ATLANTIC TIDE

Transforming Ireland's Design Economy

Report for **Atlantic TIDE Partners** and **Creative Ireland**

REGIONAL ENTERPRISE PLAN MID-WEST

REGIONAL ENTERPRISE PLAN WEST

REGIONAL ENTERPRISE PLAN NORTH-WEST

Clár Éire Ildánach Creative Ireland Programme

SLIGO COUNTY COUNCIL COMHAIRLE CHONTAE SHLIGIGH

WESTERN DEVELOPMENT COMMISSION

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Transforming Ireland's Design Economy

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FOREWORD

Sligo County Council / Sligo Local Enterprise Office

Sligo County Council and Sligo Local Enterprise Office have been privileged and pleased to have had the opportunity of acting as lead in this Creative Communities Economic Action Fund opportunity. We started out in March 2022 in early conversations with Jessica Fuller around pitching a collaborative funding application to Creative Ireland with the objective of the development of the creative economy at local and regional level through initiatives and models which could harness and demonstrate the value of culture and creativity in local economic development. The proposal to roll out a pilot engagement and communication programme for the design industry emerged, with the WDC, Údarás, the IDI, the Regional Enterprise offices and Connected hubs as key partners and which also served to address the objectives of the three Regional Enterprise Plans 2024 to advance the creative economy.

In December 2022 the project is concluding with the final reviewing of the Atlantic TIDE Partner Findings and Recommended Actions having developed the detailed Report on the Programme's three strands, workshops, findings, and analysis. The conclusions are strong and in agreement that design is intrinsic to industry and adds value to economic development. We are grateful to Jessica, Charlotte Barker and John Lynch for their unstinting contributions in progressing this project.

Liam Kiely, Sligo Local Enterprise Office

Margaret McConnell, Sligo County Council (Community & Economic Development section)

1. EXECUTIVE SUMMARY

Project 2040 aims to provide a comprehensive social, economic and cultural infrastructure. It articulates a vision that includes a creative and innovative society.

Design, as a process and as a profession, is recognised across the world as an essential activity in the evolution of enterprise and public service. Global reports indicate significant growth e.g. The Design Industry, 2021 (Forrester) ***'the size of the global design industry was estimated to be $162 billion…'*** with multiple software categories used in design anticipated to grow more than 20% in that year (Forrester, Design Industry 2021).

In Ireland, the Institute of Designers in Ireland (IDI) is the lead entity that drives the development of the commercial design industry. The IDI is also the authorised agent in Ireland for the Design Skillnet.

Through the Department of Enterprise, Trade and Employment (DETE), there is a defined system, development framework and resource model in place for enterprise in Ireland, within which the creative industries and creative enterprise is situated. The recently published Enterprise White Paper (December 2022) in addressing the mechanisms for ***'supporting enterprises to enter new markets and respond to new growth sectors and encouraging innovative start-ups'*** reference ***'fostering good design as an integral part of bringing new products and services to market'*** (Enterprise White Paper, DETE 2022). The DETE Regional Enterprise Plans for Mid-West, North West and West include the creative economy as a priority. National and regional enterprise development entities such as Enterprise Ireland and Local Enterprise Offices are working on the ground to activate the policy visions. Enterprise development is being delivered in the context of the smart specialisation strategy which focuses on key pillars including net zero, digitalisation, clustering and innovation – to be achieved through collaborative initiatives.

Creative Ireland Programme are currently preparing a Roadmap for the Digital Creative Industries as part of the Programme for Government. The Design Industry is a central tenet of the framework.

Department of Rural and Community Development (DRCD) policy and strategy identifies the creative and cultural economy as integral to rural development. The Western Development Commission (WDC) has identified the design industry as a regional strength with growth opportunity as part of its creative enterprise plan to 2026. It seeks to harness mechanisms such as Connected Hubs and CREW CLG in partnership with other senior stakeholders participating in this project to deliver the opportunity.

The impetus for this project arose from questions raised in recent research by individual sectoral and development entities about how to consolidate and grow the design industry.

Sligo County Council through the Sligo Creative Ireland office and the Sligo Local Enterprise Office have led out on this pan regional, multi-agency project.

The partners set out to address how the key actors responsible for enabling the sustainable development of industry and enterprise might collaborate to address the identified challenges to grow the design industry in the Atlantic region. These challenges relate to design industry networks and engagement in the region, commercial design enterprise capacity and sustainable growth, cross industry engagement and the consolidate of the design industry as a competitive strength for the region.

From the outset it was anticipated that the project would provide a regional, long term model for engagement, communication and networking within the design industry segments and cross industry sectors. It was anticipated that this would be achieved by building initial stakeholder relationships during the project and by maintaining and building a working relationship to address design and cross industry development and growth.

A three strand programme process engaging the design industry, enterprise enablers and four other industry verticals was undertaken over a six month period in 2022. The process included desk and action research. The Connected Hubs Network was harnessed to accelerate engagement and provide a future platform that has regional and national reach and access for the roll out of a model of engagement. The process involved desk and action research and drew on a range of literature, quantitative and qualitative research processes.

THERE WAS STRONG ENGAGEMENT ACROSS THE PROGRAMME STRANDS

Strand 1 Quantitative survey – Design Industry: 64 SME participants

Strand 1 Workshops: 34 design industry SME participants

Strand 2: 24 enterprise enabler representatives participated from education (FE, Incubators, Universities); enterprise support entities for indigenous and FDI

Strand 3: 4 connected hubs and 28 companies participated from x4 industry verticals (FMCG, Future Mobility, Construction, MedTech/Pharma)

SUMMARY FINDINGS

- Across the three strands, the participants demonstrated an informed understanding of the value of design.
- It is understood by all participants across the three strands that design provides a range of intangible values which can enhance the competitiveness of businesses, that it adds value as an innovation approach to new product/service development, a way of working which is very successful at the creation of intangible values like engagement, brand, reputation, “stickiness”, meaning, and strategy.
- It is understood that it best adds value when introduced early in a process, with the iterative approach seen as key to allowing design reduce risk.
- There remains a challenge in understanding the existing design industry verticals and the industry ecosystem. This applies to participants from strand 1 (design industry) as well as other strands. There are further engagement actions to be undertaken to facilitate awareness and understanding of the current range of design disciplines which exist, the design process, as well as the language and terminology of design.
- Significant data was yielded from the process, and it is agreed that further analysis of the material is required. It is agreed that a design enterprise “pulse” survey be undertaken on a regular basis from 2023 onwards. This may link with the CREW CLG data and market intelligence unit project (2022/2023).
- There is entrepreneurial mindset among the participating design enterprises that are based in and/or trading to the Atlantic Region.
- In total 64 self-sustaining enterprises from 16 counties participated in the quantitative survey. Of this cohort, 34 enterprises participated in the qualitative research actions.
- Participating enterprises are all in the SME category from a diverse set of design verticals.

- The participating entities either have a business address in the Atlantic region or indicated trading to entities in the Atlantic region. The top three participating counties, in order, were Galway, Cork and Limerick. Over 50% of respondent enterprises have been trading for more than 5 years, and just over than 25% are trading for between 1 and 4 years. This suggests a high level of enterprise maturity in the sector, and further investigation may provide insight as to the true levels of maturity in the >5 years bracket. 15 % of the companies reported between 7 and 80 employees, 22% with between 2 and 5 employees and 64% of the respondents have just 1 employee. Just above 50% of responding businesses were members of IDI, with a further 19% wishing to learn more about membership. The majority of respondents – 94% – declared definite, or potential growth ambitions with the remaining 6% stating that they did not wish to grow their business. There was awareness of the growth opportunity in the four selected strand 3 industry verticals – FMCG, Construction, Mobility, MedTech/Pharma. There is an ambition among almost two thirds of respondents to capitalise on that opportunity. The key identified challenge is enterprise capacity building and scaling. While perceived to be the case, this is not specific to the design industry. There are identifiable hubs in regional pockets.
- The enterprise enabler ecosystem is being harnessed by the design industry to some degree; however, there is an opportunity to explore additional enterprise development initiatives that specifically target design enterprises. This may be rolled out collaboratively with the existing partners in the Atlantic region.
- The design industry business model reflects that of other industries – it draws on a skilled employee base and a freelance/contractor structure. This is affirmed by strand 1 and strand 3 participants.
- There is clear opportunity to develop business relationships across the four other industry verticals – construction, future mobility, FMCG, MedTech/Pharma – and to co-ordinate and facilitate more focused and targeted business networking.
- The design industry business model facilitates remote working. There is a key role for the Connected Hubs Network and Grow Remote to work with the IDI to loop the enterprises into the existing hubs network and community. This may also be addressed through entrepreneurship development services.
- The participants across the three strands identified the need for orchestrated networking opportunities for the purpose of knowledge sharing, business development, showcasing, CPD and talent reach.
- ***There is a clear commitment by the enterprise enablers, WDC, REPS, LEOS, CH, CREW to continue to work together with the design industry through the IDI and with other industry verticals to enable design industry entrepreneurial ambitions. There is an opportunity to 'professionalise' the design industry in the Atlantic region and to situate it as a competitive advantage on the global stage.***

AGREED ACTIONS

- There is collective agreement that the current project partners will continue to work together to capitalise on identified opportunities by addressing challenges identified to achieve sustainable development and to build on the strengths as identified in the Atlantic TIDE 2022.
- A s-m-l term "strategic business activation" plan is to be researched, devised and activated by the partners from 2023 onwards.
- The short term plan is to be devised based on findings from phase 1. The partners will re-group in January 2023 to draft and source funding for a rollout of phase 2 in 2023-2024.
- The vision is to position the Design Industry across the Atlantic Region as a competitive advantage on the global stage to drive sustainable livelihoods and prosperity in all communities in the Atlantic Region.

2. THE DESIGN INDUSTRY

2.1 Overview

Project 2040 aims to provide a comprehensive social, economic and cultural infrastructure. It articulates a vision that includes a creative and innovative society.

Through the Department of Enterprise, Trade and Employment (DETE), there is a defined system, development framework and resource model in place for enterprise in Ireland, within which the creative industries and creative enterprise is situated. The recently published Enterprise White Paper (December 2022) in addressing the mechanisms for ***'supporting enterprises to enter new markets and respond to new growth sectors and encouraging innovative start-ups'*** reference ***'fostering good design as an integral part of bringing new products and services to market'*** (Enterprise White Paper, DETE 2022). The DETE Regional Enterprise Plans for Mid-West, North West and West include the creative economy as a priority. National and regional enterprise development entities such as Enterprise Ireland and Local Enterprise Offices are working on the ground to activate the policy visions. Enterprise development is being delivered in the context of the smart specialisation strategy which focuses on key pillars including net zero, digitalisation, clustering, and innovation – to be achieved through collaborative initiatives.

Department of Rural and Community Development (DRCD) policy and strategy identifies the creative and cultural economy as integral to rural development. Policy and strategy actions for the creative economy are amplified in multiple policies and strategies at national, regional, and local level. There is presently no national creative industry strategy to drive market opportunity and sustainable creative enterprise prosperity. Creative Ireland (CI), situated within the Department of Tourism, Culture, Arts, Gaeltacht, Sport and Media (DTCAGSM), is a cross-government entity and is the main implementation vehicle for the priorities identified in Culture 2025/Éire Ildánach, the draft cultural policy published in 2016. As part of this initiative, CI has published a Roadmap for the Creative Industries. This work has a focus on businesses which utilise creativity to deliver commercial success and employment and is part of the new CI 2023-2027 framework presented to government in December 2022. The Western Development Commission plan for creative enterprise is referenced in this national framework. The Regional Enterprise Plans (DETE) in the Atlantic Region and the WDC Strategy (DRCD) are integral to the strategic sustainable development of creative enterprise in the Atlantic Region. This is recognised in the forthcoming framework, which has a specific emphasis on digital and design. The creative economy is identified as an intrinsic part of the whole economy and ambitions are interlinked across other growth industries in these regions.

Design, both as a process and as a profession, is increasingly recognised across the world as an essential activity in the evolution of enterprise and public service. Design tools and methodology are now applied in all areas of innovation and change. The design industry is an intrinsic element of the product and service supply chain in entertainment, tourism, pharma, med tech, fin tech, education, health, non-profit cultural and arts, retail, manufacturing, construction, energy, public sector among others. Often invisible, there is significant cross sector and cross industry interoperability.

Global reports indicate significant growth e.g. The Design Industry, 2021 (Forrester) ***'the size of the global design industry was estimated to be $162 billion…'*** with multiple software categories used in design anticipated to grow more than 20% in that year (Forrester, Design Industry 2021).

A Grant Thornton report 2021 (commissioned by the Design and Crafts Council) on the economic value of the design and craft sector reported a turnover of 53bn euro – representing 6.7% of Ireland's total business turnover. This positions the combined craft and design sectors as the 8th largest in Ireland by number of enterprises and 10th largest by number of employees, and commercial design would be a significant proportion of this. Designers in the commercial design sector are highly productive, with turnover per employee of €200,000 and GVA of €72,000 – comparable to the construction sector.

Designer roles include Graphic, Digital production, Content, UI & UX, Services, Strategy, Business, Experimental, Industrial, Data visualisation, Built environment, Motion, Systems among others. Sectors where design is integral to business output include Graphic and visual communications, Product design, Construction, Architecture, Advertising, Marketing, Tech, UI/UX, Business Management, Web Design, Fast moving consumer goods, Transport, Fashion, Textiles, Medical, Education, Utilities and Telco.

2.2 Project Context

The impetus for this project arose from questions raised in recent research by individual sectoral and development entities about how to consolidate and grow the design industry. These are outlined in summary below. A predominant question is how do we enable the consolidation and growth of sustainable design enterprises in the Atlantic Region.

Creative Ireland in 2022 launched the new Creative Communities Economic Action Fund. The fund provides local authorities with the resources to develop innovative projects which seek to leverage the potential of the creative industries in supporting local and regional economic development. The introduction of the CI EAF presented an opportunity for key entities to collaborate and explore how to address the identified challenges and opportunities to consolidate the design industry in the region.

The Institute of Designers in Ireland (IDI) commenced new strategic activations in 2020 for the Design Industry in Ireland. This included looking at enterprise data, talent, enterprise development and growth, exploring white label provisions, researching market reach and access. The IDI is the authorised agent in Ireland for the Design Skillnet. ***Design Skillnet*** produced the Design Practice in Ireland Report 2021. Design Skillnet reported 37,500 designers identified as working in Ireland (2021 DSN) with an estimated need for up to 70,000 designers by 2025. However, it also identified **engagement** and **communication** among the key challenges for the design industry advancement in Ireland. The report notes that ***'the sector is inherently fragmented, which poses a communication challenge and has resulted in low engagement of designers with professional design bodies'.*** It states that ***'design has a proven ability to create impact and generate value in business. The sector has been poor at communicating this – internally and externally. The design profession needs to communicate the value of design within a business context'.***

The report recommended the following actions:

1) Create targeted engagement strategies for each of the identified industry segments.

2) IDI to work with Design Skillnet, supported by Skillnet Ireland, to develop a targeted plan that communicates the full business value of design in a two-pronged approach **a)** educate the profession and **b)** educate the clients.

Sligo County Council – Creative Ireland and Local Enterprise Office

The development of the economy and community is underpinned by a multiplicity of statutory agencies with diverse agendas and priorities, geographic reach and varied resources. The goal of the enterprise enablers in education, skills development and enterprise development agencies is to enable the activation and sustainable growth and scaling of enterprises. This is achieved through mechanisms such as industry research, development, innovation intervention – local, national, global, skills development, mentoring, coaching, infrastructure development/capital investment, networking opportunities, market engagement/activation (national and/or global), business investment loans/grants/equity, FDI, RDI. Some of the entities also devise and drive regional and national policy and strategy which directly impacts on industry advancement including the design industry.

CREW Digital CLG (CREW) launched in 2021 and has a focus on the empowerment of Digital Creatives in the West of Ireland to create, develop and scale globally. CREW lead on the Creative Entrepreneurship and Enterprise Development incubator programme (accredited through the ATU). CREW is also constructing Ireland's first dedicated and Creative Industries Innovation Hub and will open Summer 2023. It has satellite incubation hubs in Roscommon and Letterfrack also scheduled for opening 2023.

Western Development Commission (WDC)

In 2021, the WDC identified the need for targeted intervention to strengthen and grow the design industry in the Atlantic Region. Rudimentary data collected by the WDC 2021 indicates over 550 individual micro/SME and large scale are identified as design industry enterprises in nine counties across the Atlantic region. The WDC Creative Industries Plan 2026 notes the Design Industry as a priority for sectoral intervention. To stabilise and grow the following was identified as necessary – reliable and relevant enterprise data, engagement, cross-sectoral networking, business capacity activation, cross sectoral market place engagement and enterprise opportunity take up. A schedule of actions was agreed by the WDC board in Q1 2022 as follows: 2022 – Stakeholder engagement + project development and activation. 2023-2025 Design industry strategy + business activation plan linked to CreaTech agenda to be rolled out across Atlantic Region. The intended impact of the Creative Economy Plan is to create sustainable jobs and to consolidate the industry across the Atlantic Region and is situated within the framework the DETE Regional Enterprise Plans, DRCD Our Rural Futures and the forthcoming DTCAGSM Creative Industries Framework. Mechanisms to achieve these ambitions in the Atlantic include CREW Digital and the Connected Hubs Services.

ConnectedHubs.ie operated by The National Hub Network of +400 hubs, a Government of Ireland initiative that provides a vehicle for individual hubs to come together under a shared identity to maximise the economic opportunity of remote working. The National Hub Network has the support of Government, remote working advocacy groups and industry representatives. The Hub Network is particularly important and relevant to the engagement, communication and network agenda in the context of a rural enterprise environment and activation for SMEs.

The Regional Enterprise Managers for Mid-West, North West and West observed the process in the context of the existing objectives and actions for the Regional Enterprise Plans 2021-2024 and in the context of the overarching framework of the national smart specialisation strategy which focuses on core pillars including net zero, clustering, digitalisation and innovation.

2.3 Project Aim

We asked, how might the actors collaborate to address the identified challenges for the design industry in the region.

From the outset it was anticipated that the project would provide a regional, long term model for engagement, communication and networking within the design industry segments and cross industry sectors.

It was anticipated that this would be achieved by building initial stakeholder relationships during the project and to maintain and build a working relationship to address design and cross industry development and growth.

The process involved devising and rollout of programme strands that model up "internal" design industry communication and engagement programmes and the "external" cross industry client communication and engagement. By harnessing the Connected Hubs, the aim was to accelerate engagement, and provide a future platform that has regional and national reach and access for the roll out of a model of engagement.

2.4 Intended / Anticipated Project Impacts

The anticipated impacts of the project aim ultimately to strengthen the contribution of the design industry to local economic development and beyond. Our vision for intended specific impacts included influencing policy, strategy and resource at national, regional and sectoral level. These are:

- Enable the development of self-sustaining enterprise and the consolidation/growth of the design industry in the regions and ROI.
- Address key recommendations in the Design Skillnet Report 2021 and activate the response for long term design industry growth by the IDI.
- Activate regional and national design industry and cross industry networks.
- Establish formal cross industry engagement, networking; information sharing re. the specific industry segments and relevance and value to altered industry environments.
- Inform design industry enterprise development strategy for all partners and stakeholders beyond this initiative.
- Augment the existing design industry network and connection to IDI.
- Connect the design industry in their own local hubs.
- Establish model for future sustained engagement and rollout of ongoing cross sectoral communication, networking, enterprises activation; activation of other recommendations in the Design Skillnet report; address government agenda re. design on an ongoing basis.
- Baseline design industry data capture and collation – allow for evidence based creative enterprise strategies at local, regional and national level and within sectors.
- Demonstrate impact of direct engagement with the sector to address identified industry challenges.

2.4 Intended / Anticipated Project Impacts (cont.)

- Identify future activation opportunities for design industry and cross industry innovation; supports for start-ups in design industry; augment network for the CREW/ATU creative enterprise incubation programme.
- Hubs – anchor hubs showcase + engagement opportunity + networking; All hubs – engagement + network + Reach.
- Facilitate identification of thematics for RDI with tertiary level and industry partners.
- Identification of design industry business activation needs.
- Provide an activation mechanism for other recommendations in the Design Skillnet report.
- Raise awareness re. IDI, local and regional creative enterprise infrastructure and hubs support structures.
- Establish formal cross industry engagement, networking; information sharing re. the specific industry segments and relevance and value to altered industry environments.
- Activate engagement between IDI and key cohorts in MedTech; AR/VR; Mobility; Construction in the W/AEC/South West.
- Augment sustainable enterprise opportunities in the West and nationally.
- Strengthen collaboration between IDI and CH for harnessing the platform in long term for pan industry networking and collaboration.

2.5 Project Development and Activation Process

The project involved desk and action research. The partners devised the following process, secured funding from Creative Ireland and direct and match funding from the partners. Atlantic TIDE was activated in May 2022 on a pilot basis for six months as follows:

1) Appointment of a Design Industry Project Lead through the IDI to: **a)** design and implement a pilot engagement programme with prioritised design industry segments and professional design bodies and **b)** to design and implement a communications programme in order to activate cross industry networking and opportunity.

2) The programme comprising 3 Strands to be rolled out on Connected Hubs (CH) as the platform of engagement and communication in order to maximise reach, and access as well as harness the CH data collection and GIS systems for research purposes during the project.

3) A detailed project and programme schedule has been developed. In summary:

Strand 1: "Internal" industry engagement + Communications (June – Nov)
Design and action research with IDI members based in or trading in the Atlantic region.

Strand 2: Internal engagement + Communications (June – Nov) – Educating the profession
Design and action research focusing on developing the narrative and comms around the design industries. The key stakeholders were enterprise enablers with representatives from the design industry.

Strand 3: External engagement + Communications (November) – Educate the clients
Cross sector networking and comms sessions x4. Carrying the learnings from the workshops into other industries. Focus for pilot is on X4 Industry segments: AR/VR; Construction; MedTech and Mobility. Open curated networking session in situ at anchor hubs: Ludgate, Cork; FutureCast, Leitrim, Future Mobility Campus, Limerick and Sligo (online).

3. ATLANTIC TIDE PROGRAMME STRANDS PROCESS AND OUTPUTS REPORT SUMMARY

3.1 Introduction

The programme strands were devised by the partners as the mechanism to deliver the proposed outputs and achieve impact. The IDI appointed Context Studio Ltd. to manage and deliver the programme strands. Comprising desk and action research and programme report, the work was undertaken between June and December 2022. The full programme strand report authored by Context Studio Ltd is included in the appendix.

3. ATLANTIC TIDE PROGRAMME STRANDS PROCESS AND OUTPUTS REPORT SUMMARY

3.2 Strand 1 — Pan Design Industry Network and Data Gathering Sessions

3.2.1 Overview

The first strand of the programme set out to engage self-sustaining design enterprise entities to participate in networking sessions with participants filtered based on design industry priority verticals.

The objectives of Strand 1 were:

- establish network across multiple design industry segments.
- raised awareness of the policy/strategy/resource framework in place for the design industry.
- raised awareness about new industry trends/ evolving market opportunities for existing design entities in all segments as well as new enterprises.
- harness WDC communications to drive design industry engagement.

Intended outputs in this programme were:

- Augmentation of the existing network and connection to IDI.
- Loop the design industry in through their own local hubs.
- Quantitative and qualitative data from the sector.
- Enhance awareness re. IDI, local and regional creative enterprise infrastructure and hubs supports structures.

To ensure appropriate focus on the verticals required, a screening survey was first issued to the community, by which respondents could express interest in attending one of the workshop sessions, but also provide important quantitative data to the initiative relating to the profile of these businesses. The recruitment aim was to harness IDI membership and network and well as the Connected Hubs. The screener survey enabled the team to filter for businesses with growth ambition, and focussed around our priority design verticals: product/industrial design; communications design (graphic, branding, website design etc.), structures and spaces (architecture, interior design, exhibition design), digital design (web, interaction, animation, tv, social media), strategic design (service design, ethnography, futures, insights), immersive design (VR/AR etc.), product design (industrial design, consumer product design, fashion).

3.2.2 Quantitative Study — Methodology and Summary Findings

Methodology

The first strand of the work held the intention to reach out across hubs to all design entities and to host networking sessions based on design industry priorities. The aim was to harness IDI membership and the design community aligned to the Connected Hubs, for these engagement sessions. A plan was developed to host three workshops, allowing broad representation from design businesses. A screener survey was created to collect relevant quantitative enterprise data and to ensure that the participants would represent businesses appropriate to our design verticals, who harbour ambitions for growth with relevant industrial segments. The quantitative data has revealed new information about the design industry ecosystem in the Atlantic region and the individual enterprise set up and business activity. Specifically it has raised further questions and it is agreed by the partners that further in-depth analysis of the data. It is also agreed that a phase two quantitative study be developed to yield similar date from the wider design industry in the region.

Summary Findings

- In total 64 businesses responded to the survey, from 16 counties. The participating entities either have a business address in the Atlantic region or indicated trading to entities in the Atlantic region. The top three participating counties, in order, were Galway, Cork and Limerick.
- Just above 50% of responding businesses were members of IDI, with a further 19% wishing to learn more about membership.
- Over 50% of respondent enterprises have been trading for more than 5 years, and just over than 25% are trading for between 1 and 4 years. This suggests a high level of enterprise maturity in the sector, and further investigation may provide insight as to the true levels of maturity in the >5 years bracket.
- 15 % of the companies reported between 7 and 80 employees, 22% with between 2 and 5 employees and 64% of the respondents have just 1 employee.

- Significantly over 30% claim to have 1 or more contract employees. Based on this data and through discussion with the industry verticals, the design industry relies on a contract business model.
- Respondents included a diverse set of design verticals, with greater representation among companies providing Communication Design including branding, graphic design, packaging design, illustration, wayfinding and advertising. Digital Design was the next most represented vertical, including website design, interaction design, animation, tv production and social media.
- Many of our responding enterprises are actively exporting their design services, with Northern Ireland and Great Britain being the primary export markets, closely followed by the EU. In some cases, business list GB, EU and USA as their largest markets.
- The majority of respondents – 94% – declared definite, or potential growth ambitions with the remaining 6% stating that they did not wish to grow their business. There was awareness of the growth opportunity in the four selected strand 3 industry verticals – FMCG, Construction, Mobility, MedTech/Pharma. There is an ambition among almost two thirds of respondents to capitalise on that opportunity.
- This ambition is a strength for the region. However, there are clear barriers to growth identified by 70% (45) of the respondents in the free text responses in the survey. While funding and talent acquisition sit at the top, lack of confidence and isolation is identified combined within top three challenges. There is a challenge for the participating design enterprises with regards to sales capacity in their business. This question was a free text option; however, there were clear patterns in the responses received. The majority of respondents shared that they had a low sales capacity, most taking responsibility themselves as a solo entrepreneur, and others sharing a low number of hours per month dedicated to sales.
- The respondents stated that they have engaged with a variety of support services to develop their business. The free text option outlined that these range from enterprise development, with 65% engaging with LEO supports, to specific skills service providers with 41% stating engagement in Skillnet services. Other responses included EI, IDA, ÚnG, DigiClare.ie (Clare County Council), Illustrators Ireland, NDRC, Back for Business Programme, Donegal Women in Business, Intertrade Ireland Brexit Support voucher, Enterprise Ireland RTCF, Céim Programme (New Frontiers), Back to Work Enterprise Allowance, and Donegal Creative Coast Partnership. Almost 20% have stated that they have not engaged with enterprise enabler services.

3.2.3 Qualitative Study — Methodology and Summary Findings

Methodology

Following the screener process, invites were issued to survey respondents to participate in three facilitated workshops. These were held online, Friday 15th July, Tuesday 9th August, and Wednesday 21st of September. The workshops were recorded in audio-visual format and throughout the workshops, a facilitator captured feedback in order to easily visualise emerging themes and enhance discussion.

A total of 34 design businesses attended a workshop during the series. Workshops were 2 hours long, and included moderated breakout groups discussing the various challenges of starting and growing a design business in Ireland under the categories below. Participants were also invited to share their future vision for their vision. The breakout groups were followed with a playback session which offered further opportunity for consensus assessment, but also networking.

The workshops focused on the following themes:

1) Operational challenges (premises, equipment, accounting, legal, etc.).

2) Talent & people challenges (staffing, HR).

3) Market challenges (finding and connecting with potential customers to help grow the business, explaining what you do).

4) Sales challenges (closing deals, winning work, procurement processes, supporting clients in buying your work).

5) Incidental contributions not directly linked to the four areas above.

Qualitative Study – Findings

A rapidly changing sector

The application of design has been rapidly changing over the past 30 years. With the advent of new technologies came new practices like interaction design and web design. As products became more complex and connected, we saw the emergence of service design and user experience design. The development of “design thinking” has brought design practices into the worlds of policy and strategy. Even inside design communities, these titles cause some confusion.

Design is Misunderstood

It was indicated throughout the workshops that the rapid evolution of design has “left behind” many in Irish society, from potential customers in the wider business community to those who work to support the sector through enterprise supports. It is perceived by the strand 1 participants that design is misunderstood by the public, by policy, and by industries outside of the design sector. This [perceived] lack of understanding is reflected in the interactions design businesses have with clients, and with enterprise supports available in Ireland.

The Value of Designers’ Process is Under-Appreciated in the Market

When working with a new client or customer, design businesses shared that the clients’ goals or budgets were often out of line with the design tasks demanded. Clients would either not have the appropriate budget for the work they were expecting, or they would expect immediate final deliverables without allowing appropriate time for the process required to achieve those outcomes. However, an emerging generation is more aware of the value of design. Design businesses report a generation gap in the understanding and appreciation of the value of design.

Design Industry Business Model – Networks, Hubs & Clusters

Design businesses shared that the nature of their work means that flexibility is key, and that this flexibility is derived of networks of talent, and of potential customers, but also communities of practice sharing information on how to run a business and supports to be found.

Business/Enterprise Supports Aren’t Suitable for Designers

Design professionals share the challenges of all entrepreneurs in needing to learn how to run a business. Our workshop participants reported difficulty in finding information on available supports to help start and grow their business. When working with for example, Local Enterprise Office or Enterprise Ireland, participating businesses found that the advice and support they were offered wasn’t necessarily relevant to the design industry nor did it show an understanding of the nature of their work.

Learning to be a Business is Challenging

Starting a business involves a lot of learning, and the learning curve can be extremely steep. For design professionals this often means learning things that were never part of their education or practice. This might include accounting, insurance, HR, marketing, procurement, sales and more.

The challenge of learning how to run a business, while also being a designer, is exacerbated by an apparent lack of relevant supports available to design businesses. Our participants report difficulty in finding advisors with knowledge of the business of design.

Setting up a Design Business is Not Cheap!

For many new design businesses, the requirement of specialised equipment and software, as well as space for production and collaboration can add increased cost which can make it harder to get a business off the ground.

Hard to Find Clients, Harder to Find the Right Kind of Clients

Small design businesses find it hard to get their name out and find new clients, meaning that repeat work and referrals are heavily relied upon to stay in business. Small, more local businesses can be easier to connect with but often they lack necessary budget or priority for design. While larger businesses might have the budgets, it can be much more difficult to get “a foot in the door” with these companies, especially outside Dublin.

Referrals Drive Growth, and Growth Drives Referrals

For many design businesses, work comes in through referrals. These referrals can come from existing or previous clients, or other businesses that have turned down a job. For many it is their most reliable source of work and so making good industry connections and having a strong network is very important.

Public Procurement Challenges

Businesses that have taken on public sector work recall the overall experience as being frustrating. Understanding procurement procedures and tenders can be a struggle for new businesses that might not have prior experience. Sometimes the procurement process itself contradicts good principles of design, as solution proposals are often required in the procurement stage before any actual work can be done.

Sourcing Talent is Key to Survival

Finding the right freelancers and building strong, long-term relationships with them is very important to design businesses. However, it can be challenging to know who is out there, and after building a relationship with a specific freelancer it can be hard to fill that void if they move on to other work.

ATLANTIC TIDE
Transforming Ireland's Design Economy

Networks, Clusters & Community add Resilience to Design Enterprises
Design Businesses report reliance on strong networks in order to find freelancers, clients and potential collaborators. Outside of Dublin, businesses report a lack of these connections, or effective networks that provide the potential necessary for business growth.

Existing "Formal" Networks Could Be More Effective
When it comes to formal creative networks, businesses that are members of these groups claim that they are relatively inactive, and often very Dublin-centric when it comes to events. Because of this, they aren't relied upon as being useful sources of work and businesses find that better connections can be made elsewhere.

Design in Ireland is Dublin-Centred
Design businesses outside of Dublin report that the industry seems a lot more scattered in the regions than in the capital, and that it is much easier to get work and be known when operating within Dublin due to better networking opportunities and connections to be made.

3.2.4 Strand 1 Takeaways

- Entrepreneurial mindset within the design industry
- Participating enterprises are all in the SME category
- A significant proportion are trading nationally and globally and have growth ambitions.
- The key identified challenge is enterprise capacity building and scaling. Within this, issues include business skills, business planning, business management, team development and management, client engagement, services and product development, managing IP, marketing, market access and reach, business pricing, customer reach (private and public), business pitching, sales, company consolidation and scaling. It is perhaps perceived that these challenges are exclusive to the design and creative industries which is not the case. The findings reflect challenges of start-up and SMEs most recently captured in Barriers to Entrepreneurship (NW REP 2021) and are not specific to the design industry. Some of these challenges may be addressed through the existing enterprise enabler services in collaboration with the IDI and Connected Hubs.
- The enterprise enabler ecosystem is being harnessed by the design industry to some degree; however, there is a level of frustration within the design industry at the perceived lack of understanding of the intrinsic value of design to all industry by the enterprise enablers including education system and enterprise development services. An exploration of this issue identified a knowledge gap about the existing enabler ecosystem and services. There is a communications and engagement action needed to ensure enterprises are accessing the appropriate and relevant existing provisions, and also to further develop targeted enterprise activation and business growth services specific to the design industry and the functioning ecosystem. There is an opportunity to further explore IDI engagement with e.g. CREW CLG, the LEOs and Enterprise Ireland.

- The design industry business model reflects that of other industries – it draws on a skilled employee base and contractor structure.
- Participants in Strand 1 indicate existing engagement with the Strand 3 industry verticals. However, there is clear opportunity to develop business relationships across these verticals and to co-ordinate and facilitate more focused and targeted business networking.
- The industry business model facilitates remote working. This is an asset; however, lack of relevant networks and a sense of isolation were noted as significant issues by the participating entrepreneurs. There was strong interest expressed in ongoing and follow up networking, knowledge sharing and business development exploration. There is a key role for the Connected Hubs Network and Grow Remote to work with the IDI to loop the enterprises into the existing hubs network and community. This may also be addressed through entrepreneurship development services.

3. ATLANTIC TIDE PROGRAMME STRANDS PROCESS AND OUTPUTS REPORT SUMMARY

3.3 Strand 2 — Educate the Profession: Engaging Enterprise Supports

3.3.1 Overview

This strand set out to engage Enterprise Support agencies and other important ecosystem stakeholders in an online workshop setting to focus on design industry positioning, narrative development for the sector and its various verticals and to explore pathways and possibilities to exploit existing and new markets. Findings from Strand 1 were shared with participants in this strand, to aid with development of awareness as to the design industry perspective, but also to inspire collaborative thinking in line with the needs of the sector and future possibilities. This strand also included preparation of an engagement plan for 4 industry segments in advance of strand 3.

Following the extensive engagement with design enterprises during strand 1, and the identification of key findings from within the sector, strand 2 shifts the focus to enterprise support, strategy and policy agencies, with the following objectives:

- Connect and share knowledge with the entities that are responsible for shaping industry and enterprise policy, strategy and investment.
- Frame and position the design industry in the context of these agencies' rationale of investible enterprise.
- Find common ground to facilitate access to existing enterprise development resources and identify other design industry appropriate mechanisms to drive growth and jobs in the industry.
- Raise awareness of the policy, strategy, and resource frameworks in place for the design industry.

Intended Outputs

- Qualitative data on the understanding and engagement of enterprise supports across the design verticals identified, and opportunities therein.
- Framework/model for an "Educate the Profession" initiative for rollout across all industry segments over the next 3 years.
- Feedback from the enterprise supports agencies and bodies regarding ongoing engagement with the design sector.

3.3.2 Methodology

Strand 2 of the project adopted a "one shot" approach, inviting +80 representatives from the relevant enabler agencies in the Atlantic region to participate in a facilitated online workshop. There was strong participation with +50% of those invited registered and a final 30% in attendance on the day. This is indicative of the interest in the design industry in the context of enterprise development and growth in the region. Additionally, and building upon strand 1 engagement, 4 design businesses were invited to attend. These businesses were selected on the basis of their contribution to strand 1, their situation on the Atlantic Economic Corridor, and their willingness to engage further with the project to drive the objectives of the project.

The workshop was held online, using Zoom, on Friday October 7th 2022, over a two hour session. IDI CEO Charlotte Barker delivered a keynote address, providing a context to the workshop and framing the design industry in Ireland for the enterprise enabler cohort. John Lynch, Design Lead, provided the findings of Strand 1.

The presentations were followed by Breakout sessions that focussed on ***'How might we enable sustainable enterprise and job growth in the industry in the Atlantic region – now and in the future?'*** This overarching theme was broken down into a series of questions, visualised for participants on a virtual whiteboard, on which, during the sessions, notes were live scribed by our facilitators. The entire workshop was recorded for later review and notetaking. The following questions were presented to the participants for discussion:

What's our understanding of design?

— What outcomes can it create?

— What skills does it involve?

— What does good look like?

How does design add value in other industries?

— How can design help the bottom line?

— How does design create intangible value?

— What should industry consider when working with design?

What are the existing ways we support self-sustaining enterprises to grow, and to provide jobs?

— What could we do differently?

3.3.3 Qualitative Study — Summary Findings

Informed understanding of the value of design

Participants from the various education and support agencies showed an informed understanding of the value of design. There was also awareness of how design has evolved over the years to become a business-critical, user-centred problem-solving approach for some. It was understood that design provides a range of intangible values which can enhance the competitiveness of businesses.

Also noted was the collaborative nature of design – working across disciplines and silos, but additionally that design is often seen as complicated, or difficult to work with. This could be interpreted to indicate a gap of understanding between design and other industrial sectors, and the need for better ways to integrate design in other sectors.

Understanding of how design adds value in other industries?

Design is understood to add value as an innovation approach to new product / service development, a way of working which is very successful at the creation of intangible values like engagement, brand, reputation, "stickiness", meaning, and strategy.

It is understood that it best adds value when introduced early in a process, with the iterative approach seen as key to allowing design reduce risk. It was also noted that it is fundamental for design to be interdisciplinary and collaborative. This points to the strategic importance of design for other industries, but it was additionally noted that as an approach, design can help with staff engagement, empowering teams and (perhaps) aiding retention.

Healthy Networks

Healthy networks encourage peer-to-peer learning and support between design businesses. When design-relevant support and information can be hard to find from LEO etc., the best information comes from those that have been through it already, and so these connections and the sharing of knowledge is extremely valuable.

Creating Ecosystems

Additionally, the development of communities and ecosystems made up of local enterprises is an idea about which design professionals are particularly enthusiastic. The establishment of local hubs to encourage collaboration between design disciplines and other industries is an example of how this might be encouraged.

New Talent Pathways to Design

It's important to shift away from the perception that you need to be an artist to work in design. Design is a spectrum, and creative minds from other backgrounds should know that design is a viable career option and not just for "artists". The demand for designers is there, and new pathways into design need to be explored for talent coming from other fields, industries or education levels. In the context of supporting the actions under the Design Skillnet report, this finding points to a potential opportunity to market design training beyond those who already consider themselves designers.

Perception & Enablers

The perception of the design industry from those external to it is often out of line with that of design professionals. Echoing what was heard in Strand 1, we heard further how significant a barrier this has become for design businesses, specifically when it comes to engaging with enterprise services. While we heard from some enterprise support representatives during the workshop who acknowledged their own limited understanding of the design industry, there were some whose understanding was very strong and they were passionate and constructive about wanting to improve this situation.

For the perception of design as a sector to change, the support of these external enablers who understand design is needed. Specific issues lie around the awareness of the range of design disciplines which exist, the design process, as well as the language and terminology of design.

Business Skills

Opportunities to learn and develop business and entrepreneurial skills are vital to design practitioners becoming self-sustaining businesses. Creative people have lots of good ideas, but without the knowledge to convert their talent into a reliable income source they will be unable to grow. Designers need access to relevant supports, information, and seek advisors and mentors with an understanding of design that can help them build their business.

3.3.4 Strand 2 Takeaways

- There is an informed understanding of the value of design.
- The enterprise enablers understand that design provides a range of intangible values which can enhance the competitiveness of businesses.
- Design is understood to add value as an innovation approach to new product / service development, a way of working which is very successful at the creation of intangible values like engagement, brand, reputation, "stickiness", meaning, and strategy.
- It is understood that it best adds value when introduced early in a process, with the iterative approach seen as key to allowing design reduce risk.
- There is a challenge for some enterprise enabler entities (in education and enterprise development services) in understanding the existing design industry verticals and the industry ecosystem. There is further engagement actions to be undertaken to facilitate awareness and understanding of the current range of design disciplines which exist, the design process, as well as the language and terminology of design.
- The discussion and response by the participants in Strand 2 following the presentation by the IDI and the S1 data demonstrate that there is a knowledge gap to be addressed with the participating enterprise enablers about the status of the design industry in the Atlantic Region. There was limited if any awareness of the entrepreneurial ambitions of the industry and the enterprise growth opportunity for the design and other industries. The enterprise development entities observed that many of the challenges identified in Strand 1 are not specific to the design industry and are issues that face Start Ups and SMEs in general.
- There is an acknowledgement that the enabler cohorts need to review mechanisms to reach out and into the industry and enable direct engagement with design businesses to help them achieve their enterprise ambitions. It is understood by the enablers that this is an imperative for the economic and community ambitions. These may be explored further in the context of the REPS, the LEOs, the CH, CREW CLG and the RDIE with the IDI.
- There is a clear commitment by the Strand 2 participants to address the enterprise development challenges identified in Strand 1 and to work together to enable design industry entrepreneurial ambitions.

3. ATLANTIC TIDE PROGRAMME STRANDS PROCESS AND OUTPUTS REPORT SUMMARY

3.4 Strand 3 — Educate the Clients — Cross-sector Engagement Sessions

3.4.1 Overview

Strand 3 set out to deliver networking sessions to cross-sectoral and enterprise agency clients, and to offer that same opportunity to relevant Skillnet groups, industry advocacy agencies and RDI entities. Strand 3 of the project delivered four workshops, (3 in-person, 1 online) and utilised the distributed network of Connected Hubs to engage stakeholders from each of our selected industry verticals. The programme was executed over a period of two weeks as follows:

Date	Vertical	Venue	Attendance
28.11.22	Medical Technologies (including Pharmaceuticals)	The Ludgate Hub, Skibbereen, Co. Cork	9
01.12.22	Construction	FutureCast, Manorhamilton, Co. Leitrim	7
05.12.22	Mobility	Future Mobility Campus, Shannon, Co. Clare	8
06.12.22	Fast Moving Consumer Goods	Online (originally Sligo)	4

Objectives

Building upon the learnings of Strand 1 and Strand 2, this strand allowed connection through to the selected industry verticals, highlighting the opportunity presented by the design sector, but also gathering a body of qualitative data on how each industry vertical perceives the value of design. A significant driver of engagement in this strand was WDC comms and the network of connected hubs. The focus of activities within these sessions was adjusted, following the outcome of strands 1 and 2. It was surmised that much remained to be learned as to the industrial perspective on the value of design, and the experience of working with design. As such, these sessions included a component of networking, and of sharing the learnings from Strand 1 and 2, but an emphasis on data gathering was added, with facilitated "focus group" engagement to allow for qualitative research.

Intended Outputs

- Cross industry network established for further development.
- Framework for future engagement mechanisms between design industry segments and other industries engagement based on direct engagement.
- Activation of market opportunities and CPD.
- Qualitative data on the perceived value of design, and engagement with design, from perspective of each industry vertical.

3.4.2 Methodology

It was the intention for Strand 3 to arrange meet and greet networking and knowledge sharing sessions in situ at the hubs. However, during strands 1 and 2, much new information surfaced as to, respectively, the lived experience of design entrepreneurs, and the understanding among enterprise support agencies of the sector. A significant gap in our data was identified – that of the prevailing experience of the industrial "customers" of design, within our selected industry verticals.

Questions arising included, how do they utilise design currently? And why? What values does design add, and might it add in the future? Are there key design practices which industry needs? What are the challenges of working with design? With all these questions, and more, there is the additional question of whether the answers differ depending upon the particular vertical being considered.

It was agreed to adjust the approach. Industry specific networking sessions which arranged with participants representing the other industry verticals, hub teams and project partner representatives. The adjusted approach allowed significant time in each session for research – enabling the Atlantic TIDE project to begin to answer the questions here mentioned and summarised in the report below.

Each workshop was held in situ for a three hour session. IDI CEO Charlotte Barker delivered a keynote address, providing a context to the workshop and framing the design industry in Ireland for the enterprise enabler cohort. John Lynch, Design Lead, provided the findings of Strand 1. The presentations were followed by a facilitated roundtable that focused on the following questions:

What is design?

- What skills does it involve?
- What does good look like?

In what ways does / might design add value in your sector?

- How does it help the bottom line?
- How does design add intangible value to your business processes?
- Can you share stories of ways in which design has impacted your business or sector?

What is it like working with design?

- What kinds of design are important to you and why?
- How might you find and select designers to work with?
- Do you have a preference for in-house or external designers? Why?
- Are there challenges associated with working with design?

3. ATLANTIC TIDE PROGRAMME STRANDS PROCESS AND OUTPUTS REPORT SUMMARY

3.4 Strand 3 — Educate the Clients — Cross-sector Engagement Sessions

3.4.3 Qualitative Study — Summary Findings

Findings are detailed here, first as a "deep-dive" into each workshop, showing the perspectives shared by our separate verticals, and then finally as a selection of emergent themes and observations made by the team, across all four events.

WORKSHOP 1 – MEDICAL TECHNOLOGIES (INCLUDING PHARMACEUTICAL)

Participants in this workshop included MNE Pharmaceutical Company Representative (x2),MNE MedTech R&D Representative, Medical Technology Company Representative, Connected Hubs Representative (x 3), Medical Technology Start-up (x 2).

Below is a précis of the views expressed by the participants.

Question 1 – What is Design?

Problem Solving, Innovation & Empowerment

Participants expressed the view that design is a methodology for problem solving, which allows lateral thinking, and thereby innovation. This was connected to the empowerment of teams and individuals in the MedTech and Pharmaceutical Sectors.

Customer Focused

A key characteristic of the shared understanding of design within the sector appeared to be that design is “customer focused” or “user focused”. The idea was shared that design, as complimentary to engineering, could ensure that products are developed with the users and customers (patients, hospitals etc.) in mind.

Culture and Willingness to Change

It was expressed that in order to make the most of design, an organisation must behave in an open minded manner and that this is connected to culture and alignment within an organisation.

A Strategic Tool

There was an understanding that design, or design thinking, could be used as a strategic tool, and that this connects to the need for leadership buy-in in Medtech / Pharma Companies. This strategic application of design pushes back somewhat on the “Problem Solving” statements above – suggesting that perhaps a strict “problem statement” limits the potential impact of a design approach.

Question 2 – In what ways does/might design add value to your sector?

Embracing Failure & Learning from It

There was a strong signal from participants that a characteristic value of design is as a mechanism by which enterprises can learn to embrace experimentation and understand failure differently – maximizing learnings to improve product and service offerings and operational efficacy. This was not without caveat – some added that the willingness to fail is often stifled by organisational culture and precedent. This reflects points made earlier under "culture and willingness to change" (1.3).

Talent Attraction & Retention

Connected to culture, empowerment, and willingness to innovate – there was consensus among the representatives from larger organisations that design offers value in the area of talent attraction and retention. While the words "design" or "design thinking" might not feature on job descriptions or HR recruitment messaging, it's "creativity" and "innovation" as part of the "ways of working" which are attractive to potential employees.

In-house, versus external, and the challenges of working with consultancies

We heard that there are specific challenges when it comes to working with design as a lot of design services are accessed through consultancies. It is difficult to get enterprise supports for work which might involve consultancies, and an example was cited where a consultancy ended a project because hours had been fully utilised within the budget.

With that acknowledged, there was some consensus on the need for both in-house and external design talent, each with its own purpose.

Networking to Find Design Talent

There was evidence of a difficulty in finding the right talent, and a preponderance to the use of ad-hoc, or formal networks. IRDG was mentioned as an organisation that is helping with this challenge, with a specific focus on design thinking practitioners.

WORKSHOP 2 – CONSTRUCTION

The workshop participants included construction Industry Advocates (x2), Design Contractor, Construction Contractor (x2 -medium scale), Property Developer (medium scale), Construction Technologist.

Question 1 – What is Design?

Problem Solving through Creativity & Open Mindedness

Design was understood to be a collection of practices which bring lateral thinking, creativity, curiosity and imagination to the process of solving problems. It was understood that design processes are often based on research, and on communication between multiple parties.

Mapping, Vision, and Strategy

There was awareness too, that design is about collaboration and mapping the future state of projects. The alignment across multiple different contributors and disciplines that is required in order to produce a construction project was seen as something that design assists with.

Question 2 – Ways that design does/might add value to your sector?

Cost Reduction

There was an emphasis on the role of design in ensuring that expensive late changes in construction project are less necessary – design being the tool to ensure that the end product is fit for purpose, and for the uses for which it is intended.

Improving the Lives of End Users

Design was seen as essential to the lifetime experience of the construction project – and its value to the end users. In practice, not all designers adhere to this principle, but it was seen as a fundamental role for designers – understanding and advocating for the user.

Aesthetics, History and Perception

The awareness that design brings of context, history, and the perception of a construction project was seen as valuable and powerful in offsetting a culture of “box ticking” and providing a legacy in the built environment to be proud of.

Application of New Technologies

The construction sector is seeing the emergence of several disruptive new technologies, e.g. the advent of 3D Printed construction, and the widespread adoption of Building Information Modelling over the lifetime of a construction project, and of the building that results. This is seen as a "convergence" moment for the sector, which will require design skills in order to capitalise on potential. This is a two way street – where design can integrate new technologies, but also where new technologies can empower and drive new design possibilities.

Forthcoming & Current Sectoral Changes

The construction sector is under huge pressure to deliver large volumes of housing over the coming years, and not to repeat the mistakes of the past, made in a climate of such scaled delivery. Design is seen as a tool to work with accounting for the constraints of rapid delivery, the possibilities of new technologies, and the requirements of end users who will live in these buildings for generations to come.

Question 3 – What's it like working with Design?

Involvement of Building Contractors is Important

Design, as has been noted, is seen as a way to eliminate costs incurred due to issues arising with the final product of a construction project, and during the process of its construction. Candid stories were exchanged of costly problems which occurred because design had not consulted with the construction contractors who would deliver the finished product.

Design, Architecture, and the development process

There are several challenges built in to the traditional development process, and architecture, as a design discipline, is part of this. Compounding the challenge of getting design involved from the outset is the traditional architect's approach, the need for speed, and the pressure to get built, and the cost of design – including the perception that design can delay projects from getting started. The converse is the tendency for design (other than architecture) to only be called upon "last minute" and when mistakes are already made.

Referrals and Networks

The participants advised that designers for the construction industry are sourced through existing networks, contacts of contacts. What was also interesting, is that in construction, this dynamic is very similar – a sector made up of mostly SMEs, working with one another and getting work through word of mouth.

WORKSHOP 3 – MOBILITY

The workshop was attended by an Agile Coach Mobility Technology Lead, Mobility Technology Company Engineer (x 2), Connected Hub Representative, Brand Consultant, Aviation Organisation Representative, CEO of Mobility Technology Company, Enterprise Development Representative.

Question 1 – What is Design?

'Creativity' vs Design

We heard that the word "creative" is a bit of a double-edged sword, specifically placing design as something that requires some kind of "intrinsic" skillset or mindset, but also separating design from problem solving, and a means by which to achieve business goals. Despite the ambiguity these words create, participants reverted to the use of "creativity" as a description of the skills a designer must have.

Outcomes which work – for Organisations & Customers

Our participants noted good design as that which meets not just customers' goals, but also the goals of the organisation, and internal metrics. Measuring the impact of design was described as something that is lacking.

Subtractive Design – knowing what's needed, and what's not needed for a particular solution

One among our workshop respondents noted the following which was mentioned in other workshops too, and so is noted here: ***'Good design is about ability to differentiate between what's needed and not needed for a particular solution, when I was working with simulation software we got the full instructions and when fully implemented we didn't know what the solution could be… design can help identify what kind of solution we are trying to achieve before we go about building it.'*** – Engineer, Mobility Technology Company

Question 2 – In what way does / might design add value to your sector?

Achieving Objectives & Justifying Budgets

Design must be connected to organisational and business objectives and must justify its own budget. This was made clear by a few among our participants, and vitally was a common concern across different kinds of organisation from start-up to government funded entities.

Dealing with Change – New Contexts and Technologies

Design is associated with change, culture, and transformation. We heard that design has a role when new technologies disrupt a sector, that currently there is a shift in ways of working and organisational design is important, and that design must also educate – and instil a knowledge in industry which assists application of design, and collaboration with designers.

Strategic & Cultural Value

We heard that design adds value to the higher order operations of an organisation, and that designers can mediate between different parts of an organisation in the creation of strong strategy. This must be coupled with a culture of design – one which includes a drive for efficiency and improvement and not accepting things as "just the way they are".

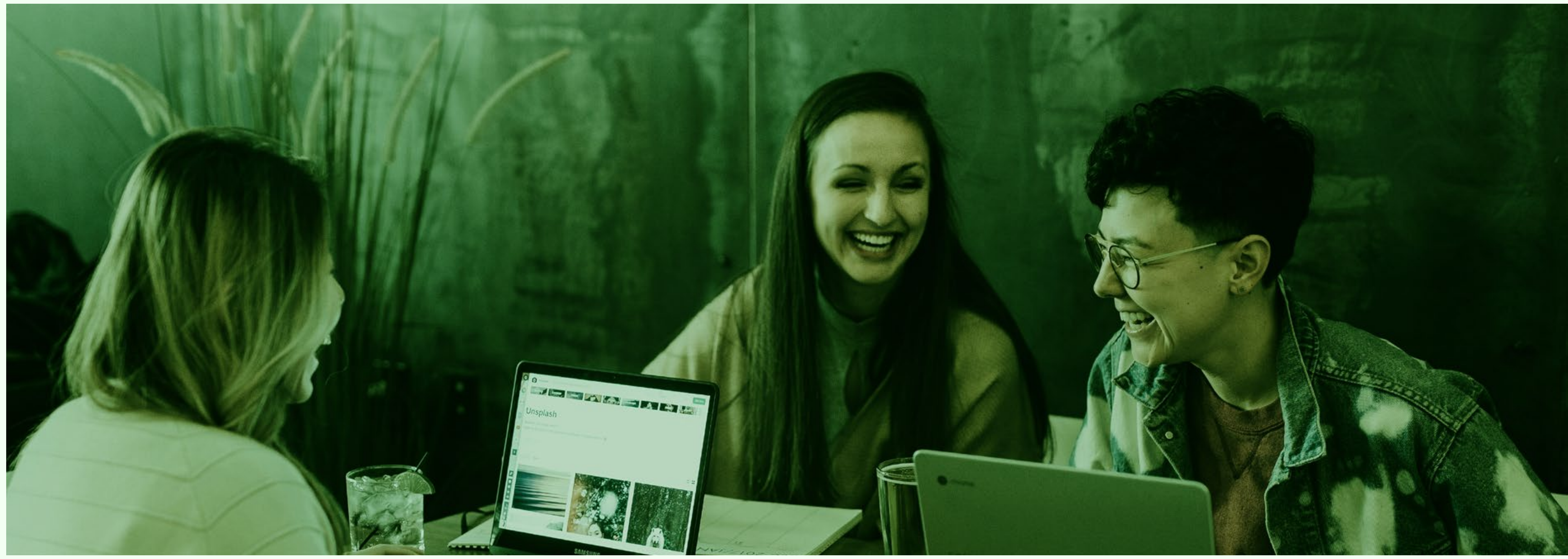
Question 3 – What's it like working with Design?

'Personality' and finding the right designer

In a finding that hasn't come up before – workshop participants spoke of the need to find the "right" designer, by personality, in order to ensure the success of a design initiative. This was contrasted with other professions, but also connected to recruitment policy and company culture.

In-house versus external

We heard that there is a need for both in-house and external design skills, and that each has an important value add – from fresh thinking, to longer term development. We also understood that some organisations, when outsourcing, need to overcome the challenges of procurement processes in order to source good design, and allow scope for design to happen.



WORKSHOP 4 – FAST MOVING CONSUMER GOODS

This workshop was attended by a Founder/CEO – Beauty Products Company (x2), Brand Manager – Beauty Products Company, CEO & Founder, Brewing Business.

Question 1 – What is Design?

Consistency within Context

Our FMCG enterprise representatives spoke of the need for a design to “fit” within the context of their business, understanding not just their brand, but also their processes and the stories around their products. This awareness of the context of the business helps designers to help businesses by providing work that is consistent with the context, and in a shorter amount of time.

Commercial Purpose

There was alignment around the fact that design needs to begin from a commercial purpose, that costs must be linked to value added, and that design mustn’t harm commercial value. There was some risk noted that design, when not commercially driven, can be taken less seriously than other professional services.

Question 2 – What way does / might design add value to your sector?

‘Brand’ as an intangible, driving outcomes

There were references to some of the value of design being intangible, but that those intangibles drive outcomes throughout the business. This can be difficult to quantify, and the respondents were not specific as to those outcomes.

Design as an holistic approach – enhancing customer (user) experience

We heard that modern product experiences extend through digital channels, into retail settings, and on through the product life cycle itself. The application of design, through a range of design skills, is required to enhance a product in this era, but some core principles help to tie these experiences together.

Question 3 – What's it like working with Design?

The cost of design can be challenging
We heard of mechanisms developed by FMCG companies to reduce the risk of longer design processes costing more than is affordable. This included a "hybrid" approach, mixing in-house and outsourced designers, and also care in returning to the same outsourced providers to utilise their familiarity with the brand.

Design needs to better understand the business
It is seen as important that design providers understand the business of an FMCG goods company, from their administrative processes, project management and planning, through to the seasonality of their work, and the kinds of tasks that might come up in a given year. This allows design to pre-empt the needs of the company, instead of being a "reactive" mechanism within the business. An opportunity was highlighted in helping businesses understand design too.

3. ATLANTIC TIDE PROGRAMME STRANDS PROCESS AND OUTPUTS REPORT SUMMARY

3.4 Strand 3 — Educate the Clients — Cross-sector Engagement Sessions

3.4.4 Strand 3 Takeaways

3.4.4 Strand 3 Takeaways

- There is an informed understanding of the value of design.
- It is understood in all four verticals that design can add value in these diverse industrial sectors, in some cases on a strategic and innovation level, in others more closely related to operations.
- The entities engagement S3 from across the different industry verticals understand that design provides a range of intangible values which can enhance the competitiveness of businesses. It is recognised that it best adds value when introduced early in a process.
- Each industry has its own nuanced understanding of design and that perceptions of design in each vertical vary. Based on the input from the S3 participants in this project only, e.g. for medical technology and pharmaceuticals the perception was predominantly one of design as a mechanism for innovation or strategic initiatives and linked to product development. For construction, the dominant experience of design came from architecture, and, as such, design disconnected from the operational reality of the construction of buildings and infrastructure. When speaking to the Mobility sector the clear connection was made with engineering, and design as a mechanism for problem solving.

  The session with FMCG companies mostly considered branding and merchandising. There is further action and desk research required to explore industry interactions and engagement with the design industry verticals in order to ascertain how to progress enterprise opportunity.
- From the 4 verticals workshops, broadly design practices being harnessed in each industry could be oriented on a spectrum from design as a strategy and design as operations.
- Entities involved in S3 design draw on a skilled employee base and contractors for design services. It was almost universally acknowledged that outsourcing of some design by a business is a good vehicle by which to bring in fresh thinking and to benefit from the experience that designers might have accrued from working in different adjacent contexts. This is tempered by the time it takes for external designers to familiarise with a new organisation, the context within that organisation, and the scope of a given brief.

- The discussion and response by the participants in Strand 3 following the presentation by the IDI and the S1 and S2 data demonstrate that there is a knowledge gap to be addressed with the participating enterprise enablers about the status of the design industry in the Atlantic Region.

- In all four verticals, design industry services are obtained predominantly on a referral basis. It was noted that sourcing Design Services is ad-hoc. The identification of appropriate, relevant professional and available design service providers is a challenge. There is an opportunity to develop business relationships in these industry verticals with the design industry, in order to facilitate more focused and targeted business networking and enterprise engagement in the region.

- The industry business model in all four verticals facilitates remote working.

- It is understood that it is best practice to bring design in early in a process; however, it was expressed that involving design from the beginning can be perceived as costly. That cost might enable efficiencies or cost reduction further along in the process, through early identification of potential issues or opportunity, but it can be difficult to relate those efficiencies back to design, as justification for the up-front investment. There is a need for further engagement and research to trace the value and supply chain and to provide best practice examples to demonstrate the value of upfront investment to an enterprise, industry and a region.

- There is a need to share knowledge about new design disciplines and their relevance, import and applicability to the four industry verticals. This may be explored through the IDI, skillnets, hubs and the orchestrator entities.

- Contrary to initial partner assumptions, recruitment for this strand (3) was not as easy as strands 1 and 2 with significant effort required on the part of the Connected Hubs managers and enterprise enablers in order to identify and invite individuals from appropriate companies and industry advocate organisations. Further work is to be done on reach and access to “other” industry entities. The incentive to engage in an ongoing process is to be considered carefully.

4. PROJECT TAKEAWAYS

The partners asked, how might the actors collaborate to address the identified challenges for the design industry in the region. The partners set out to deliver the impacts outlined below:

- Enable the development of self-sustaining enterprise and the consolidation/growth of the design industry in the regions and ROI.
- Address key recommendations in the Design Skillnet Report 2021 and activate the response for long term design industry growth by the IDI.
- Activate regional and national design industry and cross industry networks.
- Establish formal cross industry engagement, networking; information sharing re. the specific industry segments and relevance and value to altered industry environments.
- Inform design industry enterprise development strategy for all partners and stakeholders beyond this initiative.
- Augment the existing design industry network and connection to IDI.
- Connect the design industry in their own local hubs.
- Establish model for future sustained engagement and rollout of ongoing cross sectoral communication, networking, enterprises activation; activation of other recommendations in the Design Skillnet report; address government agenda re. design on an ongoing basis.
- Baseline design industry data capture and collation – allow for evidence based creative enterprise strategies at local, regional and national level and within sectors.
- Demonstrate impact of direct engagement with the sector to address identified industry challenges.

- Identify future activation opportunities for design industry and cross industry innovation; supports for start-ups in design industry; augment network for the CREW/ATU creative enterprise incubation programme.
- Hubs – anchor hubs showcase + engagement opportunity + networking; All hubs – engagement + network + Reach.
- Facilitate identification of thematics for RDI with tertiary level and industry partners.
- Identification of design industry business activation needs.
- Provide an activation mechanism for other recommendations in the Design Skillnet report.
- Raise awareness re. IDI, local and regional creative enterprise infrastructure and hubs support structures.
- Establish formal cross industry engagement, networking; information sharing re. the specific industry segments and relevance and value to altered industry environments.
- Activate engagement between IDI and key cohorts in MedTech; AR/VR; Mobility; Construction in the W/AEC/South West.
- Augment sustainable enterprise opportunities in the West and nationally.
- Strengthen collaboration between IDI and CH for harnessing the platform in long term for pan industry networking and collaboration.

The partners met (online) to review programme strands report and consider the findings and agree next actions. The meeting notes were collated by the operations lead (WDC) as a SWOT and Actions format and circulated. A SWOT analysis of the project process in context of the impacts is detailed below. The next step actions are outlined in the next section.

Strengths

- Agreement by all partners and participants that design is intrinsic to every industry and adds value.
- The AT model is acknowledged as appropriate/suitable with regards to engagement, relationship building, networking, communications, industry opportunity.
- The Connected Hubs network is identified as an important engagement and communications mechanism to for reach, access, networking, project and training development opportunities within the design industry and cross industry.
- The AT project yielded learnings for all partners about the multitudinous sectors within the design industry and how industry harnesses multiple sectors to drive the bottom line in enterprise.
- The quantitative survey outputs indicate a strong cohort of established, professional design enterprises working in the Atlantic Region, trading globally and with an ambition to grow and scale.
- The project partners have established a working relationship collectively and as separate entities with the IDI. This provides a significant range of options to address the challenges identified in the s-m-l term.
- Through the partner entities, there is a community of enterprise enablers in the Atlantic Region that see the value of the design industry and support a proposal to build on the work of AT2022 with a view to a medium to long-term strategic plan to consolidate and grow enterprise opportunities within the design industry and across other key industries.

Weaknesses/Challenges

- There is a disconnect between the design industry, enterprise enablers and business communities in other industries in the Atlantic Region.
- The design industry, as represented in this project, perceives that the intrinsic value of design to every industry is not widely understood.
- The design industry needs the support of existing and alternative enterprise frameworks and supports to deliver on enterprise, sectoral and regional S3 ambitions.
- There is a knowledge gap within the design industry about the existing enterprise support frameworks. This may be addressed by the IDI in partnership with the enterprise enablers.
- The design industry ecosystem is invisible; the business model is structured around SMEs with freelancer/consultancy. Further exploration is required with regards to how this may be supported in context of existing government enterprise frameworks.
- The primary designer services/products differ with each industry vertical (Med/Pharma; Construction; Future Mobility; FMCG). All rely presently on a referral system to reach appropriate design industry service and product providers.
- Significant frustration identified by all parties with regards to the national procurement system.
- Agreed that there remains a significant challenge with regards to visibility of existing enterprise supports.

Opportunities

- Across each strand, the following was identified as a priority – Networking and ongoing orchestrated, structured engagement for knowledge sharing, skills development, customer reach and access, a strategic development plan.
- Existing national, regional, local Rural, LG, CI and DETE policy and strategy frameworks are appropriate for the development and activation of a medium-long term design and cross industry strategy for design enterprise consolidation in the Atlantic Region (and nationally).
- Both in-person and online sessions were considered effective, with good connections made between participants, facilitators and partners. The online sessions (S1 and S2) yielded higher participation numbers. It is acknowledged that online engagement is considered effective, efficient (time and resource) and productive, particularly for enterprises in rural areas. The CH mechanism remains a critical component of a successful network into the future.
- Identifiable "hubs" of thematic strength in terms of service/product into the four vertical industries in Strand 3. There are tentative indicators of the potential for a design industry cluster – hub and spoke model which may be explored further.
- Emergence of a tentative vision for the design industry in the Atlantic Region as part of driving innovation, excellence, sustainable jobs, livelihoods and prosperity.
- Harnessing the quadruple helix model, the partners have identified multiple possible funding opportunities to support s-m-l activations.
- The AT project has positioned the IDI in the DETE REP strategic framework. NW REP has identified actions to roll out within RSO 1 (Barriers to Entrepreneurship and enabling enterprise) as well as alignment with RSO 4 (Circular Economy), RSO 5 (Shared Island) and RSO 6 (Skills).

Opportunities (cont.)

- The participating education entities will engage in future exploration with regards to attracting talent to existing programmes and to devise new industry relevant programmes, new pathways for talent to train/ upskill. This includes exploring pre-tertiary level opportunities.
- The existing partners will continue to collaborate on a next phase of Atlantic TIDE at a macro level within the framework of the DETE Enterprise White Paper and the Smart Specialisation Strategy (in key pillars including NetZero, Digitalisation, Clusters, Innovation); the Regional Enterprise Plans, the DRCD Rural Futures and WDC AIR, Connected Hubs and the Creative Enterprise plan, and IDI strategy as well as the DFHE Impact 2030 Strategy, DE Strategy and the CI Éire Ildánach Policy and CI CIF to 2027.
- The WDC is well positioned to facilitate orchestration of partners and stakeholders , as appropriate, of the next phase of AT in the context of the recent investment in a full time role of a programme manager for creative enterprise development in the Atlantic Region.
- The partners believe that there is an opportunity to position the Atlantic Region as a best practice example of the quadruple helix model at work to deliver on the national design industry /IDI ambition and to deliver sustainable prosperity for design enterprises and enterprises in the four other industry verticals in the project.

Threats

- Existing fragmentation across the Atlantic Region with regards to strategic action for design and cross industry business ambition.
- Lack of a current joined up vision, mission and plan for the design industry as part of the creative economy and industry in the region.
- There is a need to present and show best practice examples in the Atlantic region to underpin any development plan.
- Some design industry sectors/segments require professionalisation / business offering standardisation.
- Immediate and ongoing engagement required with all participants to maintain momentum, to harness the enthusiasm generated from the project, to continue to build up the new relationships, to build cohesion and collective vision.
- Appropriate, dedicated personnel are required “on the ground” to drive engagement from within the design industry advocacy entity (the IDI) and likely also in the context of the Atlantic Region RDIE agenda.

5. NEXT STEPS

5.1 Partner Actions Agreed 2023+

— There is collective agreement that the current project partners will continue to work together to address the gaps/challenges and opportunities, to offset threats to sustainable development and to build on the strengths as identified in the Atlantic TIDE 2022.

— A s-m-l term "strategic business activation" plan is to be researched, devised and activated by the partners from 2023 onwards.

— The vision is to position the Design Industry across the Atlantic Region as a competitive advantage on the global stage to drive sustainable livelihoods and prosperity in all communities in the Atlantic Region.

— The short term plan to be devised based on findings from phase 1. The partners will re-group in January 2023 to draft and source funding for a rollout of phase 2 in 2023-2024 and to address the following actions:

- Further analysis of the programme strands data.
- Reach out to all the identified design entities in the Atlantic Region with view to integrating into the IDI network and activating a phased engagement programme across the Connected Hubs.
- Research/exploration into specific S3 verticals design services and product needs (future facing).
- Research about the existing services/products available from design enterprises in the Atlantic Region and those trading into the Atlantic Region.
- Research about the skills needs and gaps in these enterprises.
- Development of an enterprise supports "handbook" for the IDI and possibly talks/intro sessions to enterprise supports by our partner agencies and development of a "wrap-around" service specific to the design industry.
- Research about best practice models globally with a view to enterprise capacity building, design industry infrastructure/facilities/professional standards. To include sharing the recently introduced public sector design principles with AT stakeholders.

- As part of a communications exercise, source best practice examples and showcase to other industry, enterprise enablers and funding entities (tbc if to do through the CREW data project Q1 2023). “Show don’t tell” principle.
- Bring all the participants from phase 1 and additional entities from design industry and the four verticals together to explore the proposed vision.
- Development of a medium-long term plan to consolidate and grow the design industry in the Atlantic Region based on reliable current data.
- Identify an appropriate fund to secure required personnel on the ground to drive the business plan once completed.

5.2 Conclusion

There is collective agreement by the partners that the project objectives, outcomes and impacts have been achieved.

There is a significant opportunity, with sustained, targeted and appropriate resources, to consolidate and grow the design industry in the Atlantic region, to enable sustainable enterprise in identified hubs and to position the design industry in the Atlantic region as a competitive advantage on the global stage. The partners will continue to collaborate to address this vision.

APPENDICES

APPENDIX 1

Acknowledgements

Project Partners
Sligo Local Authority Creative Ireland Office and the Sligo Local Authority Local Enterprise Office, the Institute of Designers in Ireland, Western Development Commission, Connected Hubs Network, An Chroí Sligo, Future Cast Leitrim, Innovate Limerick, Ludgate Hub Cork, Future Mobility Campus, Clare, Regional Enterprise MidWest, Regional Enterprise NorthWest, Regional Enterprise West, CREW CLG.

Programme Strands Process and Report
The partners would like to extend a sincere thank you to Context Studio Limited for work on the programme strands process and report.

Strand Participants
The partners would like to extend a sincere thank you to the 128 participants from industry for their time, expertise and input.

Funders
The partners would like to thank Creative Ireland for the direct funding for the Atlantic TIDE project 2022.

The partners would like to thank the partners for the indirect resources for the Atlantic TIDE project 2022.

APPENDIX 2

Literature Review (selection)

AIRe 2021 — Dr Brendan O'Brien (WDC)

Barriers to Entrepreneurship 2021 (NWREP)

CCI Value Chains European Commission 2017

Creative Ireland Eire Ildánach — DTCAGSM

Creative Sector Supports in the West of Ireland: Entrepreneur Perspectives on Future Needs — Creative Momentum 2018

Design Skillnet Design Practice in Ireland Report 2021

Digital Transformation: Assessing the Impact of Digitalisation on Ireland Workforce — EGSKN 2018

DETE Enterprise White Paper 2022

Economic Impact and Assessment of the Design and Crafts Sector of Ireland — DCCI 2021

EI Strategy 2021-2024

Local Authority EDC Plans: Atlantic Region (existing-under review) National Cultural Policy Framework to 2025 — GOI

Our Rural Futures — DRCD

Project 2040: Building Ireland's Future — GOI

WDC 2021 REPS MW/NW/W 2018-2020

SME + Entrepreneurship Growth Plan SME Task Force 2021

Solas Profile of the West Region 2021,

RSES NWRA and SWRA, Atlantic Region: Creative Economy Plan 2026 — WDC

WDC Strategy 2019-2024

APPENDIX 3

Atlantic TIDE – Programme Strands Process and Outcomes Report

(v1.0, 7th December 2022)

Compiled by Context Studio for the Institute of Designers in Ireland

www.contextstudio.ie

ATLANTIC TIDE
Transforming Ireland's Design Economy

REGIONAL ENTERPRISE PLAN MID-WEST

REGIONAL ENTERPRISE PLAN WEST

REGIONAL ENTERPRISE PLAN NORTH-WEST

Clár Éire Ildánach Creative Ireland Programme | SLIGO COUNTY COUNCIL COMHAIRLE CHONTAE SHLIGIGH | WESTERN DEVELOPMENT COMMISSION | INSTITUTE DESIGNERS IRELAND | Innovate Limerick | LUDGATE | HUB | CREW | AN CHROÍ DIGITAL HUB | FUTURECAST | connectedhubs

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CONTENTS

STRAND 1

PAN DESIGN INDUSTRY NETWORK & DATA GATHERING SESSIONS

Strand Description

The first strand of the programme set out to engage self-sustaining design enterprise entities to participate in networking sessions with participants filtered based on design industry priority verticals.

To ensure appropriate focus on the verticals required, a screening survey was first issued to the community, by which respondents could express interest in attending one of the workshop sessions, but also provide important quantitative data to the initiative relating to the profile of these businesses.

The recruitment aim was to harness IDI membership and network and well as the Connected Hubs.

The screener survey enabled us to filter for businesses with growth ambition, and focussed around our priority design verticals: product/industrial design; communications design (graphic, branding, website design etc.), structures and spaces (architecture, interior design, exhibition design), digital design (web, interaction, animation, tv, social media), strategic design (service design, ethnography, futures, insights), immersive design (VR/AR etc.), product design (industrial design, consumer product design, fashion).

Anticipated outputs in this workstream included new connections created across the sector following the engagement, but also a dataset by which to drive engagement during strands 2 and 3 of the project. This data would include quantitative data (screener survey) as well as extensive qualitative data sourced through the online workshop sessions.

Objectives of this Strand

Network established across multiple design industry segments; Raised awareness of the policy/strategy/ resource framework in place for the design industry; Raised awareness about new industry trends/evolving market opportunities for existing design entities in all segments as well as new enterprises. Also harness WDC comms to drive design industry engagement.

Intended Outputs

- Augmentation of the existing network and connection to IDI
- Loop the design industry in through their own local hubs
- Quantitative and qualitative data from the sector
- Enhance awareness re. IDI, local and regional creative enterprise infrastructure and hubs supports structures.

Intended Impacts

- Strengthening of networks through collaboration
- Better data re. design industry base across the country
- Establish connection for future ongoing engagement and rollout of ongoing networking as well as activation of other recommendations from Design Skillnet report
- Address government agenda re. design on ongoing basis
- Strengthen local design industry base in Galway and counties in the regions in the REP and nationally from 2023+
- Data for all partners re. development of design industry development needs and jobs growth
- Connect Skillnet with Connected Hubs for access to platform in long term.

STRAND 1

FINDINGS: QUANTITATIVE DATA — THE SCREENER SURVEY

Research Methodology

The first strand of the work held the intention to reach out across hubs to all design entities and to host networking sessions based on design industry priorities. The aim was to harness IDI membership and others for these engagement sessions.

A plan was developed to host three workshops, allowing broad representation from design businesses. A screener survey was created to ensure that our participants would represent businesses appropriate to our design verticals, who harbour ambitions for growth with relevant industrial segments.

The survey also provided valuable data as to the size, maturity, and ambitions of enterprises, and their prior engagement with enterprise supports and networks.

Questions Posed During the Survey

1) Which county is your business based?

2) How long has your business been trading?

3) How many employees does your business have?

4) Where are your customers based?

5) Which design services do you offer?

6) Does your business work with any of the following industries? (FMCG, Construction, Mobility, MedTech)

7) Does your business have ambitions to grow?

8) Does your business have ambitions to work with any of the following industries? (FMCG, Construction, Mobility, MedTech)

9) Describe your sales capacity.

10) What are your barriers to growth?

11) Which of the following support services have you engaged with to date? (LEO, EI, IDA, ÚnG, IBEC, Skillnet)

12) Any other supports?

13) Are you a member of IDI?

In total 64 businesses responded to the survey, from 16 counties, with 93.8% declaring definite, or potential growth ambitions.

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STRAND 1

SURVEY FINDINGS

While our sample of 64 businesses is small, it is representative of the diversity of these micro, small, and medium enterprises which exist along the Atlantic Economic Corridor. It could also be understood to represent a strong baseline study, considering it is not known how many relevant enterprises currently exist.

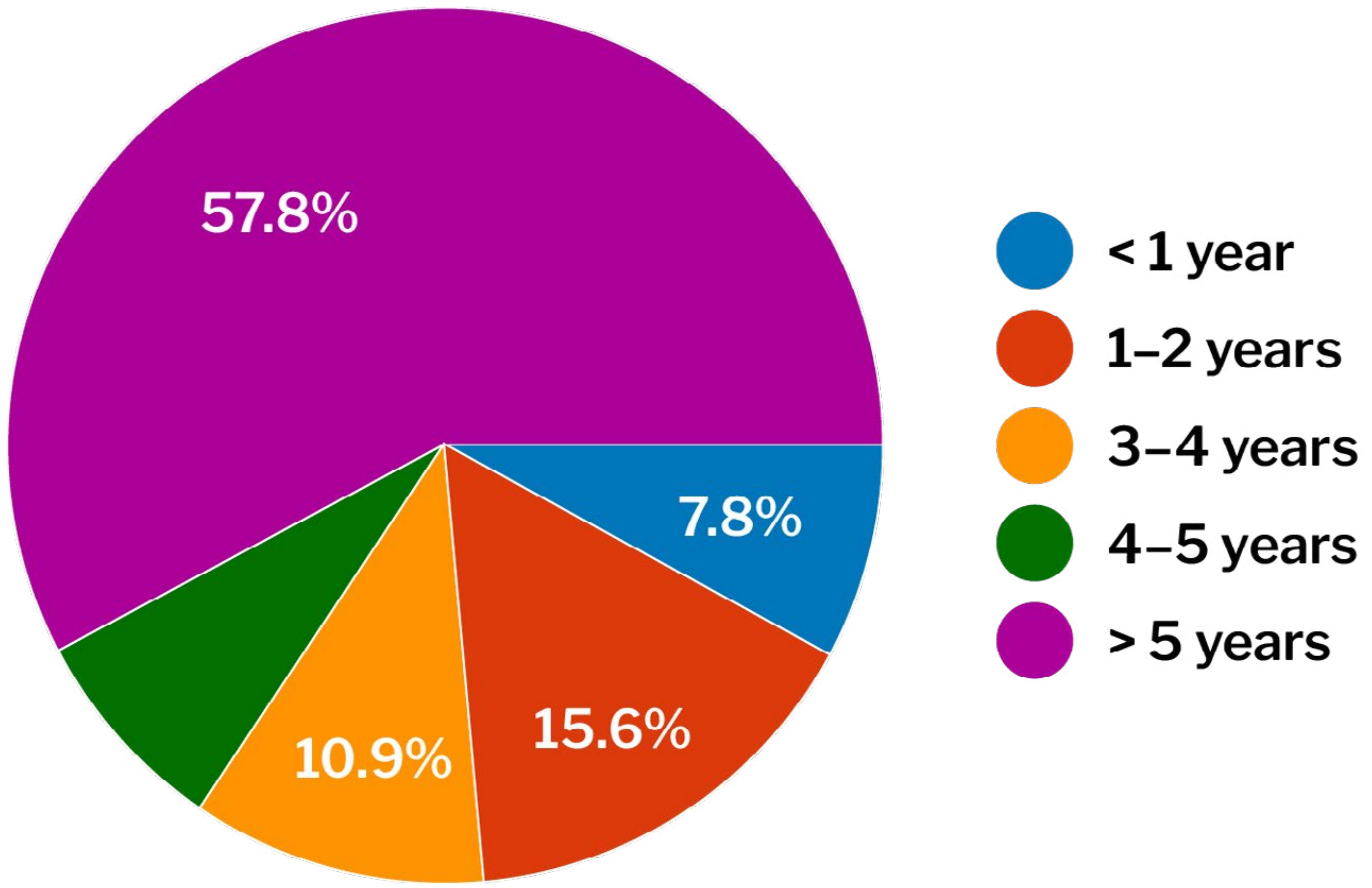
Geography

Business representatives from 16 counties completed the survey with the top counties represented being:

County	# of Enterprises	% of Total Responses
Galway	10	15.6%
Cork	10	15.6%
Limerick	6	9.4%
Dublin	6	9.4%
Sligo	5	7.8%
Mayo	4	6.3%
Donegal	4	6.3%

Trading Time

How long have you been trading?
64 responses

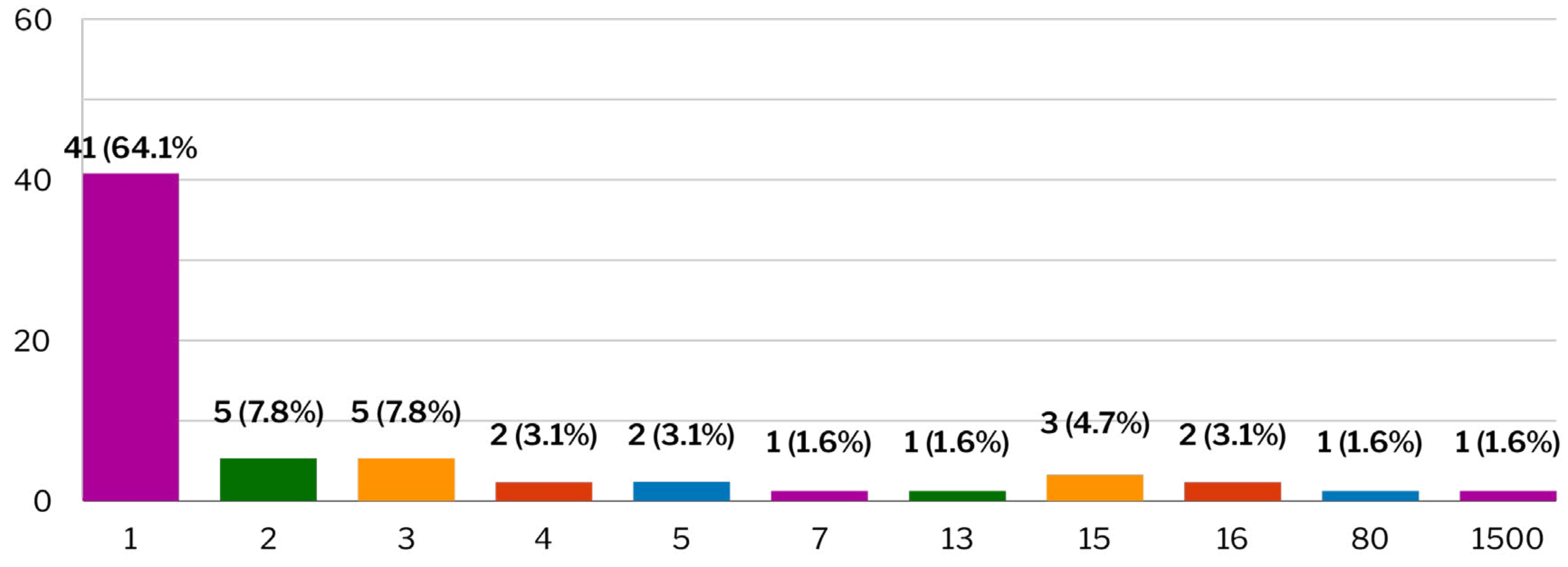


More than half of our respondent enterprises had been trading for more than 5 years, with several others (more than 25%) having been trading for between 1 and 4 years. This suggests a high level of enterprise maturity in the sector, and further investigation may provide insight as to the true levels of maturity in the >5 years bracket.

Number of Employees

The vast majority of responding business were micro-enterprises, with **41 of our respondents having just 1 employee**. There were **14 businesses with between 2 and 5 employees** while **7 companies reported between 7 and 80 employees**.

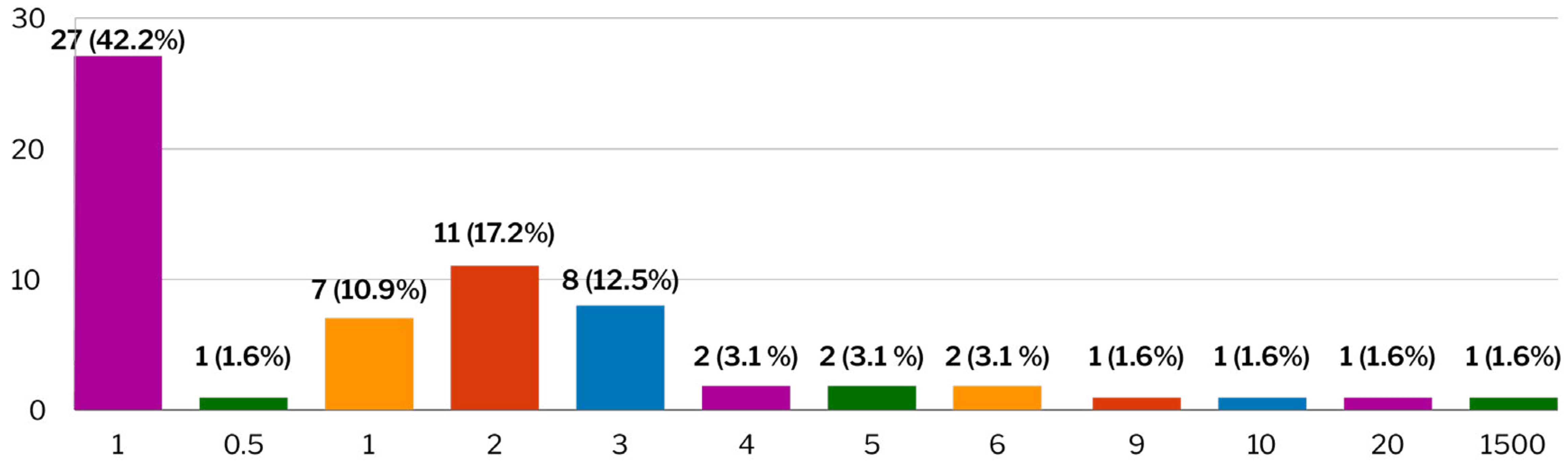
How many employees does your business have?
64 responses



Number of Contract Employees

Important too, is the number of responding enterprises who employ contract employees, with more than 30% claiming to have 1 or more contract employees.

How many contract employees does your business have?
64 responses



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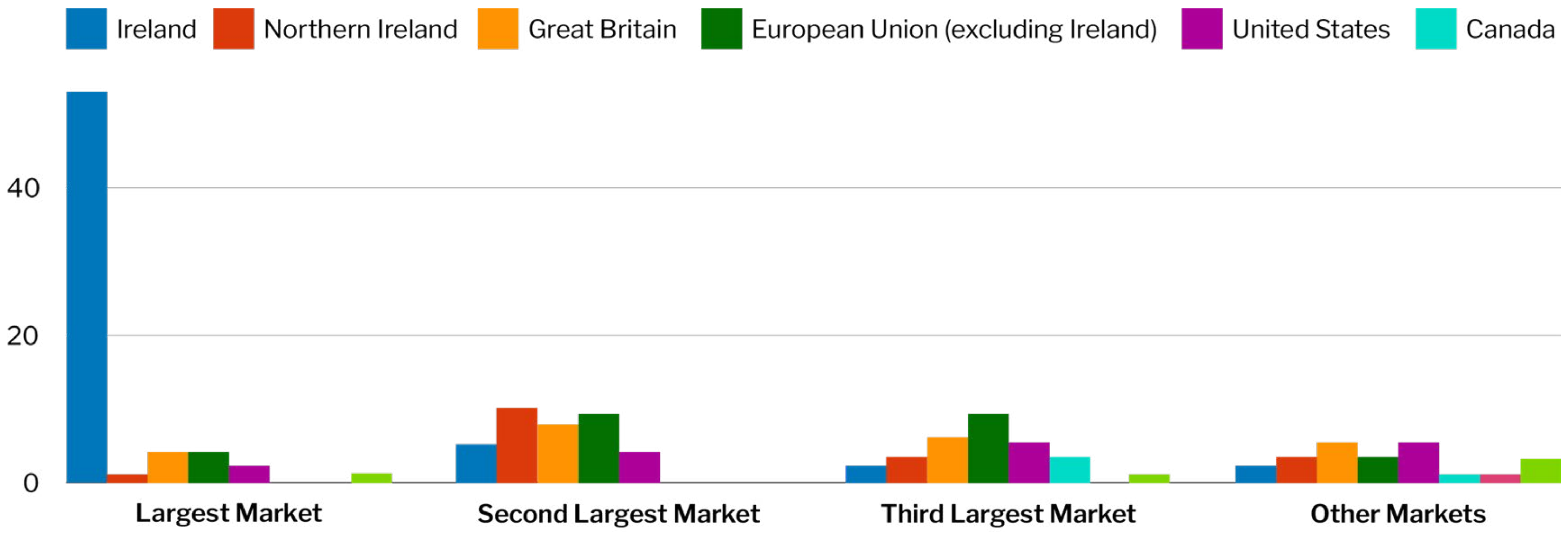
Export Markets

Many of our responding enterprises are actively exporting their design services, with Northern Ireland and Great Britain being the primary export markets, closely followed by the EU. In some cases, business list GB, EU and USA as their largest markets.

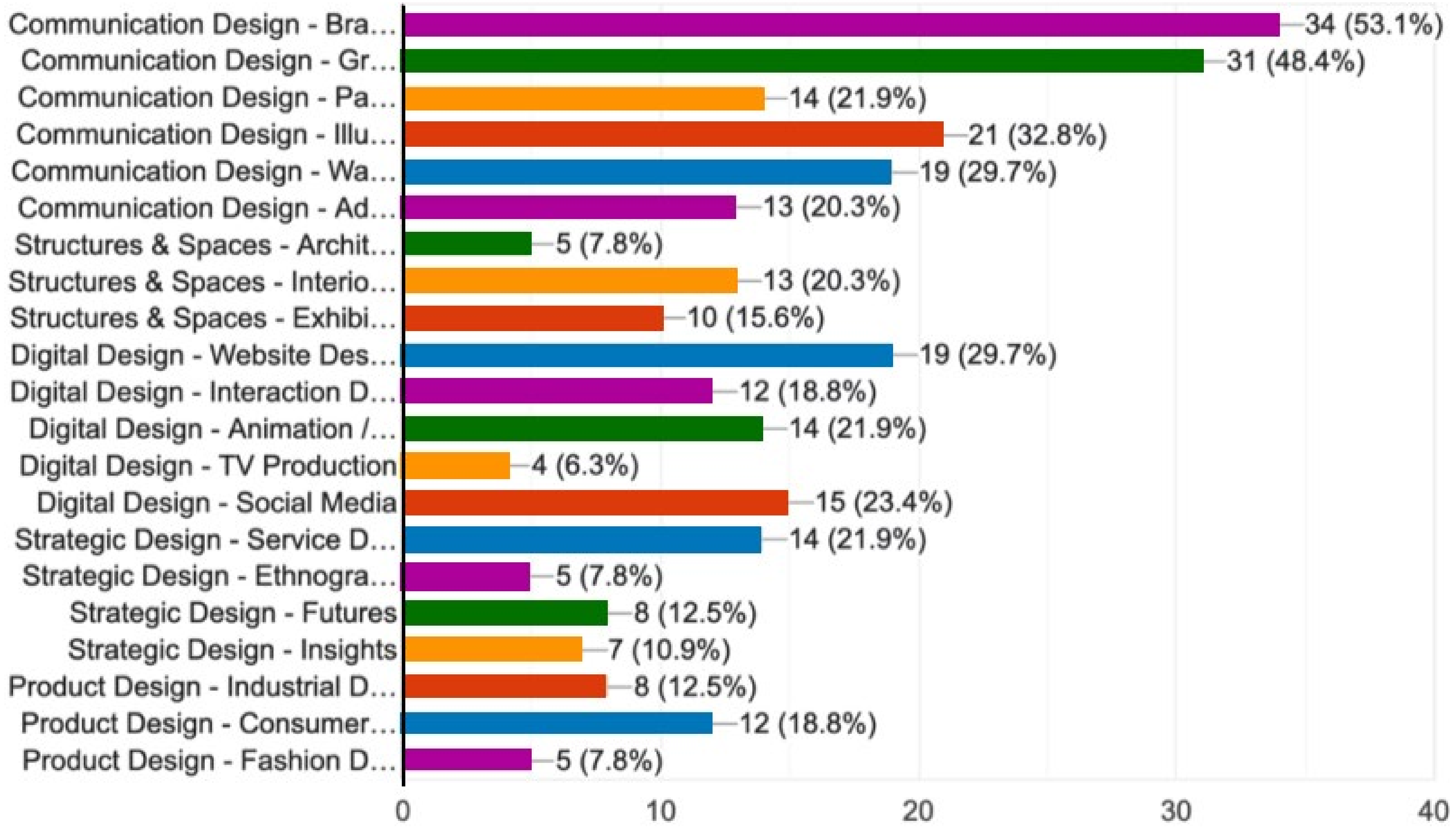
Where are your customers based?
64 responses



Design Verticals

Respondents included a diverse set of design verticals, with greater representation among companies providing **Communication Design** including **branding, graphic design, packaging design, illustration, wayfinding and advertising**. **Digital Design** was the next most represented vertical, including website design, interaction design, animation, TV production and social media.

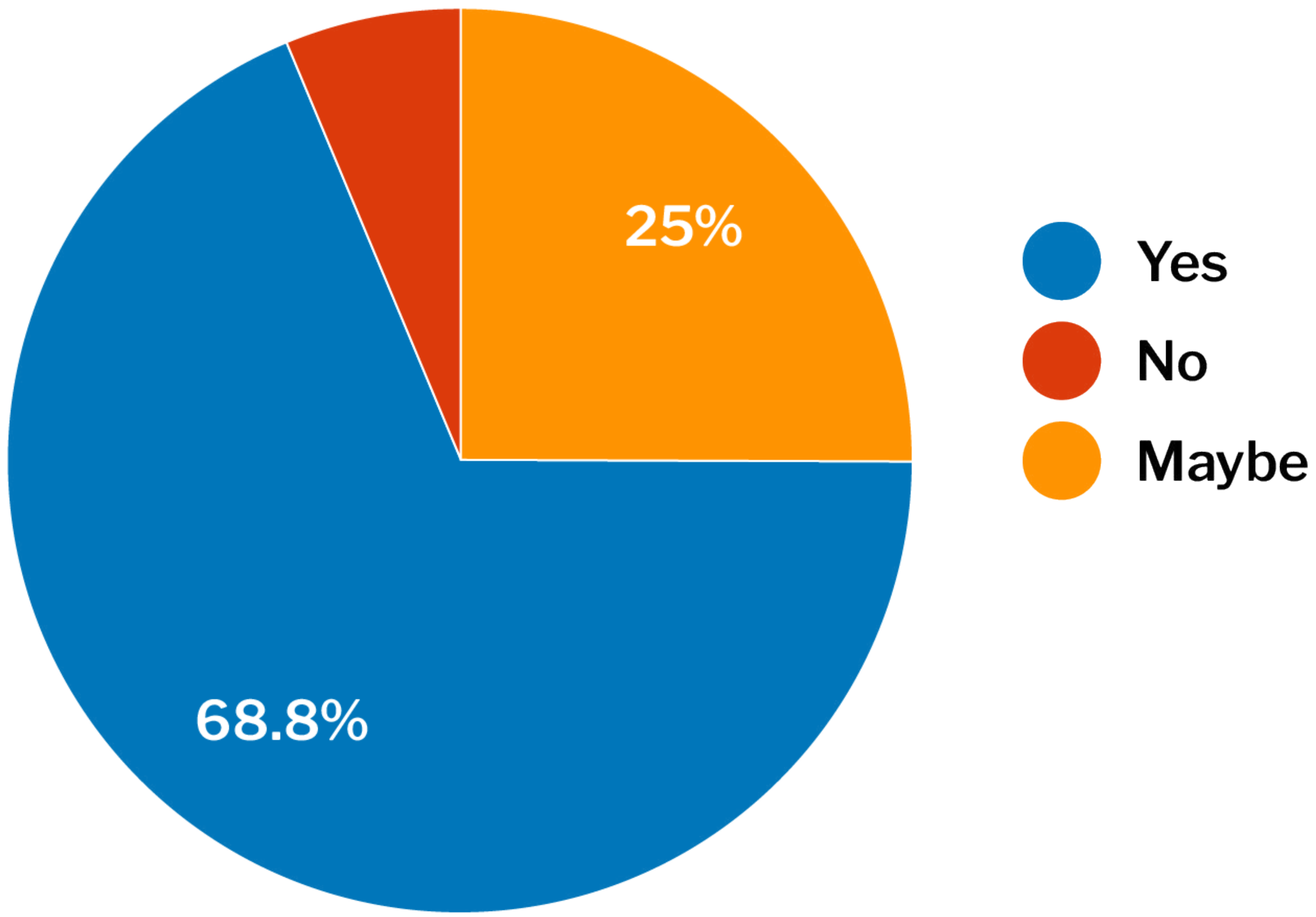
Which design services do you offer?
64 responses



Growth Ambitions

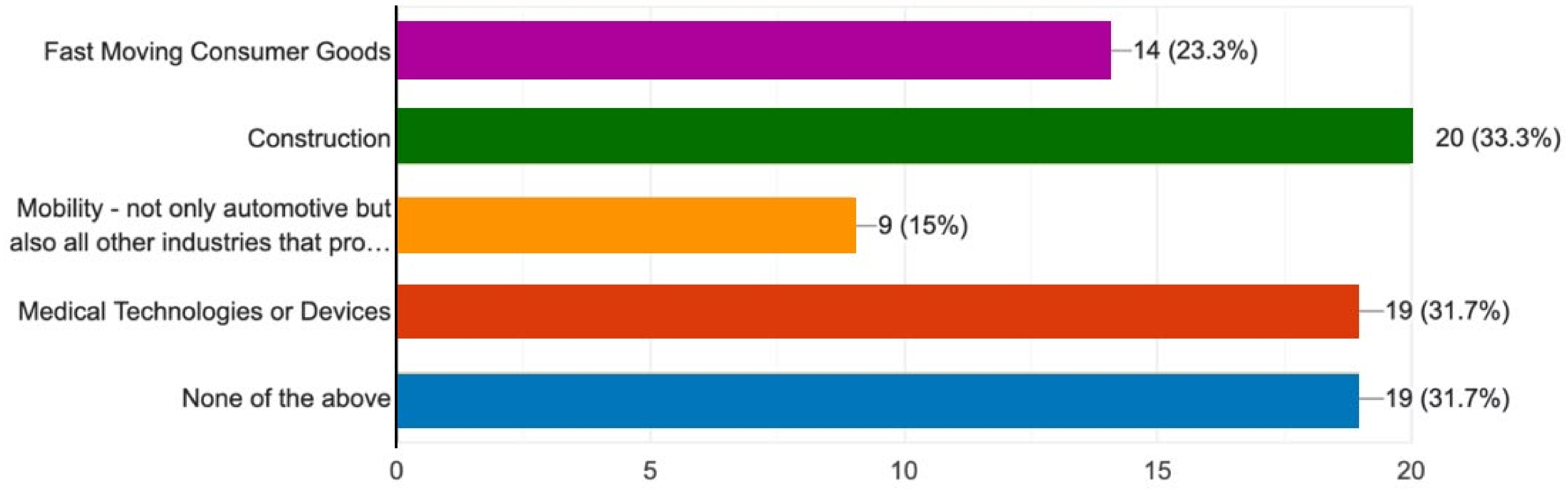
A very large proportion of businesses harbour growth ambitions, indicating that there is a **definite ambition to grow in 68.8% of cases**. Only **4 of 64 respondents** did not want to grow their business.

Does your business have ambitions to grow?
64 responses



About growth ambitions

Does your business have ambitions to work with any of the following industries?
60 responses



There was awareness of the growth opportunity that our industry verticals represent, and ambition among respondents to capitalise upon that opportunity. However, a significant proportion of respondents (almost one third) saw no opportunity to work with these verticals. This perhaps points towards work to be done in connecting design enterprise with these important sectors and highlighting the opportunities which might emerge.

Describe Your Sales Capacity

This was a "free text" response option, but there were clear patterns in the responses received. A vast majority of respondents shared that they had a low sales capacity, most taking responsibility themselves as a solo entrepreneur, and others sharing a low number of hours per month dedicated to sales.

Solo Entrepreneur with responsibility for sales	15 respondents
<5 hours per month	11 respondents
Between 5 and 16 hours per month	4 respondents
Using a partner, or dedicated staff members	10 respondents
Work mainly comes in through tenders / referrals, no sales specific effort	4 respondents
Difficult to quantify	3 respondents

Barriers to growth

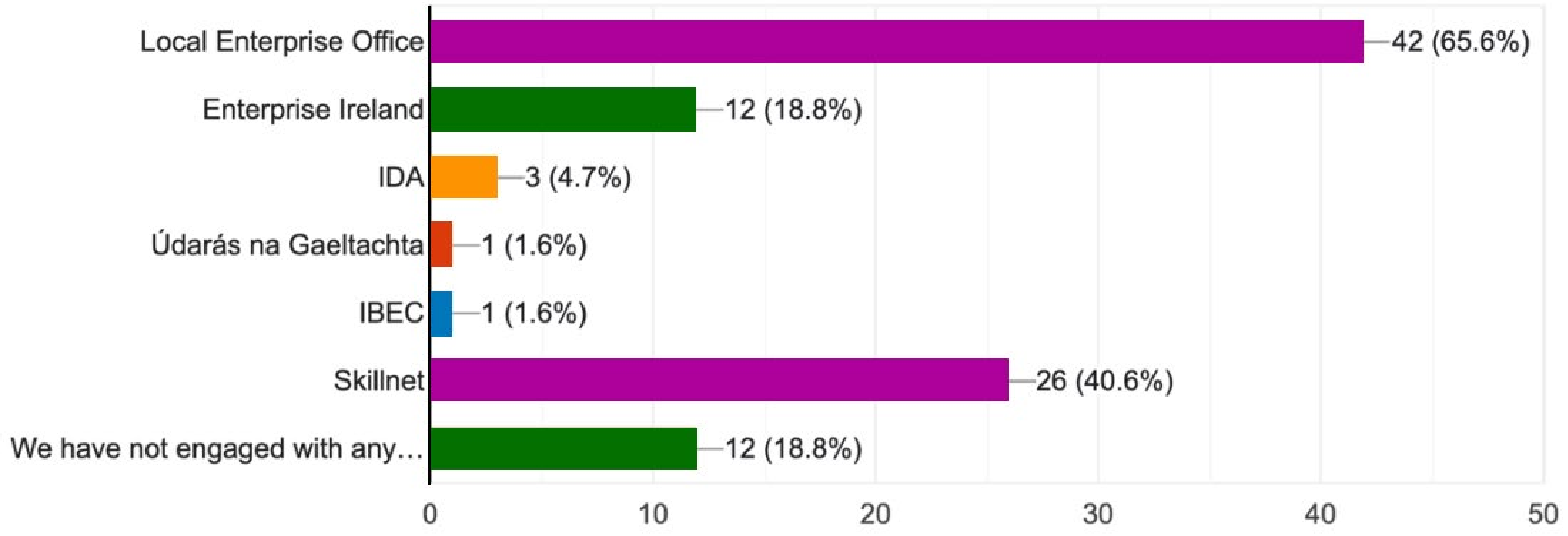
An optional question, with a free text response field, a total of 45 responses showed a significant diversity of challenges for businesses.

Funding & High costs	8 respondents
Accessing Talent / Recruiting	6 respondents
Lack of confidence & isolation	6 respondents
Access to overseas & other markets	5 respondents
Tendering process	4 respondents
Space & Facilities	3 respondents
Not ready to grow / low desire to grow further	4 respondents
Time	2 respondents
Compound challenges including some if not all of the above	3 respondents
Associated challenges of being a single-person business	3 respondents
No barriers to growth	1 respondent

This field gives some insight into the complexity of challenges faced by our respondents. While **funding and talent acquisition** sit near the top, **lack of confidence and isolation** are tied in that position. From 45 responses we found 10 different issues listed – there is much to be done in **understanding and addressing** these complex challenges for the sector.

Support Services

Which of the following have you engaged with to date?
64 responses



Other Supports?

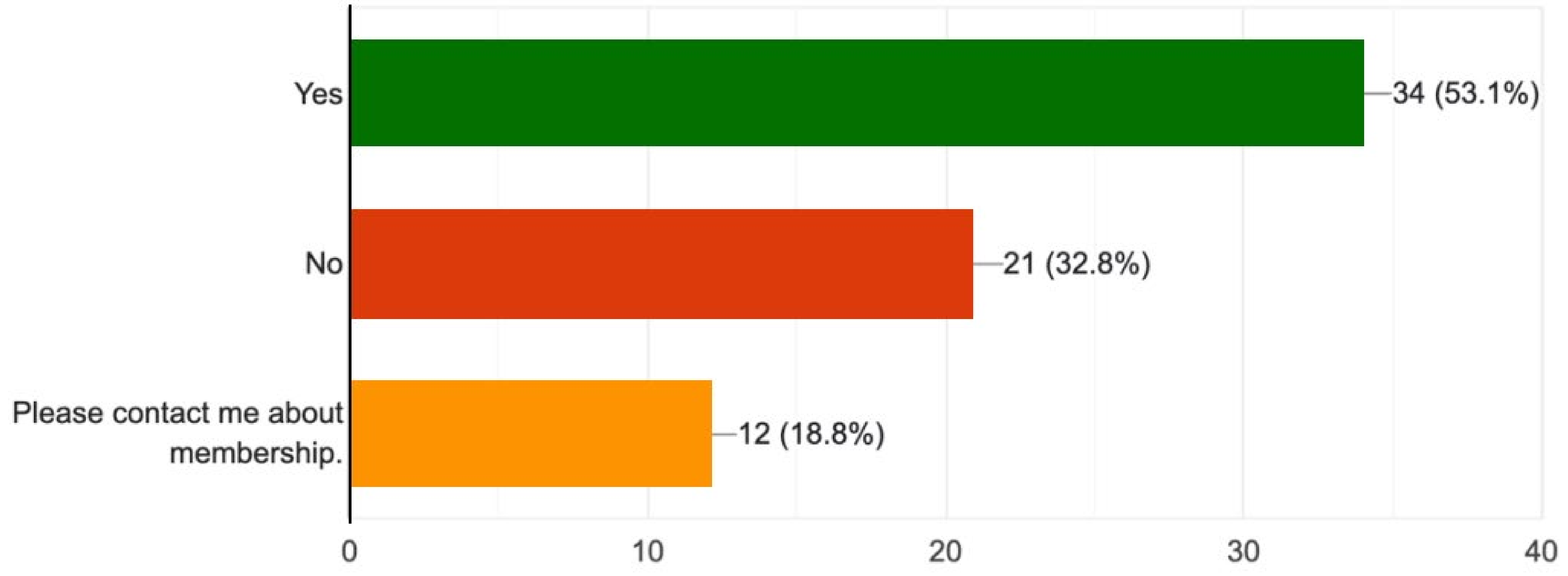
Again, a free text response field, and an optional response. Responses to this question perhaps highlighted confusion around the distinction between support agencies, and the identification in particular of the Trading Online Voucher scheme as a standalone initiative, as opposed to one under the purview of Local Enterprise Offices.

Top categories of response:	
No other supports utilised	18 respondents
Trading Online Voucher	6 respondents
Design & Crafts Council of Ireland	4 respondents
Design Skillnet	4 respondents
Other LEO services	3 respondents

Other responses included DigiClare.ie (Clare County Council), Illustrators Ireland, NDRC, Back for Business Programme, Donegal Women in Business, Intertrade Ireland Brexit Support voucher, Enterprise Ireland RTCF, Céim Programme (New Frontiers), Back to Work Enterprise Allowance, and Donegal Creative Coast Partnership.

IDI Membership

Are you a member of the Institute of Designers in Ireland?
64 responses



Just above 50% of responding businesses were members of IDI, with a further 19% wishing to learn more about membership. This indicates that the strategy of outreach via IDI channels was successful, but also points to an opportunity for the IDI to grow its membership along the Atlantic Economic Corridor, and boost representation for the sector as a result.

Process Findings

Despite the time of year extending across the summer, response rates for the survey were reasonable. It should be accounted for that this survey was not “just” a survey, but part of the process of signup for the workshops which happened over the same period. As such, response rates might have been **reduced** as to respond was also to indicate willingness to attend one of the online workshops.

While the sample is small, just 64 responses from a potential pool of several hundred businesses, some trends are clear.

Future actions might include the issuance of a regular (annual or twice yearly) “pulse” survey for creative enterprises in the selected verticals, helping create more exhaustive data on the sentiment within the sector and along the Atlantic Economic Corridor.

STRAND 1

FINDINGS: QUALITATIVE DATA — THE WORKSHOPS

Following the screener process, invites were issued for three facilitated workshops, which were held online, Friday 15th July, Tuesday 9th August, and Wednesday 21st of September. A total of **34 design businesses** attended a workshop during the series. Workshops were 2 hours long, and included breakout groups discussing the various challenges of starting and growing a design business in Ireland.

Workshop Methodology

During the workshops, participants were grouped into three breakout groups each with their own facilitator. Each workshop had four main sections which were worked through in these breakout groups, with each exercise kept under strict timing.

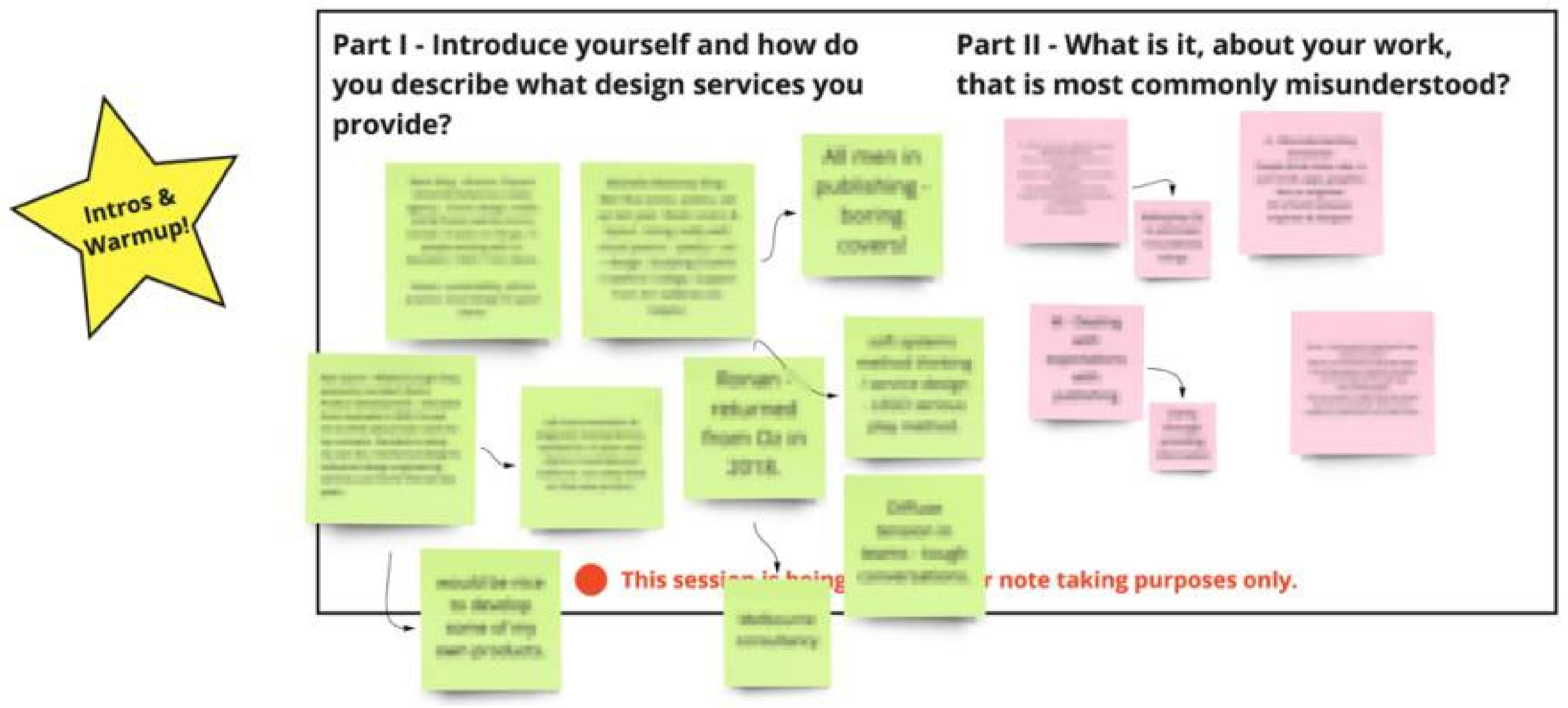


Figure 1: Example of virtual whiteboard, workshop section one. Content is obscured for data protection.

During the introductory section, participants were invited to introduce themselves and provide some details as to their professional background, and following this, asked to discuss some common misunderstandings or misconceptions about their work.

The second section involved discussion of challenges faced when starting a design business, specifically the first three years. The categories of discussion included:

1) Operational challenges (premises, equipment, accounting, legal, etc.)

2) Talent & people challenges (staffing, HR)

3) Market challenges (finding and connecting with potential customers to help grow the business, explaining what you do)

4) Sales challenges (closing deals, winning work, procurement processes, supporting clients in buying your work.

A separate section was provided for incidental contributions not directly linked to the areas above. Participants were guided through each section by their facilitator in order to make sure each topic was given attention.

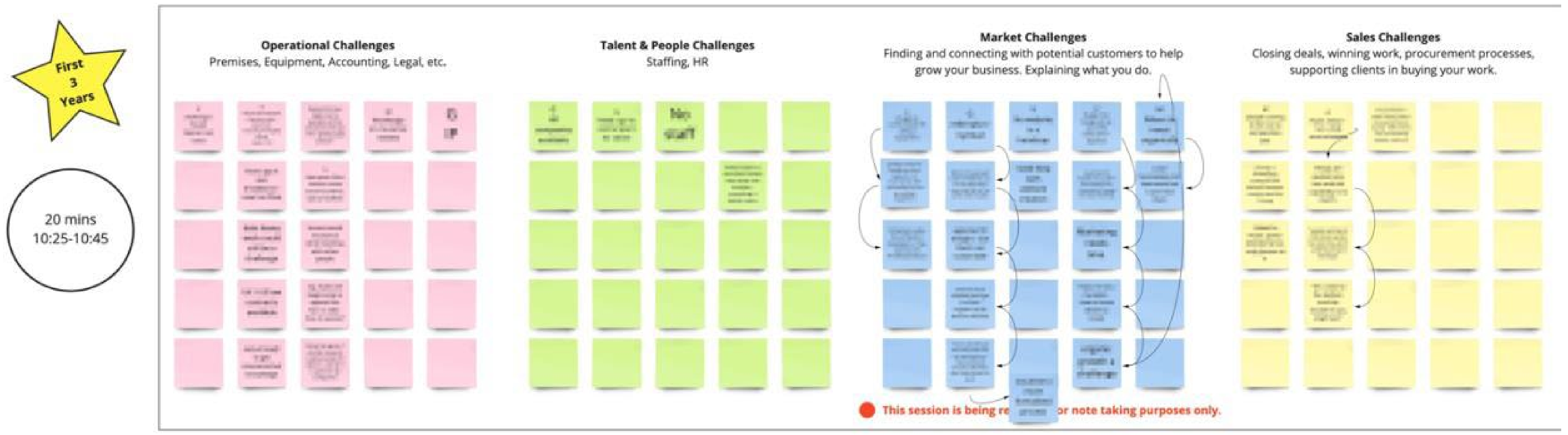


Figure 2: Example of virtual whiteboard, workshop section two.
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During the third section participants discussed the same topics but in the context of growing the business beyond three years. This section included additional discussion around challenges faced with exporting (finding overseas customers, delivering work overseas, complexities of exporting, considerations around travel & transport).

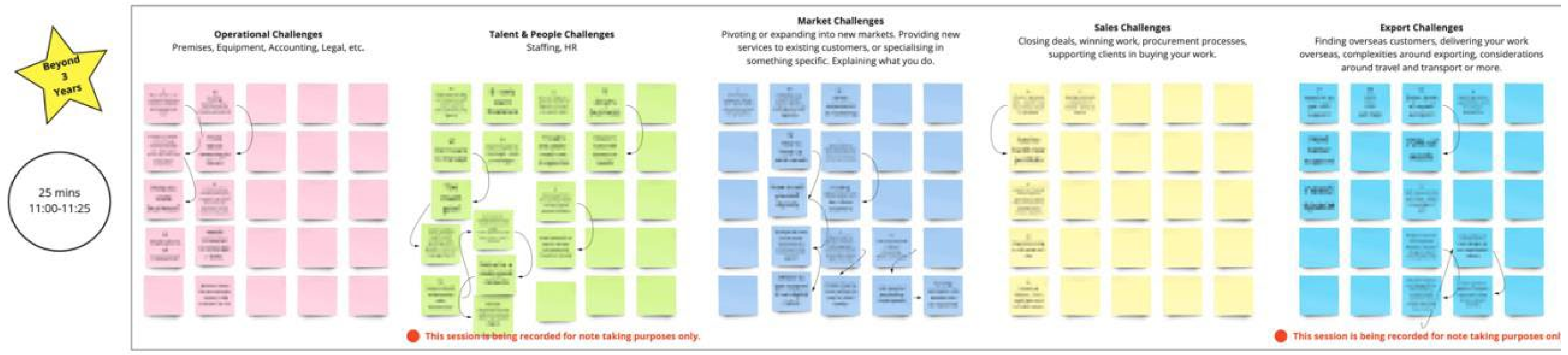

Figure 3: Example of virtual whiteboard, workshop section three.
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In the final section, discussion was centred around the future, specifically what people hope for in the future of their design business.

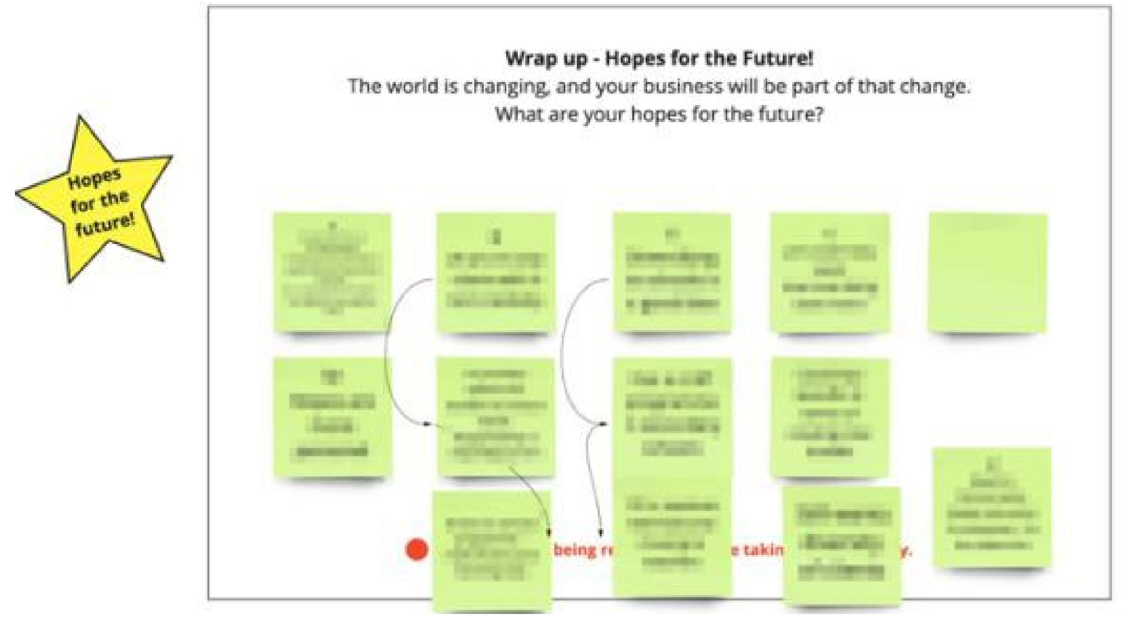

Figure 4: Example of virtual whiteboard, workshop section four.
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Playback Sessions – Sharing Experiences

Following each exercise, the whole group was reconvened for a playback session, in which each facilitator briefly shared the contributions from their participants to the rest of the group and questions could be asked or additional input shared.

This offered further opportunity for consensus assessment, but also networking. Notably, a few connections were made with the intent to follow up after the workshop.

Throughout the workshop, each exercise was captured on the boards by the facilitator in order to easily visualise emerging themes and enhance discussion.

Workshop Findings

1. Key Finding: Design is Misunderstood

It was indicated throughout the workshops that the rapid evolution of design has “left behind” many in Irish society, from potential customers in the wider business community to those who work to support the sector through enterprise supports. This rapid change is connected to the rapid evolution of technology, but also to the emergence of “design thinking” for use in business practices.

While our workshops succeeded in gathering rich qualitative data on this phenomenon, as per the intended outputs and impacts, the workshops also strengthened awareness of IDI and Design Skillnet, and mechanisms by which designers might better represent their businesses.

Bringing the qualitative data to enterprise support stakeholders during strand 2 should support government agenda regarding design and help those stakeholders better support the local design industry development in Galway and along the Atlantic Economic Corridor.

[all quotations below, unless otherwise indicated, sourced from design enterprise representatives within our workshops]

1.1 A rapidly changing sector

The application of design has been rapidly changing over the past 30 years. With the advent of new technologies came new practices like interaction design and web design. As products became more complex and connected, we saw the emergence of service design and user experience design. The development of “design thinking” has brought design practices into the worlds of policy and strategy. Even inside design communities, these titles cause some confusion.

Perhaps as a result of this rapid evolution, design is misunderstood by the public, by policy, and by industries outside of the design sector. There is the misconception that design is concerned only with aesthetics, and a lack of awareness as to the range of design practices and the value that they create. This lack of understanding is reflected in the interactions design businesses have with clients, and with enterprise supports available in Ireland.

‘There is a complete lack of understanding of what I’m doing or why I would do it. Locally, anyone I would talk to that wants to talk about branding wants to go straight to visuals, to just create something. If you want to do any kind of research or process before that they don’t see the point, they don’t see what it’s for’

‘I think the Irish state is certainly lacking in understanding and promotion that design is a critical part of any business’

‘People don’t understand the value I bring to a project as a designer’

1.2 The Value of Designers' Process is Under-Appreciated in the Market

When working with a new client or customer, design businesses shared that the clients' goals or budgets were often out of line with the design tasks demanded. Clients would either not have the appropriate budget for the work they were expecting, or they would expect immediate final deliverables without allowing appropriate time for the process required to achieve those outcomes.

'Customers want to go straight to visuals – they don't see strategy as useful.'

'You quote for a job, and the client says 'no', and then you find out later they've gone on 'fiver.com' and gotten somebody to make them a logo for 100 quid – and they think they have a brand'

'There is a challenge in getting your client to understand the process and the value of that process – going through iterations and prototypes'

'I don't work with small businesses anymore because they don't understand the need for design and don't have the budget to do it properly'

'The issue is that clients often have a pre-set budget for design work. This is usually far lower than it should be which results in me only being able to do a surface-level job.'

1.3 Business/Enterprise Supports Aren't Suitable for Designers

Design professionals share the challenges of all entrepreneurs in needing to learn how to run a business. Our workshop participants reported difficulty in finding information on available supports to help start and grow their business. When working with LEO/EI businesses found that the advice and support they were offered wasn't necessarily relevant to the design industry nor did it show an understanding of the nature of their work.

'The design industry is left behind in Ireland.'

'I don't think they [LEO] understand creative services businesses'

'The big thing for me starting out was knowing who to go to for funding or support – I wasted my time with Enterprise Ireland because they couldn't do anything'

'They just told me to do more courses'

'I found they [LEO/EI/Support Services] weren't good for getting information on specific disciplines, they seem better for product-based companies or just bigger businesses. They don't really know what I do.'

'If you look at the LEO Trading Online Voucher, for example, in some ways that has devalued what we do. Everyone is expecting everything for less than three grand'

1.4 Setting up a Design Business is Not Cheap!

For many new design businesses, the requirement of specialised equipment and software, as well as space for production and collaboration can add increased cost which can make it harder to get a business off the ground.

'I don't think LEO understand the setup costs that are required – we had to figure it out ourselves'

'I was in a catch 22 trying to get money for equipment from supports – they wanted me to show what I can do but I can't do that until I have the equipment'

1.5 An Emerging Generations is More Aware of the Value of Design

Design businesses report a generation gap in the understanding and appreciation of the value of design. It was noted that family businesses where a new generation has taken over seem to value design a lot more than before. This is the generation who have grown up seeing the positive impact that good design can have on businesses.

'The daughters and sons of established businesses are the ones that get it'

'I'm having much better dealings with the new generation than their parents that hired me in the first place'

'Often times the older they are, they think design isn't really necessary'

1.6 Public Sector Clients Don't Get It!

Businesses that have taken on public sector work recall the overall experience as being frustrating. Understanding procurement procedures and tenders can be a struggle for new businesses that might not have prior experience.

Sometimes the procurement process itself contradicts good principles of design, as solution proposals are often required in the procurement stage before any actual work can be done.

In addition, the misunderstanding of design already noted above seems to be prevalent in the public sector when it comes to pricing, and allowing scope for design process.

'I feel like they [procuring authorities] don't know what they're buying'

'The process ends up being a race to the bottom, and the problem is then that you might win.'

'Usually, you can put a substantial investment into tendering, you've got to almost tool up for that. But you then find that someone who hasn't really done the due diligence has given a crazy price, committed to something they've probably never delivered before and won the project.'

'I just glance at eTenders but I haven't ever really gone for anything'

2. Key Finding: Clusters are Key

Design businesses shared that the nature of their work means flexibility is key, and that this flexibility it derived of networks of talent, and of potential customers, but also communities of practice sharing information on how to run a business and supports to be found.

The workshops, while surfacing qualitative data on the important of clusters of design businesses in line with objectives, also fostered development of these networks. Many designers exchanged contact details and made commitments to follow up during the workshops, and while concrete data is not available as to how many connections were made, it can be said with confidence that the workshops helped create connections across the regions.

The assistance of the Connected Hubs and IDI in recruiting design businesses further advance the goal to establish connection for future ongoing engagement.

[all quotations below, unless otherwise indicated, sourced from design enterprise representatives within our workshops]

2.1 Networks, Clusters & Community add Resilience to Design Enterprises

Design Businesses report reliance on strong networks in order to find freelancers, clients and potential collaborators. Outside of Dublin, businesses report a lack of these connections, or effective networks that provide the potential necessary for business growth.

'It's about personal connections and networking – giving it that personal touch'

'In the beginning it's getting to know people that's important because then the ball starts to roll'

'We had to get out there and talk to as many people as we can, clients weren't naturally coming to us.'

2.2 Referrals Drive Growth, and Growth Drives Referrals

For many design businesses, work comes in through referrals. These referrals can come from existing or previous clients, or other businesses that have turned down a job. For many it is their most reliable source of work and so making good industry connections and having a strong network is very important.

'The referrals process is cyclical, the more I work the more work I get'

'I get a lot of work direct from other designers who couldn't take a job'

'Pretty much all my business comes from word of mouth'

2.3 Existing "Formal" Networks Could Be More Effective

When it comes to formal creative networks, businesses that are members of these groups claim that they are relatively inactive, and often very Dublin-centric when it comes to events. Because of this, they aren't relied upon as being useful sources of work and businesses find that better connections can be made elsewhere.

'Many of the forums will only have five people on the call.'

'I've tried a lot of creative networks out there but they're just not very active'

'There are lots of networks but they're not active, they don't really add value, just cost.'

2.4 Hard to Find Clients, Harder to Find the Right Kind of Clients

Small design businesses find it hard to get their name out and find new clients, meaning that repeat work and referrals are heavily relied upon to stay in business. Small, more local businesses can be easier to connect with but often they lack necessary budget or priority for design. While larger businesses might have the budgets it can be much more difficult to get "a foot in the door" with these companies, especially outside Dublin.

'I'm having a big problem in identifying where to focus my attention to get clients'

'Right now my biggest struggle is in finding clients because I don't really have an existing network'

'Once you get a client, you try and keep them and work with them long term'

2.5 Sourcing Talent is Key to Survival

Finding the right freelancers and building strong, long-term relationships with them is very important to design businesses. However, it can be challenging to know who is out there, and after building a relationship with a specific freelancer it can be hard to fill that void if they move on to other work.

'I do work with freelancers but I find it really hard to find the right people'

'It's about trying to find a person that you connect with, that can do what you need them to do, and are timely. At the moment I have a team of freelancers, but very often what can happen is people that start off as freelancers end up going into a full time job – so you could be working with them really well and then suddenly they're gone so you have to start over again.'

'I'm conscious that there are people not very far away, that are probably really good people that have come out of different agencies or companies in Dublin or beyond, but there's no network or way of bringing them together or looking these people up and knowing that they're there'

2.6 Design in Ireland is Dublin-Centred

Design businesses outside of Dublin report that the industry seems a lot more scattered in the regions than in the capital, and that it is much easier to get work and be known when operating within Dublin due to better networking opportunities and connections to be made.

'I almost find it easier to find and work with people based in London than finding people in Irish localities. Everything is very Dublin centric here.'

'I lived in Dublin for years and I always found everything to be very Dublin centric. I didn't feel like there was a huge amount happening outside of Dublin. Ever since I moved back home I feel very disconnected from the design community.'

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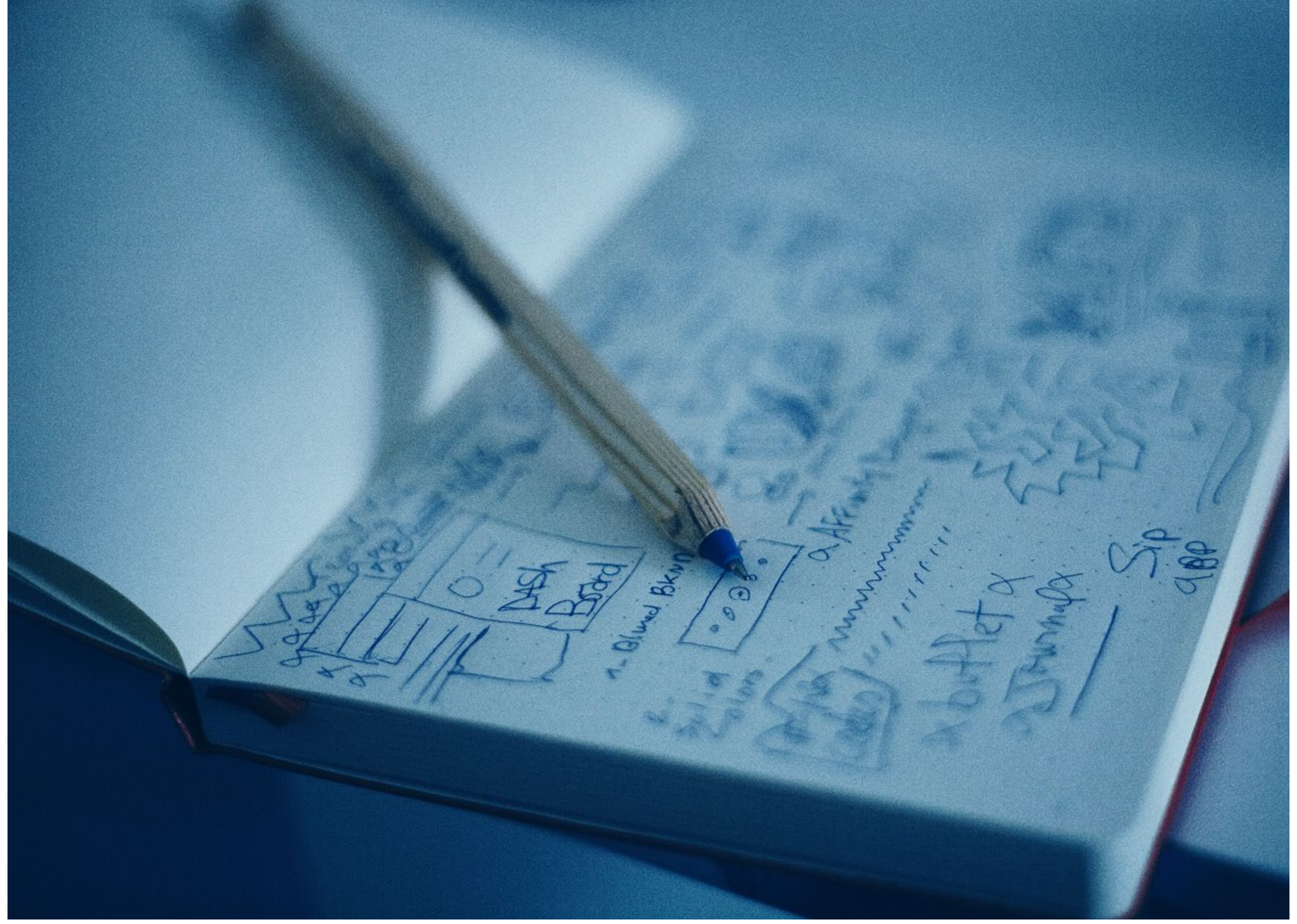
3. Key Insight: Learning to be a Business is Challenging

Starting a business involves a lot of learning, and the learning curve can be extremely steep. For design professionals this often means learning things that were never part of their education or practice. This might include accounting, insurance, HR, marketing, procurement, sales and more.

The challenge of learning how to run a business, while also being a designer, is exacerbated by an apparent lack of relevant supports available to design businesses. Our participants report difficulty in finding advisors with knowledge of the business of design.



[all quotations below, unless otherwise indicated, sourced from design enterprise representatives within our workshops]

'I found it pretty hard working on all the aspects of running the business while still trying to do actual work'

'There is no one place to go to understand how to be a sole trader, VAT, accounting...'

'For example, there's something called 'Professional Service Surcharge' it's effectively an extra 6.5% tax on companies, and nobody, not Revenue, not my LEO office, not my accountant, can tell me for sure if I shouldn't be paying it. Some design businesses do, others don't! Depends on who you ask.'

'I spent my first three years training myself to be an accountant... I think in pictures and trying to translate that into accounting was a headache'

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STRAND 1

SWOT ANALYSIS OF FINDINGS

Strengths

- The application of design has been rapidly changing over the past 30 years. With the advent of **new technologies** came new practices like interaction design and web design. As products became more complex and connected, we saw the emergence of service design and user experience design.
 The **development of "design thinking" has brought design practices into the worlds of policy and strategy**.

Weaknesses

- Even inside design communities, the multiple titles for design practices cause some **confusion**, as does their rapid change and evolution.
- Perhaps as a result of this rapid evolution, design businesses face challenges which they believe are cause by a **misunderstanding of design by the public, by policy, and by industries outside of the design sector**. There is the misconception that **design is concerned only with aesthetics**, and a **lack of awareness as to the range of design practices** and the value that they create.
- This **lack of understanding is reflected in the interactions** design businesses have with clients, and with enterprise supports available in Ireland.
- Our workshop participants reported **difficulty in finding information** on available supports to help start and grow their business.
- The advice and support offered to design businesses **wasn't always relevant to the design industry** nor did it show an understanding of the nature of their work.
- Businesses that have taken on **public sector work recall the overall experience as being frustrating. Procurement procedures and tenders** can be a struggle for new businesses that might not have prior experience.
- Sometimes the **procurement process itself contradicts good principles of design**, as solution proposals are often required in the procurement stage before any actual work can be done.

Opportunities

- Design businesses report a **generation gap in the understanding and appreciation of the value of design**. It was noted that family businesses where a new generation has taken over seem to value design a lot more than before. **This is the generation who have grown up seeing the positive impact that good design can have** on businesses.
- Design Businesses report **reliance on strong networks** in order to find freelancers, clients and potential collaborators.
- For many design businesses, **work comes in through referrals**. These referrals can come from existing or previous clients, or other businesses that have turned down a job. For many it is their **most reliable source of work** and so making good industry connections and having a strong network is very important.
- When it comes to **formal creative networks**, businesses that are members of these groups claim that they are relatively inactive, and often very Dublin-centric when it comes to events. Because of this, they aren't relied upon as being useful sources of work and businesses find that better connections can be made elsewhere.
- **Finding the right freelancers** and building strong, long-term relationships with them is very important to design businesses.

Threats

- Design businesses shared that the **clients' goals or budgets were often out of line with the design tasks demanded**.
- For many new design businesses, the **requirement of specialised equipment and software**, as well as space for production and collaboration can **add increased cost** which can make it harder to get a business off the ground.
- Small, more local businesses can be easier to connect with but often they **lack necessary budget** or priority for design. While larger businesses might have the budgets it can be much **more difficult to get "a foot in the door" with these companies**, especially outside Dublin.
- Design businesses outside of Dublin report that the industry seems **a lot more scattered in the regions than in the capital**, and that it is much easier to get work and be known when operating within Dublin due to better networking opportunities and connections to be made.

Process Findings

The process of screening survey, followed by online workshops, worked well for the community and for the research effort, enabling a sharp focus on the design verticals but also high accessibility of the initiative through online access.

The fully facilitated workshops, including facilitators dedicated to each breakout room, helped ensure that rich input was solicited from everyone who took part, while plenary sharing of conversations relating to our research questions allowed the community attending to understand the multiple perspectives being put forwards.

Substantial numbers of attendees and survey respondents were drawn from the IDI membership, suggesting that there is an opportunity to grow that network, but also to better understand who among the Connected Hubs network of enterprises can be considered as design enterprises within our verticals.

STRAND 2

EDUCATE THE PROFESSION: ENGAGING ENTERPRISE SUPPORTS

Strand Description

This strand set out to engage Enterprise Support agencies and other important ecosystem stakeholders in an online workshop setting to focus on design industry positioning, narrative development for the sector and its various verticals and to explore pathways and possibilities to exploit existing and new markets.

Findings from Strand 1 were shared with participants in this strand, to aid with development of awareness as to the design industry perspective, but also to inspire collaborative thinking in line with the needs of the sector and future possibilities.

This strand also included preparation of an engagement plan for 4 industry segments in advance of strand 3.

Objectives of this Strand

Following the extensive engagement with design enterprises during strand 1, and the identification of key findings from within the sector, strand 2 shifts the focus to enterprise support, strategy and policy agencies, with the following objectives:

- Connecting and sharing knowledge with the entities that are responsible for shaping industry and enterprise policy, strategy and investment.
- Framing and positioning the design industry in the context of these agencies' rationale of investible enterprise.
- Finding common ground to facilitate access to existing enterprise development resources and identify other design industry appropriate mechanisms to drive growth and jobs in the industry.

A goal of this strand was to raise awareness of the policy, strategy, and resource frameworks in place for the design industry. It was also intended that feedback be solicited from the enterprise supports agencies and bodies regarding ongoing engagement with the design sector.

Intended Outputs

- Qualitative data on the understanding and engagement of enterprise supports across the design verticals identified, and opportunities therein.
- Framework/model for an "Education the Profession" initiative for rollout across all industry segments over the next 3 years.

Intended Impacts

- Establish and strengthen industry connections and identify ecosystem engagement model for future ongoing engagement and rollout of ongoing networking as well as activation of other recommendations in the Design Skillnet report.
- Likely impact is increase in start-up entities in design sphere in next 3 years as well as engagement regarding innovation hub use.

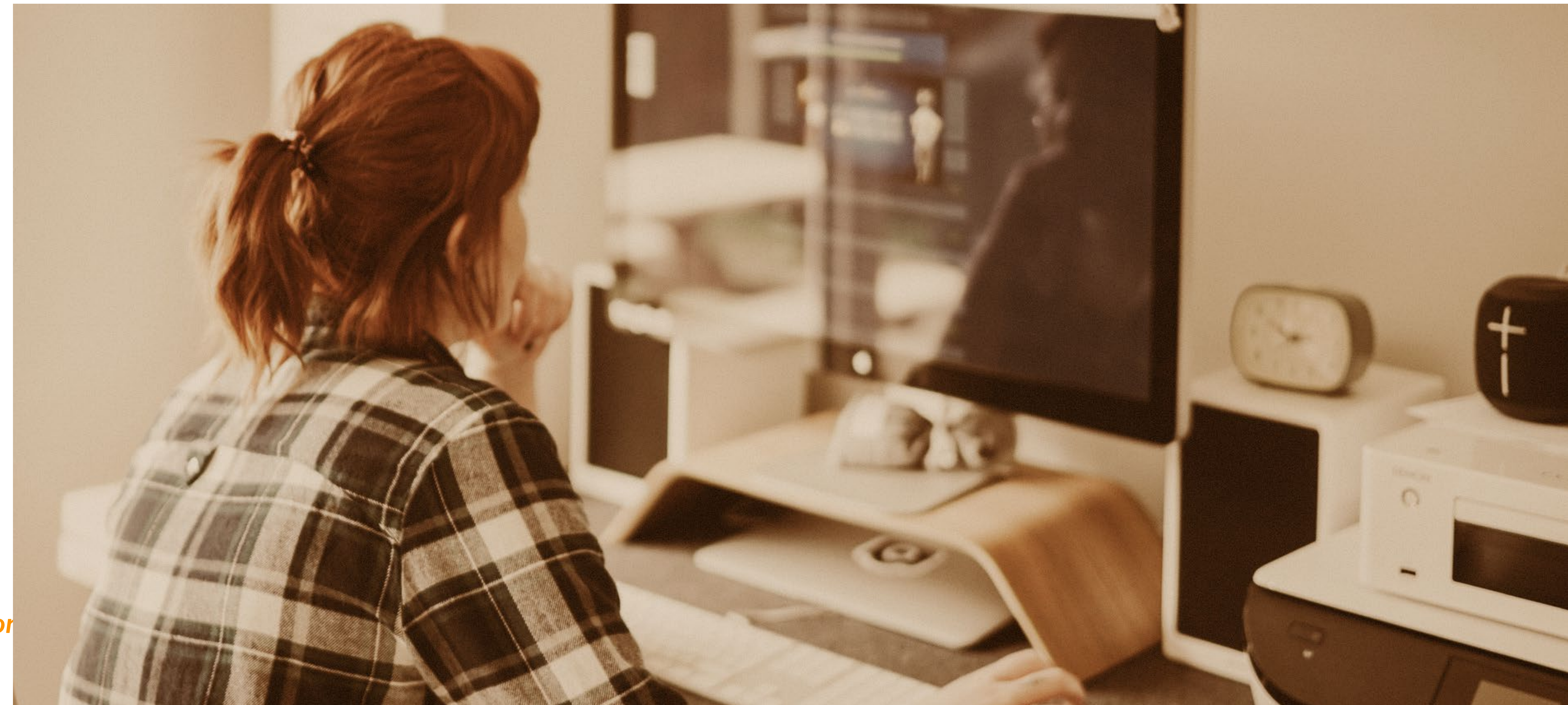
Methodology

Engagement Approach

Strand 2 of the project adopted a used a "one shot" approach, inviting a large number of representatives from the relevant agencies to participate a fully facilitated online workshop.

The event included the extension of an opportunity for representatives from agencies to hear from IDI CEO Charlotte Barker a perspective on the potential the design sector offers in terms of job creation, growth and impact on other sectors.

The Atlantic TIDE project team also shared the insights generated in strand 1 of the project, helping agencies further develop their understanding of the situation that design entrepreneurs find themselves in.



Dissemination and Registration

The strand 2 workshop event was promoted through the Atlantic TIDE project partners network, both through distribution list and personal networks. The dissemination was targeted, in order to reach the agencies and bodies who fit the strand 2 objectives.

Additionally, and building upon strand 1 engagement, 4 design businesses were invited to attend. These businesses were selected on the basis of their contribution to strand 1, their situation on the Atlantic Economic Corridor, and their willingness to engage further with the project to drive the objectives of the project.

Finally, and adding to the design expertise, and indeed enterprise support expertise in the room, IDI invited Lorraine Egan, IDI Fellow, with extensive experience of the design sector and from her time working in Enterprise Ireland.

The event secured 36 registrations, excluding facilitators, invited guests, and admin team.

Organisations who registered interest in attending included:

Entity / Agency	# of Registrations
Ardán	1
Atlantic Technological University	3
Creative Coast Donegal	1
Creative Ireland	3
CREW	2
Department of Enterprise, Trade, and Employment	1
Design Enterprise	4
Future Cast	1
Ibec	2
IDA Ireland	1
Innovate Limerick	1
Limerick School of Art & Design – Technological University of the Shannon	3
Local Enterprise Office	5
University of Limerick	2
Sligo Co Co	2
University of Galway	1
Western Development Commission	3

Workshop Format & Execution

The workshop was held online, using Zoom, on Friday October 7th 2022, over a two hour session. The agenda followed included:

11:00 Welcome and Intro
Jessica Fuller, North West REP Programme Manager

11:05 Keynote Address – Framing the Design Industry in Ireland 2022
Charlotte Barker, CEO Institute of Designers in Ireland

11:15 Industry Insights – Atlantic Tide Strand 1 Research
John Lynch, Atlantic TIDE Design Lead

11:30 How might we enable sustainable enterprise and job growth in the industry in the Atlantic region – now and in the future? Breakout sessions moderated by enterprise enabler leads
Enterprise Enabler Leads (Moderators) and
Atlantic TIDE Facilitators (Live Scribing)

12:30 Feedback and Q+A
John Lynch, Atlantic TIDE Design Lead

12:55 Plenary review + future focus
Jessica Fuller, North West REP Programme Manager

13:00 Event Ends

Breakout Sessions

Breakout sessions focussed on the theme ***'How might we enable sustainable enterprise and job growth in the industry in the Atlantic region – now and in the future?'*** were broken down into a series of questions, visualised for participants on a virtual whiteboard, on which, during the sessions, notes were live scribed by our facilitators. The entire workshop was recorded for later review and notetaking.

Breakout 1: What's our understanding of design? (15 mins)

- What outcomes can it create?
- What skills does it involve?
- What does good look like?

Breakout 2: How does design add value in other industries? (15 mins)

- How can design help the bottom line?
- How does design create intangible value?
- What should industry consider when working with design?

Breakout 3: What are the existing ways we support self-sustaining enterprises to grow, and to provide jobs? (15 mins)

- And what could we do differently?

Workshop Attendance

The workshop was attended by a total of 24 participants (excluding project team and facilitators). While attendance records do not show organisation details, inferring from attendees provided email addresses we can report that the following agencies/entities were represented:

- **IDA**
- **Technological University Shannon**
- **University of Limerick**
- **LEO Sligo**
- **Donegal Creative Coast**
- **University of Galway**
- **Western Development Commission**
- **Sligo County Council**
- **Innovate Limerick**
- **CREW Digital**
- **Creative Ireland**
- **Atlantic Technological University**

Figure 5: Screenshot of a virtual whiteboard from one of our breakout groups.

Workshop Findings

On review of the virtual whiteboards, notes, and recordings, the following themes were identified. While the sample set was small, this was a workshop involving an expert, and highly specialised group. There is strong signal from this workshop that should be considered in future initiatives.

All quotations below should be interpreted as the informed opinion of the anonymous representative, based on their experience, and not linked to specific data, unless otherwise indicated.

'I think design raises the standards of how things are delivered, I think it puts objective thought and other perspectives into how things are done, it raises the bar in all things' — Private Consultant

'Design is a methodology to ideate intangible value.' — Design Educator

1. What is our understanding of design?

Participants from the various education and support agencies showed an informed understanding of the value of design. There was also awareness of how design has evolved over the years to become a business-critical, user-centred problem-solving approach for some. It was understood that design provides a range of intangible values which can enhance the competitiveness of businesses.

'The [designer's] ability to walk a mile in someone else's shoes works across the design spectrum, it doesn't need to be one particular discipline.' — Design Professional

'Design is about being collaborative and working with other disciplines really effectively to try and solve problems' — Design Educator

Also noted was the collaborative nature of design – working across disciplines and silos, but additionally that design is often seen as complicated, or difficult to work with. This could be interpreted to indicate a gap of understanding between design and other industrial sectors, and the need for better ways to integrate design in other sectors.

'I think we need to be honest in this scenario: design is complicated, expensive and they're not easy to work with' — Local Enterprise Offices representative

2. How does design add value in other industries?

Design is understood to add value as an innovation approach to new product / service development, a way of working which is very successful at the creation of intangible values like engagement, brand, reputation, "stickiness", meaning, and strategy.

It is understood that it best adds value when introduced early in a process, with the iterative approach seen as key to allowing design reduce risk. It was also noted that it is fundamental for design to be interdisciplinary and collaborative.

This points to the strategic importance of design for other industries, but it was additionally noted that as an approach, design can help with staff engagement, empowering teams and (perhaps) aiding retention.

'Good design increases your credibility with your customers and consumers alike, it increases business from the intangible value that design provides' — Design Professional

'Good design can provide innovative solutions and can solve problems. It has the power to persuade which can help with sales and strategy decision making as well. All of these things can affect the bottom line' — Enterprise Support

'In using design or innovation thinking, it allows you to stay strategically principled, but tactically flexible.' — Enterprise Support

'Design enhances the brand but also gives value to the business and brings confidence as a result.' — Private Consultant

'It adds broad brand strength and reputation, which is something that is very, very hard to measure and hard to achieve. And then in a wider regard, good design allows companies to remain competitive in an ever-changing world. If you have good design, I suppose it aids in transformation and working towards the kind of way the world's going in terms of digital.' — Enterprise Support

3. What are the existing and new ways we can support self-sustaining design enterprises to grow?

3.1 Healthy Networks

Healthy networks encourage peer-to-peer learning and support between design businesses. When design-relevant support and information can be hard to find from LEO etc., the best information comes from those that have been through it already, and so these connections and the sharing of knowledge is extremely valuable.

'Developing a facilitated network is especially valuable for creatives and other sectors to learn from each other. How has someone else approached a problem? How has someone else overcome these difficulties?' — Unidentifiable from Recording

'We now want to be part of a design network across Ireland, across various regions. And that's a real challenge for us as that we can all unify in that challenge and see success locally and regionally within that process.' — Design Professional

'Not all designers are going to have all the skills required. And so collaboration is absolutely key. Collaboration and networking is a skill of its own as well.' — Local Enterprise Support Representative

3.2 Creating Ecosystems

Additionally, the development of communities and ecosystems made up of local enterprises is an idea of which design professionals are particularly enthusiastic. The establishment of local hubs to encourage collaboration between design disciplines and other industries is an example of how this might be encouraged.

'It is so important for design businesses to be fully embedded with the enterprise ecosystem' — Enterprise Support Representative

'There lots of people in our community that we don't know about, and they can bring lots of perspectives... there are opportunities for them [designers] to bring their skills and enhance the community which they live in.' — Private Consultant

3.3 New Pathways to Design

It's important to shift away from the perception that you need to be an artist to work in design. Design is a spectrum, and creative minds from other backgrounds should know that design is a viable career option and not just for "artists". The demand for designers is there, and new pathways into design need to be explored for talent coming from other fields, industries or education levels.

In the context of supporting the actions under the Design Skillnet report, this finding points to a potential opportunity to market design training beyond those who already consider themselves designers.

'It's important that we really look at different pathways into design.' — Design Professional

'We need more people from different aspects with different strengths to understand that creativity isn't exclusively for artists. It's something that many people can apply into a range of different careers. We are exploring new ways to enter the design system, other ways that we might develop a new kind of educational ecosystem to bring people into third level or bring people into apprenticeship or rethinking the ways and means by which people enter the design community and can build a career from there.' — Design Professional

'The idea that there's a lack of talent, when there's huge potential to grow that pool, and how do we do that? How do we show the channels clearly to our graduates and how do we make that happen?' — Design Educator

3.4 Perception & Enablers

The perception of the design industry from those external to it is often out of line with that of design professionals. Echoing what was heard in Strand 1, we heard further how significant a barrier this has become for design businesses, specifically when it comes to engaging with enterprise services.

While we heard from some enterprise support representatives during the workshop who acknowledged their own limited understanding of the design industry, there were some whose understanding was very strong and they were passionate and constructive about wanting to improve this situation.

For the perception of design as a sector to change, the support of these external enablers who understand design is needed. Specific issues lie around the awareness of the range of design disciplines which exist, the design process, as well as the language and terminology of design.

'Enablers are needed in order to reframe how the design industry is viewed.' — Academic

'There is a bit of a language barrier between the agencies and the design sector' — Design Professional

'What EI want is innovation, but that is the outcome. We need to recognise that design is the process to get to that innovation outcome.' — Design Professional

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3.5 Business Skills

Opportunities to learn and develop business and entrepreneurial skills are vital to design practitioners becoming self-sustaining businesses. Creative people have lots of good ideas, but without the knowledge to convert their talent into a reliable income source they will be unable to grow. Designers need access to relevant supports, information, and seek advisors and mentors with an understanding of design that can help them build their business.

'There are so many creatives and so many people with creative ideas. But in order to make it into a sustainable business and a sustainable career, they do have to have the business skills element.' — Enterprise Support Representative

'We're assuming they're self-sustaining, so they've got a value proposition, they've got a service, they're starting to grow their business. So if we park kind of regular kind of technical business training and then look at maybe market opportunities... incubation/acceleration type programs focus on growth opportunities. Those supports are in place, but we could do more' — Enterprise Support Representative

'It's regular that we get businesses in saying, I can't go into a boardroom or I can't go into a company and sell myself. That's not my area, 'I'm a craftsperson'. So we have mentors that can sit down and prepare a pitch, a presentation that can identify potential customers for businesses [for designers]. ' — Enterprise Support Representative

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STRAND 2

SWOT ANALYSIS OF FINDINGS

Strengths

- Participants from the various education and support agencies **showed an informed understanding of the value of design**.
- It was understood that **design provides a range of intangible values** which can enhance the competitiveness of businesses.
- Design is **understood to add value as an innovation approach to new product / service development**, a way of working which is very successful at the creation of intangible values like engagement, brand, reputation, “stickiness”, meaning, and strategy.
- **There were some whose understanding was very strong** and they were **passionate and constructive about wanting to improve this situation**.

Weaknesses

- Design is often **seen as complicated, or difficult to work with**. This could be interpreted to indicate a **gap of understanding between design and other industrial sectors**, and the need for better ways to integrate design in other sectors.
- While we heard from some enterprise support representatives during the workshop who **acknowledged their own limited understanding of the design industry**,

Opportunities

- It is understood that **it best adds value when introduced early in a process**, with the iterative approach seen as key to allowing design reduce risk.
- This points to the **strategic importance of design for other industries**, but it was additionally noted that as an approach, **design can help with staff engagement**, empowering teams and (perhaps) aiding retention.
- **Healthy networks encourage peer-to-peer learning and support between design businesses.** When design-relevant support and information can be hard to find from LEO etc., the best information comes from those that have been through it already, and so these connections and the sharing of knowledge is extremely valuable.
- Additionally, **the development of communities and ecosystems made up of local enterprises is an idea of which design professionals are particularly enthusiastic**. The establishment of local hubs to encourage collaboration between design disciplines and other industries is an example of how this might be encouraged.
- It's important to shift away from **the perception that you need to be an artist to work in design**. Design is a spectrum, and creative minds from other backgrounds should know that **design is a viable career option and not just for "artists"**. The **demand for designers is there**, and new pathways into design need to be explored for talent coming from other fields, industries or education levels.
- For the perception of design as an industry to change, **the support of these external enablers who understand design is needed**.
- **Opportunities to learn and develop business and entrepreneurial skills are vital to design practitioners becoming self-sustaining businesses.** Creative people have lots of good ideas, but without the knowledge to convert their talent into a reliable income source they will be unable to grow. **Designers need access to relevant supports, information, and seek advisors and mentors with an understanding of design that can help them build their business.**

Threats

- Design is **sometimes seen as complicated, or difficult to work with**.
- The **perception of the design industry from those external to it is often out of line with that of design professionals**.
- Specific issues lie around the **awareness of the range of design disciplines which exist, the design process, as well as the language and terminology of design**.

Process Findings

A key signal from this process was that of the interest in, and enthusiasm for engagement relating to the design sector, and the businesses therein. The conversion rate of the workshop was high, with stakeholders from across the enterprise supports interested to attend, learn more, and take part. Attendance was good too, as a proportion of those registered.

As with Strand 1, the decision to conduct an online, fully facilitated workshop, can be deemed to have been a factor in the success of this strand. Facilitators dedicated to each breakout room helped ensure that rich input was solicited from everyone who took part, while plenary sharing of conversations relating to our research questions allowed the attending guests to understand the multiple perspectives being put forwards.

The enhanced accessibility of an online workshop, negating the need for travel, could potentially have helped with the reach and attendance of the strand.

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STRAND 3

EDUCATE THE CLIENTS: CROSS-SECTOR ENGAGEMENT SESSIONS

Strand Description

Strand 3 set out to deliver networking sessions to cross-sectoral and enterprise agency clients, and to offer that same opportunity to relevant Skillnet groups, industry advocacy agencies and RDI entities.

The aims for these networking sessions included the harvesting of qualitative data regarding the specific industry segments and relevance of design to those segments. This data could then inform opportunities for CPD via Skillnet, enabling these current and potential design clients to develop their understanding of the value of design and its associated services.

Four sessions were held (3 in-person, and one online) in order to accommodate four separate industry verticals:

- MedTech (including Pharmaceutical), held at Ludgate Hub, Skibbereen
- Construction, held at FutureCast, Manorhamilton
- Mobility, held at Future Mobility Campus, Shannon
- Fast Moving Consumer Goods, held online

A significant driver of engagement in this strand was WDC comms and the network of connected hubs.

The focus of activities within these sessions was adjusted, following the outcome of strands 1 and 2. It was surmised that much remained to be learned as to the industrial perspective on the value of design, and the experience of working with design. As such, these sessions included a component of networking, and of sharing the learnings from Strand 1 and 2, but an emphasis on data gathering was added, with facilitated “focus group” engagement to allow for qualitative research.

Objectives of this Strand

Building upon the learnings of Strand 1 and Strand 2, this strand allowed connection through to the selected industry verticals, highlighting the opportunity presented by the design sector, but also gathering a body of qualitative data on how each industry vertical perceives the value of design.

Intended Outputs

- Cross industry network established for further development.
- Framework for future engagement mechanisms between design industry segments and other industries engagement based on direct engagement.
- Activation of market opportunities and CPD.
- Qualitative data on the perceived value of design, and engagement with design, from perspective of each industry vertical.

Intended Impacts

- Establish connection and model for future ongoing engagement and rollout of ongoing cross sectoral networking & enterprise activation
- Activation of other recommendations in the design skillnet report
- Address government agenda regarding design
- Connect Skillnet to Connected Hubs for access to platform in long term.

Methodology

An Adjusted Approach

During strands 1 and 2, much new information surfaced as to, respectively, the lived experience of design entrepreneurs, and the understanding among enterprise support agencies of the sector. A significant gap in our data was identified – that of the prevailing experience of the industrial "customers" of design, within our selected industry verticals.

How do they utilise design currently? And why? What values does design add, and might it add in the future? Are there key design practices which industry needs? What are the challenges of working with design? With all these questions, and more, there is the additional question of whether the answers differ depending upon the particular vertical being considered.

As such, the "networking" sessions which were held during this strand allowed connections to be made between players from each sector, their advocacy bodies, and the Connected Hubs network. They also showcased the IDI as a representative body for design and a means for connecting with design enterprises to capitalise on the significant economic opportunity presented by design. Finally, they included the sharing of some of the relevant findings from strands 1 and 2 of the work.

But the adjusted approach allowed significant time in each session for research – enabling the Atlantic TIDE project to begin to answer the questions here mentioned and summarised in the report below.

Engagement Approach

Strand 3 of the project delivered four workshops, (3 in-person, 1 online) and utilised the distributed network of Connected Hubs to engage stakeholders from each of our selected industry verticals.

The programme was executed over a period of two weeks:

Date	Vertical	Venue	Attendance
28.11.22	Medical Technologies (incl. Pharmaceuticals)	The Ludgate Hub, Skibbereen, Co. Cork	9
01.12.22	Construction	FutureCast, Manorhamilton, Co. Leitrim	7
05.12.22	Mobility	Future Mobility Campus, Shannon, Co. Clare	8
06.12.22	Fast Moving Consumer Goods	Online (originally Sligo)	4

The agenda of each event was as follows:

Welcome and Intro
Jessica Fuller, North West REP Programme Manager

Keynote Address – Framing the Design Industry in Ireland 2022
Charlotte Barker, CEO Institute of Designers in Ireland

Atlantic TIDE Insights – Atlantic Tide Strand 1 Research
John Lynch, Design Lead Atlantic TIDE

Facilitated Round Table Discussions

- What is design?
  - What skills does it involve?
  - What does good look like?
- In what was does / might design add value in your sector?
  - How does it help the bottom line?
  - How does design add intangible value to your business processes?
  - Can you share stories of ways in which design has impacted your business or sector?
- What is it like working with design?
  - What kinds of design are important to you and why?
  - How might you find and select designers to work with?
  - Do you have preference for in-house or external designers? Why?
  - Are there challenges associated with working with design?

Workshops Format & Execution

Each session was professionally facilitated, with templates provided, and live note taking during in person and online workshops, allowing for the capture of rich data from all participants.

Following each engagement, time was spent to identify themes which emerged from the feedback, on a per-vertical basis. These themed findings, along with their supporting evidence in the form of anonymised quotations from our participants, were included in the draft capture for each workshop before being reported below. This allowed the team to identify both the differences, and the similarities in attitudes and experiences across the four industrial verticals involved.

Workshops Findings

Findings are detailed here, first as a "deep-dive" into each workshop, showing the perspectives shared by our separate verticals, and then finally as a selection of emergent themes and observations made by the team, across all four events.

All quotations below should be interpreted as the informed opinion of the anonymous representative, based on their experience, and not linked to specific data, unless otherwise indicated.

WORKSHOP 1 – MEDICAL TECHNOLOGIES (INCLUDING PHARMACEUTICAL)

Attendance: Pharmaceutical Company Representative (x2), MedTech R&D Representative, Medical Technology Company Representative, Connected Hubs Representative (x 3), Medical Technology Start-up (x 2)

Question 1 – What is Design?

1.1 Problem Solving, Innovation & Empowerment

We heard from a number of our participants that design is a methodology for problem solving, which allows lateral thinking, and thereby innovation. This was connected to the empowerment of teams and individuals in the MedTech and Pharmaceutical Sectors.

'The ability to solve any given problem, but it's wider than that.' — Connected Hub Representative

'A methodology, tool set, approach to equip citizens, it's about teaching you to make decisions – it doesn't have to be a problem statement. A clear understanding of what good design is, and its impact. I would like everybody who comes into our organisation to do training on what is design and design thinking.' — Medtech R&D Representative

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1.2 Customer Focused

A key characteristic of the shared understanding of design within the sector appeared to be that design is "customer focused" or "user focused". The idea was shared that design, as complimentary to engineering, could ensure that products are developed with the users and customers (patients, hospitals etc.) in mind.

'When we launch a product, if it is designed in such a way that it goes to market and meets expectations – that's a good design.' — Pharma Company Representative

'Very easy example – a product that was launched 10 years ago, wasn't great take-up, [later, design students] determined that the product was designed for the problem statement, as opposed to those who were using it' — Medical Technology Company Representative

'Engineers will solve the problem that you give them, they may not ask how did you arrive at the problem, or is that the right problem?' — Medtech R&D Representative

1.3 Culture and Willingness to Change

It was expressed that in order to make the most of design an organisation must behave in an open minded manner and that this is connected to culture and alignment within an organisation.

'To begin with you need to be open minded as to what the problem is, and take a structured approach to that open mindedness' — Medical Technology Company Representative

'Design is a culture and an orientation around adjustment' — Pharma Company Representative

1.4 A Strategic Tool

There was an understanding that design, or design thinking, could be used as a strategic tool, and that this connects to the need for leadership buy-in in Medtech / Pharma Companies. This strategic application of design pushes back somewhat on the "Problem Solving" statements above – suggesting that perhaps a strict "problem statement" limits the potential impact of a design approach.

'We're trying to use design as design strategy. Our management doesn't understand it, the only way to bring it in is bringing it in by stealth.' — Medtech R&D Representative

'Design is a way of planning towards and defining a desired outcome, it's about listening' — Connected Hub Representative

'Design is something that adds value – you're walking in with some objective that needs to be met, you might not meet it but you see a path to that objective. Adding value, for example could be shutting down an approach that doesn't make sense.' — MedTech R&D Representative

'Good looks like when the outcomes are better than what they would have been without design, and that the problem solving exercise has been valuable in itself – could be providing ideas for different issues, team building etc.' — Pharma Company Representative

Question 2 – In what ways does / might design add value to your sector?

2.1 Embracing Failure & Learning from It

There was a strong signal from participants that a characteristic value of design is as a mechanism by which enterprises can learn to embrace experimentation and understand failure differently – maximizing learnings to improve product and service offerings and operational efficacy.

This was not without caveat – some added that the willingness to fail is often stifled by organisational culture and precedent. This reflects points made earlier under "culture and willingness to change" (1.3).

'I like to create a sandbox to fail and adjust from failure – so we constantly fail and improve from failure.' — MedTech Start-up Representative

'Failure – the Beckett quote, we see this all the time, it can be very simple things like how we present information to our stakeholders, when you get different political elements pulling things in different directions the message isn't going to resonate with everybody in the room. We redesign messaging.' — Pharma Company Representative

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2.2 Talent Attraction & Retention

Connected to culture, empowerment, and willingness to innovate – there was consensus among the representatives from larger organisations that design offers value in the area of talent attraction and retention. While the words “design” or “design thinking” might not feature on job descriptions or HR recruitment messaging, it’s “creativity” and “innovation” as part of the “ways of working” which are attractive to potential employees.

‘Talent attraction... especially for bigger organisations, it’s a really competitive landscape for talent, this is one of the intangible values or benefits [of design thinking], but in terms of how you present your organisation as a place where people want to spend their time, or join. It’s really important to present yourself as innovative. My experience is they have moved beyond the foosball tables in the canteen, they want to know how the organisation works and is it a good use of their time.’ — Pharma Company

‘Employees by being able to put an input they are more engaged – we do that on a regular basis, e.g. having a patient coming in and talking to them about how the product has affected them.’ — MedTech Company Representative

‘ ‘Design’, ‘design thinking’ – people won’t get that. Instead we say ‘we have an organisation where creativity is valued, we use innovative ways of working’ – the articulation of the values of the company.’ — Pharma Company Representative

‘Bottom line is that you have a robust and flexible organisation. Intangible is that there is an opportunity to listen and be heard, and a shared vision across the organisation.’ — MedTech Consultant

2.3 Enhanced Profitability

There was a strong signal from representatives of companies present that the key value of good design is the bottom line – satisfying customers’ needs in order to enhance profitability. This was true of both larger organisations and start-ups / micros.

‘Good design will pay off, if you don’t do it your product won’t sell.’ — MedTech Start-up Representative

‘It makes it a complete product design, rather than having engineers design the product – which makes it great for manufacturing, versus making it for the user and for the patient.’ — MedTech Company Representative

Question 3 – What's it like working with Design?

3.1 Strategic Design & Organisation Design

Representatives from larger organisations stressed the importance of strategic design practices including organisation design. This was in contrast to the (smaller number) of small companies present, who expressed a lack of time for these practices, being much more focused on the design and implementation of products and services than strategic planning or organisational design.

'Organisational design is number one on this list. It can be a function of "size of company" I can't imagine that org design would be high up for micro and SMEs.' — Pharma Company Representative

'My first ever bump up against Design Thinking was in the context of organisational design – an innovative leadership person at the time who wanted to do this. A three-day workshop of storytelling what the organisation was, objectives, history, broke it down into ideas and followed a final path through to a well-designed organisation at the end of it. Right through to implementation' — Pharma Company Representative

'[Strategic design helps with] Scenario Planning – thinking about the future, unleashing people's creativity. What I tend to do is use that as the opening piece for something else, people are just fired up. Challenging assumptions and putting people in a new mindset.' — MedTech Consultant

'Smaller enterprises don't waste time on politics – it's creative destruction. It ties into stakeholder management – you deliver products – you have a destination you are trying to get to, as little white noise as you can here.' — MedTech Start-up

3.2 In-house, versus external, and the challenges of working with consultancies

We heard that there are specific challenges when it comes to working with design as a lot of design services are accessed through consultancies. It is difficult to get enterprise supports for work which might involve consultancies, and an example was cited where a consultancy ended a project because hours had been fully utilised within the budget.

With that acknowledged, there was some consensus on the need for both in-house and external design talent, each with its own purpose.

'External preferred, because in-house designers are already indoctrinated, there's more value in bringing in external thinkers.' — Pharma Company Representative

'For best value for money you need both - you need in house because they make it happen, but for that fresh view you need the outsiders. You need a depth of specialism coming in from outside but you also need the ability to keep the momentum going internally.' — MedTech Company Representative

3.3 Networking to Find Design Talent

There was evidence of a difficulty in finding the right talent, and a preponderance to the use of ad-hoc, or formal networks. IRDG was mentioned as an organisation that is helping with this challenge, with a specific focus on design thinking practitioners.

'We rely on people's networks – which isn't ideal.' — Pharma Company Representative

'We bring x number of design thinking houses to the companies we work with and then they select. We found them through [design school] for design thinking in biomedical field.' — MedTech R&D Representative

WORKSHOP 2 – CONSTRUCTION

Attendance: Construction Industry Advocate (x2), Design Contractor, Construction Contractor (x2), Property Developer, Construction Technologist

Question 1 – What is Design?

1.1 Problem Solving through Creativity & Open Mindedness

Design was understood to be a collection of practices which bring lateral thinking, creativity, curiosity and imagination to the process of solving problems. It was understood that design processes are often based on research, and on communication between multiple parties.

'[Design is] problem solving, and it involves – listening, questioning, communication, open mindedness, ability to define.' — Construction Industry Advocate

'[Design is] using research and intuitive skills to strategically solve problems that improve lives and environment.' — Design Contractor

'What skills – being totally open to all aspects of the project, good to co-ordinate all the team' — Property Developer

'Collaborative communication with relevant stakeholders, good is that the end product is fit for purpose but eliminates issues.' — Construction Contractor

1.2 Mapping, Vision, and Strategy

There was awareness too, that design is about collaboration and mapping the future state of projects. The alignment across multiple different contributors and disciplines that is required in order to produce a construction project was seen as something that design assists with.

'Thinking out of the box, mapping vision – showing others in the plan, good design is new street landscapes, new building culture, and technology bringing everything together.' — Construction Industry Advocate

'[Design can help to] bring all the elements together at the start and have a design strategy – you can help align people. BIM (building information modelling) will help you co-ordinate it all. Ask what is this building trying to achieve, and define that goal?' — Construction Industry Advocate

'Good design is all strands working together and being tied in with each other.' — Construction Technologist

'[Good design] should simplify and eliminate issues before they arise. I wouldn't be designing houses and that sort of thing, not about aesthetics, you try to design issues out before they happen' — Construction Contractor

Question 2 – In what ways does / might design add value to your sector?

2.1 Cost Reduction

There was an emphasis on the role of design in ensuring that expensive late changes in construction project are less necessary – design being the tool to ensure that the end product is fit for purpose, and for the uses for which it is intended.

'Design offers the ability to reduce overall cost by designing issues out of the outcome.' — Construction Industry Advocate (agreed by another Construction Industry Advocate, Construction Technologist, and Building Contractor)

'Design sets out a pathway for everyone to follow, and a great process e.g. BIM lining everything up so that everything is pre-ordered. The whole process is more cost effective.' — Construction Technologist

2.2 Improving the Lives of End Users

Design was seen as essential to the lifetime experience of the construction project – and its value to the end users. In practice, not all designers adhere to this principle, but it was seen as a fundamental role for designers – understanding and advocating for the user.

'Good design is user centric.' — Construction Industry Advocate

'It often doesn't matter about the end product because design has created that, it's already been designed. Architects always believe that they will design the next big building that will be remembered for many years.' — Construction Industry Advocate

'Success [in design] impacts on quality, and therefore potential for profits. I always think of the end product, which is for the end user. A better [designed] experience for the end user' — Property Developer

2.3 Aesthetics, History and Perception

The awareness that design brings of context, history, and the perception of a construction project was seen as valuable and powerful in offsetting a culture of "box ticking" and providing a legacy in the built environment to be proud of.

'Where design is invaluable is [in its understanding of] value of history, seeing the beautiful EU cities, if you have good landscapes and designs that people from other countries will come visit, e.g. Italian cities that have truly invested in design over the years – people will go visit them. Design through history has added value and what is our next 100 years?' — Construction Industry Advocate

'If you do good landscaping designs it ups the value of your property. It's about perception, if you look at the outside that's the first value, and when people go inside you keep ticking their boxes [with good design characteristics]' — Property Developer

2.4 Application of New Technologies

The construction sector is seeing the emergence of several disruptive new technologies, not least the advent of 3D Printed construction, and the widespread adoption of Building Information Modelling over the lifetime of a construction project, and of the building that results. This is seen as a "convergence" moment for the sector, which will require design skills in order to capitalise on potential. This is a two way street – where design can integrate new technologies, but also where new technologies can empower and drive new design possibilities.

'Futures and foresights, product design and service design – BIM is going to end up as a maintenance model – especially in hospitals, and commercial buildings –it's going to be a maintenance model.' — Construction Contractor

'VR walkthrough of houses, ability to position and specify, the biggest thing to consider is electrical plugs. But you can't do that anymore if it's going to be modular built. People will need to walk through that design.' — Construction Industry Advocate

'It will be changing a wee bit, 3d printing will be about 5% of houses, modular and robotic will be around 30%, 3d printing will build a round wall... but brickies will not necessarily do that for you. This is important because there are aspects of design that are now possible, which previously they weren't.' — Property Developer

'If you can bring other things [technologies] to the table that can inform the design as to what's possible that can help the designer.' — Construction Contractor

2.5 Forthcoming & Current Sectoral Changes

The construction sector is under huge pressure to deliver large volumes of housing over the coming years, and not to repeat the mistakes of the past, made in a climate of such scaled delivery. Design is seen as a tool to work with accounting for the constraints of rapid delivery, the possibilities of new technologies, and the requirements of end users who will live in these buildings for generations to come.

'We've been so focused on the last building boom in this country and a lot was learned, and there's a cultural shift happening.' — Construction Contractor

'If we want to build the amount of houses that we need to build – that's what needs to happen, is to build buildings in factories, all the issues are design out, and everything you need designed in before it even goes to production.' — Construction Industry Advocate

'The volume of production that's required will introduce constraint and design compromise – that's something that people are not necessarily going to be good for me. Good design needs to consider constraints and restrictions.' — Construction Technologist

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Question 3 – What's it like working with Design?

3.1 Involvement of Building Contractors is Important

Design, as has been noted, is seen as a way to eliminate costs incurred due to issues arising with the final product of a construction project, and during the process of its construction. Candid stories were exchanged of costly problems which occurred because design had not consulted with the construction contractors who would deliver the finished product.

'The people on the ground construction are never involved in the process, they should be involved in a practical way.' — Construction Contractor

'My first major build was 25-28 apartments and retail underneath. Got the architect, got the planning, knew what we wanted. [When we] went to tender, looked at the cheapest builder, we couldn't afford to build it. So we went to the builder and asked him "what can we do to build this building?" and he was keen to build it. So we sent him up to the architects, put the two of them together and came up with a plan, the development was built and we made money. It's the end user we're failing by not getting the builders and the architects together in the first place' — Property Developer

3.2 Design, Architecture, and the development process

There are several challenges built in to the traditional development process, and architecture, as a design discipline is part of this. Compounding the challenge of getting design involved form the outset is the traditional architect's approach, the need for speed, and the pressure to get built, and the cost of design – including the perception that design can delay projects from getting started. The converse is the tendency for design (other than architecture) to only be called upon "last minute" and when mistakes are already made.

'If you take the challenges, it comes to cost... the design is considered "nice to have" rather than an essential part of the food chain. If it's designed properly it costs less to implement, but it's seen as a cost rather than a value add. It's an up-front cost.' — Construction Contractor

'For at least half of the jobs, the building has been built, the furniture has been bought, and then the client realises that it's not really working as it's just a box and some piece of furniture – so they get you in to add the 'wow' factor. It says a lot about the traditional attitude of clients in Ireland' — Design Contractor

'Speed is a very big thing for designers because the things about construction is it's about speed – you can't go to a designer and they tell you 'we'll have it for you in 6-8 weeks' ' — Construction Industry Advocate

'The planners are all looking for the fastest thing to build.' — Property Developer

3.3 Networks and Referrals

We heard during strand 1 that the design sector relies on referrals, networks, and word of mouth both to find work, and to source talent. This is reflected in what the Construction sector told us too – that designers are sourced through existing networks, contacts of contacts. What was also interesting, is that in construction, this dynamic is very similar – a sector made up of mostly SMEs, working with one another and getting work through word of mouth.

'Most of my business comes through referral, and through word of mouth. It's always been the way. Trying to pool the resource of all the individual people working across the rest could be a solution to the challenge of everybody trying to work on their own and make enough money' — Design Contractor

'If I'm dealing with design it's a personal network that helps me find the right person for the right job.' — Construction Technologist

'I would use fiver.com and would recommend to others to use it, it's everything from business cards all the way up to website design.' — Construction Industry Advocate

'Finding design happens through people you know or partnerships, through architects or engineering or others. An idea might be to open up a 'members list' on the IDI website to link them in as everyone has a website, each element of the business has an element of design' — Construction Industry Advocate

'The biggest thing in construction is small SMEs – there's a lot of small companies who work as subcontractors, it's a big thing in construction.' — Construction Industry Advocate

WORKSHOP 3 – MOBILITY

Attendance: Agile Coach Mobility Technology, Mobility Technology Company Engineer (x 2), Connected Hub Representative, Brand Consultant, Aviation Organisation Representative, CEO of Mobility Technology Company, Enterprise Development Representative

Question 1 – What is Design?

1.1 "Creativity" vs Design

We heard that the word "creative" is a bit of a double-edged sword, specifically placing design as something that requires some kind of "intrinsic" skillset or mindset, but also separating design from problem solving, and a means by which to achieve business goals. Despite the ambiguity these words create, participants reverted to the use of "creativity" as a description of the skills a designer must have.

'It's like the red herring in terms of design is creativity – you need to be creative to be a designer... there's a problem, I want to solve it, there is a way to solve it. I thought problem solving was a higher skill than creativity.' — Enterprise Development Representative

'Creativity is very time consuming, you can go down a lot of wrong avenues to get to the answer. It's an engineering.' — Engineer, Mobility Technology Company

'Creativity is a label for design, and those terms get confused. Commercial confidence is what design is, if we can bridge the gap from that creativity to commercial.' — Brand Consultant

1.2 Outcomes which work – for Organisations & Customers

Our participants noted good design as that which meets not just customers' goals, but also the goals of the organisation, and internal metrics. Measuring the impact of design was described as something that is lacking.

'Projects can be dropped because they do not align with brand identity [of the organisation]. The ability to align the brand identity to the end product [is important]' — Agile Coach, Mobility Technology Company

'Ability to resonate with the end customer and see their point of view, [bad] designers can just jump to the solution straight away rather than thinking about the customer – need that skill, to see things from another perspective.' — Agile Coach, Mobility Technology Company

'Good design is – simple and functional, works for the end user and customer, communicates through design' — Connected Hub Representative

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1.3 Subtractive Design – knowing what's needed, and what's not

One among our workshop respondents noted the following which was mentioned in other workshops too, and so is noted here:

'Good design is about ability to differentiate between what's needed and not needed for a particular solution, when I was working with simulation software we got the full instructions and when fully implemented we didn't know what the solution could be… design can help identify what kind of solution we are trying to achieve before we go about building it.' — Engineer, Mobility Technology Company

Question 2 – In what ways does / might design add value to your sector?

2.1 Achieving Objectives & Justifying Budgets

Design must be connected to organisational and business objectives and must justify its own budget. This was made clear by a few among our participants, and vitally was a common concern across different kinds of organisation from start-up to government funded entities.

'Achieving the objectives and measures of the business are vital. If you don't have design and a set of processes, if you have an irregular process and for example omit something – you haven't fulfilled business goals' — Engineer, Mobility Technology Company

'Our main challenge is how can we report back to those who fund you that the value of design has been worthwhile. What are your KPIs when it comes to workplaces – is it the number of seats, is it collaborations, is it privacy? What are the KPIs for designs.' — Connected Hub Representative

'Bottom line is that good design must attract more customers, and increase profits.' — Engineer, Mobility Technology Company

2.2 Dealing with Change – New Contexts and Technologies

Design is associated with change, culture, and transformation. We heard that design has a role when new technologies disrupt a sector, that currently there is a shift in ways of working and organisational design is important, and that design must also educate – and instil a knowledge in industry which assists application of design, and collaboration with designers.

'In a new technology, [design is about] how can you increase the value of the user experience. Example of two air taxis, one was popular for selfies and another not so popular – down to the orientation of the seat. The perception of a product is important [to the value].' — Connected Hub Representative

'Workplace design has completely changed with covid, people working remotely, 4 day weeks, that's a huge thing I'm working on is how to make that work for people, distributed workforce, in multiple time zones on the same teams. How to make it so that people view work differently, that's become forefront of the mind for a lot of employers – they have to start to think differently about their employees and what they value.' — Agile Coach, Mobility Technology Company

2.3 Strategic & Cultural Value

We heard that design adds value to the higher order operations of an organisation, and that designers can mediate between different parts of an organisation in the creation of strong strategy. This must be coupled with a culture of design – one which includes a drive for efficiency and improvement and not accepting things as "just the way they are".

'Strategic goals of companies, designers can be the facilitators between the doers and the strategic development. Turning goals into operations.' — Connected Hub Representative

'[Design can be] a strategic part of the business, if you have a really well-designed strategic framework – it enables the company to execute well.' — Aviation Organisation Representative

Question 3 – What's it like working with Design?

3.1 "Personality" and finding the right designer

In a finding that hasn't come up before – workshop participants spoke of the need to find the "right" designer, by personality, in order to ensure the success of a design initiative. This was contrasted with other professions, but also connected to recruitment policy and company culture.

'[It's difficult] finding the right designer, because design varies with the person, finding the right person for the right job requires you to have an understanding of who they are as a person. They can show you a portfolio, but you might need to give them a design challenge to show that their way of working is suitable. The design philosophy that they use is important.' — Agile Coach, Mobility Technology Company

'In our own business we have lots of freelancers because being able to change your team to fit the personality of the client is an advantage.' — Brand Consultant

'[Even in general recruitment] It's very important, the personality of the person you're working with is really important, it has a huge impact on the dynamic of the team, if they feel safe talking about things.' — Agile Coach, Mobility Technology Company

3.2 In-house, versus external

We heard that there is a need for both in-house and external design skills, and that each has an important value add – from fresh thinking, to longer term development. We also understood that some organisations, when outsourcing, need to overcome the challenges of procurement processes in order to source good design, and allow scope for design to happen.

'External people provide fresh thinking and guidance, we have our own internal team but we would always bring in outside people because they are not biased or anything they don't bring an agenda.' — Aviation Organisation Representative

'External designers are important, for critical thinking and to avoid groupthink, but it depends on the scale of the organisation' — Engineer, Mobility Technology Company

'Both internal and external designers are needed – and it must be collaborative. Important to keep the link between the engineering and the designers' — Engineer, Mobility Technology Company

'You have to be very careful with the language of the tender to ensure that the right kind of designer can come in. Our procurement team are dialled in to produce tenders that are very carefully worded it enables a scope in terms of delivery.' — Aviation Organisation Representative

WORKSHOP 4 – FAST MOVING CONSUMER GOODS

Attendance: Founder / CEO – Beauty Products Company (x2), Brand Manager – Beauty Products Company, CEO & Founder, Brewing Business

Question 1 – What is Design?

1.1 Consistency within Context

Our FMCG enterprise representatives spoke of the need for a design to "fit" within the context of their business, understanding not just their brand, but also their processes and the stories around their products. This awareness of the context of the business helps designers to help businesses by providing work that is consistent with the context, and in a shorter amount of time.

'Designers need to bring a broad range of skills, but also understand how to apply the 'building blocks' which we use in our branding – this helps with consistency' — Brand Manager, Beauty Products

'Good design takes account of the story of the product, researching and understanding the market, the channels and the challenges – design just for the product is not enough' — CEO & Founder, Brewing Business

'It's also important to have a good way of explaining design to the rest of the business, that's a challenge because it can be difficult to communicate the value of design across the business' — CEO & Founder, Brewing Business

1.2 Commercial Purpose

There was alignment around the fact that design needs to begin from a commercial purpose, that costs must be linked to value added, and that design mustn't harm commercial value. There was some risk noted that design, when not commercially driven, can be taken less seriously than other professional services.

> ***'There has got to be commercial purpose in design, good design should keep commercial purpose in mind but also be as attractive or useful or engaging as possible' — CEO & Founder, Brewing Business***

> ***'[Design helps to] make a product as engaging as possible without impacting the commercial value of that product negatively' — CEO & Founder, Brewing Business***

Question 2 – In what ways does / might design add value to your sector?

2.1 "Brand" as an intangible, driving outcomes

There were references to some of the value of design being intangible, but that those intangibles drive outcomes throughout the business. This can be difficult to quantify, and our respondents were not specific as to those outcomes.

> ***'The brand is a complete intangible value, made up of many intangible distinctive assets.' — Brand Manager, Beauty Products***

> ***'Design impacts many areas, from packaging to whether we can go into certain regions, we're trying to expand everything, going into new regions which brings new languages etc.' — Brand Manager, Beauty Products***

2.2 Design as an holistic approach – enhancing customer experience

We heard that modern product experiences extend through digital channels, into retail settings, and on through the product life cycle itself. The application of design, through a range of design skills, is required to enhance a product in this era, but some core principles help to tie these experiences together.

> ***'You need a cohort of designers in order to have access to a range of skills, for example, we're getting a lot more retail – so understanding the shopper is key, eye level, that's a very specific expertise' — CEO & Founder, Brewing Business***

> ***'UX should be at the centre of everything right now – a core skill for any designer should be taking UX principles and applying them to all.' — CEO & Founder, Brewing Business***

'Content creators are expected to know how to do everything, from shooting the content, to making it look like an M&S ad, to ensuring it has the right functions for social platforms.' — CEO & Founder, Brewing Business

Question 3 – What's it like working with Design?

3.1 The cost of design can be challenging

We heard of mechanisms developed by FMCG companies to reduce the risk of longer design processes costing more than is affordable. This included a "hybrid" approach, mixing in-house and outsourced designers, and also care in returning to the same outsourced providers to utilise their familiarity with the brand.

'Budgets are an issue, we can sometimes get very contrasting quotes for the same jobs' — Brand Manager, Beauty Products

'Brand understanding is important – designers need to be briefed on the brand, its history, evolution, and future trajectory, it's very useful for designers but it's hard to invest that time [as a client] for someone you might not work with again' — CEO & Founder, Brewing Business

'Having an in-house designer helps when sourcing design, sometimes we remove the concept stage [to save on costs] and bring that in-house' — Brand Manager, Beauty Products

3.2 Design needs to better understand the business

It is seen as important that design providers understand the business of an FMCG goods company, from their administrative processes, project management and planning, through to the seasonality of their work, and the kinds of tasks that might come up in a given year. This allows design to pre-empt the needs of the company, instead of being a "reactive" mechanism within the business. An opportunity was highlighted in helping businesses understand design too.

'Understanding the planning model & proactively prompting for design tasks with seasonality in mind could be very helpful, maybe designers could agree a rate and a number of hours in advance so we could get work 'hedged' and it could be built into our process' — CEO & Founder, Brewing Business

'There's something to be done in introducing people who have appropriate expertise – for example introducing a packaging design expert to a pharma company, or sharing knowledge between small business owners on how to work with design' — CEO & Founder, Brewing Business

'Our process [of branding] with [project redacted] was seen as innovative because we did initial engagement about understanding the brand, and the organisation. I was astonished how many of these experienced business people hadn't been through that kind of process before' — CEO & Founder, Brewing Business

STRAND 3

SOME KEY OBSERVATIONS — ACROSS INDUSTRY VERTICALS

Each industry has its own nuanced understanding of design.

It was apparent, through the conversations in each session, that perceptions of design in each vertical vary, and that these might be traced back to the key activities in that vertical and the traditional ways in which those sectors have engaged with design processes.

For medical technology and pharmaceuticals the perception was predominantly one of design as a mechanism for innovation or strategic initiatives, and linked to product development. For construction the dominant experience of design came from architecture, and, as such, design disconnected from the operational reality of the construction of buildings and infrastructure. When speaking to the Mobility sector the clear connection was made with engineering, and design as a mechanism for problem solving. Finally, the session with FMCG companies mostly considered branding and merchandising.

Contrast between "Design as Strategy" and Design Operations

We heard varying perspectives on the role of design in an organisation, but broadly design practices could be oriented on a spectrum from design as a strategy and design as operations.

Design as strategy means design practices are involved in the understanding of organisational priorities, innovation, and product development. More operational design included the creation of brand assets, communications materials, packaging designs, product designs, and user interface designs.

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External Design services seen to bring fresh thinking

It was almost universally acknowledged that outsourcing of some design by a business is a good vehicle by which to bring in fresh thinking and to benefit from the experience that designers might have accrued from working in different adjacent contexts. This is tempered by the time it takes for external designers to familiarise with a new organisation, the context within that organisation, and the scope of a given brief.

Sourcing Design Services is Ad-hoc and Poorly Supported

Most of our contributors, regardless of industrial vertical, referenced personal and professional networks, word of mouth, and referrals as the main mechanisms by which design services can be found. There were some comments regarding the difficulty in obtaining support when soliciting design services, but also challenges in “matching” the appropriate designer to the required brief.

Perception of Design as an Additional Up Front cost, Needing Justification

While most of our participants, across verticals, understood that it is bad practice to bring design in only at the end of a process, there was concern that involving design from the beginning can be perceived as costly. That cost might enable efficiencies or cost reduction further along in the process, through early identification of potential issues or opportunity, but it can be difficult to relate those efficiencies back to design, as justification for the up-front investment.

STRAND 3

SWOT ANALYSIS OF FINDINGS

Strengths

- There is a widely shared understanding that design can add value in these diverse industrial sectors, in some cases on a strategic and innovation level, in others more closely related to operations.

Weaknesses

- The legacy of older design practices looms in the understanding of design as shared by each sector. This legacy can bring with it positive and negative connotations or cause the understanding of newer design disciplines to be limited or inaccurate.
- The reliance on ad-hoc networks and referrals to find design services is a limiting factor across all our verticals, with the minor exception of construction. In the construction vertical this use of networks is also the case but is a characteristic of how that sector works across all services required.

Opportunities

- There is varying awareness of the value of design, the value of newer design practices, and the importance of involving design early in processes to maximise that value. This variance across business offers a potential opportunity for peer-to-peer awareness development, or for skills development, for example through Design Skillnet.
- This short series of relatively small engagements highlighted the enthusiasm of diverse sectors to learn more about design and its application. There is potential opportunity for Enterprise Supports to better bridge between their clients, and the offering of the design sector.
- There was a need expressed for better case studies about how design helps enterprise. This is an opportunity to showcase best practices, and key success stories from across the networks of IDI and enterprise support agencies.

Threats

- There were difficulties, across verticals, in justifying the cost of design, and in attaching design investment to metrics and KPIs – justification of design, and measurement of its impact are lacking, and perhaps even blocking design investment.

Process Findings

Recruitment for this strand was not as easy as strands 1 and 2. While we were looking for a smaller sample size in each vertical, effort was required on the part of the Connected Hubs managers in order to identify and invite individuals from appropriate companies and industry advocate organisations.

This points towards further work to be done in gathering data on industrial entities, perhaps clients of support agencies, who are interested in design and the application of design in their sector. Further data might be collected through the Connected Hubs network also.

In-person sessions were very effective, and good connections were made between participants and our facilitators and partners. That said, the distances travelled might have impacted on the accessibility of these sessions, and further work is required to understand when in-person engagement is appropriate, and if online workshops might be more accessible.

End.

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Report for **Atlantic TIDE Partners** and **Creative Ireland**

REGIONAL ENTERPRISE PLAN MID-WEST

REGIONAL ENTERPRISE PLAN WEST

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Clár Éire Ildánach Creative Ireland Programme

SLIGO COUNTY COUNCIL COMHAIRLE CHONTAE SHLIGIGH

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