric of Galway City. The music attracts shoppers and provides income for the musicians. In order to promote this sector retailers have agreed to finance a music competition in order to improve the music quality in return for a ban on street amplification (Tierney, 2014).

3.1.5 Visual Arts

Galway has been hosting an annual three week long visual arts festival called TULCA since 2002. It is a multi-venue, artist-centred festival of contemporary visual art. It provides artists with the opportunity to connect and create. It promotes the visual arts through educational workshops (Galway Tourism, 2014).

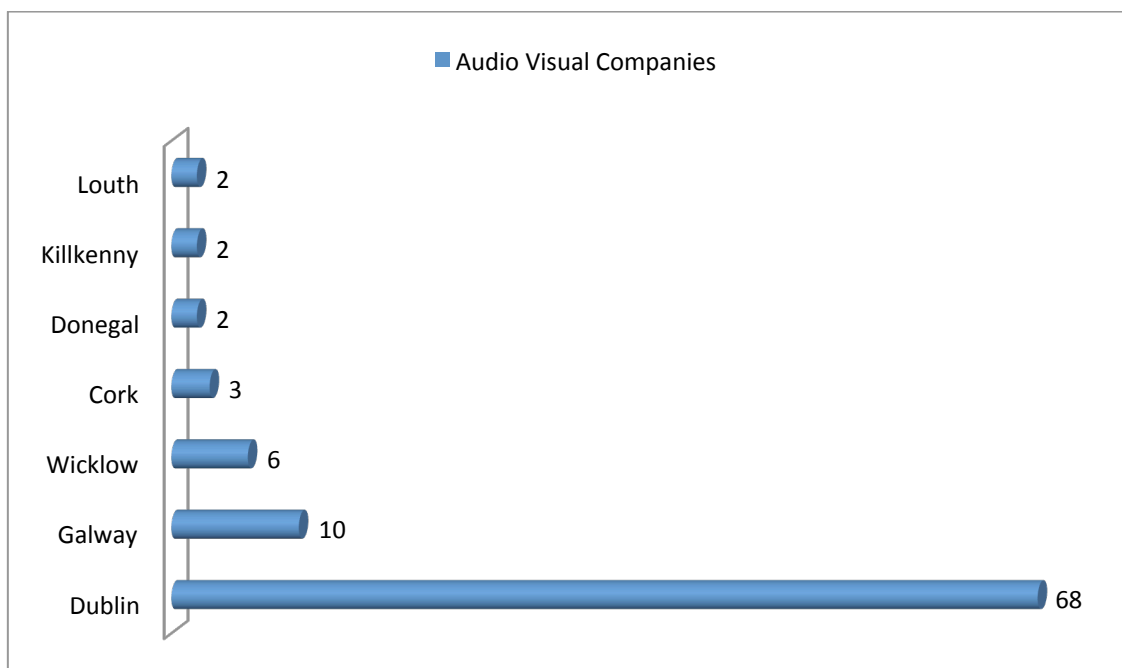
The proposal to construct the Féach contemporary art centre in Galway could make Galway a flagship for contemporary visual arts centres within Ireland. This two year project has an estimated build cost of €1 million. The centre would attract major international and domestic exhibitions, providing employment and boosting the economy of Galway. Galway's docklands area is the suggested site for the build with the intention to bring interest and activity to the area. It has been argued that the Féach contemporary art centre would deal with the issue of there being no dedicated space to cater for the needs of the visual arts sector in Galway (Andrews, 2010).

3.1.6 Audio Visual

The economy of Co. Galway has an audio visual sector worth €72 million, employing over 600 people (Collins et al., 2013). Connemara has a cluster of audio-visual companies due to the establishment of TG4 in 1996 (White, 2013). The channel, broadcasting through the medium of Gaeilge was established in 1997 and has acted as an anchor to a thriving digital media cluster. The success of TG4 has influenced the establishment of 40 companies in the audio visual sector, employing 220 full time as well as 180 part time employees. According to the most recent data this cluster significantly impacts the local economy with an annual contribution of €7 million (Collins & Fahy, 2010).

The Galway Film Partnership was established in 2009 as a group of organisations that work to encourage, market, support and facilitate film and television production in Galway. Film production directly and indirectly generates wealth for the local economy (Mottiar et al., 2013). Non-profit organisations support the audio-visual sector in county Galway, such as the Galway Picture Palace, which has now almost finished building an arthouse cinema and film centre in Galway city. The Galway Film Centre is another non-profit body: it acts as a resource centre for film in the west of Ireland. The Galway Film Centre operates Screenwest, which supports the production of audio-visual content in the west of Ireland.

Figure 25:
Number of Audio Visual Companies in Galway and Ireland



(Adapted from IFB, 2008).

Table 9 shows the radio stations of Galway. Some 58% of the Galway population listen to a local or regional station, while 46% listen to a National station. Younger listeners of the age group 15-34 are the biggest fans of local and regional radio with 66% listening to local compared to 34% for nationals (JNLR, 2015).

Table 9:
Galway's Radio Stations

Station	Address
RTÉ Galway	Hynes Building, St Augustine Street, Galway
Flirt FM	NUIG
Galway Bay FM Limited	Sandy Road, Galway

(Adapted from Yourlocal, 2015).

Each station's revenue is distributed as a separate pool on the basis of logs submitted by the broadcaster. The radio stations are paid out on a duration basis and all advertising is also paid out based on duration (IMRO, 2014). Figure 24 illustrates the highest music payment rates as well as advertising music payment rates and administrative costs of the top ten Galway radio stations.

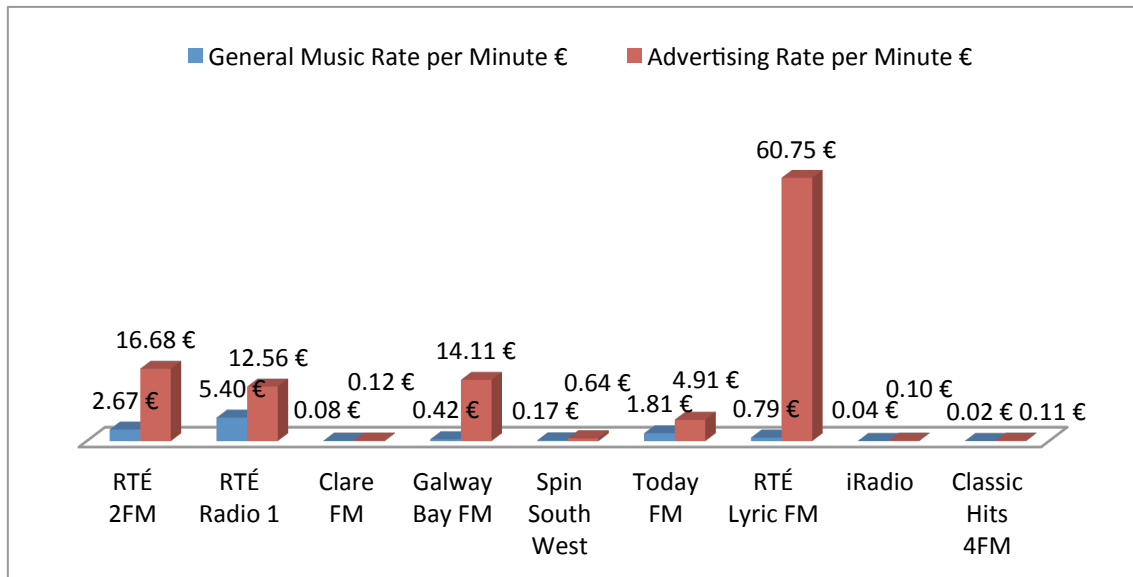
Galway Bay FM was established in 1989 and serves Galway City and County reaching 135,000 weekly listeners. It is Galway's most popular radio station and has a 24.6% market share as of June 2014. This is a drop from 28.5% in June 2013, representing a decline of 14,000 listeners. Galway Bay FM broadcasts music, news, current affairs, sport, arts, Irish language shows and religious beliefs (Choose Radio, 2015).

Flirt FM, established in 1995 is a student, community and alternative station based in National University Galway. It has two full time employees and is home to 150 volunteers annually. Flirt FM provides low advertising and offer low cost in-house production by a promotions team. It also broadcasts online allowing it to be heard in Brazil and Japan (Flirt FM, 2015).

iRadio has recently closed its base in Galway laying off 12 of its employees. The group moved its staff from Wellpark, Galway to its sister station in Athlone (NiFhlatharta, 2013).

Figure 26 compares the music and advertising costs of national, regional and local radio stations.

Figure 26:
Galway Radio Stations, Music and Advertising Costs

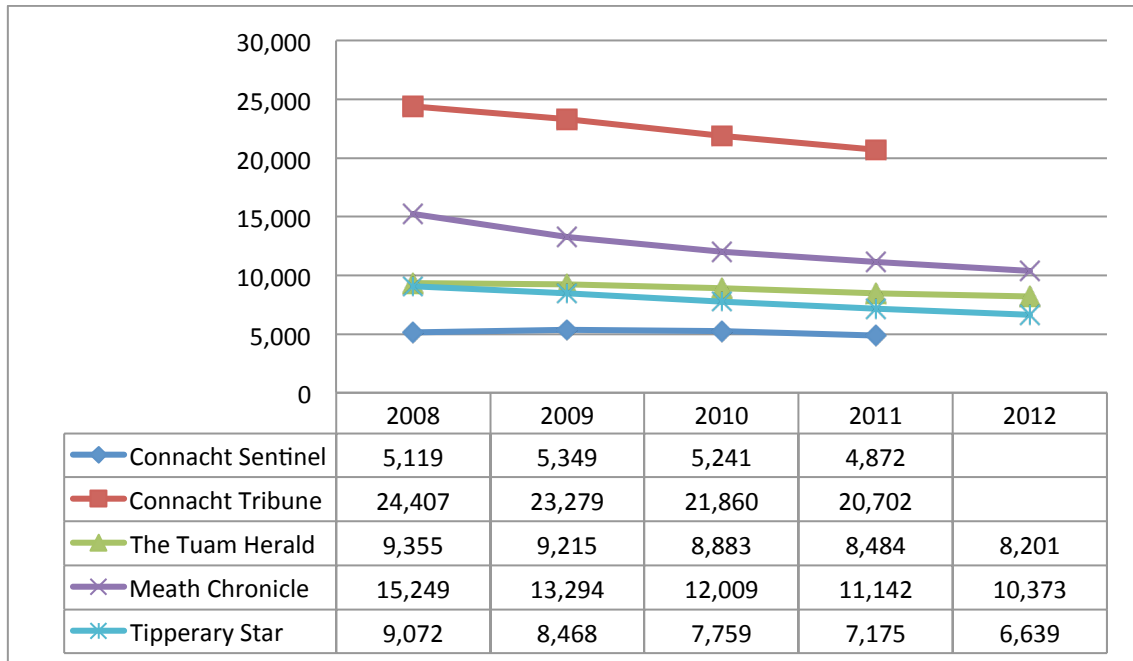


(Adapted from IMRO, 2014).

3.1.7 Publishing and Printed Media

Some 38 out of 40 Irish 'paid for' newspapers have been reporting declining sales but there has been a growth in 'free titles'. The main 'paid for papers' available in Galway are The Connacht Tribune, The Tuam Herald, The Connacht Sentinel as well as the free papers such as The Galway Advertiser, The Galway Independent. Figure 27 illustrates the decreasing circulation rates of the Galway newspapers in comparison with Meath's Chronicle and The Tipperary Star.

Figure 27:
Regional Newspaper Circulation Rate, 2008-2012

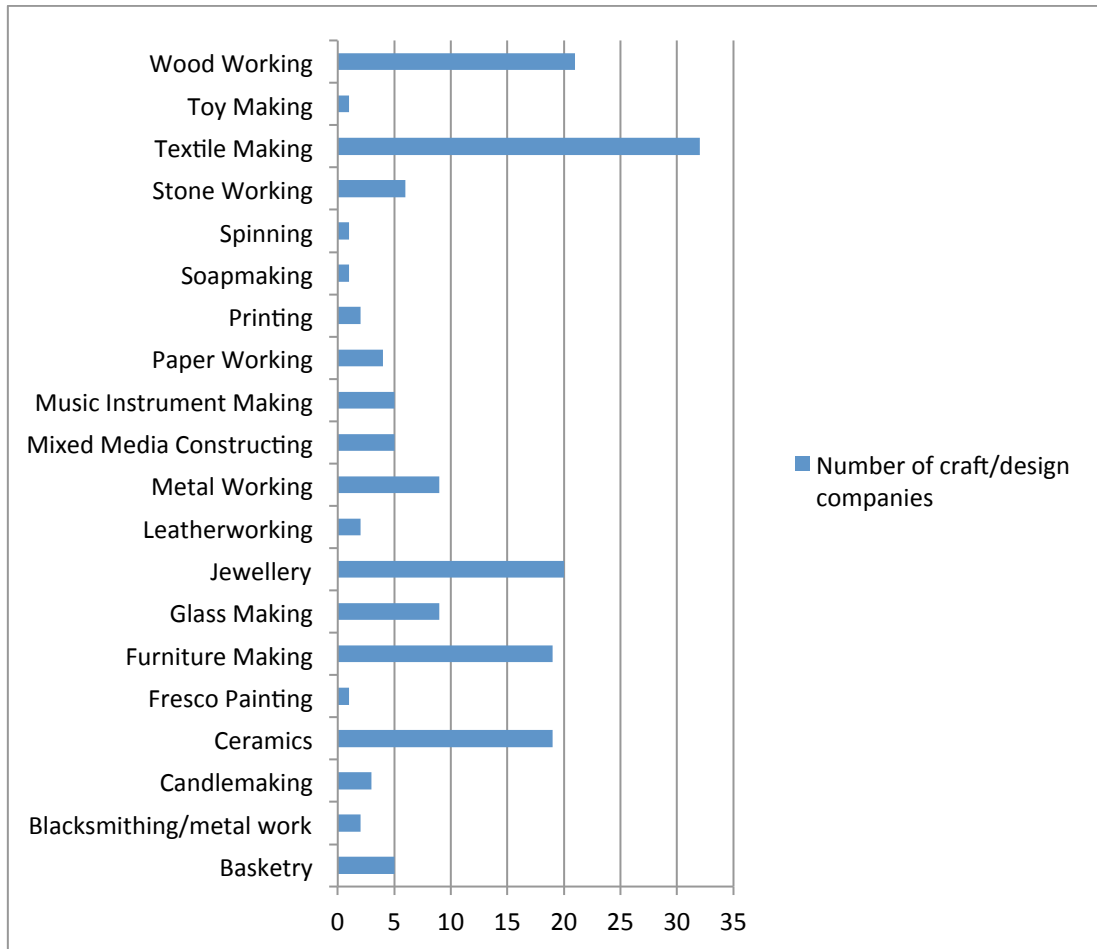


(Adapted from ilevel, 2013).

3.1.8 Design

Galway City and County is home to 162 design and craftspeople, with numerous different disciplines ranging from ceramics to glass making, to jewellery making, to textile making and blacksmithing (Design and Craft Council of Ireland, 2015). There are 162 design/craft businesses in Galway. Figure 28 displays these businesses.

Figure 28:
Design/Craft Businesses in Galway



(Adapted from Design Craft Council of Ireland, 2015).

Galway is becoming a creative hub for design, with such businesses as 'Milliners' who attract headlines nationally as well as internationally. There is a growing demand for accessory designers and jewellery designers driven in part due to Galway's large number of various festivals which has received local, national and international media coverage. Galway's fashion sector was promoted through the 5th Annual Irish Fashion Innovation Awards, where Galwegian accessory designers and jewellery designers have the opportunity to market their products to a jury of fashion design experts.

3.1.9 New Media

Galway recently joined the UNESCO's Creative Cities network as a City of Film. Galway is now one of five cities in the world to hold this status. Galway's audio visual sector is valued at €72

million including 50 production companies with employment growing at 24.5% in the sector (Collins & Fahy, 2010). It is now also an internationally recognised standard of excellence.

New talent for the current and future gaming and animation industry is being developed as of September 2014 at Galway Technical Institute. Some 44% of companies within the area of animation, games, visual effects and digital media cite recruitment and staffing as being the predominant business concern (Newton, 2014). Galway provides the necessary technology infrastructure and international recruitment opportunities in order to bring the highest quality gaming experiences to market (NiFhlatharta, 2013).

Galway has a growing computer game design sector. The U.S. firm EA Games, one of the biggest gaming companies in the world created in excess of 200 jobs when it opened a Customer Experience Centre of Excellence in Galway in 2011. It now employs over 400 individuals and has a turnover of €15 million (NiFhlatharta, 2013).

A number of start-ups are going in this space in the last few years, for example 'Element Wave' which invented a way for companies to better understand how people are using their apps. The product helps companies understand their app's life cycle and when to develop practical responses. 'Element Wave' is also becoming successful within the iGaming sector. The founders cite Galway as being a prime start-up location.

3.1.10 Promotion and Support

WDC Micro-Loan Fund: Creative Industries

The WDC Micro-Loan Fund: Creative Industries is a pilot initiative of the WDC, allocating €1,000,000 over a three year period from the Western Investment Revolved Fund to the creative industries sector. The Micro-Loan Fund will operate on a competitive 'Call for Applications' basis. The fund is open to sole traders, partnerships, businesses, co-operatives and groups operating in the creative industries sector in the Western Region. This scheme was developed by the Western Development Commission as WDC research identified access to funding as an issue for creative industries and an impediment to the growth of the sector.

Arts in Action

'Arts in Action' is a creative arts programme run by the College of Arts, Social Sciences and Celtic Studies at NUI Galway. The programme aims to promote a greater awareness of the performing arts among students and increase their engagement with them. It includes a practice-based class, 'Exploring the Indigenous Arts', for US visiting students to NUIG exploring

Irish music, song and dance, as well as organising a series of performances throughout the academic year featuring music, dance, drama and poetry readings. The 2013-2014 Arts in Action performance programme focused on young, emerging performers and legends of traditional Irish music. The focus was also on performers from the west of Ireland, such as from counties Sligo, Donegal, Leitrim, Mayo and Galway.

3.1.11 Future Growth

Future growth prospects for the western region's creative sector is potentially strong, as identified in the economic impact assessment of the sector carried out in 2010 by the Centre for Innovation and Structural Change. This report found that, if a 'high growth' scenario was implemented, including support for networking, formal networks for specific sub-sectors and the implementation of an export promotion strategy, by 2020 the sector could generate €648,720,000 in direct sales and directly employ 29,720 people

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