

An Economic Assessment of the Contributions of the Creative Arts Sector to Cork City

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Executive Summary

- ✚ This Report was compiled on behalf of Cork City Council by Richard Moloney, Aisling Ward and Marie Ryan of the Centre for Policy Studies, UCC.
- ✚ The report primarily covers the years from 2002 to 2007, but in the case of Cork City Council support results are reported up to 2009.
- ✚ The overall values of the Arts Industry in the Cork Metropolitan Area are €207.5 million and 1050 Full Time Equivalent (FTE) jobs in 2007.
- ✚ The direct values of the Arts Industry are €166.5 million and 810 FTE jobs.
- ✚ The average grants varied from €3,478 in 2002 to €6,755 in 2007.
- ✚ The total value of grant aided activities is €20 million and 269 FTE jobs.
- ✚ The direct value of grant aided activities is €16.3 million and 207 FTE jobs.
- ✚ Heritage Activities resulted in a total of €33.3 million in income and 211 FTE jobs.
- ✚ Festivals generated total income of €16.2 million and 102 FTE jobs.
- ✚ Galleries and studios are worth €12 million to the City and 75 FTE jobs.
- ✚ Theatre, Music and Dance Venues contribute €32.6 million to the City's economy and 210 FTE jobs.
- ✚ Number of people attending grant aided activities on average is 950,000 and generates €45.0 million and 125 FTE jobs.

1. Introduction:

The purpose of this study is to analyse the creative arts sector in Cork City and its potential in coming years. To achieve this, the creative arts sector needs to be defined and the state of the sector in Cork City articulated. In this context the creative arts sector includes all active participants in production of artistic works, in its broadest sense, and those providing for development of the sector through training and economic support. The end result will provide an estimate of the size of the sector and its value to Cork City in terms of employment and income generation.

This study details the key role played by the arts industry supported by Cork City Council, in strengthening the City's economy. The results should alter the perception of the arts as luxuries—worth supporting in prosperous times but hard to justify when the economy is struggling. The current difficult economic climate imply tough budget choices will need to be made over coming years, this study sends a message—that support for the arts does not come at the expense of economic development but is complimentary to such development.

In recent years the manufacturing base of the economy of Ireland has begun to decline relative to the services sector. This decline is seen both in terms of contributions to Gross Domestic Product and employment. The creative arts sector can be seen as an important and vibrant component of this increasingly service based economy. The arts sector provides a strong supporting infrastructure for other service-based sectors such as tourism. Recognizing the importance of the creative arts to commerce is crucial given the likely importance of growth in the service sectors in the future. This will be accelerated by the massive increase in global communications.

In 2002, CHL CONSULTING CO. published its report on making space for the Arts in Dublin and Cork. This study builds on this report in assessing to economic linkages achieved through Cork City Council's support of the Arts. The results demonstrate the value of the arts to the community and City. We want to measure the impact of spending by arts organizations supported by the Cork City Council, and to quantify the economic impact of event-related spending by their audiences.

As already stated, the creative arts sector will be measured in both qualitative and quantitative terms. The main issues, which will be dealt with, are:

1. What is the definition of the sector?
2. What is the size of the sector and its contribution to Cork City?
3. What are the issues influencing the creative arts sector within the City?
4. What are the policy implications of the findings?

The above criteria will allow the analysis of the resources, complementarities and spatial diversity that underpin the arts sector and its potential for Cork City. The economic assessment of the creative arts sector will be documented as follows:

1. A full description of recent research literature in the area.
2. A detailed audit and description of the creative arts sector in the City.
3. An economic analysis of the value of the public and private support of the arts in Cork City.
4. The policy proscriptions, based on the above results.

Data for the study is obtained by direct survey techniques, tourist satellite accounts, and financial information from the Arts Council and Cork City Council.

1.1 Outline of Study

- Section 2 defines what is meant by economic impact and how it is measured.
- Section 3 is an over view of the Arts in the Cork Metropolitan Area.
- Section 4 provides results of the value of the grant aided arts organisations to Cork City and its hinterland.
- Section 5 suggests some policy prescriptions for the future.
- Section 6 presents concluding remarks.

2. Defining Economic Impact

This study is an economic impact study of the Cork City Council supported arts organizations and the overall value of the creative arts sector in the City. Economic impact is defined as the employment and expenditure generated by the Euro spent and generated in the community by the arts organizations supported by Cork City Council. The impacts are assessed both in direct and indirect terms. It also quantifies non market valuation of areas in which activities are voluntary. In this case only direct valuation is calculated. An assumption is made that most of the organisations require the support of the Council in order to maintain their activities. In the report, *Making Space for the Arts*, it was “noted that a significant factor in the rise in the number of artists living in Cork is the presence of support organisations in the city” (CHL Consulting Co. Ltd., 2002). The impacts produced in the study can be assumed to be a minimum. Discussion on the wider social implications is provided in a qualitative rather than in a quantitative method. It is essential to remember that these external social impacts are present and are even more so given the wide variety of communities supported by these grants.

In section 3 estimates are provided on the overall arts market in the Cork Metropolitan area. The estimates are based on figures adapted from ‘The Economics of Arts in Ireland’ (Durkin, 1994) and ‘The Public and the Arts 2006’ (Drury, 2006) and using data on spending, employment and populations changes obtained from the Central Statistics Office. All assumptions made are on the cautious sided, so the estimates reported should be viewed as minimum estimates. Results are reported in terms of money and Full-Time Equivalent (FTE) jobs. FTEs describe the total amount of labour employed. Economists measure FTE jobs, not the total number of employees, because it is a more accurate measure that accounts for part-time employment. Money includes expenditure on goods and services and wages and salaries.

The study uses input output analysis to estimate not only direct impacts but also indirect impacts. Direct impacts look only at the initial values of an activity, in this sense one captures the minimum economic significance of the activity. Such an analysis excludes the linkages that a business activity has with other sectors of the economy and the re-spending of wages and salaries generated by the activity. These

linkages can be described in terms of indirect contributions. Indirect expenditure support further jobs and provide extra wages and salaries. The purpose of the input-output model is to estimate the total impact (direct + indirect) on a country, a region or a city area. The starting point is the expenditure and employment that is directly related to the activity being studied. Input-output is a method of measuring the overall impact of an industry or industrial service.

Using this approach, the overall impact of the activities may be separated into three parts as follows:

1. The **Direct Impacts** give the total expenditure on the purchase of goods and services by tourists visiting the Cork City Metropolitan Area. It includes the direct payment of wages and salaries of employees.
2. **Indirect Impacts** are those which occur when local suppliers in receipt of expenditure, in turn purchase goods and services. This in turn results in further production and employment in businesses located in the country and also to additional consumer spending, which takes place due to the initial economic activity.

The overall impact is the sum of the direct and indirect. These impacts may be quantified in terms of money and employment. This overall impact can then be measured as a multiple of the direct impact of the business. Therefore, this report presents its analysis in terms of two distinct types of contribution of the arts industry on the economy of the city region: the direct and indirect contributions. An appreciation for the meaning of these contributions is a necessity in interpreting their significance and understanding the results produced in section 3 and 4 of this report.

Many of the community based Arts and cultural groups are voluntary non profit organisations. Therefore it is difficult to calculate their direct economic value in terms of income or employment. In order to value these groups tourist satellite accounts are used. This allows us to put a monetary value on these non market activities.

3. An Overview of the Arts in Cork City

Cork City is the second largest city in Ireland. The City itself has a population of 119,000 people but the greater metropolitan area has a population of around 300,000 people. The city forms the economic and cultural centre of the South West Region and Munster. It is characterised by the dominance of technology oriented institutions in the fields of education, research, development and production, among them the renowned third level institutions of UCC and CIT. These institutions are highly regarded technological research institutions. As well as their other academic pursuits both organisations have strong links to the arts. The Crawford School of Art and Design, the Cork School of Music and Cork Arts Fest are based with CIT and UCC has a Department of Music, a vibrant History of Art courses and the Glucksman Gallery. The school of arts, and the schools of music are both highly regarded in their fields. The City also has an Opera House and theatres, a city owned museum and Art Gallery and a wealth of artists' studios, exhibition halls, and orchestras. A number of major seasonal art and music festivals are held in the city and the region.

In 2002, an overview of the Arts in Cork City was produced in “Making Space for the Arts. It is not intended to rehearse the same data here. The artistic areas available in Cork City include Visual Artists, Theatre, Circus, Dance, Literature, Opera, Music, Film, and Architecture. Indeed, in recent times, art infrastructure has been improved with the building of the new Cork School of Music and the Glucksman Gallery. A new school of Architecture, Art and Design has been jointly introduced by UCC and CIT. It is proposed that a new City centre building will be provided in the near future for the school. Art and music are both taught in virtually all second level schools in the area. The area also has a major tradition of adult educational support for training in the Arts notability St Johns College and Coláiste Stiofain Naofa.

The values reported in this section were obtained through direct interviews and surveys of the various creative arts sectors in the Cork City economy.

3.1 Performance and Exhibition Venues:

Table 1 shows the main venues for performance and exhibition in Cork City. It is largely based on the findings in “Making Space for Arts” report. The table illustrates the wide variety and availability of artistic infrastructures in the City. The improvement in infrastructure and the likely development of a conference/concert venue in the Docklands will further enhance the City’s status as the premier centre for the Arts in the Munster Region.

Table 3.1 Principal Performance and Exhibition Venues in Cork	
Theatre	Galleries
Cork Opera House Half Moon Theatre Everyman Palace Triskel Arts Centre Granary, UCC Cork Arts Theatre Performance Theatre, CIT Rory Gallagher Theatre CIT	Crawford Municipal Gallery Triskel Gallery (2 galleries) Lavit Gallery Patrick Street Gallery Black Mariah Gallery 44 La Galerie Cork Vision Centre Couch Gallery Allicance Francaise de Cork James Barry Exhibition Centre CIT The Lee Gallery Gallerie Nautique Buckley Fine Art Cork School of Music Guesthouse Glucksman Gallery (UCC)
Music	
City Hall Aula Maxima, UCC Millennium Hall Connolly Hall School of Music Fr. Matthew Hall	
Dance	City Architecture
Firkin Crane	Vision Centre

3.2 Heritage Attractions:

Table 2 gives a detailed report of the Cork City Metropolitan Area's heritage sites. There were over 1.1 million visits to these establishments in 2007. It estimated that at least 66% of these visits were by people from outside the area. The largest attraction Blarney Castle accounted for 29% of the overall volume of visitors to such attractions.

Table 3.2		
Cork City Metropolitan Area's Heritage Attractions		
Attraction	Numbers	Cork City Metropolitan Area
Blarney Castle	297,000	Rest of Metropolitan Cork
Fota Island and House	290,000	Rest of Metropolitan Cork
Crawford Gallery	200,000	City
Cobh Heritage Centre	109,000	Rest of Metropolitan Cork
Midleton Distillery	100,000	Rest of Metropolitan Cork
Cork City Prison	50,000	City
Vision Centre, North Main Street	40,000	City
Fitzgerald's Park Museum	26,000	City
Butter Market	4,500	City

3.3 Festival Attractions:

Another important aspect of the Cork City Cultural activities is the organisation of various festivals. It is estimated that approximately 170,000 attended these festivals in 2009. Approximately 30% (36,000) of those attending are from outside the area. Around 8% of those attending festivals are from outside the country. Table 3 provides a list of the various festivals held in the area.

Table 3.3
Festivals in the Cork City
Cork Folk Festival
Cork St. Patrick's Festival
Cork International Choral Festival
Cork Mid-Summer Festival
Cork Youth International Film Festival
Cork World Book Festival
Cork ArtFest
Cork Film Festival
Cork French Film Festival
Art Trail
Cork Jazz Festival
Eurochild Festival
Frank O'Connor Festival

3.4 Groups Supported by Cork City Council

Table 3.5 shows the 67 art and cultural groups that have been supported by Cork City Council over various years 2002 - 2009.

Table 3.5

Cultural and Artistic Groups Supported By Cork City Council.

Tigh Fíli	Arts Centre	Ballyphehane Togher Community Arts Initiative	Craft Group
Cork Community Artlink	Community Arts	Cork City Ballet	Dance
Feila Africa/Irish- African			
Community Gospel Choir	Community Arts	Crux Dance Theatre	Dance
Competition	Community Arts	Firkin Crane	Dance
Frameworks Films		Snippets Historical & Cultural Drama Group	Drama
Mahon Men's Art group	Community Arts		
Mayfield Community Arts Centre	Community Arts	Art Trail	Festival
No Frontiers Dance Company	Community Arts	Cork Film Festival	Festival
Cork Film Centre	Film	Cork Folk Festival	Festival
Munster Literature Centre	Literature	Cork French Film Festival	Festival
	Multi	Cork International Choral	
Triskel	Disciplinary	Festival	Festival
Ballyphehane and District Pipe band	Music Group	Cork Youth International Film/Art Festival	Festival
Butter Exchange Brass & Reed Band	Music Group	Ballyphehane Men's Arts Group	Painting Group
City of Cork Male Voice Choir	Music Group	Ballyphehane Women's Art Group	Painting Group
Comhaltas Ceoltoiri na hEireann	Music Group	Maclise Arts Society	Painting Group
Cork Academy of Music	Music Group	Tuesday Art Group	Painting Group
Cork Barrack Street Band	Music Group	Turners Cross Art Group	Painting Group
		Asylum Productions	Theatre
Comhaltas Ceoltoiri Eireann- Douglas	Music Group	Active Pulse Theatre Group	Theatre
Cork International Folk Dance Festival	Music Group	Boomerang Productions Ltd	Theatre
		Corcadorca Theatre Company	Theatre
Cork Music Works	Music Group	Cork Arts Theatre Club Ltd	Theatre
Cork Orchestral Society	Music Group	Everyman Palace Theatre	Theatre
Cumman Naisiunta na gCor	Music Group	Graffiti Theatre Company	Theatre
Mayfield Brass Band	Music Group	Meridian Theatre Company	Theatre
St Finbarrs Pipe Band	Music Group	Backwater Artists Group	Visual Arts
St Nicholas Brass Band	Music Group	Middle Parish Community	Visual Arts
Togher Music Project	Music Group		
Cork Opera Works/Cork Children's Chorus	Opera	Cork Artists Collective	Visual Arts
OBhéal	Literature	Cork Printmakers	Visual Arts
		St. Finbarrs Retired Social and Recreational Art Group	Visual Arts
Karnival Group	Other	Lavitt Gallery	Visual Arts
Backwater Artists Group	Visual Arts	National Sculpture Factory	Visual Arts

Many of those supported are non profit community organisations. Tourist satellite accounts are used to estimate the economic value of the activities outlined below. There is also non monetary and external value from these activities which the study is not able to quantify but should be considered when assessing the value of Cork City Council's support of the above.

3.5 Art Galleries:

Table 3.4 lists the various Art Galleries found in Cork City. They vary from relatively small commercial galleries such as the Lavitt Gallery to the Crawford Gallery which is a large municipal gallery.

Table 3.4 Art Galleries
Alliance Francaise de Cork Black Mariah Buckley's Fine Art Cork School of Music Cork Vision Centre Couch Gallery Crawford Art Gallery Gallerie Nautique Gallery 44 Glucksman Gallery Guesthouse James Barry Exhibition Centre CIT Lavitt Gallery The Lee Gallery Patrick Street Gallery Triskel Arts Centre

The above descriptions of the Arts and cultural sectors in Cork City show the size and vibrancy of the sector. It is obvious that the support of Cork City Council to the Creative Arts Sectors is an essential part in developing and maintaining the sector in Cork City. In the next section the valuation of the sector is reported.

4. Economic Value of Arts and Cultural Sectors to Cork City

The involvement in funding the arts has been shown to have an important role in maintaining the quantity and quality of the arts in the community. Support of the Arts comes from both national and local sources. These supports are important as it is known that arts are central to the economic growth and vitality of communities around the world. It is hoped that this study will be a tool that can continue to build the case that investing in the arts is good policy and is good for business. Firstly the overall value of the sectors is reported. This is followed by valuation of the various subsectors. Then, the overall structure of the Cork City Council grants is discussed. This is followed relating these grants to an overall value of activities on the groups which receive these grants.

The estimates are obtained using published data on the Arts in Ireland, data from surveys carried out by the consultants, data supplied by Cork City Council and other data, such as Tourist Satellite Accounts, available to the consultants.

4.1 Over All Value of Arts and Cultural Sectors

The report provides compelling evidence that not only is the arts sector highly important to the Cork area; it also generates large levels of economic activity. Within this the support of Cork City Council is crucial. The economic study sends a strong signal to communities that when they support the arts, they not only enhance the quality of community life but also invest in the economic well-being of society.

Table 4.1 provides an over view of the value of the Arts in Ireland for the year 2007. The Table indicates that total direct revenue generated by the arts in the Cork City Metropolitan area was €166.5 million in 2007. A further €41 million was generated indirectly giving a total revenue impact of €207.5 million. It is estimated that state grants account for approximately €7.5 million. These funds would indirectly contribute €2.3 million to the local economy giving a total impact of €13 million. Employment levels are high approximately 810 direct FTE jobs and a further 240 FTE jobs indirectly related to the arts. Although the estimates relate to the whole

metropolitan area the bulk of the impacts would be expected to be in the City itself as this is where much of the Arts infrastructure is to be found.

Table 4.1 Value of the Arts in Cork Metropolitan Area – 2007		
	€m	€m
	Direct	Total
Total Revenue	166.5	207.5
State Grants	7.5	9.8
FTE Jobs	810	1050

The number of jobs per million is 5.1 jobs per million. This employment is found in various sectors including education, galleries, theatres, etc. The indirect employment is spread found throughout the City's economy.

This section investigated the overall value of the arts sector to the Cork City economy. The next section will investigate the value of various sub-sectors discussed in section 3.

4.2 Sectoral Analysis of Value of Arts Activity

In comparing the various sectors there is overlap so they should not be aggregated as this may result in double counting.

The Heritage Sector:

As stated earlier over 1.5 million visitors went to the various heritage sites in the Cork Metropolitan area. In 2007, Heritage and Cultural centres generated economic activity worth €24.2m directly and a further €9.1m indirectly. Total direct employment in this sector is approximately 120 full time jobs and 90 part time jobs. The indirect employment associated with the activities is calculated at 46 full time equivalent jobs. The employment is distributed between Cork City and the Rest of the Metropolitan area.

Table 4.2 Direct contribution of Heritage and Cultural Sites to the Cork City Metropolitan Area	
Receipts	€33.3m
Employment (FTEs)	211

Festivals:

Table 4.3 shows to value of festivals within the Cork area. Festivals directly generate up to €12.8 million in expenditure from outside the area and a further €3.4 million in indirect impacts. This is approximately 8% of the total revenue generated by tourism activities in 2007. This economic activity supports 102 FTE jobs in the area.

Table 4.3 Total Contributions of Heritage and Cultural Sites to the Cork City Metropolitan Area	
Receipts	€16.2
Employment (FTEs)	102

Art Galleries and Studios:

There are 18 Art Galleries in the Cork City Area. The largest is the Crawford Gallery. There are also two studio bases for artists. Overall, these Galleries and studios maintained directly 62 FTE jobs and 13 FTE jobs indirectly. It was not possible to obtain an estimate of the total number of artists are facilitated by these facilities. The Galleries contributed €9.2m in economic activity, €2.8m directly.

Table 4.4 Total Contributions of Galleries and Studios to the Cork City Metropolitan Area	
Receipts	€12.0m
Employment (FTEs)	75

Theatres, Music Venues and Dance Venues

The largest theatre in Cork is the Opera House. It has capacity for 1000 people. Total theatre capacity in the City is 2260 seats. Music venues have a total 2800 seats. The two dance venues have 330 seats. Table 4.5 gives the economic value generated by

these venues. Total direct value is €27.5m and while €5.1m is generated indirectly. Total FTE employment is 165 direct and 45 indirect.

Table 4.5	
Total Contributions of Galleries and Studios to the Cork City Metropolitan Area	
Receipts	€32.6m
Employment (FTEs)	210

Cultural and Artistic Groups Supported By Cork City Council.

Between 2002 and 2008 nearly 300 different organisations obtained grants of some level from Cork City Council. These grants were given to a wide variety of organisations covering all of the various arts categories. Table 4.6 outlines the total yearly contributions by Cork City Council for the years 2002 to 2008. As many of these groups find such support crucial, it can be contended that Cork City is getting value not only for its direct investment but also from the overall activity that might not happen without assistance.

The Table shows that that between 2002 and 2007 total grant aid increased from €289,000 in 2002 to 358,000 in 2007, an increase of 23.9%. Between 2005 and 2006 there was an 8.2% decrease in total grants. The average grant during the period varies from €3,578 to €6,755. Fewer organisations have received grants in 2006 or 2007. The size of individual grants vary greatly. In 2006 the largest grant was €30,000, while the smallest was €500.

Table 4.6
Cork City Council Grants

Year	Grant € 000s	Number of Organisations	Average Gant €	% Chang
2002	2.89	81	3,478	
2003	2.85	72	3,962	-1.6
2004	3.61	84	4,293	+26.4
2005	3.66	84	4,358	+1.5
2006	3.36	50	6720	-8.2
2007	3.58	53	6755	+6.5
Triskel Gallery	3.65	56	6518	+2.0

Table 4.7 gives an over view of the total economic contributions that the various City grant aided organisations have on the local community. In 2007, total direct

expenditure by these groups was approximately €16.3 million. The number of jobs directly related to these activities is 207 FTE jobs. Indirectly a further €3.7 million accrues to the Metropolitan Area with an extra 62 FTE jobs.

Table 4.7 Total Value of Grant Aided Activities in Cork Metropolitan 2007		
	€m	€m
	Direct	Total
Total Revenue	16.3	20.0
FTE Jobs	207	269

The study also reveals a significant contribution to non-profit arts organizations as a result of volunteerism. While these arts volunteers may not have an economic impact as defined in this study, they clearly have an enormous impact on their communities by assisting in keeping arts organizations functioning as a viable industry. Furthermore, arts organizations provide rewarding employment for more than just artists, curators, and musicians. They also directly support builders, plumbers, accountants, educators, printers, and an array of occupations spanning many industries.

Also the numbers that attend or use the services supported by Cork City Council is approximately 950,000. Using adjusted statistics from Tourist Satellite Accounts (Deegan, et al, 2004) total spending by people using the services is estimated to €45 million and supports 225 FTE jobs.

5. STRENGTHENING COMMUNITIES THROUGH THE ARTS

This study aims to stimulate discussion among policy makers and practitioners in the arts, community development, and local government sectors to encourage a closer integration of their efforts towards strengthening communities in the Cork City Area. The study indicated the importance of economic and social impacts that the Arts and culture have on the City.

Given the definite economic gains from the Arts, Cork City Council's support for the Arts is crucial. This support can be enhanced with more coordination between the City Council, local communities and cultural groups. While Arts programs are supported by the City Council, effective partnerships should be promoted beyond the arts especially to those dealing with community health, community planning, and social inclusion. Local Government is a key starting point in achieving this.

Policies and support need to be framed to embrace local governance and participation. When overarching public policy frameworks accommodate cultural as well as social, environmental and economic bottom lines, the arts – at the heart of culture – can be valued and supported for their essential 'cultural' purpose. Their impact assessed in terms of cultural as well as economic viability or social equity terms. The cultural impact, of all public policy and decision-making, needs to be assessed and considered. This paradigm will contribute to the development of a deeper and broader commitment to the value of community-based arts, along with other community-based cultural activities.

Recent developments at local, national and even international levels suggest a growing interest in forging more effective links between the arts, culture and community development. A fertile environment is indicated through strong focus on civic engagement and community planning within local government. The City Council has central role as a catalyst for community strengthening. An emphasis must be placed on continuing a flexible, responsive service to communities guided by policies forged across the whole of community. Continued engagement and participation of local communities in the development of arts policy is needed. The

strong leadership shown by the City Council in support for community cultural development is important.

A coalition of arts, council and community advocates should be formed, in order to promote and protect community cultural development. The complexity of issues, viewpoints and structures entailed in a journey towards successful and sustainable integration of the arts into local community development means that there is a need for a special kind of conversation or discourse. Without ignoring the interests, needs and preoccupations of particular sub groups, the primary focus of discussion should extend beyond these to fix on larger, shared objectives. The lack of a common language and culture amongst diverse sectoral interests is a familiar difficulty, but must not become a deterrent.

The terminology of ‘community cultural development’ continues to function more as a barrier than a doorway for many, both from within and beyond the arts. Nevertheless, there are many in community, arts, and government sectors with a capacity to embrace its principles, processes, and potentials, if pathways for action are more clearly identified. It is vital to sustain policy and program reform to maintain the vibrancy of the Arts sector.

A perennial issue is, and always will be, funding. If Cork City is to maintain its vibrant arts sector and insure that community cultural development thrives, then scarce funding resources need to co-ordinated and targeted. A fixation solely on funding issues must be avoided especially if it is at the expense of an analysis of broader, deeper and less tangible factors. Public policy drives budget decisions. The challenge for the arts and community cultural development advocates is to identifying gaps in existing policies where community cultural development approaches could be embraced.

There is need to formulate clear proposals for new policies integrating cultural perspectives and techniques focussed on benefits for communities. Cork City Council should continue to target disadvantaged communities directly, successfully building skills, confidence, connectedness and opportunities through hands-on art-making by, and about, members of the communities themselves. Communities creating and

expressing their own culture, not just accessing the arts, are a vitally important dimension of breaking down economic, social and cultural barriers especially within disadvantaged communities. The challenge is to persuade policy makers to address this gap, and develop connections between social and cultural programs.

It is encouraging to see an emphasis on strengthening community in the Cork City Council's Arts policy, programs supporting communities' active participation in arts – creating their own culture as distinct from 'accessing' the arts as audiences needs to be strengthened. Strategies to meet the goal of encouraging people from more diverse backgrounds to engage with cultural activities should be developed. People are entitled to access arts and cultural activities as a way of enjoying life, developing wellbeing and stimulating their own creative, intellectual and expressive capacities.

Cork City Council has shown commitment to fostering local identity and participation in all communities. Cultural programs play a key role in forging a sense of connection, belonging and communal wellbeing.

Local government is pivotal to the success of community strengthening initiatives and to meet that challenge local government will need to develop active partnerships and capitalise on the support of local business and the many non-government organisations active at local level. Local Government must engage their community in planning for local development and place management in identifying indicators of progress towards achievement of community goals. The City Council should seek more ways to actively engage communities, in all their diversity. There is now greater scope for creative approaches that consider cultural issues and integrate cultural development techniques to engage citizens, especially those usually marginalised from traditional consultation processes.

There are obvious linkages between investment and Local Government's broader investment in community strengthening and community planning. A more conscious effort to encourage convergence of cultural and social programs would yield better outcomes for communities. Meantime, it seems clear that now is the time for those at local, state and national levels with a belief in the power of community-based arts to positively transform communities to focus their attention on building a sustainable

support system integrating policies and programs of all levels of government within and beyond the arts.

6. Conclusions

This report presents the results of a comprehensive economic impact study of the City of Cork's granted aided arts industry. The project findings indicated the vital nature of these activities and value to the City community. This study focused primarily on the economic impact of Cork City's support for the Arts. It has striking implications, because of the variety and number of communities involved. Given the wide and varied nature of the support, the value to Cork City is far greater the measurable quantities discussed above. What's good for the arts is good for the economy. Cities with strong economies find that the arts help their communities thrive. Therefore support for Cork City's cultural organizations is sound public policy.

The arts industry is a €207.5 million business in the Cork Metropolitan Area - one that supports over 1050 FTE jobs. The grant aided arts organizations spend more than €generate a total of €20 and support 269 FTE jobs annually. This spending provides vital revenue into restaurants, hotels, retail stores, parking garages, and other local businesses. Indirectly Cork City gains €3.7 million and 62 FTE jobs. By demonstrating that investing in the arts yields significant economic benefits, this report lays to rest a common misconception: that communities support the arts at the expense of local economic development. The report shows conclusively that locally, the arts mean business.

It was not possible to quantify the non monetary and external benefits of the sector in Cork City, but they are likely to be very important and of increasing importance in the current down turn.

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