Knowledge Exchange Seminar Series (KESS)

Drivers of Economic Growth

Hide and Seek: Where is design in the creative industries network of Northern Ireland and do we really understand its power in the growth of our economy?

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In almost all the official Northern Ireland documentation highlighting statistics and reviews for the creative industries, there is very little differentiation of the sector and little recognition of design as a distinct and essential factor in success. With debate focused on end-product, digital and manufacturing sectors, there is no policy or ministerial advisory committee that promotes the value of design in Northern Ireland. Nor is there physical space or a council to advise on design policy or academic research for the creative industries. Design spans several government department remits, but is most closely aligned with the creativity industries under the Department of Culture Arts and Leisure. This presentation examines understanding of design as a sector and why the visibility of it so vague in Northern Ireland. It is based on research of the eco-systems (networks, practices, operating environments, and sustainability) of small design driven practices (SME) based in Northern Ireland. The research investigated current Northern Ireland innovation and culture policy context, while exploring the contribution of micro creative businesses to the social, cultural and economic environment. It examined: what the support mechanisms are for their initiation, maintenance and growth?; and, what sort of early stage eco-system needs to be put in place within Northern Ireland society to nurture confident risk-takers entering in to the private sector? The presentation highlights how the value of design relates to the regional advantage attached to creative industries growth in UK and Northern Ireland, which should be considered when formulating policy in this area.

Context:

"Few people think about it or are aware of it. But there is nothing made by human beings that does not involve a design decision somewhere."
— Bill Moggridge

At grass roots level, design encompasses many sub-sectors within it like graphics, communications, fashion, product and architecture. In recent years, the emergence of a new 'tech' world has created a renaissance in the design sector. New disciplines are coming to the forefront to keep up with the demand of a fast evolving sector including User Experience (UX), Service Design, Organisation Design, User Interface (UI), Interaction Design and the use of additive manufacturing (3D printing) and other digital prototyping software tools are now common place.

Not only is the design sector an inherently collaborative network (KELLEY, T, 2008) where multi-disciplinary professionals work together to solve a problem, but design thinking is also a key component used within other businesses. It is common practice for designers who take a user-centred approach to their work, to co-design alongside their user group and combine forces with complimentary disciplines (engineers, psychologists, anthropologists) to achieve a more thorough and considered solution. An example of this type of design practice is IDEO, one of the world's largest and most successful design and innovation companies. They originated the term 'design thinking' and place as much emphasis on solving business and cultural needs as the more standardised expectation of brand and product solutions. "We identify new ways to serve and support people by uncovering latent needs, behaviors, and desires…We help organizations build creative culture and the internal systems required to sustain innovation and launch new ventures" (IDEO, 2014).

Given that Design, IT, Advertising & Marketing were the only other creative industry groups in Northern Ireland with annual average increases in their number of enterprises for 2009-2013 (2.0% and 1.5%, respectively), this presentation investigates how Design is represented in NI and whether their production processes, work ethics and approaches are adequate to compete globally.

Creative Industries and **NI design sector** analysis**:**

The definition of the Creative Industries is an ongoing agenda across the world, with some countries taking the lead in establishing a generic definition that categorises the occupations and industries which fit into this emerging economy. The UK is regarded as a leader in this industry and recognises nine creative employment sectors, including sectors like design, music and film, which fuel the creative economy (Department for Culture, Media & Sport, 2014). The CI are described in terms of their difference and idiosyncratic independence, setting them apart from other industries. Indeed, the term itself is open to a multitude of interpretations and while this makes it/them difficult to define, it also has a beguiling and elusive quality that make them attractive to many external funders, policymakers, and consumers. It is one of the fastest growing sectors in the world and in recent years, there has been global recognition of its economic value. In a recent report by Create UK they stated "…It is an exciting and pivotal time for the UK's creative industries. Recent statistics show the sector punches above its weight for the economy, generating £71.4 billion gross value added (GVA) in 2012 – a 9.4 per cent increase that surpasses the growth of any other UK industry sector" (Creative Industries Council, 2014). The most dominant sector showing continuous growth in the CI is the 'IT, Software and Computer Services' group. This category includes IT businesses, programming/software companies and digital/web design professionals and although not visibly acknowledged within government reports, the 'IT, Software and Computer Services' group tend to be design driven companies (Department of Culture, Media and Sport, 2014).

<u>Overview of growth in Creative Industries in Northern Ireland:</u>

GVA for CI -	2008: £696M
	2012: £714M
Creative Employment:	2009 – 31,000 people
	2013 – 40,000 people
Business Units (CI):	2011 – 1,375 businesses
	2013 – 2,415 businesses

The **design industry** is one of the nine sub-sectors of the defined UK Creative Industries and it has been established that no major studies have been conducted to realise an accurate ***size*** of the sector in Northern Ireland. Recent findings have estimated that approximately 6,110 people are employed "A number of previous attempts have been made to establish the size of the design sector in

Northern Ireland. Creative & Cultural Skills commissioned TBR to interrogate the Inter-Departmental Business Register (IDBR) for their 2012/13 Impact and Footprint research. The study identified 256 design firms in NI (excluding design teams within businesses in other areas of the economy) employing a total of 6,110 people" (Creative & Cultural Skills, 2014)**.**

There are no current *accurate* statistics to show GVA for the Design sector in NI, though it is estimated that the industry is growing, "Design and Advertising and Marketing were the only other creative industry groups (other than the IT sector) with annual average increases in their number of enterprises for **2009-2013** (2.0% and 1.5%, respectively)" (DCAL, 2014).

Although this proves that the design sector showed growth between the period of 2009-2013, more up-to-date statistics have estimated the industry at 265 enterprises in 2013, which is a **decrease** on the previous year of 270. This is outlined in Table 1:

Table 1: Creative Enterprises operating in Northern Ireland

Creative Industries Group	Number of creative enterprises				
	2009	2010	2011	2012	2013
Advertising and marketing	240	250	245	255	255
Architecture	415	415	410	405	380
Crafts	10	10	10	10	10
Design: product, graphic and fashion design	245	245	260	270	265
Film, TV, video, radio and photography	295	280	290	290	295
IT, software and computer services	750	745	775	800	865
Museums, galleries and libraries	20	20	20	15	20
Music, performing and visual arts	205	200	200	195	195
Publishing	155	150	125	140	130
All Creative Enterprises	**2,330**	**2,310**	**2,340**	**2,385**	**2,415**
All enterprises	71,590	69,580	69,080	68,660	67,745
Percentage share of all enterprises	3.3	3.3	3.4	3.5	3.6

Source: Table 1 shows statistics taken from DCAL Creative Industries Economic Estimates: Experimental Statistics (DCAL, 2014)

In CI statistics, it is clear that design is recognised as a narrow field (product, graphics, fashion), when in reality, design-educated professionals span careers in 'Advertising', 'IT, Software and computing', 'Crafts', 'Architecture' and potentially 'Publishing'. Through the interrogation of the existing NI eco-system, part of this ongoing research will map an accurate scheme of where NI design professionals and graduates are employed and aim to expose the cross-overs into other CI sectors. This will be a factor in helping to determine the value of design in broader CI society and prompt a better understanding of its infrastructure as an 'umbrella brand'. Although the 'design' category is classified as Graphics, Products and Fashion, this text will refer to it as a more holistic overview of the traditional model of design practices, which excludes the fashion industry (Creative & Cultural Skills, 2014)

Almost all of the official Northern Ireland published government reviews and documentation in the past 10/20 years to 2014, show a lack of focus on design as a contributing sector in the Creative Industries (CI). It has been the focus of one recent mapping report by Creative and Cultural Skills (Creative & Cultural Skills, 2014) and given minor recognition in a handful of Government reports (Committee for Culture, Arts & Leisure, 2013). When undertaking scoping research to determine the value of design in the CI of Northern Ireland, there seems to be a lack of understanding or appreciation of its value from within government. This was reflected in the 'All Ireland Creative Industries Conference 2014', hosted by the Department of Culture Arts & Leisure (DCAL), when it omitted the design sector from its agenda and chose instead to focus on NI Screen and animation. Although DCAL are the responsible government body for the Creative Industries, there is still no policy or ministerial advisory committee that promotes the value of design in Northern Ireland. There is no physical space or council that advises on design policy or academic research for the Creative Industries. However, more recently the Committee for Culture, Arts and Leisure have acknowledged the need to drive design as sub-sector of the Creative Industries referring to *"The commissioning of a cross-departmental design policy, in collaboration with the NI Design Alliance, and that consideration is given to developing and supporting a design hub from which government departments and other public authorities could seek advice on how best to enhance the design industries within their remit. The Committee welcomes the work of Invest NI in advancing the design agenda"* (Committee for Culture, Arts & Leisure, 2013).

The holistic overview of the CI in Northern Ireland is generally reassuring, with at least fourteen industry bodies and/or centres promoting various strands of the nine sectors: NI Screen, Creative & Cultural Skills, NORIBIC, Nerve Centre, Digital Circle, Royal Television Society NI, Honeycomb, NI Theatre Association, CultureTECH, Generator NI, Creative Skillset, Craft NI, Oh Yeah Centre, NI Design Alliance. However, only one of these syndicates truly supports design (NI Design Alliance), whilst others connected to design, have a more fragmented and cross-disciplinary allegiance to digital technology. Due to the growth of a fast moving tech and digital industry, the design sector is becoming disorientated with how to present itself, how it's perceived and how it fits into the new and emerging world of technology and knowledge economy. When investigating how major cities/countries officially represent design, it is understood that the sector is seen as more of an 'umbrella brand', which allows for different disciplines to be housed 'under one roof'. The Design Council in London has evolved into a design thinking hub where "Working with designers and other disciplines, we tackle major issues like health, ageing and community cohesion. We help foster innovation in business and public services, and improve our built environment" (The Design Council, 2014). It is at the forefront of using a more intelligent approach and methodology in helping to make people's lives better through design. In the 'design disciplines' section of their expertise, they have highlighted twelve categories including diverse fields like digital, architecture, policy and service. In the USA, Fast Company magazine is revered as one of the most innovative publications for design and innovation in the world: "Fast Company inspires a new breed of innovative and creative thought leaders who are actively inventing the future of business" (Fast Company, 2014). It acknowledges the prominence of design in 'CoDesign' which is one of its major online sub-sectors, alongside CoExist, CoCreate and CoLabs. These four sectors are all interlinked using innovation at their root and use interdisciplinary influences amongst all of their categories.

In comparison, the design sector of Northern Ireland includes traditional categories like graphics, branding, communications, product, and web (Northern Ireland Design Alliance, 2014) as part of their portfolio of expertise. It is slow to grasp the relevance of emerging disciplines like UX (User experience) and its relevance to successful digital solutions, with only a handful of jobs currently available in this field. In comparison to the London market, there are multiple companies offering UX roles with a continuous demand to fill job vacancies (Just UX Jobs, 2014), claiming a large percentage of the UK design workforce from various backgrounds. However, when seen as a separate community, the digital (web and games) sector is strong in NI and has good networks showcasing platforms and incentives like Refresh Belfast[1] and CoderDojo[2].

Design and Culture in Northern Ireland

In the wider context of country representation of the Creative Industries in the UK, Northern Ireland is by far the weakest region in the UK. In comparison, a number of formal design/creative industry bodies have been implemented in England, Scotland and Wales. Creative Britain was at the forefront of establishing the creative industry blueprint for the UK. England has an array of collectives and quangos ranging from The Design Council, NESTA and Technology Strategy Board to more focussed initiatives like Tech City. Wales has a recognised initiative called Design Wales championing the strategic value of design. Creative Scotland also acts as a national advisory agency

[1] Refresh Belfast: meeting group for web community in Belfast
[2] CoderDojo: Not-for-profit coding clubs

for the arts, screen and creative industries. The Republic of Ireland have a good stance in supporting design with an official body for design membership (Institute of Designers Ireland) and the Design & Crafts Council Ireland, which is the national economic organisation for the design and craft industry in Ireland. In comparison, Northern Ireland offers minimal design support through the Arts Council of Northern Ireland and uses official government sectors like Invest Northern Ireland (InvestNI) to offer design advice to businesses.

Creative and Cultural Skills commissioned a report for the Northern Ireland Design Alliance which aimed to map the design industry of NI in 2014. This report showed that the large majority of thriving design businesses in NI were operating in the communications/graphics and web/interactive disciplines, with the remaining sectors (Interior, Product etc) not as active. It also proved that over half of design businesses in NI were operating at micro level, "55.6% of respondents to the survey where business owners in their own right, 28.5% of respondents were employed within a design business (not as the owner), and 16% were members of an in-house design team in a non-design business…. Over half of the businesses who responded were **either sole traders or businesses that employed five people or fewer**" (Creative & Cultural Skills, 2014). The report also acknowledged that a large proportion of design businesses (73%) collaborate with other designers as a means of optimising their range of services and "In terms of the NI Design industry, there is clearly an appetite for the creation of a formal design industry body, with some 44% of respondents stating they would like to access support from this in future" (Creative & Cultural Skills, 2014).

The large percentage of designers who claim to be collaborating needs to be examined further to understand whether it is a necessity (lack of skills from within company) or an intentional part of their design process.

Conclusion:

Throughout this text it has been recognised that England and Scotland have established government strategies in relation to design and the wider CI, and Wales have developed support services to promote the value of design through Cardiff Metropolitan University (UWIC). It has proved that Northern Ireland has an active design community, though lacks recognition in any official capacity to promote its value or contribute to policy. As part of the United Kingdom, NI has recognised differences and idiosyncrasies within its cultural DNA that make it different from its British siblings. Whilst London is recognised as a world leader in innovative creative and tech enterprises, Northern Ireland as a region falls to the 11th out of 12 regions in the UK Innovation League. "Only 27% of Northern Ireland businesses are considered to be innovation active, compared to an average of 31% of the UK. (To put in perspective, an additional 2,750 NI businesses would be needed to innovate just to catch up with the UK average.)" (DETI, 2013). Within Northern Ireland, there visible signs of a design culture in context (industry, students, CI bodies) and although collaboration and innovation seem to be encouraged through different official agendas, NI still operates in silos throughout business (Committee for Culture, Arts & Leisure, 2013)

It can be argued that due to cultural, economic and socio-political differences, the blueprint for a system that works well in one society, cannot be copied and transferred into another without complications. Each society should massage and adapt a suitable strategy for their own cultural environment, and thus, Northern Ireland needs to implement a **customised** vision borne out of successful cities and/or countries. Future research into this area will question what systems need to be in place for a design council or advisory committee to be established in the correct context for their cultural needs in NI?

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