

# Creative Industries

January 2007

## Sector Profile

### Overview

Invest NI's current priority sectors in relation to Creative Industries are:

- Software
- Digital Content, and
- Film & TV

During the two year period 04/05, 05/06 Invest NI made in excess of 270 offers of financial assistance to Software, Digital Content and Film & TV businesses, representing an aggregate Invest NI commitment of £14.8m leveraging a total investment of £58.2 million.

The software sector is discussed in more detail in a separate factsheet. Digital Content and Film & TV are discussed below.

### Overview - Digital Content

**Summary**      **Digital Content** can be defined as the creation, development, production, management and distribution of commercially innovative original digital content across multiple delivery platforms and channels. An individual company may well supply a blend of content, applications (software) and associated services to its customers. What identifies this company as being 'digital content' as opposed to 'software' is the existence of the content element of that mix.

Although the local industry is embryonic, it has significant potential to develop on a global scale. The recent 'Midas' report on the digital content industry on the Island of Ireland contained the following statistics:

- Digital Content employs 2,600 people in over 400 Companies
- Turnover is estimated to be £150 Million
- Estimated 35% growth in turnover in 2005

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**Employment** Initial figures for the sector in Northern Ireland identify 55 companies employing 900 people with sales of £50m of which 50% are generated outside NI.

**Companies** Digital Content Sub-sectors with examples of local companies:

- Animation & Post Production – Banjax, Streetmonkey, Inferno
- Mobile Content – Sugar Cube, TIBUS
- Internationally Traded Web Content – GCAS Networks
- e-Learning – Aurion, Synergy, Fable

## **Our approach to the Digital Content sector**

Limited information is available on Digital Content in Northern Ireland and Invest NI is currently seeking to address this issue in conjunction with drafting a strategy for the development of the sector. This work is expected to be completed by March 2007.

## **Business Development Solutions**

Invest NI offers an extensive portfolio of advice, assistance and support which can be tailored to meet the needs of companies either in particular sectors, or who are tackling specific challenges within their business. This covers areas such as strategy development, people development, research and development, exporting, energy management and e-business. Full details of our programmes and services are available from the [Business Development Solutions section](#).

## **Overview - Film and TV**

**Summary** The independent film & TV sector comprises of approximately 50 companies with a combined turnover of circa £15m p.a.

**Employment** In Northern Ireland 700 (100 freelance) people are employed in broadcast TV, and 200 (100 freelance) in independent production.

**Companies** 50 independent production companies, including:

- Waddell Media
- Wild Rover Productions
- Green Inc
- Stirling Television
- Doubleband Films
- Straightforward Productions

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**The Future**      Whilst local commissions from BBCNI are still very important to the sector, companies are becoming increasingly focused on producing programming for export markets.

Legislation has recently changed to permit production companies to retain the intellectual property rights to the programmes they produce. This will lead to increased revenues through secondary income streams.

## **Our approach to the Film and TV sector**

Our approach to the sector is to work in partnership with the Northern Ireland Film & Television Commission (NIFTC) to deliver support to the local sector to increase sales outside NI and to secure inward investment. NIFTC is the lead organisation in the development of the film and television industry in Northern Ireland. Invest NI is the largest funder of the NIFTC, with a budget of £9.9m for the period 2003 to 2007.

The NIFTC's current strategy for development of the sector has two basic strands:

- Inward investment: where it seeks to attract high value productions – both feature films and television drama - to shoot on location in Northern Ireland, and
- Home industry: where the objective is to increase the cumulative turnover of the local production sector from £11m in 2003 to £22m in 2006.

During the two year period 04/05, 05/06 Invest NI provided the funding to enable the NIFTC to finance 10 film productions to a total of £2.7m leveraging a total investment of £8.2m, and to make 83 offers of financial assistance to indigenous film and TV production companies to a total of £261,000 leveraging a total investment of £550,000.

## **Events**

See [Invest NI's Event Planner](#) for more events, and see also the [Trade Events Programme](#) for trade missions in your sector.

## **Industry Links**

**Momentum** - ICT industry body

[www.momentumni.org](http://www.momentumni.org)

**Northern Ireland Film and Television Commission**

[www.niftc.co.uk](http://www.niftc.co.uk)

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## **Useful Information Sources**

Guides to the market research sources which are available from Invest NI's Business Information Services can be downloaded from the Publications A – Z section of the website (under S for Sector Guides).

## **Contacts**

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