


Creative Industries Environmental Scan 2018

Summary



Cultural & creative
content drives the
digital economy





Geelong Region Local Learning and Employment Network (GRLLEN) and Creative Geelong Inc. have been working on a joint project, with funding assistance from the City of Greater Geelong to research the role and impact of the creative industries at a global, national, state and regional level and concludes that the sector provides growing economic benefits to the region.

This booklet is a snapshot of our findings.

Front Cover Photograph
Virtual Reality Family by Baby Guerilla Shorts Place, Geelong
Photograph by Caryn Bourke

Pictured above:
Makers Hub. Photo supplied by Creative Geelong



The Cultural Impacts of the Creative Industries:

- Inspiration
- Diversity
- Excellence
- Community pride & identity

No Mixed Bathers (2) by Jan Mitchell, Waterfront Geelong
Photograph by Caryn Bourke

Who are the Creative Industries?

According to the International Confederation of Societies of Authors and Composers and UNESCO, the global creative industries comprise eleven Cultural and Creative Industries (CCI) sectors:

- **advertising**
- **architecture**
- **books**
- **gaming**
- **movies**
- **music**
- **newspapers/
magazines**
- **performing arts**
- **radio, television**
- **visual arts**

**CULTURAL
PRODUCTION
IS YOUNG
INCLUSIVE &
ENTREPRENEURIAL**

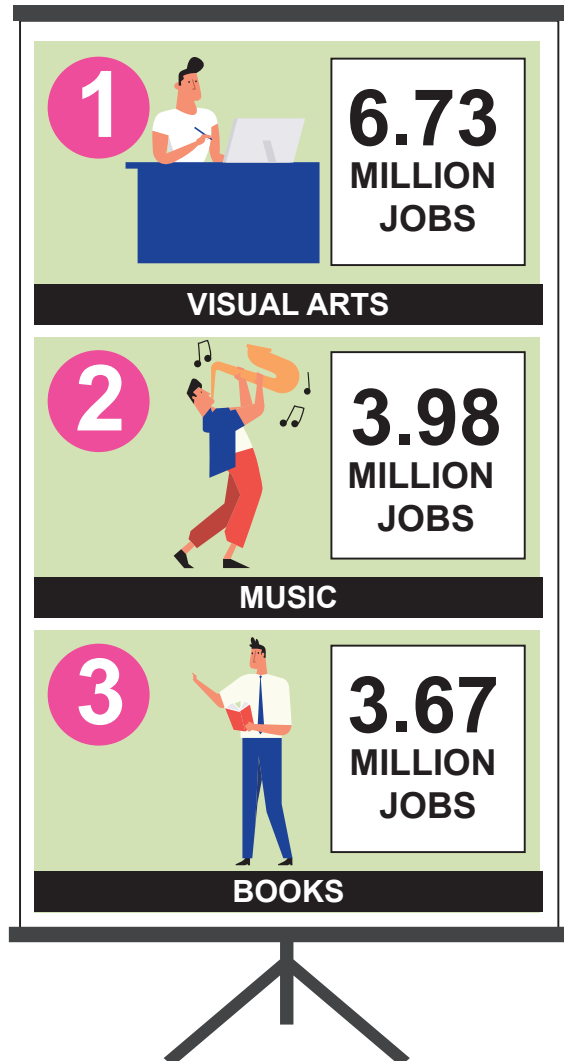
The Chrissy Amphlett Mural
by Ian Lowe
McLarty Place, Geelong

Photograph by Caryn Bourke

Creative Industries – a global picture....



The top three global creative employers are:



Photograph by Ryan Holloway

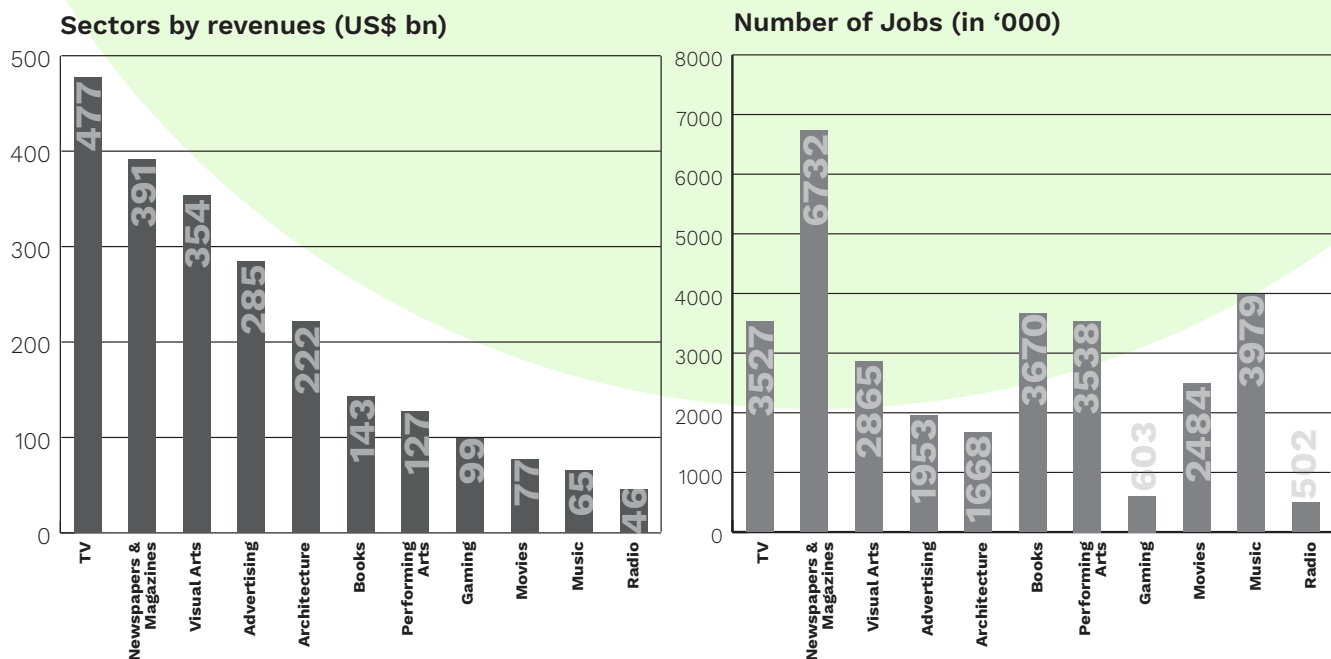
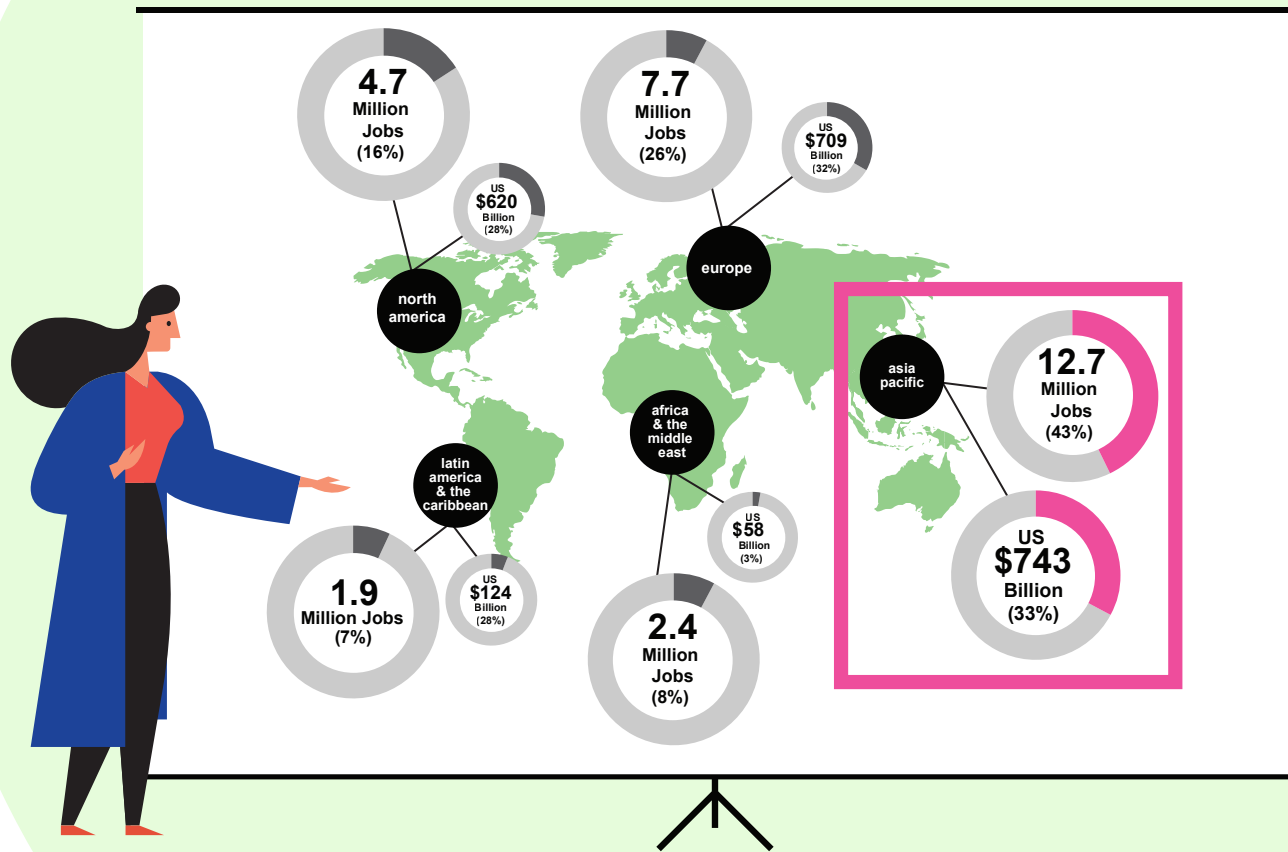
In 2013,
[the CCI industries]
generated
(US)
\$2,250b
of revenues

International Confederation
of Societies of Authors and
Composers and UNESCO

equating to
29.5
million
jobs!

and
3%
of world
GDP

The global contribution made by CCI industries is shown in the map and chart below.



¹¹ EY 2015, Cultural times: The first global map of cultural and creative industries, http://www.worldcreative.org/wp-content/uploads/2015/12/EY_CulturalTimes2015_Download.pdf, p. 15

¹² <http://www.worldcreative.org/#overview>



The Economic Impacts of the Creative Industries:

- Business growth
- Employment
- Exports
- Tourism & investment

The Unknown Mariner by Cam Scale
Brougham Street, Geelong
Photograph by Caryn Bourke

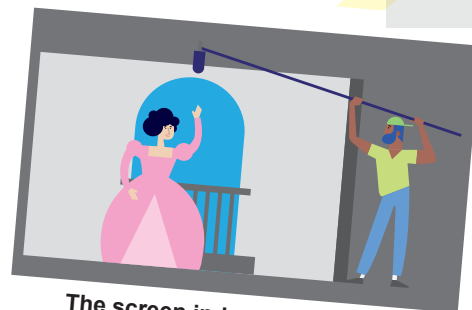
The Victorian Creative Industries

The Victoria Creative Industries are “an evolving mix of sectors spanning arts, culture, screen, design, publishing and advertising. They cover disciplines as diverse as game development and graphic design, fashion and filmmaking, performing arts and publishing, architecture and advertising, media and music, comedy and craft.”

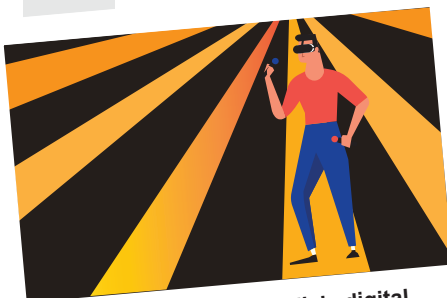
The creative sector
contributes
\$23 billion
in gross value added,
equating to 8% of the
Victorian economy



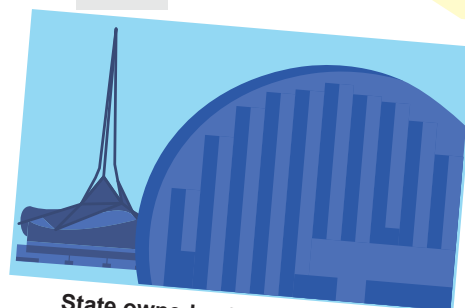
Victoria has **3X**
more live music performances
than the national average.



The screen industry contributed
1.4 billion
to the state economy in 2015.



50% of Australia's digital
games sectors are
located in Victoria.



State owned cultural institutions
host over **10 million**
visitors each year.

Photograph by Anthony Delanoix

The Victorian Government has developed five major areas of focus, and forty specific action areas, as shown in the Figure below. The expectation is that achievement of these action areas will contribute to the economic, cultural and social wellbeing of the State. The following table identifies what the actions are designed to achieve and how they will be measured.

In developing these five areas of focus, over the next four years, the State Government has allocated \$6.35million to Action 1, \$57.35 million to Action 2, \$14.05 million to Action 3, \$32.15 million to Action 4 and \$5.05 million to Action 5.

| 1. Backing creative talent | 2. Strengthening the creative industries ecosystem | 3. Delivering wider economic and social impact | 4. Increasing participation and access | 5. Building international engagement |
|---|--|--|---|--|
| Creating more opportunities to produce and present great work | Building capability and conditions for growth | Stimulating innovation and wider creative impact | Engaging more Victorians in cultural and creative endeavour | Extending Victoria's impact and profile for global audiences, visitors and markets |



Photograph by David Hofmann

The Creative Industries in Geelong

According to REMPLAN, the total output estimate for the G21 Region in 2017 is **\$35.051,041 billion (up from \$29.609,251 billion in 2015, an increase of 18.4%).**

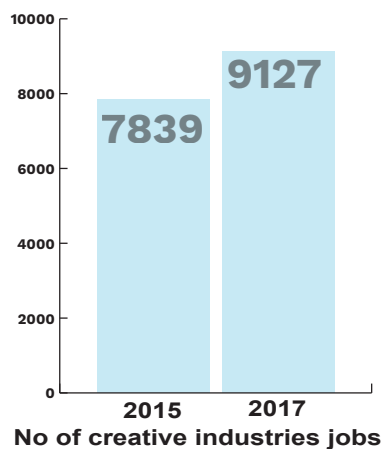
1200+
jobs have been
created by creative
industries in the G21
Region between
2015-2017

The creative industries sectors
contributed

\$2.1
billion
(5.9%)

to the overall regional output.

There are
5,252
creative industry
businesses in
the G21 Region
(2015)



There was a
rise of
16.4%
of creative
industries
jobs
in the G21
(2017)

Creative Industries

CREATE JOBS

for our community



Photograph by Samuel Zeller

Creative Industries create jobs in our region

REMPPLAN also has the capacity to analyse the impact of job creation on the regional economy. This is done in relation to four different indicators:

- **Impact on output** ⁷³
- **Impact on employment**
- **Impact on wages and salaries**
- **Impact on value-added**

For the purposes of this report, REMPLAN has been used to model the impact of the creation of ten, twenty, fifty and one hundred jobs in the Information and Communications Technology sector as an example of the contribution that growth in the Creative Industries can make to the regional economy. Details are shown below.

Ten Jobs

For this scenario, REMPLAN estimates that the **demand** for intermediate goods and services would **rise by \$1.890 million**. The creation of ten additional jobs will result in a rise in wages and salaries, which leads to **increased consumption**, estimated at **\$1.326 million**. The increase in purchases of goods and services is estimated to have a direct gain of an **additional 6 jobs**, whilst **6 extra jobs** are expected to be created to service the increased consumption. **The total estimated value-added is \$3.429 million.**

10

Creative Jobs

\$1.8
MILLION

• Demand for Goods & Services Increase

\$1.3
MILLION

• Increased Consumption

6

• Additional Jobs

6

• Bonus Jobs

TOTAL EST
VALUE ADDED
\$3.4
MILLION



20

Creative Jobs

\$3.8
MILLION

• Demand for Goods & Services Increase

\$2.6
MILLION

• Increased Consumption

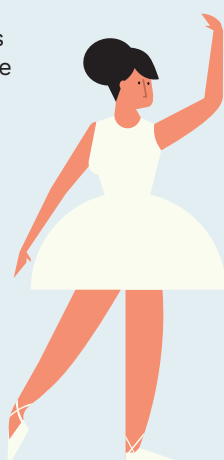
13

• Additional Jobs

10

• Bonus Jobs

TOTAL EST
VALUE ADDED
\$6.8
MILLION

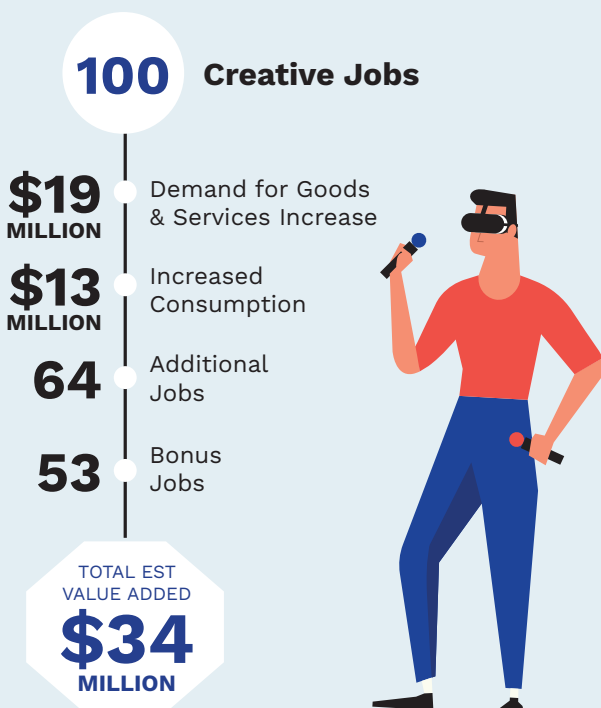
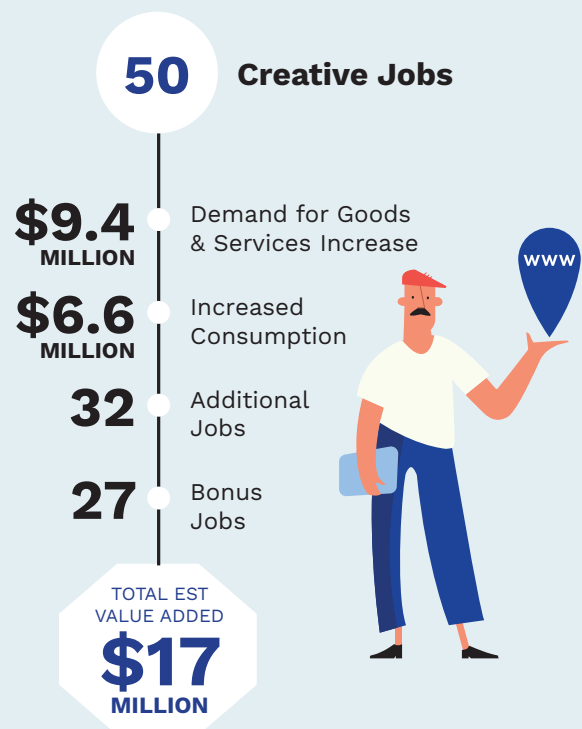


Twenty Jobs

For this scenario, REMPLAN estimates that the **demand** for intermediate goods and services would **rise by \$3.780 million**. The creation of twenty additional jobs will result in a rise in wages and salaries, which leads to **increased consumption**, estimated at **\$2.652 million**. The increase in purchases of goods and services is estimated to have a direct gain of an **additional 13 jobs**, whilst **10 extra jobs** are expected to be created to service the increased consumption. **The total estimated value-added is \$6.859 million.**

Fifty Jobs

For this scenario, REMPLAN estimates that the demand for intermediate goods and services would **rise by \$9.451 million**. The creation of fifty additional jobs will result in a rise in wages and salaries, which leads to **increased consumption**, estimated at **\$6.630 million**. The increase in purchases of goods and services is estimated to have a direct gain of an **additional 32 jobs**, whilst **27 extra jobs** are expected to be **created** to service the increased consumption. **The total estimated value-added is \$17.147 million.**



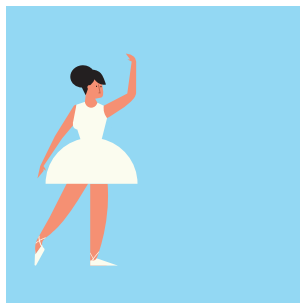
One Hundred Jobs

For this scenario, REMPLAN estimates that the **demand** for intermediate goods and services would **rise by \$18.901 million**. The creation of one hundred additional jobs will result in a rise in wages and salaries, which leads to **increased consumption**, estimated at **\$13.259 million**. The increase in purchases of goods and services is estimated to have a direct gain of an **additional 64 jobs**, whilst **53 extra jobs** are expected to be created to service the increased consumption. **The total estimated value-added is \$34.293 million.**

Even a modest growth of ten jobs can have a significant impact on the regional economy and labour market. Given the projections provided by REMPLAN, the potential growth in various parts of the Creative Industries could have a profound effect on the regional economy.

⁷³Output data represents the gross revenue generated by businesses and organisations in each of the industry sectors in a defined region. Output Impacts allows REMPLAN to model the flow-on economic impacts from an actual or hypothetical direct change to the local economy. Direct changes can be entered as positive or negative changes to direct jobs or to direct output for each industry sector. REMPLAN Economy automatically calculates the flow-on industrial effects and consumption effects for direct changes. The flow-on impacts for the region's economy from a direct change are summarised as Output Type 1 and Type 2 economic multipliers.

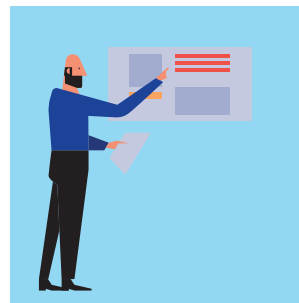
You can train for all of these creative careers right here in Geelong!



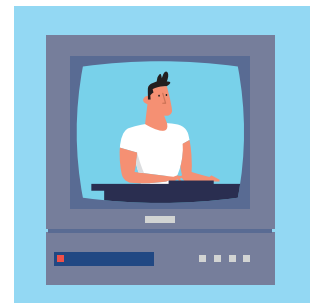
Actors, Dancers and Other Entertainers



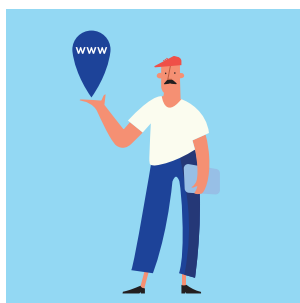
Advertising and Marketing Professionals



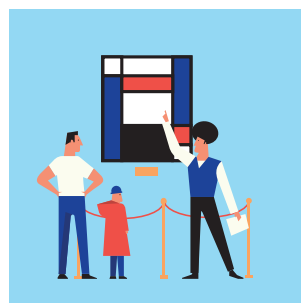
Artistic Directors, Media Producers & Presenters



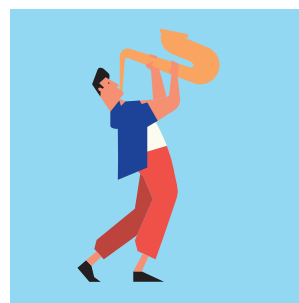
Film, Television, Radio and Stage Directors



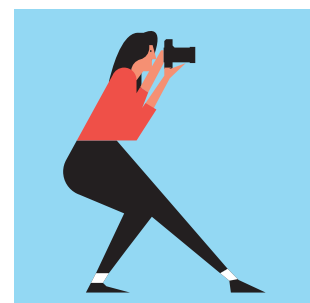
Multimedia Specialists & Web Developers



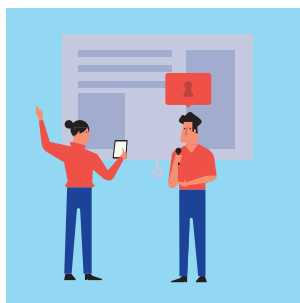
Gallery, Museum & Tour Guides



Music Professionals



Photographers



Public Relations Professionals







Visual Arts and Crafts Professionals

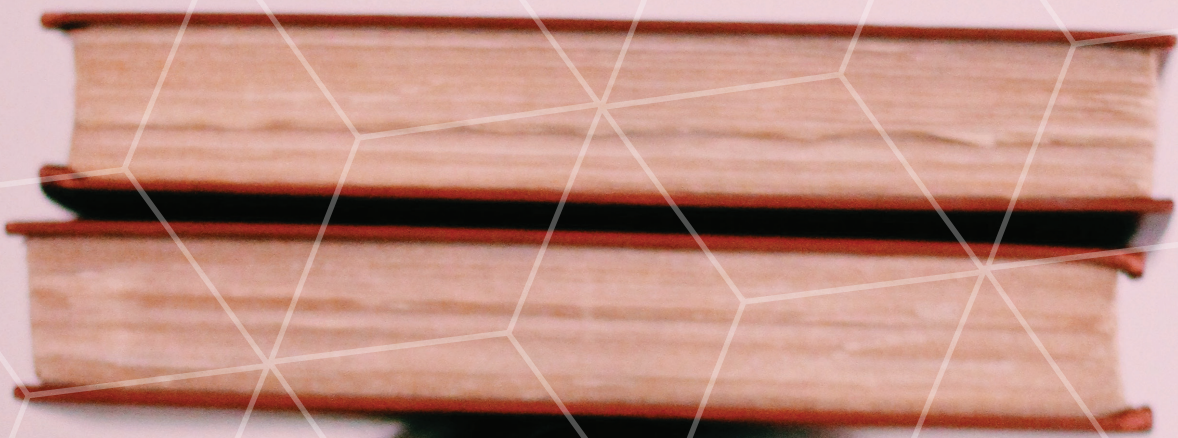


Software and Applications Programmers



Welfare, Recreation & Community Arts Workers

| | | | |
|---|---|---|--|
|  |  |  |  |
| <p>The Gordon offers a large number of VET qualifications.</p> | <p>Deakin offers a wide range of courses which relate to the creative industries.</p> | <p>Oxygen College offers music performance, sound production, electronic music, digital content creation, photography and visual arts</p> | <p>Diversitat through its Pulse Radio Station provides training in radio programming</p> |



The Social Impacts of the Creative Industries:

- Improved Education
- Better Health and Wellbeing
- Community Strength
- Crime Prevention

Photograph by Mahrael Boutros

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This booklet was designed by Deakin University (Waterfront Geelong Campus)
Visual Communication Design students for Creative Geelong.
The Design & Collaboration Team is Caryn Bourke and Tarni Pearce.