



Creative Industries Report

Part 2: Commissioners of Creativity

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Introduction

The rise of Corporate-Creative Patronage

One of the key characteristics of society in Florence over centuries of cultural and scientific success was a deeply-rooted system of patronage networks. Today, although perhaps the majority of corporate-creative partnerships are still closer to an ‘artist-for-hire’, at the more developed end of collaboration between major corporations and the creative sector, the structure is increasingly closer to traditional patronage.

**“Content isn’t king.
Conversation is king.
Content is just
something you talk
about.”**

– Cory Doctorow

A wealthy brand or party supports the creation of an eye-catching or attention grabbing work or activity that has the potential to ‘go viral’. This supports the artist and group of creators who made it, allowing them to explore ideas, develop skills, work across new mediums with new collaborators and create something unique, while also providing income to support other less-profitable activity. If the artists already have a following, they introduce a new audience to the brand’s work who get the benefit of any associated kudos with the artist.

As major corporations – emerging from a top-down communications world where decisions were led by focus groups and sales reports through the CEO and Marketing Chief to an Agency to a Creative team – adapt to a networked world where any creative capable of attracting online ‘buzz’ is both powerful and sought-after, new working methods and expectations are being formed. A key shift is the value of integrity and the ‘authentic voice’; for creative practitioners’ social capital is linked with how much their fans and followers trust, identify with and respect them.

The relationship between film, television and advertising is nothing new; indeed, the term *soap opera* originally referred to the radio dramas that were sponsored by soap manufacturers. Faced with a web generation who are reluctant to pay for their entertainment, ‘branded content’ – where a brand commissions, produces, distributes and sells content – is an understandable way of funding stories; the backer simply wants the content to reach as wide an audience as possible. It’s certainly easy to see why it’s an attractive space for advertisers; Jean Claude van Damme’s ‘Enya Splits’ commercial, for example, made an estimated \$170m for *Volvo*, achieving over 70 million views on YouTube without anyone paying a cent for airtime.

“You don’t need to wedge in logos or present a fake scenario to your consumers... Be honest. Find a relevant story and people will love your work & respect the brand.”

– Alana Hutton-Shaw, *Hare Meets Tortoise*

There are a number of types of ‘corporate-creative-patronage’. Red Bull Media House is one of the pioneers and global success stories in branded content, and now produces dozens of documentaries each year without their logo or even a connection to adrenaline sports, instead because it’s profitable and helps scale their skills, relationships and capacity. Shell Oil, has a TV production arm with an estimated annual budget of \$60m, commissioning work around science and the environment through a group of production companies including a major output deal with Darlow Smithson Productions. Shell’s TV ‘advertorial’, however, is identifiable only to viewers who read the copyright notice at the end of production credits – something that could be difficult for some TV buyers.

Online, where an army of Twitter activists and ‘Reditors’ are standing by to challenge any popular figure’s credibility, *integrity* is king, which has empowered the

more independent creative voices who have an audience. Indeed *empowerment* is also king; the brands and personalities who use their fame, resources or wealth to promote and support others typically gain social credibility (and further free audience exposure/impressions). In their groundbreaking 2003/04 multi-Cannes Lion project for Hewlett Packard, [HyPe Gallery](#), Publicis' team created an open access online and offline gallery showcasing new artists and filmmakers' work in major cities around the world. The twist: there was no HP branding to be seen other than on the projectors showing the films, and the A0 printers producing the prints that were hung in the gallery space – and of course in the press surrounding the campaign.

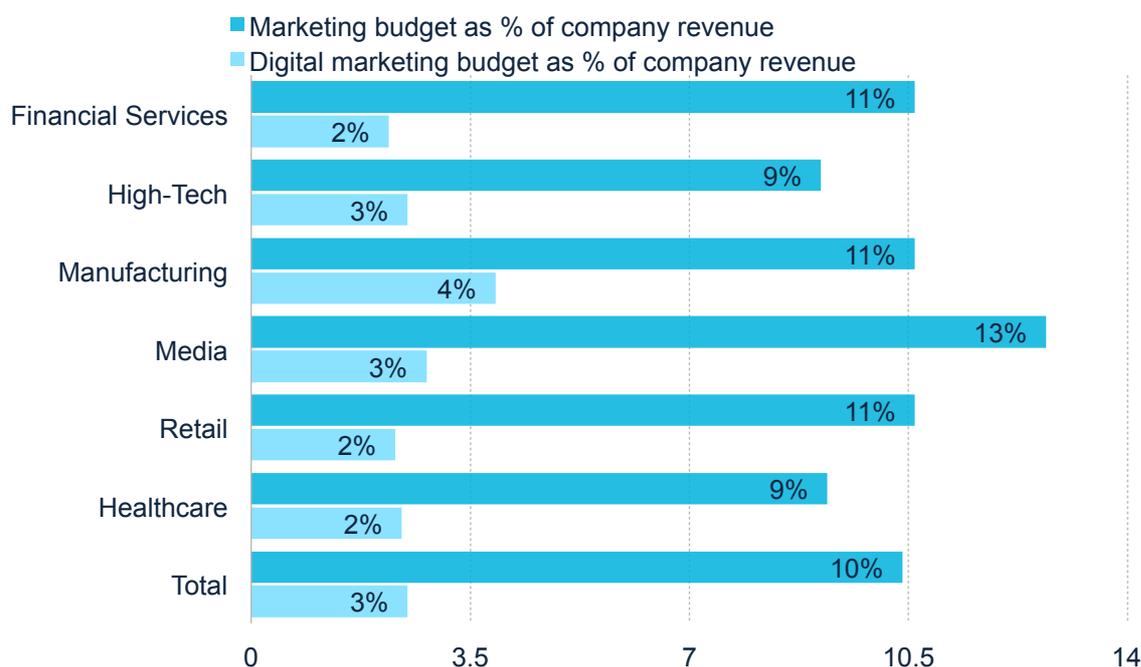
Nokia's promotion campaign for Nokia Music involved the commissioning of six short documentaries on the history of modern music in six U.S. cities, shown on [newamericanoise.com](#), while highlighting up-coming and unsigned musicians in each city. Most significantly, Nokia stood back and had minimal input into the creative process, simply putting their logo at the end of the films and on the website – a lack of interference which is clear in the honest and from-the-hip style in the final films on the site. New American Noise represents a perfect example of *corporate-creative-patronage* (CCP): the funding of new original work, the promotion of unsigned and undiscovered artists, and a focus on regions outside the traditional centres of New York and Los Angeles – all inferring credibility and kudos to the brand who enabled these things, while linking them strongly with the sound of music in the films.

Overview: Digital marketing

Very loosely, companies spend around 10% of their revenue on marketing. The figure tends to rise during upturn and shrink during recession, and the figure varies by sector.

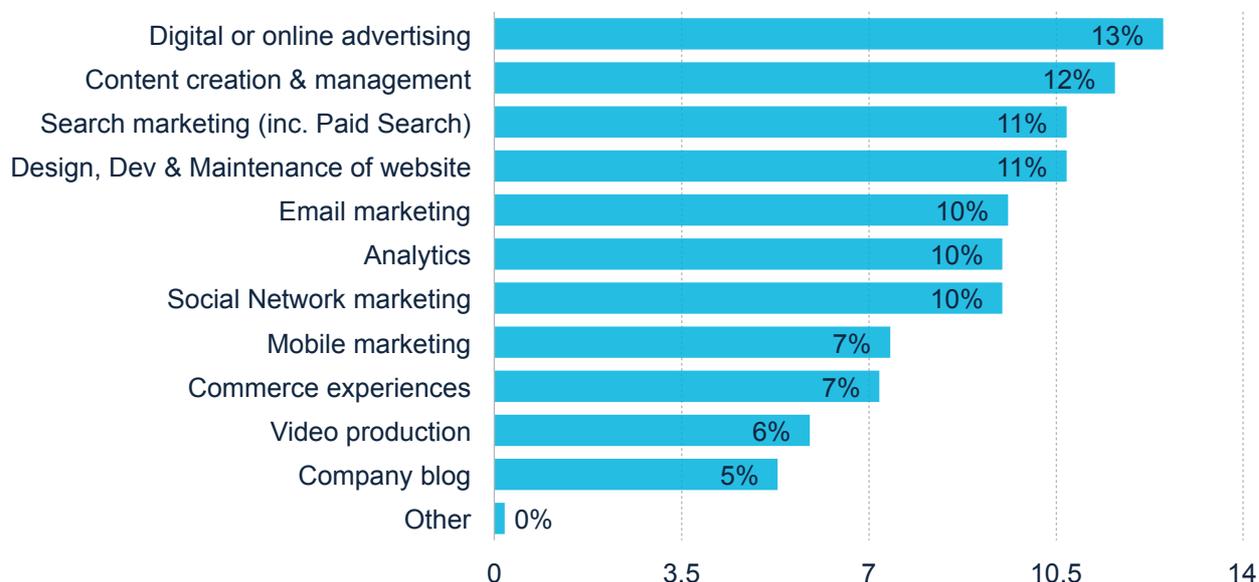
For [2012 in the US, marketing spend as a percentage of revenues was 10.4%](#), a level which ranged from 9.1% within high-tech, up to 12.7% for media as a whole. Of this, on average a quarter is spent on digital content and digital marketing. This again varies by sector – the lowest percentage is healthcare and the highest is manufacturing.

Marketing & digital marketing as a % of company revenue 2012 (Source: Gartner)



Of particular interest is how this digital marketing investment is spent. Gartner found a breakdown for 2012 below, with content creation the second highest area, taking 11.6% of digital marketing budget. Video production takes 5.9% and the company blog a surprisingly high 5.3%. Design, development and maintenance of the company website is only double this – 10.7%.

Where companies allocate their digital marketing budgets 2012 (Source: Gartner)



Extrapolating from these figures it's easy to make estimates for the potential market size for different forms of digital activity and sectors.

For instance, in 2011/2012 total sales by manufacturing companies in Northern Ireland were [estimated to be worth £16.6bn](#). Subsequently, if the US figures were applicable and 3.9% of this amount was spent on digital marketing, there would be an annual spend of £647m. Based on Gartner's figures, the *potential digital marketing spend in manufacturing* for Northern Ireland would break down as:

- + Digital or online advertising – £80.9m
- + Content creation & management – £75.1m
- + Design, development, maintenance of website – £69.2m
- + Email marketing – £62.1m
- + Social Network marketing – £61.5m
- + Mobile marketing – £47.9m
- + Video production – £38.2m
- + Company blog – £34.3m

Not only are these sizable sums, as digital marketing takes up a larger proportion of overall marketing spend, these figures should show consistent growth.

Stepping back wider, the global value of digital advertising reached [\\$121bn in 2014](#), approximately a quarter of a \$537bn global advertising spend, and the second biggest source of spend after TV. ZenithOptimedia predicts that 2015 will be the year Internet display advertising (i.e. Facebook adverts) overtakes paid search in revenues (\$74.4bn to \$71.1bn).

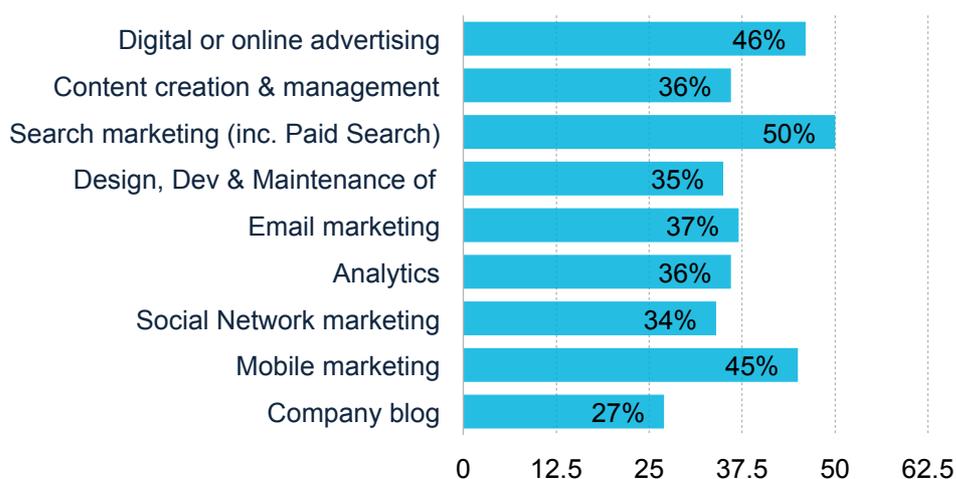
Digital video is estimated in the US to take up [9.7% of all US digital revenues, \\$4.15bn](#) in 2013, about a fifth of which is generated through YouTube. Zenith also forecasts that mobile ad spend will make up 28% of Internet ad spend by 2016.

Digital marketing is a bigger sector still – worth \$62bn in the US – as it includes all marketing activities including branded content, direct email, and so forth. According to the Content Marketing Association, content marketing alone in the [UK is worth £4bn a year](#).

Finding contractors

Gartner found up to 50% of marketing activities are outsourced, depending on the type of spend:

What percentage of digital marketing spend is outsourced? (Source: Gartner)



In our surveys we asked companies how they selected the outsourced talent they required for digital content services. Of those who responded (with multiple responses allowed), over half first asked previous suppliers to quote, with 22% offering them the work without a quote. Over a third used recommendations from trusted industry contacts.

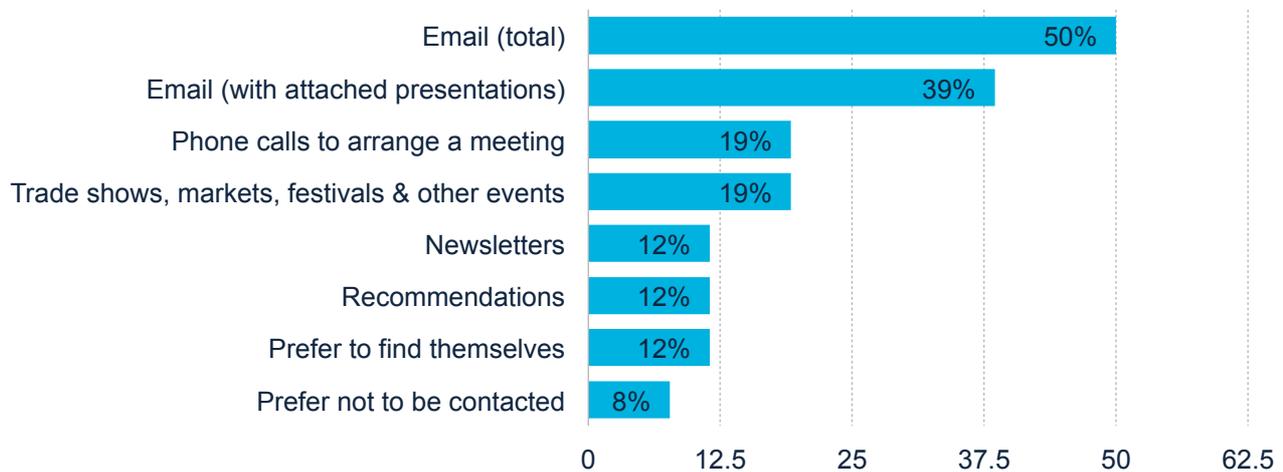
How do you source people & companies with the skills you need? (Spongelt, Honeycomb 2015)



How to approach

Of the companies who answered this question, email was by far the most popular response – although trade shows and phone calls also featured highly.

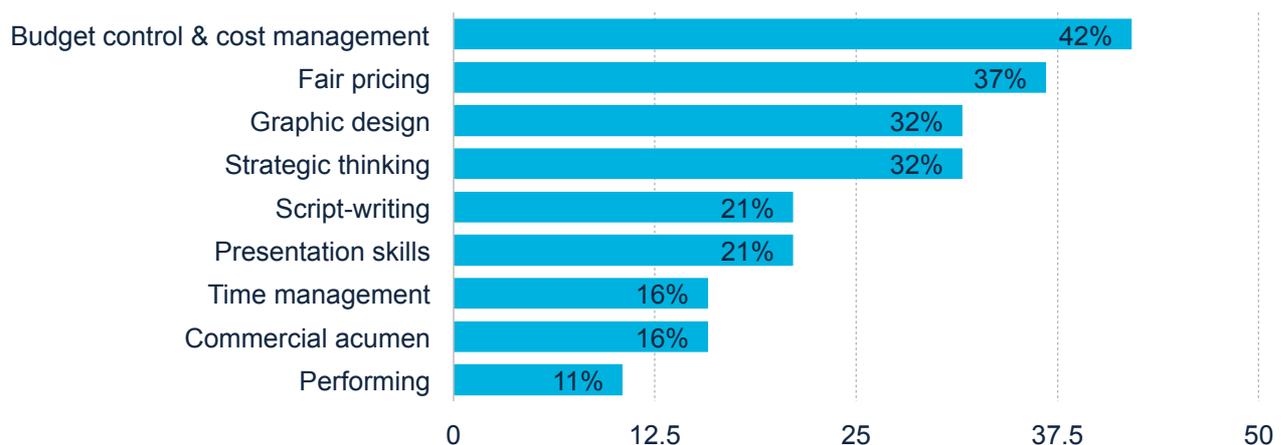
How do you prefer to be contacted by providers of digital content? (*Spongelt, Honeycomb 2015*)



Skills shortages

One of the most striking findings across the surveys of both creative companies and digital buyers is the difference in perceived skills shortages. While creative companies identified technical capabilities and knowledge, the commissioners and buyers of creative services overwhelmingly identified business skills around pricing, budgeting, planning and meeting targets.

What are the main skills gaps of providers of digital content? (*Sponge It, Honeycomb 2015*)



Corporate

Surveyed companies

This section focussed on buyers of creative digital content across:

- ✦ TV/Film projects, short videos, animation
- ✦ Web/graphic design
- ✦ Music & audio services
- ✦ Content provision, advertising
- ✦ E-books, phone/tablet app development, game development.

A broad range of companies were surveyed from international consumer brands such as Three to global media agencies and their subsidiary companies, technology services companies through to small communications agencies. The smaller agencies focussed their work 90–100% within their country (Ireland or UK) with some spillover to neighbours.

- ✦ Carzone, Ireland's biggest portal for buying and selling used cars.
- ✦ Chill Insurance, founded eight years ago and now one of Ireland's largest Insurance brokers.
- ✦ Dowshu is one of the world's leading manufacturers of security Digital Video Recorders (DVR).
- ✦ H+A Marketing+PR is a growing award winning marketing and communications agency.
- ✦ Halo Marketing is a marketing agency based in Wexford.
- ✦ Irish Hotels Federation, the national organisation for the hotel and guesthouse industry.
- ✦ jump! are a creative agency developing brands, products and services.
- ✦ Karro Food is one of the UK's biggest pork suppliers and processors.
- ✦ Lafferty Group provide information and knowledge services for the financial industry.
- ✦ Maxus/Maxus Ireland is an agency specialising in planning and CRM that's part of WPP.
- ✦ Mindshare is a global media agency, created from the merger of JWT and Ogilvy & Mather and is part of WPP.
- ✦ Nestlé Ireland is a giant global food and bottled water company, pioneers in baby milk powder.
- ✦ Newtec is an IT and cloud computing infrastructure company founded in 2009.
- ✦ Ogilvy & Mather Ireland is parent of Mindshare and part of the WPP Group.
- ✦ Open Communications, a marketing consultancy.
- ✦ Precision Marketing is a communications agency with a specialism in healthcare.
- ✦ Three is a major mobile telecommunications company owned by Hutchison Whampoa.
- ✦ Version 1 delivers technology and management services across UK and Ireland.
- ✦ Web Scene is a small web design and development company.
- ✦ Winsight is a marketing consultancy based in Dublin.

	Commissions	Value	Find suppliers	Skills shortages	How to approach
Carzone	-	-	Established relationships	-	-
Chill Insurance	Many a year: Advertising Graphic/web design Animation/TV/film projects A few a year: Audio phone/tablet app dev. short video	€100k €51-100k €100k €51-100k €51-100k €21-50k	Established relationships Search from scratch Respond to pitches	Strategic thinking, fair pricing, performing They also find it difficult to find results-driven content	Emails, Phone to arrange meeting Meeting
Dowshu	A few: Graphic/web design No more than one a year: Phone/tablet dev short video	€11-22k €11-20k €5-10k	Preferred suppliers are offered the work first Recommendation from trusted contacts	Fair pricing and presentation skills	Email
H & A	A few: Music Audio services Short videos No more than one: TV/film project	€5-10k €5k €5-10k €50-100k	Established relationships Preferred supplies are offered the work first	-	-
Halo	A few: Advertising Content provision Graphic/Web design No more than one: Animation Less than once a year: Phone/tablet app Short videos	over €101k €5k-10k €5k-10k under €5k €5k-10k under €5k	Established relationships Search from scratch Recommendation from trusted contacts	Fair pricing, time management, budget/cost control Campaign management	Emails Digital presentations Phone to arrange meeting
Irish Hotels Federation	A few: Advertising Design Short videos No more than one: e-book Phone/tablet app a year	over €101k €51-€100k €11k-20k €5-10k €5-10k	Preferred suppliers offered the work first Pitches from specific companies Requests to use certain suppliers	Independent verification of skills and competencies	Email
Jump!	A few content provision. Phone/tablet app dev. Less than once: Graphic/web design	€5k €5-10k €5-10k	Established relationships Search from scratch Recommendation from trusted contacts	Strategic thinking, producing, performing, creative graphic design, budget control and cost management, presentation skills, and commercial acumen	Email Phone LinkedIn Post Meeting
Karro Foods	No more than one: Design Advertising Less often: TV/Film Audio services	€5-10k €51-100k; €51-100k €5-10k	Established relationships Search from scratch Respond to pitches	Hard to ensure value for money on investments	Email
Lafferty Group	Many: Content provision Web/graphic design	under €5k under €5k	Established relationships Search from scratch Recommendation from trusted contacts	Presentation skills	Email News-letters
Maxus / Maxus Irealnd	Many: Advertising A few: Film/TV Short video projects	-	-	Video & TV experience/skills	-

	Commissions	Value	Find suppliers	Skills/content shortages	How to approach
Mindshare	Many: Advertising Phone/tablet app development, A few: Content provision Website and graphic design Short videos, Less often: TV/film	€51k–100k under 5K €21k–50k under 5K €11k–20k under €5k	Established relationships Recommendation from trusted contacts	Commercial acumen Stock images, news articles, web advertising, print advertising	Email
Nestlé	Many: advertising A few: Graphic/web design Content provision Less often: phone/tablet app development	€51k–100k €21k–50k €11k–20k €51k–100k	Established relationships	Website content design and website based competition mechanics at a sufficient quality	Email
Newtec	A few: Graphic/web design	Under €5k	Recommendations from trusted contact Recommendations for industry/awards/press	Website and graphic design skills, marketing	Linked In
Ogilvy & Mather	TV/Film projects Many: audio services Short videos A few: eBooks Phone/tablet app development No more than once a year: Games development Animation projects	€51k–100k under €5k €11k–20k €5k–10k €21k–50k €11k–20k €11k–20k	Established relationships; Preferred suppliers are offered the work first. An approved list of suppliers	Technical	-
Open Comms	A few: Advertising No more than once: audio TV/Film	€21–50k under €5k under €5k	-	-	-
Precision Marketing	Web/Graphic design Short videos	-	-	Digital developers, account managers and training, copywriting	Provide a quote
Three	Many: Advertising Web/graphic design A few: Music Content provision Audio Short videos Less often: TV/Film	over €101k €11k–20k under €5k €21k–50k under €5k under €5k €51k–100k	Established relationships In response to pitches Recommendation from trusted contacts	Strategic thinking, budget control and cost management, creative solutions TV and film production, advertising, music, content provision and production, audio services and videos	Email Phone LinkedIn
Version 1	Less often: advertising	Under €5k	Search from scratch & ask to quote	Performance and testing (devising and implementing)	Linked In
Web scene	Many: music audio services	€21k–50k €21k–50k	Search from scratch An approved list Recommendations for industry/awards/press	Time management/ budget control/ commercial acumen. Music & audio services	Email Newsletters Phone calls Trade shows
Winsight	A few: advertising Animation Content provision Graphic/web design Audio services Short video	over €101k under €5k €5k–10k €5k–10k under €5k under €5k	An approved list of suppliers Advised/requested to use certain suppliers	Strategic thinking Script-writing Commercial acumen Keeping on budget and schedule	Linked In

Education

The global spend on education in 2012 was estimated to be [\\$4450.9bn \(\\$4.45tn\)](#) with an expected annual growth of 7%. Government spending on education in both Ireland and the UK in 2011 was [13.1% of total government spending](#). For 2012 education and training spending was [€8.6bn](#) in Ireland, and in the UK £95bn with [£8.5bn](#) for Scotland and [£1.9bn](#) for Northern Ireland.

E-learning is a fast growing market for a range of technologies from 'self-paced' e-learning where students learn in their own time without traditional start dates or deadlines; virtual classrooms and broadcast lectures; education games; MOOCs (Massive Open Online Courses) and Learning Management Systems that support traditional classes and assignments. The worldwide market for 'self-paced' e-learning [was \\$35.6bn in 2011](#) – and [some estimates](#) put the total market as high as \$90bn. The [fastest growing countries](#) for e-learning are India, China, Malaysia and Romania – countries with traditionally low per-capita educational spend. As well as providing education to people in remote regions, or with low education provision, e-learning is seen as a way of supporting the concept of 'lifetime learning' where work and study always co-exist.

The survey looked at a full range of Irish further and higher education institutions, particular colleges.

- ✦ Cló Iar-Chonnacht is a publishing house that works to preserve Irish language culture and music, publishing over 300 books and 150 albums.
- ✦ The College of Computer Training (CTT) is an HE college training students in IT and business.
- ✦ Dublin Business School is Ireland's largest independent college with over 100 courses for more than 9,000 students.
- ✦ Dublin University Central Athletic Club is responsible for the 49 sports clubs at Trinity College.
- ✦ Galway Business School specialises in adult and online learning.
- ✦ Griffith College in Dublin houses over 7,000 students with campuses in Limerick and Cork.
- ✦ Hibernia College is Ireland's only government-accredited e-learning college, specialising CPD and postgraduate studies.
- ✦ Dun Laoghaire Institute of Art, Design and Technology (IADT) has a focus on creative, art and media with the National Film School and a Media Cube incubation centre located on campus.
- ✦ IBAT College in Dublin has over 2,000 students.
- ✦ Irish Institute of Purchasing & Materials Management was established in 1975.
- ✦ Newpark Music Centre is a private Dublin music school catering for over 1,000 students and a centre for jazz-related education in the country.
- ✦ Professional Development Service for Teachers (PDST) provides development support for teachers.
- ✦ Setanta College offers sports coaching and strength & conditioning courses
- ✦ St Nicholas Montessori is a higher education institution offering Montessori teaching
- ✦ The Institute of Integrative Counselling & Psychotherapy provides professional and academic accreditation in a range of mental health services.
- ✦ The Institute of Physical Therapy (IPTAS) offers courses and degrees in physical therapy and applied science.

	Commissions	Value	Find suppliers	Skills/content shortages	How to approach
Cló Iar-Chonnacht	Many: Content provision e-books A few: Web/graphic design Audio services Less often: Phone/tablet app development	Under €5k Under €5k €5k–10k Under €5k Under €5k	Established relationships Preferred suppliers	Web design/digital technical.	-
College of Computer Training	A few: Web/graphic design No more than once a year: Advertising Content provision & production e-book	Under €5k Under €5k Under €5k Under €5k	Established relationships Recommendations by trusted contacts	Quality control Advertising, content provision and web design	Email
Dublin Business School	Many: Graphic/web design A few: Advertising Once a year: Film & TV Less often: Content provision e-books	€51k–100k €11k–30k €21k–50k under €5k	Established relationships Preferred suppliers are offered the work first Search from scratch Recommendations by trusted contacts	Strategic thinking, script-writing, budget control and management, price e-books providers, audio providers, art work and graphic providers, web advertising and radio/pod, advertising providers and print advertising providers	Email
Dublin University Central Athletic Club	Photography, Advertising A few: Web/graphic design	under €5k	Established relationships Search from scratch Advised/requested to use certain suppliers	Strategic thinking, designing, creative graphic design and fair pricing	Post
Galway Business School	No more than once a year: Content provision Less often: e-books	under €5k under €5k	Recommendations by trusted contacts	Strategic thinking, budget control and cost management	Email
Griffith College	Many: Advertising A few: TV/film Music/audio-services Animation Content provision Web/graphic design Short videos No more than once: app dev.	Over €101k €5k–10k Under €5k Under €5k €5k–10k €5k–10k Under €5k Under €5k	Established relationships Response to pitches Recommendations by trusted contacts	Strategic thinking, digital content, creative graphic design, time management and budget control/cost management. Creative social media advertising.	Email
Hibernia College	Many: Advertising	Under €5k	Produces in-house with freelancers	Creative expertise	-
IADT	Many: Web/graphic design Content provision Phone/tablet app development A few: Games development No more than once: Advertising	€11k–20k €21–50k €11k–20k €21k–50k €51k–100k	Established relationships An approved list Recommendations by trusted contacts Tender competitive bids	Financial expertise	-
IBAT	A few: Advertising Music/audio services Content provision e-books	Over €101k €5k–10k €11k–20k €11k–20k	Established relationships Search from scratch Response to pitches	Content producers	Email
IIPMM	Less than yearly: Design	€5k–10k	Established relationships Search from scratch	Strategic thinking, producing, time management and budget/cost control	Email
Newpark Music Centre	No more than once: Advertising Short videos Less than yearly: e-books	Under €5k Under €5k Under €5k	Established relationships Response to pitches	Strategic thinking and time management Digital content creation	Email Trade fairs

	Commissions	Value	Find suppliers	Skills/content shortages	How to approach
PDST	A few: Content provisions Web/graphic design No more than once: Short video Less often: Phone/tablet dev	€21k–50k €5k–10k €21k–50k €11–20k	Established contacts Search from scratch Tender competitive sealed bids	Technical and creative expertise	-
Setanta College	A few: Advertising Web/graphic design e-books			Graphic design, web design and animation expertise	Email
St Nicholas Montessori	A few: Advertising Less often: Web/graphic design	€5k–10k €11k–20k	Established contacts Recommendation from trusted colleagues and industry awards	-	Email Newsletters
IICP	Many: Web design e-journals	Under €5k	Established contacts	Fair pricing, budget control and cost management Web hosting and web design	No contact Schedule a meeting

Health

In 2013 Ireland spent [8.9% of GDP and the UK 9.1%](#) on healthcare, the US spent 17.1%, while the [global average was 10.5%](#). This puts the global spend on healthcare at approximately \$7.94 trillion, a level growing by approximately 5.3% a year. Private healthcare accounted for [30% of Irish and 16% of British](#) spending. A total of [€13.1bn is set to be spent](#) on healthcare by the Irish government in 2015, while [Scotland spends £11.3bn](#), [Northern Ireland £4.5bn](#) and the [UK as a whole £133bn](#).

Three companies were surveyed which represent a cross section of the different kinds of organisations in the healthcare sector: one is a non-profit charity occasionally commissioning original content from trusted contacts on a tight budget; one is a large international medical engineering firm; and one is a mid-sized native chemical processing company, both selling business-to-business.

- ✦ La Cheile Family Resource Centre, supporting disadvantaged families & individuals.
- ✦ Medtronic is an international company that develops and manufactures medical hardware.
- ✦ PR euroCHEM produces low volume high-value pharmaceutical active ingredients.

	Commissions	Value	Find suppliers	Skills/content shortages	How to approach
La Cheile	Even less: Content production Web/graphic design	Under €5k Under €5k	Established contacts Recommendations from trusted contacts	Staying within budget	Don't - they prefer to contact suppliers.
Medtronic	A few: Advertising Web/graphic design Audio services Phone/tablet app	€51k-10k €51k-10k €51k-10k €11k-20k	An approved list of suppliers	Production of software	Email Phone LinkedIn Meeting
PR euroCHEM	A few: Web/graphic design	€5k-10k	Established contacts In response to pitches Search from scratch	Scriptwriting, design, fair-pricing, presentation skills, meeting deadlines/budget, business professionalism Website & Graphic design	Email Phone LinkedIn Meeting

Tourism

Tourism is a major part of both islands' economies although the majority is internal and between both countries. In [2014 the Republic of Ireland had 7.6 million](#) visitors and tourism revenues of €3.5bn, forecast to grow through the People, Place and Policy plan by 2025 to 10 million and €5bn respectively. Domestic tourism made for spending of [€1.5bn in 2014](#), and from Northern Ireland a further €300m. Tourism Ireland takes on responsibility for marketing the entire island – and for 2013 calculated [€3.9bn in revenues and 8 million visits](#). They worked with HBO to create a [Game of Thrones-themed](#) international campaign, and estimate 49% of visits are from Britain. The South West, Northern Ireland and Dublin remain the most popular areas for tourists.

The majority of tourism in Scotland is internal, with [12.12m visits and £2.89bn](#) spent from Wales, England and Scotland in 2013, and a further [2.44m, spending £1.68bn](#), from the rest of the world (visits from Northern Ireland stopped being recorded in 2011 but amounted to 225,000 visits and £55m of spending). British internal tourism fell 3% in 2013 to 122.9m trips with £23.3bn spent. In addition, 32.3 million international visits generated a further £21.3bn. The total value of tourism to the UK economy is [£126.9bn, or 9% of GDP](#) – with an estimated third of 900,000 jobs created since 2010 being in tourism.

Marketing activities for the tourism sector in each country are coordinated by the main tourism bodies. [In 2013/2014](#), VisitScotland spent £47m; Tourism Ireland's marketing budget was £36m; VisitBritain's was £36m; and VisitEngland's £11m. These levels are boosted through [match-funded campaigns](#) such as the £100m campaign in 2012 VisitBritain ran to accompany the Olympics.

Three companies were surveyed:

- ✦ Fáilte Ireland is the National Tourism Authority for Ireland,
- ✦ Kilmainham Tales publishes online and offline on Irish social, political and penal history
- ✦ Silken Thomas is a family run pub that hosts a restaurant, bar and guest house.

	Commissions	Value	Find suppliers	Skills/content shortages	How to approach
Fáilte Ireland	Many: Content provision A few: Web/graphic design Phone/tablet app dev.	€21k–50k	Competitive tenders An approved list of suppliers	Sales, strategy	-
Kilmainham Tales	A few: Content provision	Under €5k	Recommendations by trusted contacts	Fair pricing Advertising, artwork, graphic design, in-depth articles, illustrations and photographs	Email
Silken Thomas	Many: Advertising A few: Music No more than once: Short videos Content provision Phone/tablet App dev. Audio services	Under €5k Under €5k Under €5k Under €5k Under €5k	Established contacts Preferred suppliers offered the work first Search from scratch Recommendations by trusted contacts An approved list of suppliers	Strategic thinking, design limitations, creative graphic design problems. Advertising, audio, articles, music and apps	Email Schedule a meeting Trade show

Conclusions

1. Going viral in a good way: the holy grail of digital marketing

- ✦ When a video or campaign idea goes viral, it not only offers the company behind it millions in free advertising impressions, it adds an invaluable layer of authenticity as the work is introduced by people to their friends, colleagues and family and reduces the risk of marketing to the wrong audience.
- ✦ The vast majority of creative content ideas fail to hit the tipping point of 'going viral', leading agencies to explore different approaches. As a new space, only a few patterns are emerging:
 - ✦ Communication is a 'conversation', not a speech or sermon. This means listening and responding to user/audience feedback are a key part of marketing and companies whose corporate structure best supports that, such as high growth start-ups, are better placed.
 - ✦ The space is often driven forward by creators with large followings who have much interconnectedness; cross-promoting and collaborating between them.
 - ✦ Authenticity is vital for a lasting relationship with an audience. Importantly, the person who is authentic to a million Twitter or YouTube subscribers to a CEO may not 'feel' authentic in a traditional pitch or boardroom as it's not their natural space. Significantly, their social & cultural capital is typically more valuable to them than easy cash or fame.
 - ✦ For a positive connection to be made there normally should be something spectacular, inspiring, uplifting, empowering, or socially beneficial or important around what is being shared. Negative shock campaigns also go viral but have a much higher risk of backlash.

2. Digital and creative skills: improvement and focus

- ✦ Our research revealed a disparity in perceived skills shortages between producers and buyers. While almost all creative companies identified a shortage in technical skills, prioritising this ahead of any other shortfalls; commissioning companies identified budgeting, cost control and fair pricing as the biggest shortfalls in creative companies.
- ✦ This illustrates a double challenge – both in improving digital and business/budgetary skills – and in overcoming a perception gap where SMEs and microbusiness could be prioritising and focusing on different skills to the ones commissioners of their work are calling for. The issue resonates with the age-old tension within creative production between art and commerce.
- ✦ Importantly, in looking at technical and business/budgetary skills shortfalls, a sector-specific operating factor must be considered: that creative work will often both try to push the limits of current technical capability, and be harder to quantify, budget and plan around. This is because the best creative work can feel like reinventing the wheel *every time*; the delivery of a good idea is not the same as asking a factory to deliver a particular type of widget of specified size and colour. It requires a huge number of intangible, soft skills to deliver .
- ✦ In other words, to build a thriving creative digital economy, as well technical and business skills, the core factors that underpin creativity, innovation and art must also be prioritised. Strength at this is the key factor that allows creative companies and individuals to stand out and succeed in a crowded world with huge competition for user attention.

“In a rapidly changing technological culture and an ever-growing information-based economy, creative ideas are the ultimate resource. Yet our current educational system does little to nourish this resource.”

– Peter H. Diamandis, Abundance: The Future is Better Than You Think