ATTACHMENTS

Economic Development Committee Meeting

10 November 2015

6.30pm

City of Albany Council Chambers

TABLE OF CONTENTS

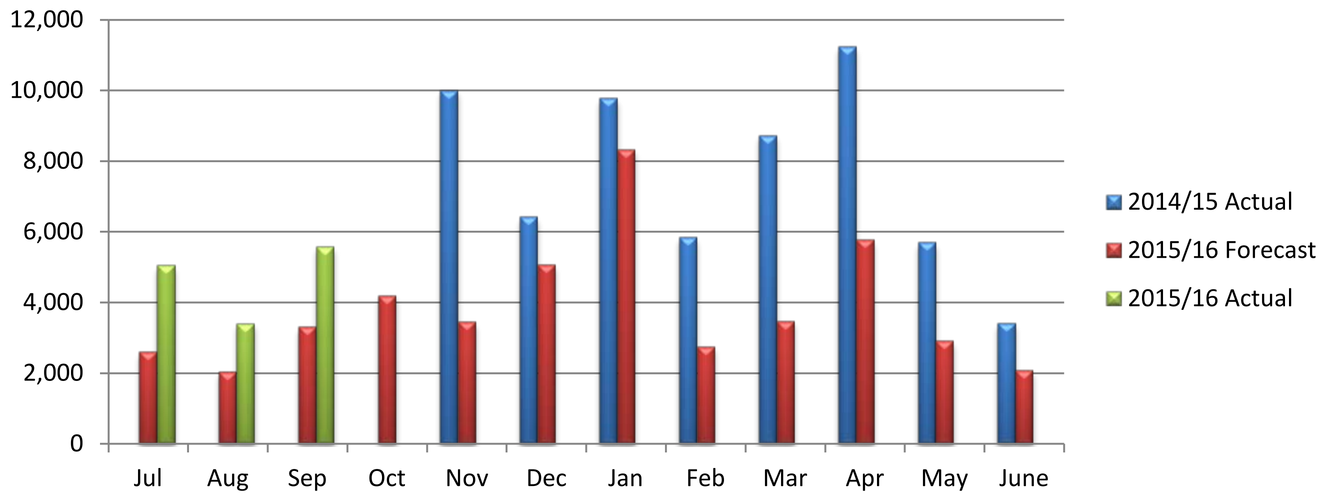
Albany Heritage Park

Statistics Report July to September 2015

Visitation

National Anzac Centre Overall Visitation Statistics and Comparisons
Running total since opening to 30 September 2015 - 75,199

	Jul	Aug	Sep
2014/15 Actual	0	0	0
2015/16 Forecast	2 598	2 032	3 309
2015/16 Actual	5 047	3 402	5 575
%	194%	167%	168%
Daily Visitation Target	84	66	110
Days Below Target	7	1	2

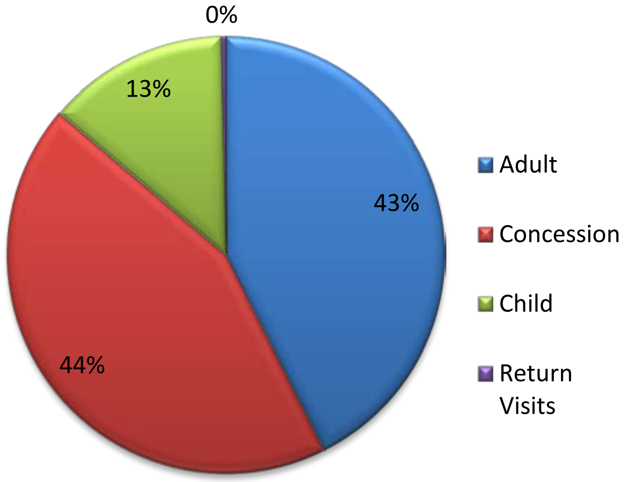


National Anzac Centre Visitation Type Detail

	Jul	Aug	Sep
Adult	2 362	1 337	2 057
Concession	1 591	1 595	2 677
Child (5-15)	463	95	241
Child Extra	386	75	204
Child (4 & under)	89	51	48
DVA Card	44	42	48
RAC 20% Discount	51	45	17
Armed Services	0	0	1
Free	12	32	72
Tour Group	40	37	22
School Group	0	90	147
Annual Passes	28	24	14
Annual Pass Return	15	9	26
2 Day Passes	0	0	7
2 Day Pass Return	0	0	2
Gift Vouchers	13	4	5
Gift Voucher Redeem	0	11	6

National Anzac Centre Visitation Type Summary

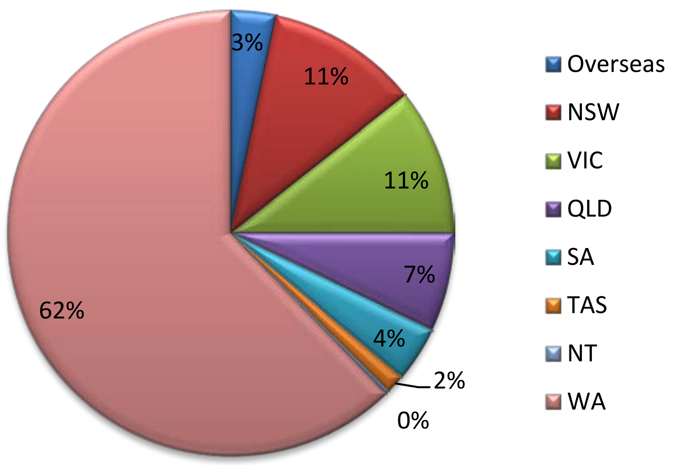
	Jul	Aug	Sep
Adult	2 432	1 416	2 161
Concession	1 706	1 698	2 759
Child	941	313	640
Return Visits	15	9	28



Princess Royal Fortress Tours Statistics

	Jul	Aug	Sep
2014/15 Tours Held	0	0	0
2014/15 Attendance	0	0	0
2015/16 Tours Held	53	50	38
2015/16 Attendance	669	479	527

Visitation by Location



Finance – Year to Date 30 September 2015

Annual Budget	YTD To Date Budget	YTD Actual	YTD Variance	YTD % Variance
$256,386	$65,255	$172,693	$237,948	365%

Operating Expenditure	YTD Budget	YTD Actual	$ YTD Variance	% YTD Variance
Total	$304,489	$216,861	$87,628	29%
Operating Income	**YTD Budget**	**YTD Actual**	**$ YTD Variance**	**% YTD Variance**
Total	$239,234	$389,554	$150,320	63%

Key Variances Notes:

Expenditure:
- Curatorial Expenditure $34,000 below budget due to the contract not being awarded to WAM as we review operations.
- Maintenance and operations $35,000 below budget.

Income:
- NAC Entry Sales $100,000 above budget.
- NAC Forts Merchandise $50,000 above budget

AGENDA ITEM ED027 REFERS

Creative Industries Analysis and Potential Strategic Directions for the City of Albany

A Scoping Study

April 2014

SC Lennon & Associates

economics • planning • policy • strategy

This scoping report has been prepared by:

SC Lennon & Associates
economics • planning • policy • strategy

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CONTENTS

1 Introduction

1.1 Background

This scoping report has been prepared by SC Lennon & Associates Pty Ltd. It has been prepared on behalf of the City of Albany.

The City of Albany has identified the attraction and establishment of creative industries as a key economic development focus area, particularly when combined with creating a learning centre of excellence for creative industries services and production. The City is investigating the establishment of an innovation park and a regional university as a means of generating economic development for the region. Hence, the City is interested in how Albany might leverage its unique sense of place to attract residents and business enterprises to help attract these industries / activities and to establish Albany as a hub of creative industries in the Great Southern Region.

In order to flag these and related economic development opportunities for the region, the City of Albany plans to host an Economic Development Forum in late 2014. To this end, appropriate data and information on the City's creative industries is required to help inform the forum.

1.2 This Scoping Report

Until now, the City of Albany has only had access to the broad industry sector human capital profiling via data sourced from the Australian Bureau of Statistics. Hence, more detailed data is required to accurately profile and quantify the City of Albany's creative industries. This report documents the findings of tailored research and data analysis for the City of Albany and the Great Southern Region in profiling the creative economy.

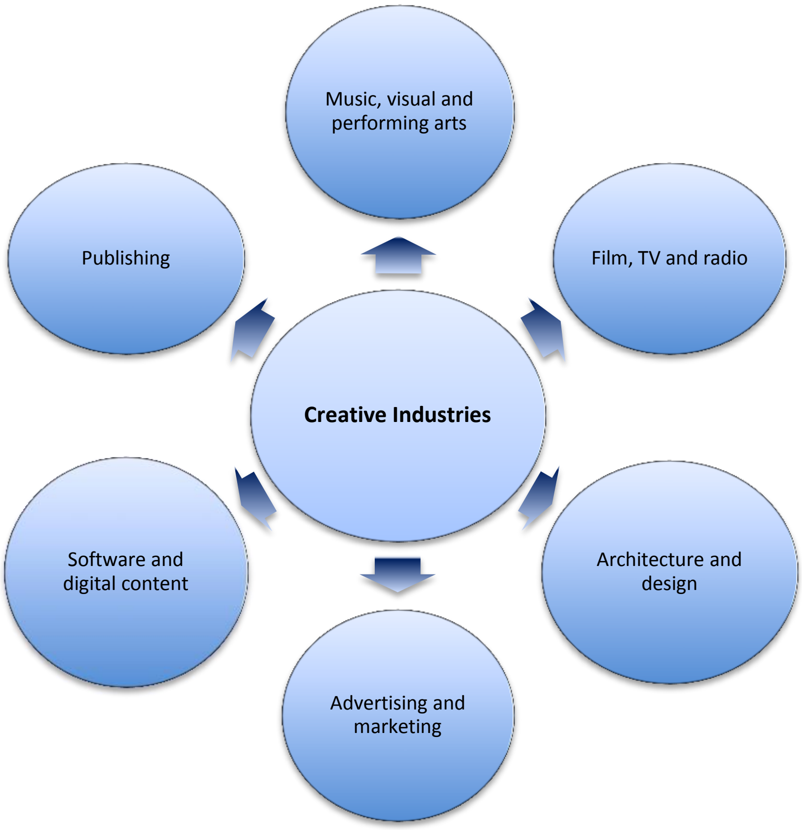
Creative Industries Data Analysis

The research, consultation and analysis which informs this scoping report began with a tailored analysis of available ABS Census data. In terms of accurate statistical analysis, a challenge for the City of Albany, like elsewhere, is allocating the Australian Bureau of Statistics' detailed industry classifications and occupational classifications into creative industries segment definitions. As demonstrated herein, this can be done at the most detailed level of industry and occupational classification which is available at the local government area level.

The accepted definition of creative industries, at least for the purpose of statistical analysis, consists of:

- Music, Visual and Performing Arts;
- Film, TV and Radio;
- Advertising and Marketing;
- Architecture and Design;
- Software and Digital Content; and
- Publishing.

FIGURE 1. CREATIVE SEGMENTS



But rather than being separate sectors of the economy, creative industries are a pervasive input to many, if not all industries. Besides measuring employment in the creative industries themselves, where possible, the analysis also identifies employment of creative workers (by occupation) 'embedded' in other (non-creative) industry sectors. This reflects the dynamics of the creative workforce, which, broadly-speaking, includes:

1. Creative occupations within the core creative industries (what are referred to as 'specialists');
2. Non-creative occupations ('support staff') employed in the creative industries; and
3. Creative occupations employed in other (non-creative) industries (termed 'embedded' creatives).

To capture this full range of employment types, what is known as the 'Creative Trident' is used to measure employment in both the creative industries and other non-creative industry sectors by combining data on employment by industry and data on employment by occupation.

In order to get an accurate measure of the creative workers embedded in other (non-creative) sectors of the economy, a profile of occupations at the most refined 6-digit level as per the Australia and New Zealand Standard Classification of Occupations (ANZSCO) is required. Even at this most refined level, some occupation codes are quite specific, e.g. 'landscape architect' while others may include a mix of occupations that from some points of view seem relatively unrelated - for example, the ANZSCO code 211499 Visual Arts and Crafts Professionals includes New Media Artist, as well as Leadlighter and Textile Artist.

Unfortunately, for a comparatively small workforce in a small geographic area like the City of Albany, the occupational profile data is not readily available at this most refined level. Instead, this scoping report assesses the data at the broader (4-digit) level of occupational classification as used by the ABS. This still provides a good understanding of the extent of the City of Albany's creative workforce which is employed in both the creative industries themselves and other non-creative sectors of the economy.

Therefore, the data presented in this report focuses on the first two components of Albany's creative workforce, that is, those 'creatives' and support staff employed in the creative industries. Data is collated for the City of Albany at the most detailed (4-digit) Australia and New Zealand Standard Industrial Classification level and compared to the creative industries profile for the Great Southern Region (as defined by an amalgamation of 11 local government areas), Western Australia and Australia.

Despite limitations with respect to the occupational profile data, the profile of employment in Albany's creative industries (in the context of the regional, State and national figures) provides a sufficient overview of the local creative economy profile, on which to establish a clear understanding of local dynamics and make some informed decisions in planning for creative industries growth and development in the City of Albany.

Stakeholder Consultation

The data analysis is complemented with findings from targeted stakeholder consultations which were undertaken in Albany in March 2014. Those consulted were identified in conjunction with the City of Albany and meetings were held according to the availability of those contacted. Meetings were held with: selected Council officers; City of Albany Councillors; Regional Development Australia – Great Southern Region, Great Southern Development Commission; the Albany Chamber of Commerce and Industry; Creative Albany Incorporated; the Albany Entertainment Centre; and the Perth International Arts Festival – Great Southern.

The consultation meetings discussed key challenges and opportunities facing the local creative segments with a view to incorporating this critical information into recommendations for the City of Albany to help foster its creative industries in a strategic fashion. The ideas for action and strategic directions touched on in this report were in part informed by these consultations.

Strategic Directions

Using the findings from the data analysis and consultation with key stakeholders, the final section of this scoping report puts forward considerations for the City of Albany as it seeks to address its role in helping facilitate and grow the City's creative economy.

The suggested strategic directions and ideas for action are not all-conclusive. Rather, they are designed to generate further thinking and discussion around the City's desire to attract and establish creative industries as a key economic development focus area.

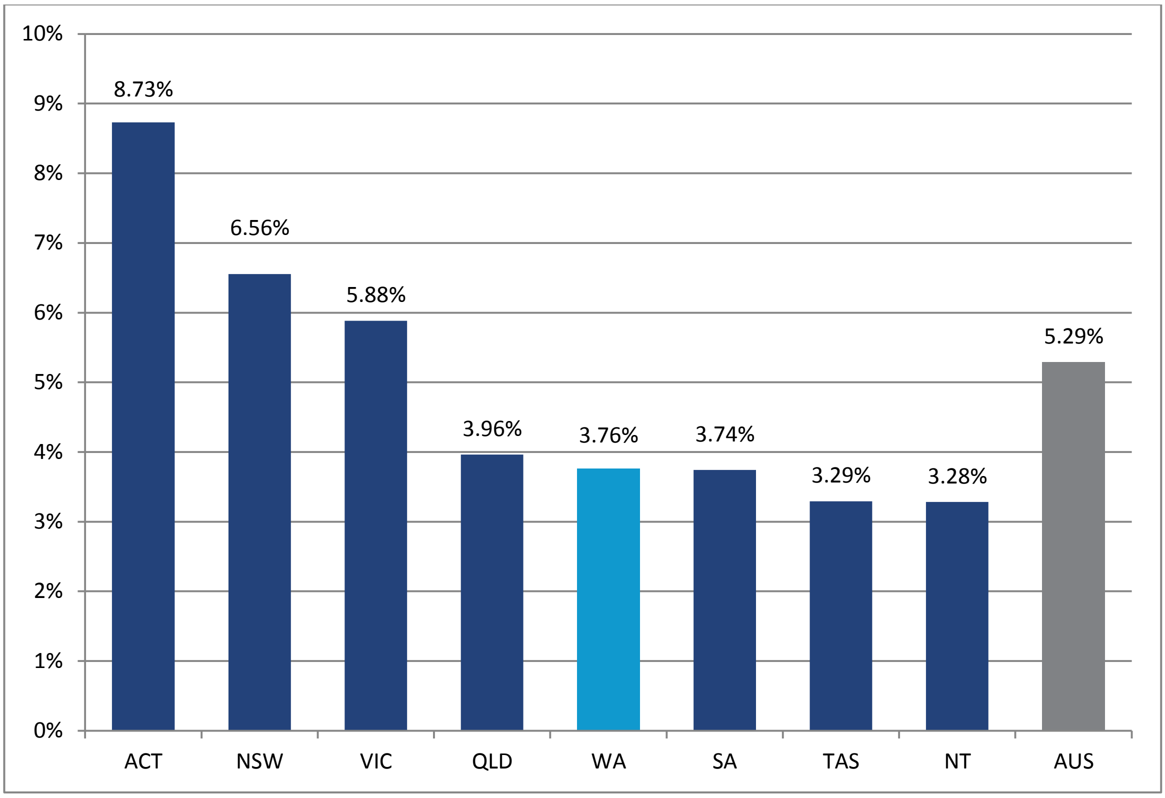
2 Introducing the Creative Industries

2.1 Creative Industries Defined

Creative employment in all of its complexity and variations is still regarded by policy makers as a critical component of a vibrant society and economy. The creative industries are those areas of practice that turn original individual creativity into social and commercial outcomes, drawing on creative talent to produce new products and services for local, national and international markets.

In Western Australia, creative employment represents 3.76% of the state's total workforce (compared to 5.29% nationally). This places Western Australia on par with Queensland and South Australia, but below the comparable proportions for Victoria and New South Wales, where a higher share of the workforce is accounted for by 'creatives'.

FIGURE 2. CREATIVE EMPLOYMENT AS A PROPORTION OF THE WORKFORCE, AUSTRALIA'S STATES AND TERRITORIES, 2011



Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

There is no standard definition of what makes up Australia's creative industries or occupations. The Australian Bureau of Statistics (ABS) 'cultural employment' definition of industries has until now, been very broad, as it includes zoos, botanical gardens, nature reserves, religious and funeral services, arts education, wholesaling and retailing activities while it does not count elements of digital media and software development critical to cultural and creative production and consumption in Australia.

Hence there is no readily available data from the ABS or other sources to accurately measure the creative industries in a place like the City of Albany and to compare it with other localities or state and national averages. As a result, a tailored approach to employment by industry and occupation data is required, to measure the true extent of creative industries and occupations at the local level.

Following the work of the ARC Centre of Excellence for Creative Industries and Innovation, in Australia, the accepted definition of 'creative segments' (or what are sometimes more simply referred to as creative industries), at least for the purpose of statistical analysis, consists of:

- Music, Visual and Performing Arts;
- Film, TV and Radio;
- Advertising and Marketing;
- Architecture and Design;
- Software and Digital Content; and
- Publishing.

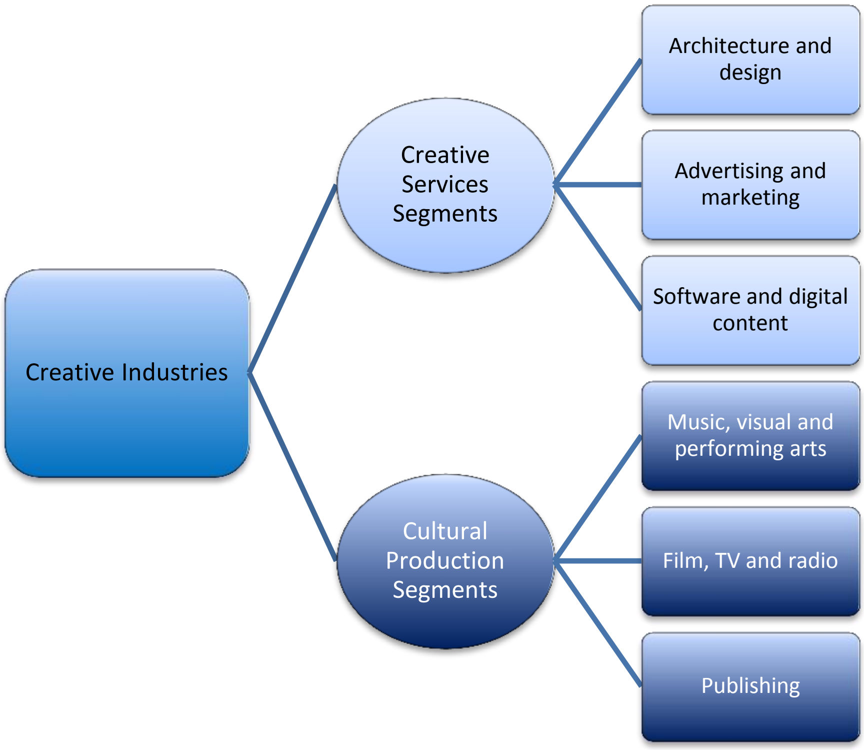
This is a widely-accepted grouping which has improved upon earlier iterations by more accurately categorising industry sectors according to the role of 'creativity' as their primary source of value. It excludes, for example, those sectors which serve as retailers of creative goods and services without generating creative capital in their own right.

Broadly speaking, the six creative segments fall into one of two sub-groups. One is the 'creative services' segments which include: architecture and design; advertising and marketing; and software and digital content.

Creative services enterprises and creative entrepreneurs provide inputs that are central to businesses across many industries, from manufacturing and construction to retailing and entertainment. Representing what is in effect, a 'creative services economy', creative enterprises add value to production through design, technical performance, packaging and branding.

The 'cultural production' segments on the other hand include: film, TV and radio; music, visual and performing arts; and publishing. These sectors embody the role of arts and cultural assets as contributors to quality of life and community well-being and as important contributors to economic activity and economic development in their own right.

FIGURE 3. CREATIVE SERVICES AND CULTURAL PRODUCTION SEGMENTS



In Western Australia, approximately 70% of all creative occupations are in the ‘creative services’ segments (Software and Digital Content; Architecture and Design; and Advertising and Marketing). Creative services enterprises and creative entrepreneurs provide inputs that are central to businesses across many industries, from manufacturing and construction to retailing and entertainment.

The remaining 30% is employed in the ‘cultural production’ segments (Film, TV and Radio; Music, Visual and Performing Arts; and Publishing). This 70/30 split between creative services and cultural production segments is typical of most of Australia’s states and territories.

3 Albany's Creative Industries

3.1 Creative Industries Profile

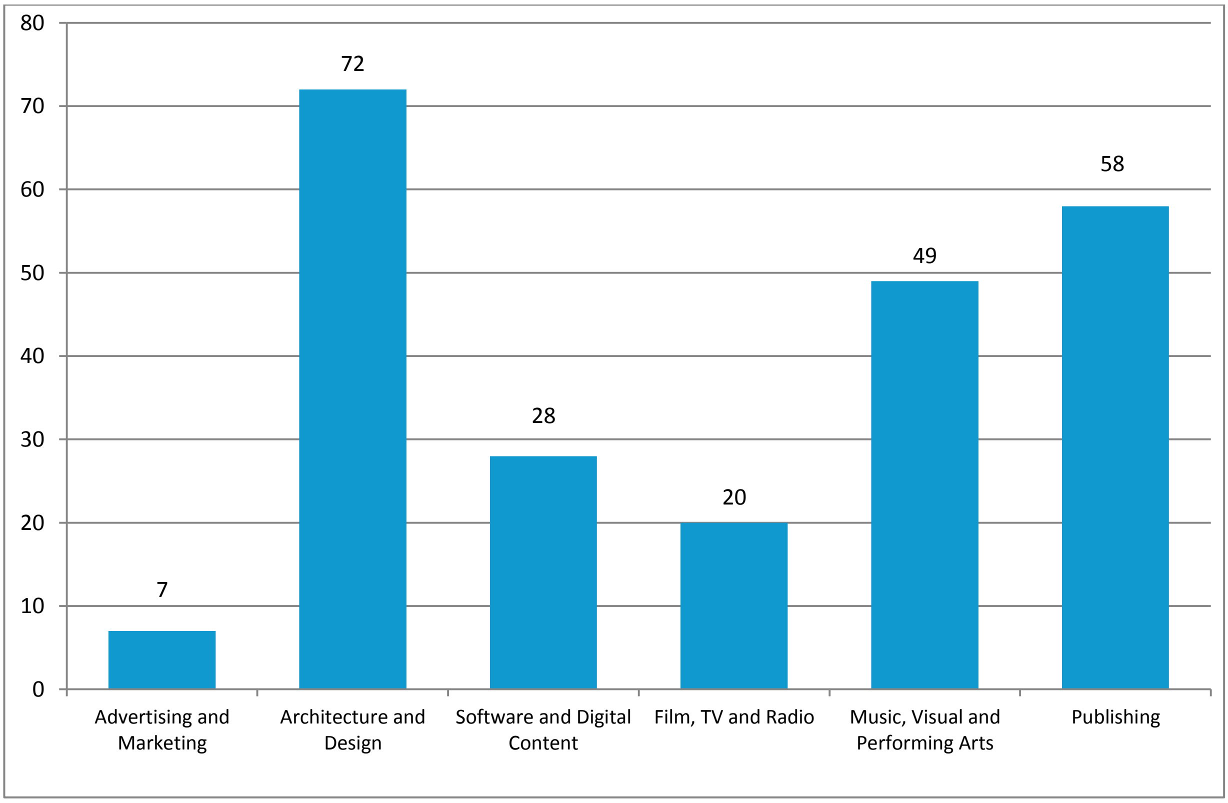
According to data from the 2011 Census of Population and Housing, the City of Albany's creative industries account for 234 local jobs, which equates to approximately 1.5% of the City's employed workforce of around 15,000. This figure of 234 jobs excludes creative workers employed (or 'embedded') in other non-creative industry sectors (see discussion below).

The City's largest creative industries segment is Architecture and Design, which in 2011 employed 72 workers (both creatives and support staff) or 31% of the City's total creative industries employment. The majority of workers employed in this segment (48 workers or two-thirds of the segment total) are engaged in the provision of architectural services. Other activities include the provision of specialised design services and professional photographic services.

The cultural production segments of Publishing (58 workers or 25% of total creative industries employment) and Music, Visual and Performing Arts (49 workers or 21%) are the also notable contributors to the City of Albany's creative workforce.

The majority of Albany's workforce employed in the Music, Visual and performing Arts segment are creative artists, musicians, writers and performers and those involved in museum operation. In the City of Albany's Publishing segment, the large majority of workers (81%) are employed in newspaper publishing.

FIGURE 4. CREATIVE INDUSTRIES EMPLOYMENT BY SEGMENT, CITY OF ALBANY, 2011

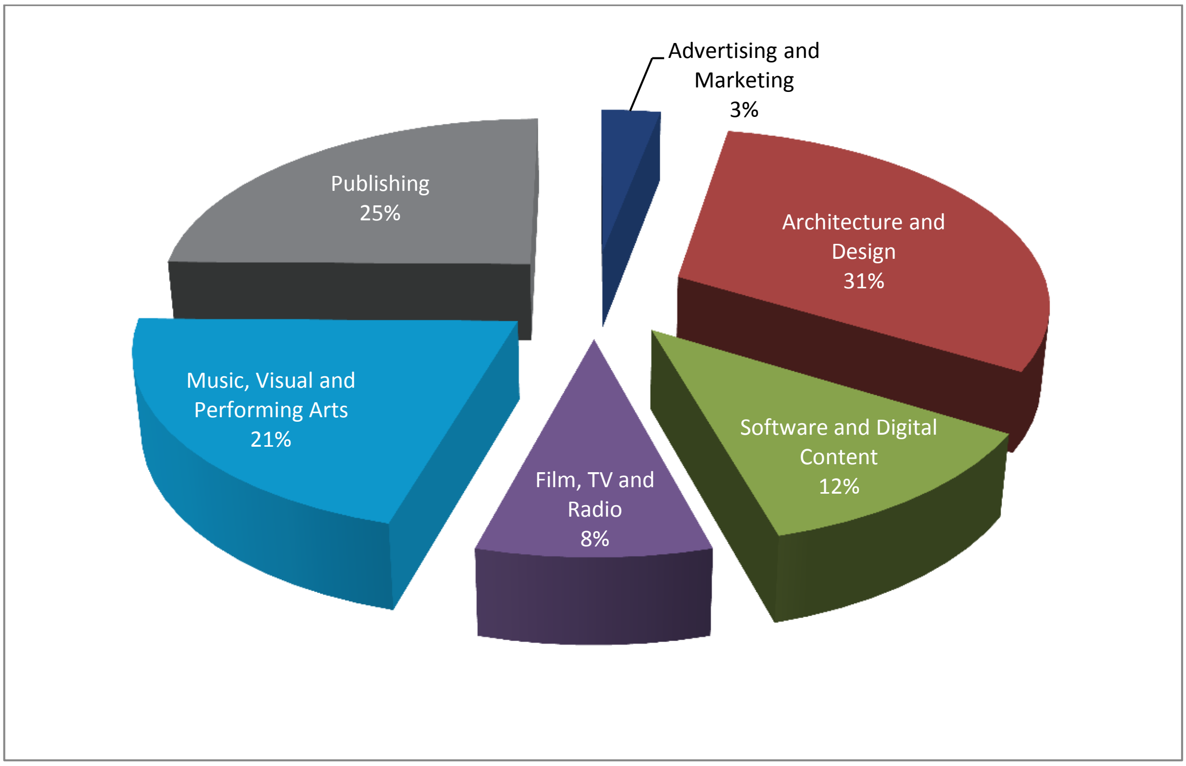


Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

The City of Albany's smallest creative industries segment is Advertising and Marketing, which employs just seven people or 3% of the City's creative industries workforce.

Figure 5 shows the breakdown of the City of Albany's creative industries employment by segment in proportional terms, while Figure 5 compares the proportional breakdown in Albany with that of the wider Great Southern Region (as defined by a collection of 11 local government areas), Western Australia and Australia.

FIGURE 5. CREATIVE INDUSTRIES EMPLOYMENT BY SEGMENT (%), CITY OF ALBANY, 2011

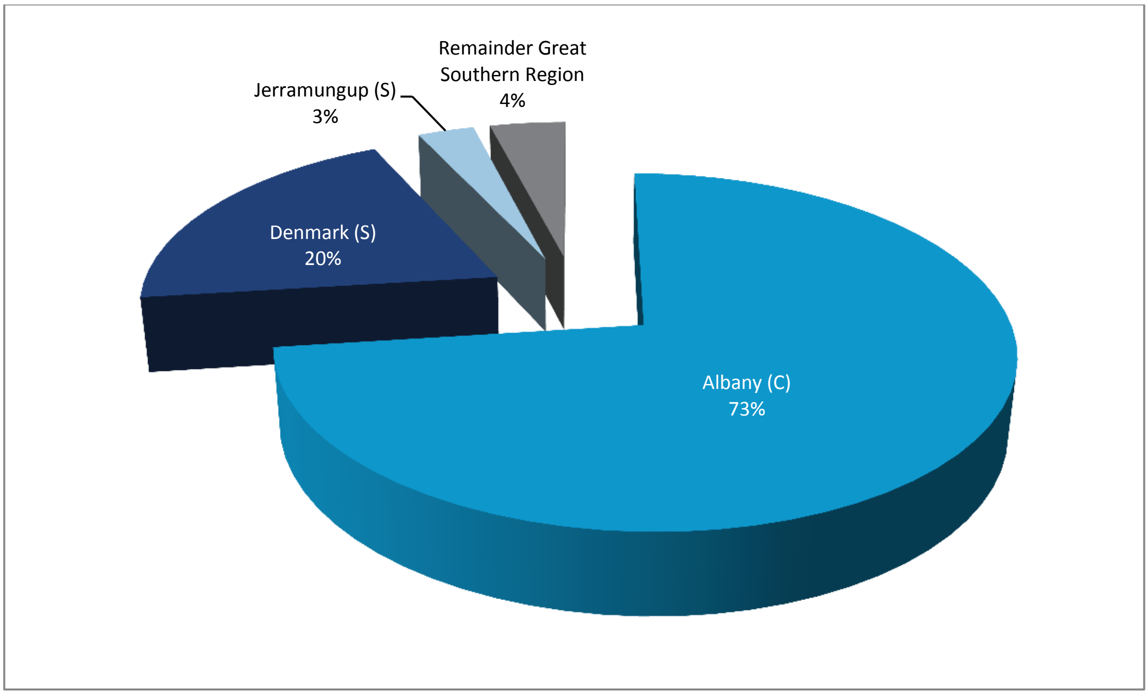


Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

As shown in Figure 6, across the Great Southern Region, the majority of creative industries employment is located in the City of Albany (73% of the region's creative industries employment) and the neighbouring Shire of Denmark (20%) with very little of no creative industries employment recorded in the region's nine other local government areas. In fact, the remaining 7% of creative industries employment (or 23 jobs) is located in the four local government areas of Jerramungup, Katanning, Gnowangerup and Woodanilling. Denmark's creative industries profile mirrors that of the City of Albany though with a comparatively higher proportion of creative artists, musicians, writers and performers. Jerramungup, which accounts for 3% of the region's creative industries employment, is home to 11 jobs in the Libraries and Archives sub-sector of the Publishing segment, with no other creative industries employment.

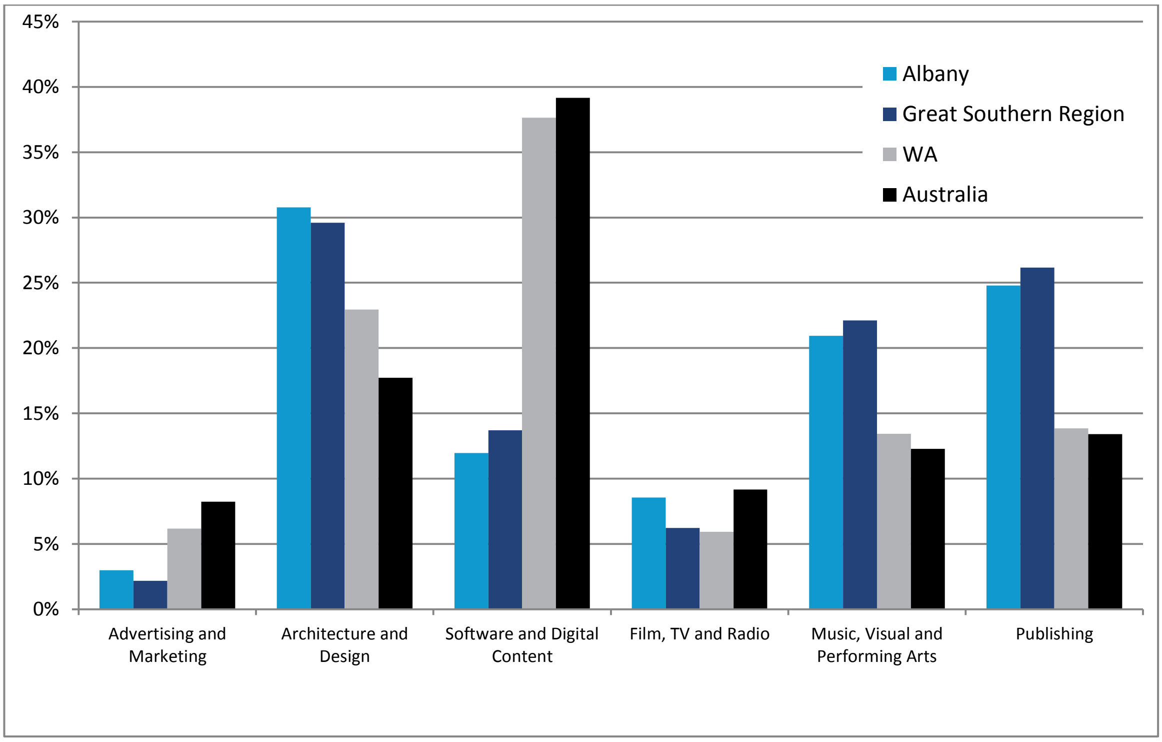
As illustrated in Figure 7, the City of Albany's Architecture and Design segment employs a higher proportion of creative industries workers (31% of total creative industries employment) than the Great Southern Region (30%), Western Australia (23%) or Australia (18%).

FIGURE 6. TOTAL CREATIVE INDUSTRIES EMPLOYMENT BY LOCAL GOVERNMENT AREA, GREAT SOUTHERN REGION, 2011



Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

FIGURE 7. CREATIVE INDUSTRIES EMPLOYMENT BY SEGMENT (%), CITY OF ALBANY, GREAT SOUTHERN REGION, WESTERN AUSTRALIA AND AUSTRALIA, 2011



Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

The City of Albany and the Great Southern Region compare favourably, in employment terms, to Western Australia and Australia as a whole in the Publishing and Music, Visual and Performing Arts segments. Conversely, the City of Albany has a relatively small representation in the creative industries segment of Software and Digital Content, which accounts for 12% of the City's creative industries employment compared to 38% and 39% for WA and Australia respectively.

Typically, Australia's Advertising and Marketing segment employs a small proportion of the creative industries workforce because many creatives working in this field are embedded in other sectors of the economy (over two-thirds of Western Australia's Advertising and Marketing workers are embedded in other sectors of the state's economy).[1] In the City of Albany and the Great Southern Region, the proportional representation of this segment, by employment, is lower than that in Western Australia and Australia.

3.2 Creative Employment by Occupation

As noted in the introduction, to get an accurate measure of the creative workers embedded in other (non-creative) sectors of the economy, a profile of occupations at the most refined (6-digit) level as per the Australia and New Zealand Standard Classification of Occupations (ANZSCO) is required. Unfortunately, for a comparatively small workforce in a small geographic area like the City of Albany, the occupational profile data is not readily available at this most detailed level. Instead, this scoping report assesses the data at the broader (4-digit) level of occupational classification as used by the ABS. This still provides a good understanding of the extent of the City of Albany's creative workforce which is employed in both the creative industries themselves and other non-creative sectors of the economy.

A report recently released by the Department of Culture and The Arts titled *Creative Industries Analysis for Western Australia* demonstrates the significance of the creative workforce embedded in other sectors of the economy, with some creative segments having a significantly higher representation of embedded creatives than others. The report notes a large share of creative services workers are employed in other (non-creative industries) sectors.

In Western Australia, over two-thirds (69%) of all Advertising and Marketing workers are embedded in other (non-creative) industries. Around one-third of Architecture and Design workers are 'creatives' embedded in other sectors of the economy, while 21% of WA's Software and Digital Content workers are employed in other non-creative industry sectors.

While the data limitations described above prevent a cross-tabulated analysis of Albany's creative workforce employed across the creative and non-creative industries to generate a sum total, the profile of occupations does provide some insights into the extent of the City's creative workforce employed across all industry sectors. From this, conclusions can be drawn as to the extent of creative workers employed in other (non-creative) sectors of the economy.

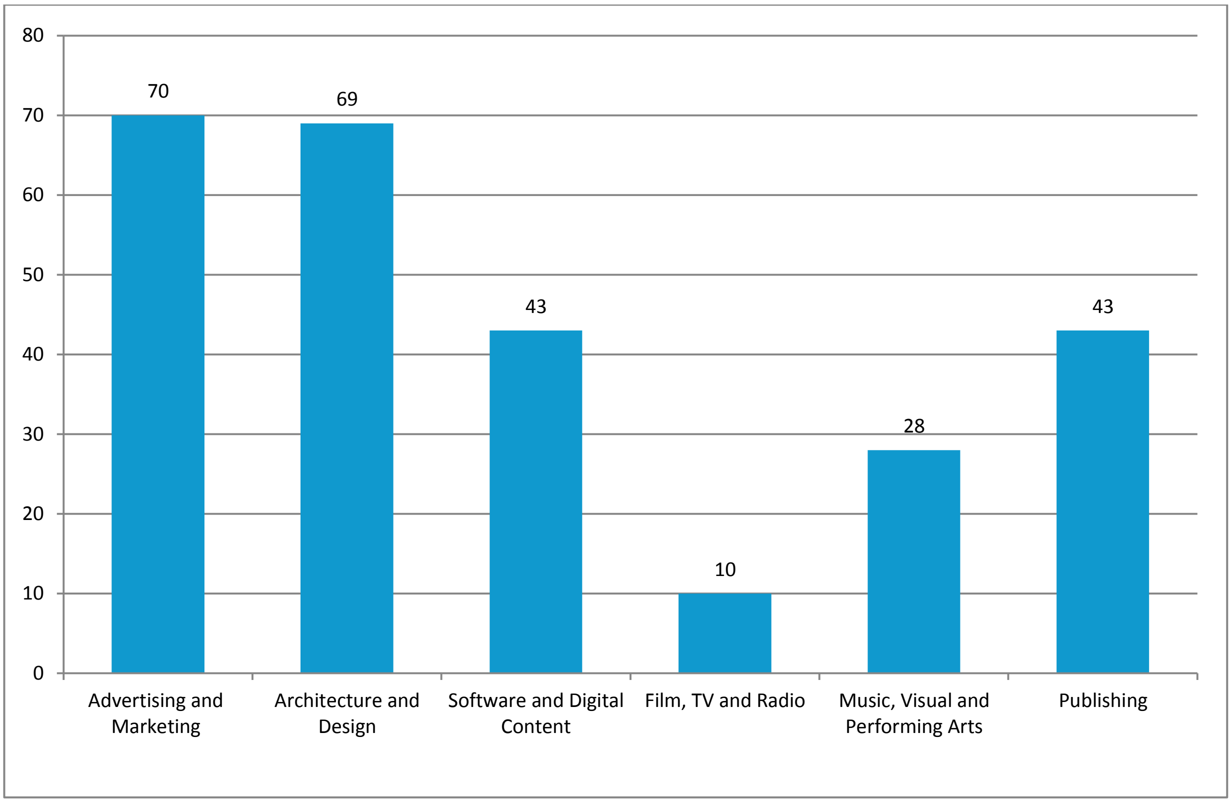
Consistent with the findings of the Department of Culture and the Arts, Figure 8, which illustrates employment in creative occupations in the City of Albany, shows the Advertising and Marketing segment and the Architecture and Design segment to be much larger in employment numbers when those 'creative' employed in other non-creative industries are included in the totals.

[1] Source: Department of Culture and the Arts (2013), *Creative Industries Statistical Analysis for Western Australia*

Although the 4-digit level industry data does capture some occupations which are on the margins of being considered ‘creative’ (e.g. advertising and public relations managers are combined with sales managers), it does illustrate the extent of the creative services workforce – notably those employed in Advertising and Marketing and in Architecture and Design - employed outside the creative industries.

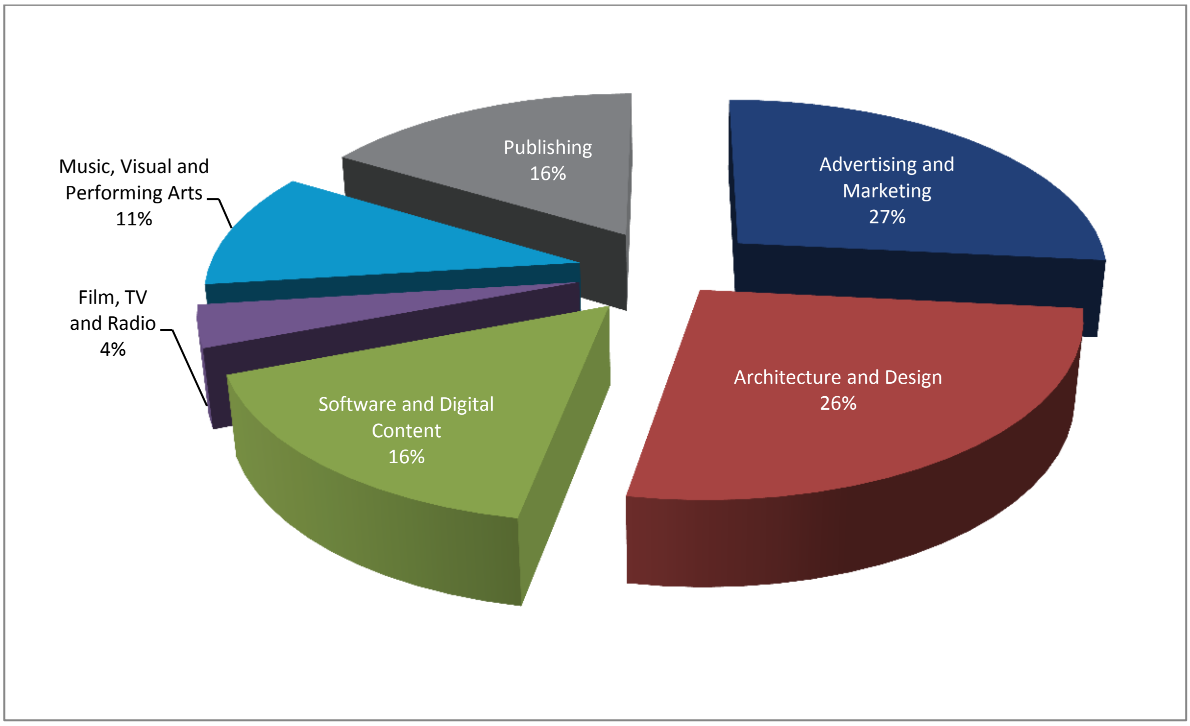
As shown in Figure 8, when all creative workers in these segments are captured in the data, these segments are much larger. As shown below, in Albany, the Advertising and Design segment accounts for 70 jobs or 27% of creative employment; Architecture and Design accounts for another 69 creative workers or 26% of the total.

FIGURE 8. EMPLOYMENT IN CREATIVE OCCUPATIONS BY SEGMENT, CITY OF ALBANY, 2011



Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

FIGURE 9. EMPLOYMENT IN CREATIVE OCCUPATIONS BY SEGMENT (%), CITY OF ALBANY, 2011



Source: ABS Census of Population and Housing, 2011 with interpretations by SC Lennon & Associates

3.3 Trends in Creative Industries Employment

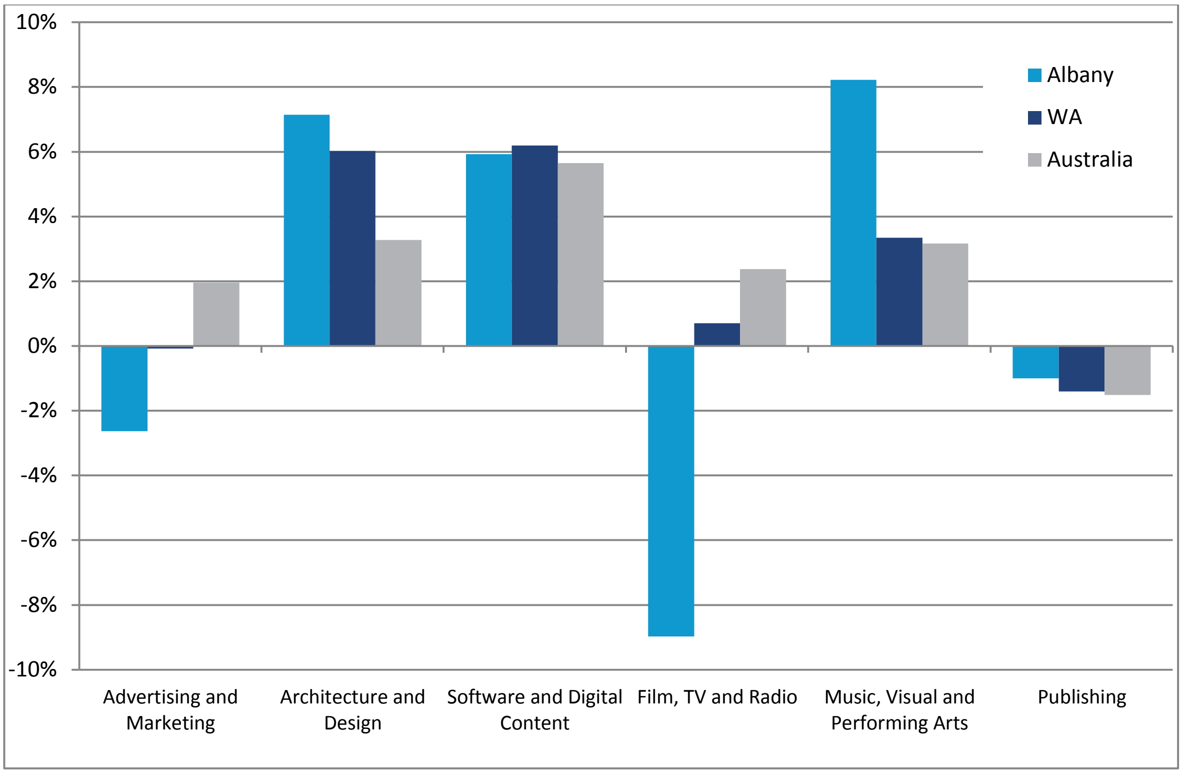
Figure 10 illustrates the average annual change in employment by creative industries segment between 2006 and 2011 in the City of Albany compared to Western Australia and Australia. While it is difficult to draw strong conclusions from such small numbers, the findings nevertheless give some insight into how the creative industries are trending in the City of Albany.

Employment in the City of Albany's Publishing segment declined over the five year period, from 61 workers in 2006 to 58 in 2011. This is typical of the trend nationally with employment in Publishing falling in all of Australia's states and territories including Western Australia.

The City of Albany also experienced a notable fall in employment numbers in its Film, TV and Radio segment, from 32 to 20 workers, representing an average annual decline of 9%.

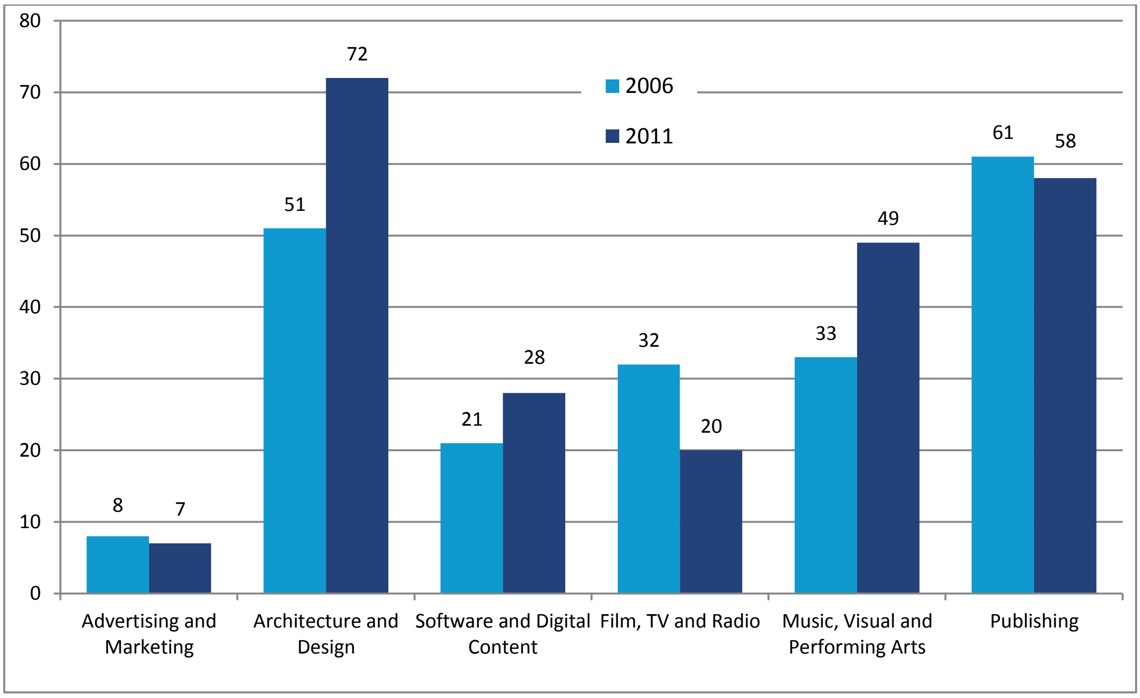
Conversely, Albany's Music, Visual and Performing Arts segment experienced notable growth in employment numbers from 33 in 2006 to 49 in 2011 (an average annual increase of 8%). So too did Albany's Architecture and Design segment, which showed an increase in employment from 51 workers in 2006 to 72 in 2011, representing an average annual growth rate of 7%.

FIGURE 10. AVERAGE ANNUAL CHANGE IN CREATIVE INDUSTRIES EMPLOYMENT BY SEGMENT, CITY OF ALBANY, WESTERN AUSTRALIA AND AUSTRALIA, 2006-2011



Source: ABS Census of Population and Housing, 2006 and 2011 with interpretations by SC Lennon & Associates

FIGURE 11. CREATIVE INDUSTRIES EMPLOYMENT BY SEGMENT, CITY OF ALBANY, 2006 AND 2011



Source: ABS Census of Population and Housing, 2006 and 2011 with interpretations by SC Lennon & Associates

4 Initial Consultation Findings

In order to establish a baseline understanding of the City of Albany's creative industries profile and prospects in the context of broader regional economic development considerations in Albany and the Great Southern Region, targeted stakeholder consultations were undertaken in Albany in March 2014.

Those consulted were identified in conjunction with the City of Albany and meetings were held according to the availability of those contacted. Meetings were held with: selected Council officers; City of Albany Councillors; Regional Development Australia – Great Southern Region, Great Southern Development Commission; the Albany Chamber of Commerce and Industry; Creative Albany Incorporated; the Albany Entertainment Centre; and the Perth International Arts Festival – Great Southern.

The consultation meetings discussed key challenges and opportunities facing the local creative segments with a view to incorporating this critical information into recommendations for the City of Albany to help foster its creative industries in a strategic fashion.

The following is a summary of key points raised during these initial consultations. It is expected these findings will help inform further planning for the City of Albany's creative industries. The points presented below do not represent the views of the consultant and they only reflect matters raised by those consulted. They are not listed in any particular order of priority.

- **Albany Has an Eclectic Mix of Local Creative Individuals and Enterprises** – In a small regional centre like Albany, it only takes a few dynamic and creative individuals or enterprises to establish a creative presence. Albany has some examples of this such as the violin teachers. The furniture making course at the TAFE also accommodates a number of students with a passion for musical instrument making. Nevertheless, Albany lacks a critical mass of creative industries. The attraction and retention of a few more creatives across the cultural production sectors and creative services would enhance the City's creative economy and add to its diversity.

- **Support Creative Industries to Broaden Albany's economic base** – Planning for the City of Albany's economic development requires consideration of means to broaden the City's economic base, which currently relies heavily on agriculture, retail trade, construction, health care and social assistance. The creative industries are considered one means of looking at ways to diversify Albany's economy.

- **Promote Albany' Cultural Assets – the Albany Entertainment Centre** – Albany has a number of cultural assets which can be leveraged to nurture and attract creative talent to the region. The Albany Entertainment Centre (AEC) is a state-of the-art facility. The AEC provides access to a diversity of artists from around the world, but it also raises the bar for local artists, providing an incentive for creative activity and expression in its own right. Last calendar year the AEC held a total of 161 events with an audience of approximately 39,000 people. The AEC is a key asset which helps promote Albany to national and international markets. It should feature prominently in the City's tourism and investment attraction strategies.

- **The Albany Entertainment Centre is a Catalyst for Foreshore Development** – The Albany Entertainment Centre hosts a very successful program of events delivering a depth of creative output from artists and performers from the local area, from elsewhere in Australia and overseas. It is the principal venue for the Great Southern Festival, which is run by the Perth International Arts Festival. The AEC is a catalyst for further development of the foreshore with a seafood tavern currently under construction and a hotel development planned for the future. This will help revitalise Albany's foreshore area.

- **The Vancouver Arts Centre is a Valuable Cultural Asset with Potential to Grow** - The Vancouver Arts Centre provides studio space and employment for artists and has gallery space with displays open to the public. It has a long history of nurturing local creative talent by providing affordable space for creative learning, performance and display. There are opportunities to further develop the Centre with improved marketing, to ensure visitors are more aware of the Centre and what it offers, as well as programming for the youth and family demographics and promoting the Centres, as Albany's cultural heritage.

- **The Great Southern Festival** – The Great Southern Festival, which sits under the Perth International Arts Festival (PIAF) brand, is a successful event which brings a wealth of talent to perform in Albany and the region. A key element of the festival's success is the community interest and support it receives. As part of the Festival, workshops are run by visiting artists for the benefit of locals, providing a tremendous learning experience for local creatives. Another local festival with a particular focus (e.g. music) which complements the Great Southern Festival could benefit Albany and the region.

- **Regional Collaboration** – Albany's neighbouring locality of Denmark, despite having a much smaller population, is a hive of creative activity. Therefore, efforts to facilitate and promote the creative industries would be best served by taking a regional approach to strategic planning which capitalises on the commonalities and shared opportunities on offer to Albany, Denmark and the wiser Great Southern Region. For example, regional branding of creative talent, cultural assets and creative industries opportunities would prove a more powerful force than only focusing on Albany's cultural and creative attributes.

  The creative arts / creative industries are supported by the policies and strategies of State and Federal Government agencies responsible for promoting economic development in the Great Southern Region. Both the Great Southern Development Commission and RDA Great Southern promote the importance of arts and culture to regional economic development. This presents an opportunity for the City of Albany to collaborate with its regional partners on efforts to support and promote the City's creative industries.

- **Albany's Creative Vibe** – The City of Albany has its own creative vibe and feel which is unique. There is a depth of creative talent in Albany and the wider region as well as a mature and sophisticated audience which appreciates the arts. This is evident in the high attendance numbers at performances held at the Albany Entertainment Centre and the community's support for the Great Southern Festival. This is an attribute which could be leveraged. 'Creative Albany' could be a genuine and attractive component of the City's branding and investment attraction efforts.

- **A Hub of Music and Performing Arts** – Albany is a hub of music and performing arts and this strength should continue to be nurtured and developed.

- **Creative Industries and Tourism** – Tourism intersects with the creative industries and the arts, and there is an opportunity to explore links between creative industries / the arts and tourism, particularly given Albany's unique rich maritime heritage, its status as the first European settlement in Western Australia, its military / ANZAC heritage and its Indigenous heritage. The City's vibrant music and performing arts scene should also feature prominently in tourism attraction and destination management strategies as part of a package. Marketing Albany and the region to national and international tourism markets should distinguish the region from the South-West and Margaret River.

Albany and the Great Southern Region has its own unique offering and the creative industries are a key feature.

- **Developing a Vibrant City Centre** – A well-functioning, vibrant city centre is considered a critical attractor for creative talent. Public spaces should be provided, particularly along Stirling Terrace, for creative performance and display. In turn, the presence of artistic talent in the Albany city centre creates an active vibrant atmosphere which is an important foundation for attracting all sorts of businesses and people to the centre. The current works being undertaken for the ANZAC commemorations will have positive flow-ons for the Albany city centre generally.

- **Underutilised Sites, Urban Blight, Adaptive Re-use of Buildings and the Concept of a Redevelopment Authority** – Further to the preceding point, there are a number of vacant or derelict sites throughout Albany which could provide catalysts for redevelopment. The old Esplanade Hotel site and the Middleton Beach site are just two examples. Establishment of a local / regional redevelopment authority, which could plan for and activate some of the City's underutilised sites might be worth exploring with the State Government. The adaptive re-sue of derelict buildings would help activate CBD spaces.

- **Creative Industries Incubator** – The concept of a creative industries business incubator has some support amongst stakeholders consulted. This would be a physical building for local creatives to access for support with things like meeting spaces, work spaces, spaces for performance and display, administration support and access to business mentors and training.

  Various creative industries incubator models operate in Australia and around the world. The City of Albany could explore various models and engage with local creatives to ascertain the need for and suitability of such a facility in Albany. The establishment of such a facility would help put creative industries on the map in Albany by providing a physical catalyst to make them more visible. The concept of a creative industries incubator could be explored in conjunction with opportunities for creative learning through the University of Western Australia and / or other tertiary learning institutions.

- **Networking and Collaboration** – Informal local networks are critical to micro-businesses and sole operators in small towns and regional centres, including the creatives. Networking should be encouraged and supported by any means. The City of Albany could be a facilitator of local creative enterprise networking.

- **Connectivity Between Creative Nodes** – The Vancouver Arts Centre is considered by some to be 'off the beaten track' making it a challenge for visitors to Albany to locate. Better visual connections and directions for people walking between the waterfront, the Albany Entertainment Centre, Stirling Terrace, York Street and Vancouver Street would improve the visitor experience and improve visitor numbers to the Vancouver Arts Centre.

- **Information on the City's Creative Industries** – Available data on the size and dynamics of Albany's creative industries provides some useful insights. However, to develop a comprehensive understanding of the City's creative economy as well as the needs, challenges and opportunities facing the City's creative workforce and enterprises, a consultative survey would be required. This could form part of a broader strategy to nurture and support the development of creative industries in Albany and the region.

- **Connect Local Arts with Families and Younger Demographics** – A lot of the local programming for arts in Albany is tailored to older demographic groups. There is an opportunity to better connect arts with the local family and youth demographics.

- **Creative Industries Education** – There are some very good secondary schools in Albany and the region with prominence in certain creative fields such as music. The University of Western Australia's presence in Albany presents an opportunity to explore the creative industries as a viable learning option in the region. Creative pursuits such as creative writing have always been supported by UWA in Albany and the local area has a strong creative writing culture.

  Other tertiary institutions could also be approached to discuss interest and opportunities for creative industries courses in Albany. Albany does not have the typical student catchment required for the delivery of tertiary education and it has succeeded by developing niche areas of learning such as rural clinical health. The creative industries may provide a similar opportunity for Albany. The concept of a creative industries business incubator, linked to tertiary research and learning could also be explored.

- **Natural Resource Management** – The Great Southern Region is a biodiversity hot spot and the importance of the area's biodiversity features strongly in the region's strategic planning documents. Strategic planning for the creative industries could explore opportunities for innovative pursuits such as region-specific environmentally-sensitive architecture and design for example.

- **Infrastructure Issues** – Local businesses (and residents) are sometimes affected by infrastructure constraints such as local power 'brown-outs' which can affect productivity. Slow Internet speed and poor mobile phone coverage can also be an issue. RDA Great Southern is in the process of preparing a digital economy strategy for the region. The needs of and opportunities for the creative industries should be explored and addressed as part of this strategy.

- **Air Transport Costs and Connectivity to Perth** – The cost of flights from Albany to Perth can be prohibitive for some local creatives. There are also issues with a lack of reliability of flights out of Albany. Sometimes it is cheaper and quicker to drive to Perth for business meetings.

The strengths, attributes, challenges and opportunities described above are by no means exhaustive. They have been documented from meetings held with a selection of government and industry stakeholders. Together with the data analysis presented in Section 3, they should provide prompts for further investigations, discussions, strategic planning and program development to help attract, nurture and grow the City of Albany's creative economy.

The following section of this report provides some general ideas for action which could assist the City of Albany in its strategic planning for creative industries growth and development.

5 Ideas for Action

5.1 Strategic Themes

Provided below are some general ideas for action which could assist the City of Albany in its strategic planning for creative industries growth and development. These are ideas generated by the consultant following input received through the targeted initial stakeholder consultation and based on experience elsewhere.

The ideas are put forward as prompts for further thinking. In order to develop a full suite of actions and programs to support the creative industries, it is recommended the City of Albany develop a tailored creative industries strategy, or include the creative industries as one theme in a City-wide economic development strategy. The contents of this report would serve as a starting point for the development of a more informed strategy which would rely on a much wider range of consultation with creative industries and individuals in the City of Albany. The potential actions and activities are presented in no particular order of priority. They are listed under the following themes:

- Creative Enterprise Business Assistance
- Creative Industries Incubation Space and City Centre Activation
- Creative Industries Marketing and Promotion
- Creative Industries and Tourism Development
- Creative Learning
- Infrastructure

5.2 Ideas for Action

Creative Enterprise Business Assistance

- **Creative Enterprise Assistance** - Establish, in consultation and partnership with the Great Southern Region Development Commission and/ or RDA Great Southern WA, a first point of contact offering business advice for creative industries start-ups or micro-businesses / sole operators. The City of Albany's Community Services team could work in partnership with other government agencies and organisations such as Creative Albany to determine the most suitable approach.

- **Investigate Creative Business Assistance and Support Programs** - Review small business assistance programs that are available to creative industries in other municipalities and states that might apply to designers, writers, visual artists and other 'creatives' in the City of Albany. Use this intelligence to identify programs that might be tailored to the needs of local creative industries.

- **Prepare a Local Creative Industries Survey** - The possession of accurate information on the local creative economy, its structure and dynamics is critical to successful strategic planning and project implementation to support and develop Albany's creative industries. Identification of the current activities, needs and aspirations of local creatives would be an important first step in developing strategies to grow the creative industries in Albany.

- **Formalise Local Creative Enterprise Networks** - The City of Albany can play the role of facilitator in formalising and improving local creative industries networks.

Creative Industries Incubation Space and City Centre Activation

- **Undertake an Audit of Available Building Spaces** - Undertake an audit to identify any redundant or underutilised Council-owned (or State-owned) buildings that could potentially be leased to emerging artists and arts organisations (as well as other community groups). If space could be identified, then appropriate leasing arrangement models for such purposes would need to be explored and considered as would methods for determining the eligibility of potential users or user groups.

- **Investigate the Feasibility of a Creative Industries Incubator Facility** - Such a facility would serve a range of users including writers, musicians, visual artists, performing artists, designers and others. Research suggests that such a facility would need to offer: flexible spaces; studios; information support (e.g. on government-sponsored business support programs for which creative businesses are eligible to apply); general administration/office support; exhibition and possibly performance/rehearsal space; meeting space; business mentoring services; marketing and promotional services. This facility could be located in currently derelict or underutilised building space in the Albany city centre or proximate to the AEC on the foreshore. (Alternative locations would need to be properly investigated and feasibility assessment undertaken).

- **Establish a Live Music Program in Public Spaces** - Establish a program of live music performance in dedicated public spaces (such as the redeveloped Stirling Terrace) in consultation with local creative industries representatives. Identify underutilised performance spaces and explore strategies for re-vamping, re-positioning or re-locating them.

- **Public Performance Programming** - Explore opportunities to utilise local creative individuals and businesses (musicians, visual artists, performing artists, writers, etc.) in programming of public entertainment in Stirling Terrace, York Street and in locations along the foreshore, for example.

- **Establish Visual Connections Between Creative Nodes** - Better visual connections and directions for people walking between the waterfront, the Albany Entertainment Centre, Stirling Terrace, York Street and Vancouver Street would improve the visitor experience and improve visitor numbers to the Vancouver Arts Centre. Council could explore options and deliver streetscape enhancements to improve connections.

Creative Industries Marketing and Promotion

- **Market the City's Creative Industries** - Work in conjunction with Creative Albany, The GSR Development Commission, RDA Great Southern and the Albany Chamber of Commerce and Industry to promote Albany and the region as a 'creative hub'. Marketing efforts should be undertaken in a collaborative fashion and, where appropriate, involve neighbouring localities such as the Shire of Denmark to ensure Albany gets the greatest reach for its investment attraction efforts.

- **Leverage Cultural Assets and Events to Promote Albany** - The Albany Entertainment Centre (AEC) is a world-class facility providing a rich suite of performances and programs for a wide audience. The Great Southern Festival enjoys a strong profile and community support, attracting visitors from outside the region and a diversity of artists from around the world. The City's efforts to attract people and investment to the City should include the AEC and the Great Southern Festival as catalyst features of Albany's unique offer.

- **Promote the Vancouver Arts Centre** - There are opportunities to further develop the Vancouver Arts Centre with improved marketing, to ensure visitors are more aware of the Centre and what it offers, as well as programming for the youth and family demographics and promoting the Centre as a focal-point of Albany's cultural heritage.

- **Explore Opportunities for Collaborative Marketing Strategies** - Explore collaborative marketing opportunities to develop greater communication between members of the City of Albany's (and the Great Southern Region's) creative industries. Creative Albany could play an important partnership role with Council.

- **Promote Albany's Creative Industries as Part of the 'Lifestyle Package'** - Ensure Albany's lifestyle attributes are always at the forefront of promotional material targeted at creative and other knowledge-based industries.

- **Actively Promote Local Creatives in the Media** - Work with local, state and national newspapers, other media outlets and tourism authorities to feature stories and work by local writers, performers and artists. Promote local success stories on the City of Albany's web site, promotional and informational brochures.

Creative Industries and Tourism Development

- **Tourism Promotion** - Encourage local and regional tourism marketing bodies to have an emphasis on featuring local cultural events in the City's (and the region's) promotional materials.

- **Indigenous Heritage** - Explore opportunities for authentic, local Indigenous art and craft display and interpretation.

- **Creative Markets** - Explore the possibility of establishing a local creative industries market to provide a 'point of sale' for local producers of arts and craft. Such a venture could be based upon a farmers markets model.

Creative Learning

- **Explore Opportunities for Creative Learning in Albany** - Liaise with the University of Western Australia and other higher education providers to explore the concept of creative industries course offerings being made available locally, reflecting local community / industry needs and opportunities for growth. Identify potential education and training providers who could locate in Albany that already focus on the creative industries (e.g. Curtin University).

Infrastructure

- **Identify and Address Communications Infrastructure Shortfalls** - Identify Albany's and the Great Southern Region's broadband and mobile phone coverage 'black spots' with a view to lobbying the relevant authorities and private infrastructure providers on the need to address communications infrastructure constraints for the benefit of all industries, including the creative industries.

- **Public Art** - Examine the City of Albany's public art policy (if it has one) and consider appropriate areas around the city centre to enhance outcomes for collaboration of visual art, architecture and design.

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an audit of the creative sector in albany and the great southern region of western australia

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Creative ALBANY

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Schedule of Acronyms

ABS – Australian Bureau of Statistics

AEC - Albany Entertainment Centre

CAN - Community Arts Network

CENRM - Centre of Excellence in Natural Resource Management

CEX - Creative Exchange

Country Arts WA – Country Arts Western Australia

CRC - Community Resource Centres

DCA – Department of Culture and the Arts

FTE – Full Time Equivalent

GDP – Gross Domestic Product

GSDC – Great Southern Development Commission

GSEDC – Great Southern Employment Development Committee

GSIT – Great Southern Institute of Technology

LGS – Lower Great Southern

NFP – Not-for-profit

PD – Professional Development

PIAF - Perth International Arts Festival

R4R – Royalties for Regions

RDA (GS) – Regional Development Australia Great Southern

SW – South West

UWA – University of Western Australia

VAC – Vancouver Arts Centre

Creative Industry Terms and Definitions

ANZSCO and ANZSIC – classifications of occupations and industry within the creative sector, which are standard in Census data in Australia and New Zealand.

Creative Economy – Also called creative industry and creative sector. Defined internationally as the sector of the economy based on creativity and innovation, also known as the 'knowledge economy'. The professions included in this sector in this report are: Architecture and design; Advertising and marketing; Software and digital content; Music, visual and performing arts; Film, TV and radio; and Publishing and writing.

Creative 'by Industry' – sometimes also 'by Organisation'. The sector of the creative workforce that includes specialists and support workers, often used to quantify creative business trends.

Creative 'by Occupation' – the sector of the creative workforce that includes specialists and embedded creatives, often used to quantify individual professional trends.

Creative Services – A subset of the creative industries including the three specialties of Architecture and design, Advertising and marketing, and Software and digital content. It focuses on products and services which support other industries through manufacturing, sales, infrastructure and innovative marketing and access platforms. Cultural Production is the partner subset; see Figure 5.

Creative Trident – A collection of the three workforce groups engaged in the creative economy: embedded workers; specialists; and support workers. See Figure 3.

Cultural Production – A subset of the creative industries including the three specialties of Music, visual and performing arts, Film, TV and radio, and Publishing and writing. It focuses on goods and services based around culture, history, sense of place and entertainment and is a key element of a place's 'liveability'. Creative Services is the partner subset; see Figure 5.

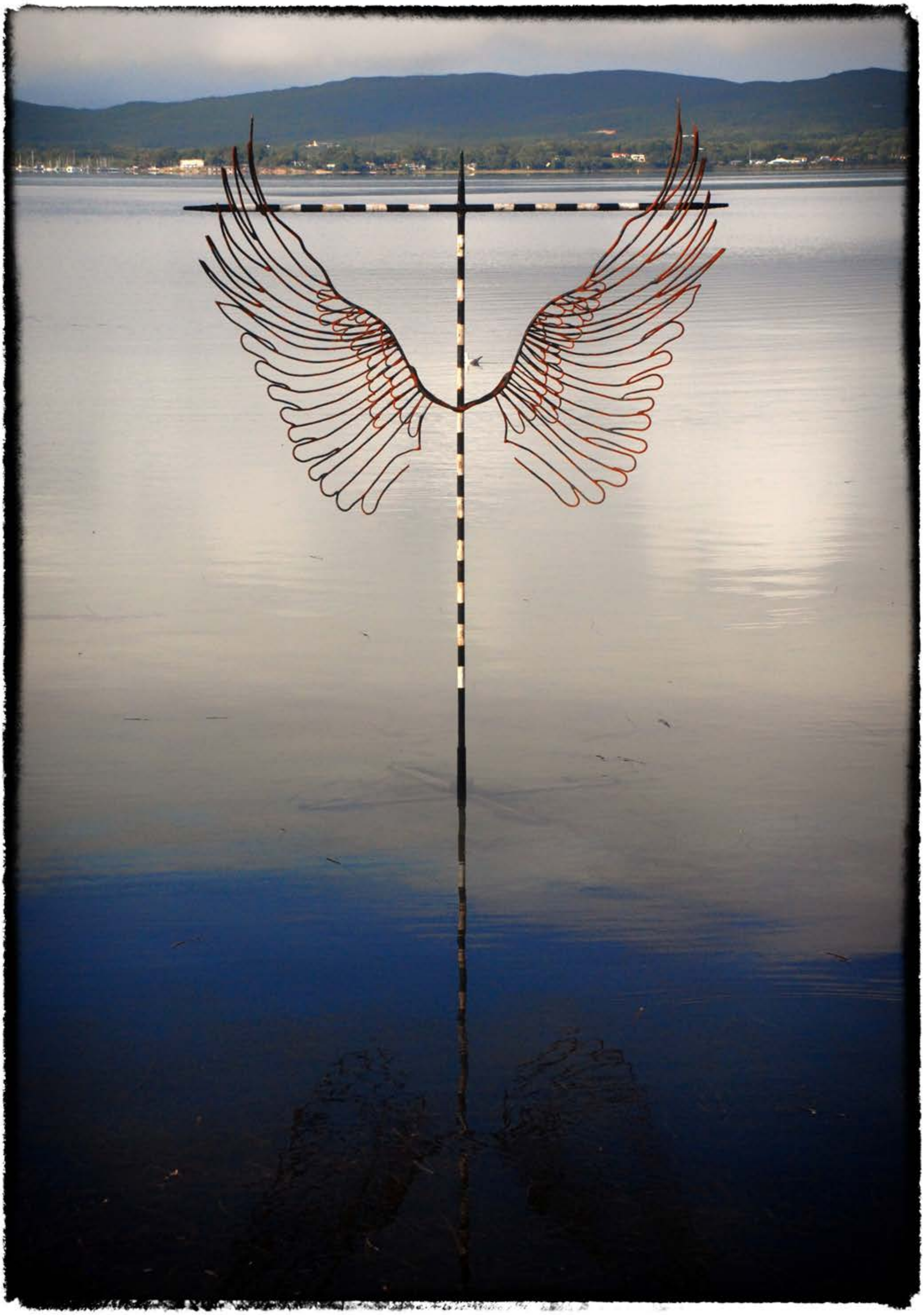
Embedded Creatives – A creative specialist who works in a non-creative business, for example a designer working in a metal fabrication business.

Emergents – Creative workers whose main income is not their creative work, thereby making them unlikely to have been counted in the Census as part of the creative economy.

Nesta – Formerly NESTA, National Endowment for Science, Technology and the Arts. Nesta is an independent charity that works to increase the innovation capacity of the UK.

Specialist Creative – A creative worker working in a creative business, for example an architect working in an architectural practice.

Support Worker – a non-creative person working for a creative business, for example a receptionist in an architectural practice.



Study for Neither Here Nor There by Kevin Draper. Sculpture by the Sea 2013.
Image © Malone Ink

1. Executive Summary

Background

This report presents the findings of research on the Creative Economy in the Great Southern based on data collected from the Census and bespoke surveys of the sector in the Region. The report's goal is to provide a broad picture of the economic impact of the sector and reveal creative workers who may not have been captured in ABS data, as well as to identify the issues, trends and aspirations of individuals and businesses working in the creative economy.

Creative workers and businesses are broadly defined as those that make an income from knowledge and ideas. Creative professions typically fall into six groupings:

- Architecture and design;
- Advertising and marketing;
- Film, television and radio;
- Music, visual and performing arts;
- Publishing and writing; and
- Software and interactive media development.

The creative sector accounts for 2% of the workforce in the Great Southern, and 2.51% in the Albany urban area.

Findings

This creative audit has revealed that the sector accounts for 2% of the workforce in the Great Southern, and 2.51% in the Albany urban area. This is comparable to other similar regional centres. The Census shows that the sector is growing, particularly in the areas of Architecture and design, and Music, visual and performing arts. This data was supported by the surveys, which also revealed a significant proportion of creative workers who are unlikely to have been counted in the Census - at least twice the official figure.

The surveys provided detailed information from both creative individuals and creative organisations, and reveal a sector which:

- Is unusually rich in Cultural production activity - a key element of liveability.
- Is well represented and active in the creative specialties of Music, performing and visual arts, Publishing and writing, and Architecture & design.
- Is actively working beyond the boundaries of the Great Southern region to supplement the local market and employment opportunities.
- Is characterised by a significant unrecognised resource of 'emergent' creative workers.
- Has formed a creative cluster in the lower Great Southern with Albany acting as the support centre for the creative sector in the Region as a whole.
- Is making a significant contribution to the Region's economy through employment and the flow-on effects of creative activity.

There are at least twice as many creative workers in the Great Southern than are counted in the National Census.

Benefits of a Vibrant Creative Economy

The creative sector has the potential to bring economic advantages in its own right, as well as to augment the viability of other industries in the Great Southern by:

- adding value to the primary production chain;
- providing experiences and products to the tourism sector;
- contributing to the diversity of education options;
- embedding the knowledge economy in natural resource management; and
- enriching retail products.

In addition, research is showing that the creative sector provides flow-on advantages above the average for all industries, generating employment and economic multipliers which benefit the economy as a whole.

The Great Southern is unusually rich in Cultural production resources, a sector of the creative economy which has benefits for community well being and quality of life , while also generating economic value in its own right.

Goals and Recommendations

The research undertaken for this report has shown that the creative sector is facing challenges related to the relative remoteness and small size of the local market, difficulty accessing skills development and impediments to growing small businesses. Initiatives developed to address these challenges will need to fulfill the goals of: providing a leadership structure for the creative sector; developing a skilled workforce; building on existing strong networks; promoting the Great Southern as an innovative region; and ensuring viable creative businesses.

The creative sector workforce grew by 14% between 2006 and 2011 in the Great Southern, compared to the average growth for all occupations of 4.8%.

A series of inter-related and staged actions have been proposed to address the issues and meet the goals, including:

- Bringing together an ***advocacy*** team to prioritise and manage initiatives;
- Developing a ***marketing*** strategy that builds partnerships with other sectors, assists creatives to market their products and services and brands the Great Southern as an innovative region;
- Providing ***financial*** skills and assistance to help grow and strengthen the sector;
- Pinpointing the ***professional development*** needed to resource the sector and working to bring cutting-edge technology to the Region; and
- Establishing a virtual and physical ***creative hub*** structure to build connections and gain maximum leverage from resources.

24% of individuals and 38% of organisations gain some income from international clients.

New technology and improved telecommunications are providing opportunities to creative industries world-wide, and the Great Southern creative sector has particular advantages which, if key issues are addressed, could bring significant gains to the community in building economic diversity and resilience, enhancing lifestyle benefits and enriching other sectors of the local economy.

The strong response to the surveys undertaken for this report suggest that the Great Southern's creative sector is ready to engage in positive change and that they see their regional location as a significant strength for their creative work.

Final Runnings. Annette Carmichael's ?My War.
Image ©Michael Hemmings

2. Introduction

2.1 Great Southern Region Economic Snapshot (1)

West Australia's Great Southern Region covers 39,00 square kilometres and includes 11 local government areas and a population of just over 59,000. The majority of the population (61 per cent) live in the City of Albany local government area, which is the administrative centre of the Great Southern. The State Government (through its Royalties for Regions Programme), has also been supporting the Shire of Katanning's growth as a sub-regional centre in the Great Southern. The population of the Region is growing at an average of 9% per annum, although higher growth percentages are occurring in the coastal shires compared to inland towns.

Primary production is the backbone of the Region's economy. In 2011-12 it was valued at $1.04 billion, and employed 15.4% of the workforce – the largest proportion in the Region, but down from 19.2% in 2006.

Retail and health care / social assistance are the next two highest employment industry sectors, while the manufacturing and fabrication sectors are mainly driven by the requirements of agriculture. 5.7% of the workforce are employed in accommodation and food services, which has connections with the tourism industry.

The Region has not experienced the economic growth seen over the last ten years by other regions, particularly those connected with major mining projects, and growth in the Great Southern in terms of turnover or value has mainly been in the retail sector - which represents 23% of the value of the Great Southern's economy. The Region's overall businesses and retail numbers however, fell an average of 1% between 2009 and 2012, despite a rise in turnover.

Business numbers grew most in the areas of public administration and safety (200%), gas, water, etc. supply (60%), information media and telecommunications (56%), and accommodation and food services (23%). Caution may be needed in reading these percentages however, as some are coming from a low base, and others may be due to specific short-term projects – such as infrastructure construction initiatives which are now complete.

The Great Southern is only experiencing modest economic growth, and is vulnerable to downturns in the agricultural sector.

In summary, the economy of the Region is dominated by primary industries and is only experiencing modest growth. Its long-term engagement in, and reliance on, low-skill and low-wage primary industries is reflected in (relative to the WA average) lower level wages, and lower education and skills of its resident workforce. In addition, while primary production will remain a significant driver in the Regional economy in terms of value, historic trends in mechanization, farm amalgamation and aging demographics are likely to continue – meaning the agricultural sector will continue to have a reducing workforce and provide less local employment opportunities.

1 Source: Regional Snapshot information summarized from:
~ Great Southern Regional Development Commission (GSDC). Great Southern Regional Profile. 2014.
~ Regional Development Australia Great Southern (RDA). Regional Plan 2013 – 2018.
~ Albany Baseline Study For Long Run Socio-Economic Sustainability. Martinus and Tonts. UWA. 2013 .

These trends and the Region's apparent lower socio-economic profile may pose a threat to the Great Southern's long term community sustainability, and suggest that it would be advantageous to broaden the diversity of industries in the Region. Building resilience and economic flexibility will help reduce negative effects of seasonal and longer term downturns in the agricultural sector.

Figure 1.

The Great Southern

2.2 Creative Industries – why are they important to the economy?

2.2.1. Creative Economy Definitions

Creative workers and businesses are broadly defined as those that make an income from knowledge and ideas. The internationally adopted list (1) of professions involved include: Architecture and design; Advertising and marketing; Film, television and radio; Music, visual and performing arts; Publishing and writing; and Software and interactive media development - although the grouping and nomenclature for these six sectors sometimes differs slightly between studies.

The growth of the creative sector and its potential to enhance economies is widely understood and SGS Economics and Planning note in their 2013 report for the South West Development Commission that;

> *"Western economies are increasingly moving from reliance on manufacturing to a 'knowledge economy' – that is, an economy which is "directly based on production distribution and use of knowledge and information" (OECD, 1996). The creative industries are a key component of a knowledge economy. The growing knowledge economy together with the impact of globalisation highlights the importance of strengthening relationships between education and training, financial and creative industries. In order to compete in a global economy, it is essential that we have the capacity to maximise production through innovation, reduce the cost of labour (as cheaper labour is outsourced from overseas) and the market imperative to stimulate new ideas, consumer demands and creative endeavours."(2)*

1 Source: Page 17. Valuing Australia's Creative Industries. SGS. 2013.

2 Source: Page 64. Economic Opportunities for Creative Industries in Western Australia's South West Region. SGS Economics and Planning. July 2013

Accurately defining and understanding the character of individual creative sectors is key to making the most of the advantages they can bring.

2.2.2. Creative Economy Inclusions

The generally accepted sectors of the West Australian creative economy are pictured below. A detailed list of the specialties included in this study within each of these groupings is provided in Appendix 9.2 . This report has utilised the Nesta method, which is considered current bast practice (1).

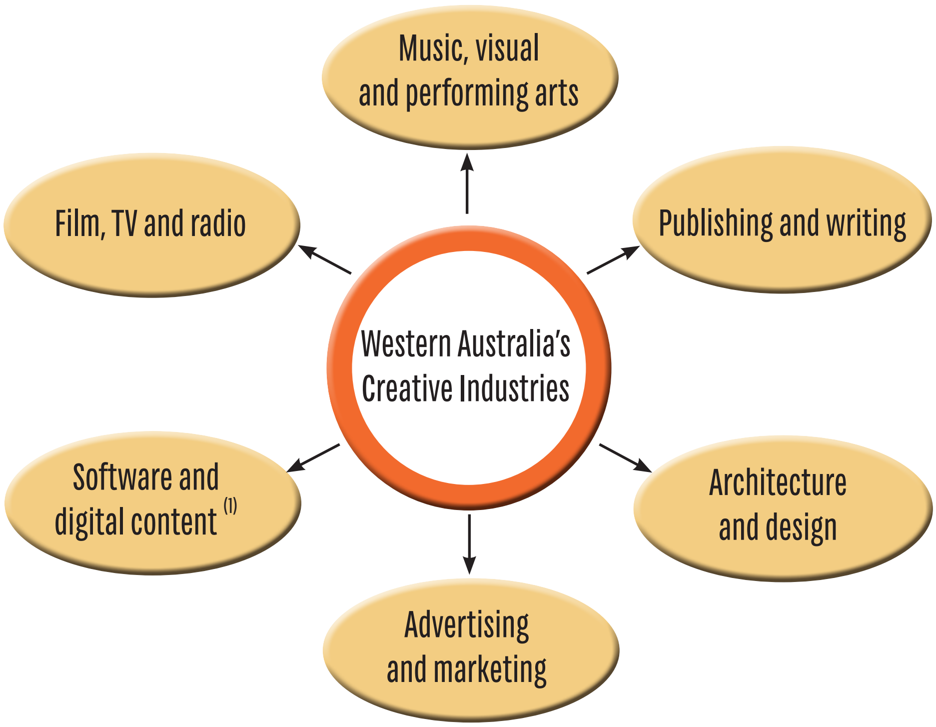


Figure 2.

The Six Creative Sectors

Source: Adapted from Page 2. Creative Industries Statistical Analysis for Western Australia. S C Lennon and Assoc. 2013.

1 NOTE: Software and digital content is sometimes also named Software and interactive content.

2.2.3. Value Production

Creative industries are engaged in the use of creativity and intellectual property for commercial purposes - new ideas are the primary source of economic value in the production process. This raw 'value' is the most easily understood and measurable element of the creative economy and is an important tool for creating leverage in economies which are based in primary production.

For example, growing wool and shipping it out of a region has a single value chain with jobs created around servicing that product. Refining the wool and designing finished products such as clothing, insulating materials, craft supplies, protective equipment and designer accessories uses intellectual processes to leverage additional commercial advantages from the base product and broaden employment opportunities.

1 Source: Page 8. Valuing Australia's Creative Industries. SGS. 2013. Nesta is a UK based organisation, which has set the benchmark for creative economy research.

In addition to the value that innovation adds to the economy, analysis of the creative industries Australia wide reveals that a significant proportion of the workforce in the sector is made up of 'non-creative' support staff. In some sectors over 50% of the people employed in the sector are not creative specialists (1). The potential for creative businesses to contribute significantly to the wider employment market is also a marker of the value that the sector adds to the economy.

Secondary to the raw value of the creative process, are the social and cultural values that flow on from creative industries. These have been explored by commentators such as Charles Landry and Richard Florida (2) and relate to the way that clusters of creative activity can help create a sense of energy for a community, improve community cohesion, attract new residents and businesses and enhance the liveability of a town or city. Indeed favorable liveability ratings are much sought after internationally and heavily depend on the cultural richness of a place, which includes the products and services of a vibrant creative economy.

The community-building aspect of creative economy value is difficult to quantify and highly subjective - and this report will not attempt to include a dollar value figure in the findings. It will however, make comment on how social and cultural creative levers can be used to economic advantage.

In some sectors, over 50% of the people employed in creative businesses are not creative specialists - indicating employment growth has the potential to go beyond just creative professionals.

2.2.4. Diversity and Connection

The values generated by the creative sector have the potential to augment other industries in the Great Southern, such as:

- value adding to primary production;
- providing experiences and products to the tourism sector;
- contributing to the diversity of education options;
- embedding the knowledge economy in natural resource management;
- enriching retail products; and
- developing innovative approaches in health care.

As an economic sector it has the ability to both help diversify the economy, and to create economic links between other industry sectors; potentially supporting a more resilient economic base for the Great Southern.

Economic diversity and connections may also be mirrored in cultural diversity and social connections through creative processes such as performances, interpretation, writing and place making - to list the most obvious examples.

1 Source: Figure 48. Valuing Australia's Creative Industries. SGS. 2013.

2 Note: References to publications by Landry and Florida are included in the bibliography.

2.3 The Creative Sector in the Great Southern

This report is the first attempt to accurately measure and describe the creative sector across the whole region. The Great Southern Development Commission (GSDC) had previously estimated 'Arts and Recreation Services' as being 0.9% of the Great Southern workforce in their 2014 Regional Profile (1) and Regional Development Australia (RDA) identifies 44 businesses in the creative sector in their Regional Plan (2). These figures are based on Census data and the 'Arts and Recreational Services' grouping could be seen as a rough approximation to the creative industries' definition.

When the nationally recognised Nesta definition is applied to the Great Southern, the data shows that creative industries account for 2% of the workforce in the Great Southern and 2.31% in the Albany local government area (3), a figure which is higher than a number of other sectors including Mining and Financial and Insurance services.

The Australian Bureau of Statistics (ABS) figures however, only tell part of the story - they are unable to quantify the significant contribution to the economy that creative workers make through volunteer activities and pro-bono contribution of their expertise to their communities. Furthermore, the ABS data may not be including all the creative workers active in the economy.

Creative industries account for 2% of the workforce in the Great Southern, and 2.31% in the Albany local government area.

The Census only asks for information on 'main' work, and the survey showed that many creative workers rely on alternate jobs to supplement their income. Additionally, presentation of the ABS data is routinely randomized where small numbers are displayed to protect individual privacy. This means gaining accurate information for small communities – such as Great Southern towns – is difficult.

Gaining an accurate picture of the sector is key to enabling creative work to be used as a lever to help improve economic diversity in the Region and this study will show that not only is the creative economy larger in the Great Southern than previously anticipated, it is growing faster than the national average in some sectors. Notably, creative industries have a higher multiplier effect than other industries (4), which means higher flow-on contributions to the economy, suggesting investment in the creative sector is good value for money.

In addition to the direct economic contribution of the creative economy, are the less measurable effects of the impact of the sector. The 'liveability' advantages that an active creative sector generates, and the potential for creative work to support the GSDC's vision that: "The Great Southern is recognized internationally as a natural choice for opportunity and lifestyle" (5) is clear. Furthermore the GSDC Blueprint goes on to emphasise the importance of knowledge and innovation to the diversification of the economy.

1 Source: Page 30. Great Southern: a region in profile. GSDC. 2014.

2 Source: Page 54. RDA Regional Plan 2013 ~ 2018. RDA Great Southern.

3 Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories and Creative Trident Calculations 2011.

4 Source: Page 64. Valuing Australia's Creative Industries. SGS. 2013.

5 Source: Great Southern Regional Blueprint. GSDC. 2014.

These goals are reiterated in a number of local government strategies in the Great Southern, including the City of Albany's Community Strategic Plan 2023 which states the City's Vision will be achieved through:

- Diverse industries, education & employment programs
- Vision, innovation & technology
- Festivals, events & attractions

A well developed and sustainable creative sector is at the core of many of these goals for the Region and its community, and the commissioning of this report will enable stakeholders to gain a more in-depth understanding of the creative economy in the Great Southern.

2.4 Project Context and Brief

Recognising the importance of the creative sector, in 2014 the City of Albany commissioned a scoping report by S C Lennon and Associates to help them understand creative industries in the city better. The report; *Creative Industries. Analysis and Potential Strategic Directions for the City of Albany* notes;

> *"The City of Albany has identified the attraction and establishment of creative industries as a key economic development focus area, particularly when combined with creating a learning centre of excellence for creative industries services and production. The City is investigating the establishment of an innovation park and a regional university as a means of generating economic development for the Region. Hence, the City is interested in how Albany might leverage its unique sense of place to attract residents and business enterprises to help attract these industries / activities and to establish Albany as a hub of creative industries in the Great Southern Region." (1)*

The report suggested a number of 'Ideas for Action', one of which was to prepare a local creative industries survey, noting;

> *"Identification of the current activities, needs and aspirations of local creatives would be an important first step in developing strategies to grow the creative industries in Albany."*

The community based organisation – Creative Albany Inc. had been interested in this area of research and undertook to auspice and fund the survey, broadening it out to encompass the whole Great Southern region with Albany as the hub. Additional funding and support was secured from the following organisations:

- The City of Albany;
- The Great Southern Development Commission;
- The Department of Culture and the Arts;
- Regional Development Australia Great Southern, and
- The Committee for Albany.

1 Source: Page 1. S C Lennon and Assoc. 2014.

The brief for the study included the following specific outcomes:

- A profile of the sector;
- Identification of needs, aspirations and opportunities;
- Case studies, and
- Recommendations, strategies and actions.

The study aims to improve the understanding of the strengths of the creative economy sector in the Great Southern. This will enhance the capability of stakeholders to build on those strengths and to use the creative industries to make a positive contribution to a sustainable regional economy and enriched community.

This report aims to be a practical, plain speaking and accessible guide for policy makers, funding providers, support organisations and infrastructure planners.

The study is not designed as a high level economic analysis or an academic and purely quantitative research project. Its goal is to provide a broad picture of the economic impact of the sector and include creative workers who may not have been captured in ABS data, as well as to reveal the real issues, trends and aspirations of individuals working in the creative economy. It aims to be a practical, plain speaking and highly accessible guide for policy makers, funding providers, support organisations and infrastructure planners.

Creative Albany commenced this work in April 2015, and completed the report in October 2015. The report will be distributed to the sponsors and wider stakeholder groups, and placed on the Creative Albany website for downloading. Findings will be promoted in the regional media and a presentation of the report will be offered to interested organisations and forums.

2.5 Study Method

2.5.1. Comparative Studies

This report makes reference to four key research studies, these are:

- Valuing Australia's Creative Industries by SGS Economics and Planning December 2013;
- Creative Industries Statistical Analysis for Western Australia by S C Lennon and Assoc. November 2013;
- Economic Opportunities for Creative Industries in Western Australia's South West Region by SGS Economics and Planning July 2013; and
- Creative Industries Analysis and Potential Strategic Directions for the City of Albany by S C Lennon and Assoc. April 2014.

This report also refers to the research work of the Centre of Excellence for Creative Industries and Innovation (CCi) which was "established in 2005 to focus research and development on the role the creative industries and their contributing disciplines make to a more dynamic and inclusive innovation system and society." (1)

1 Source: www.cci.edu.au

These sources have been essential to providing a context for the Great Southern, and are an excellent resource for readers who wish to obtain more detail on the economics and dynamics of the sector as a whole.

In some cases, the figures quoted in this report may differ slightly from those used in other reports. This is due to recent changes in the classification of creative groups, difficulties with ABS data levels (discussed in Section 3.3) and the need to keep the research to a manageable size and compare it to the survey conducted. This report always uses like-for-like however, and so comparative figures presented have identical base calculations.

2.5.2. Measurement Standards and the Creative Trident

As part of the report "Valuing Australia's Creative Industries" SGS applied a method described in the Nesta report of 2013 to identify the occupations and industries that form part of the creative sector (1). The occupations and industries identified by SGS have been used in this study for the measurement of the Great Southern creative economy, and its comparisons with other jurisdictions throughout Australia (2).

The national standards used by the Australian Bureau of Statistics for the classification of occupations, ANZSCO, and of industries, ANZSIC, are used throughout this report (3).

Research into the creative sector commonly quantifies the size of the creative sector by measuring the 'Creative Trident'. The trident counts three groups: workers employed in creative occupations and working in creative industries (specialists); creative workers embedded in non-creative industries (embedded); and non-creative workers employed in creative industries (support). While there are difficulties in extracting detailed numbers for workers in the creative sector at the 6-digit code level, it is possible to extract data at the detailed industry level and at 4-digit occupation level (4). Appendix 9.2 provides tables detailing the occupations and industries used in this report.

The Trident is therefore a useful tool for researchers measuring total employment in the sector, providing a more accurate description of the creative economies' character and value. Importantly, it identifies not only creative specialists, but also 'non-creative' support workers who rely on creative businesses for their employment.

		INDUSTRIES		
		Employed in creative industries	Employed in non-creative industries	
OCCUPATIONS	Employed in creative occupations	1. Specialist Creatives	2. Embedded creatives	Total Employment in creative occupations
	Employed in non-creative occupations	3. Support workers		
		Total Employment in creative industries		1+2+3 = Total creative workforce

1 Source: Page 23. Valuing Australia's Creative Industries. See Section 3 of the report for a full discussion and description of the Nesta method.

2: The occupations and industries identified by SGS by applying the Nesta method are similar to, but not identical to the occupations and industries used by SC Lennon and Assoc. in their report for the City of Albany.

3: ANZSCO = Australian and New Zealand Standard Classifications of Occupation. ANZSIC = Australian and New Zealand Standard Industry Classifications.

4: The six and four digit levels are the identifying codes applied buy the ABS. For some locations, only the less detailed 4-digit detail is avaialble.

Figure 3.

The Creative Trident

Source: Adapted from Page 8. Valuing Australia's Creative Industries. SGS. 2013.

2.5.3. Project Structure and Method

The project commenced with a literature review and establishment of a Regional Steering Group. The steering group included the following individuals representing their organisations or creative sectors:

Amber Perryman – City of Albany / member Country Arts Board / Vancouver Arts Centre (VAC) coordinator

Annette Carmichael – Creative Producer and Choreographer

Caroline O'Neil – Department of Culture and the Arts (DCA)

David Heaver – Architect and Committee for Albany member

Jess Hagley – Katanning Gallery & Library

Ken Matts – Writer, Photographer & Journalist

Linsey McFarlane – Great Southern Development Commission

Malcolm Traill – Creative Albany Inc. Chair and curator at the WA Museum Albany

Marie O'Dea - ArtSouth WA (Great Southern Art Trail)

Vivienne Robertson - Denmark Arts

The steering group assisted in the development and promotion of two surveys designed to:

- capture data from creative workers who have been missed in the standard Census data – such as the teacher who is recorded in the ABS as an educator, but who also performs part-time as a musician and so earns an income from their creative work;
- gather some detail around working practices, such as if they are from home offices, do they use social media, who are their main client groups, etc.;
- identify issues and problems for creative people in the Great Southern, highlighting the ones most commonly experienced;
- identify the strengths of and advantages experienced by creative individuals and organisations; and
- assess the interest in the development of a broad support network of creative industries in the Great Southern

The surveys were for both individuals and for organisations (businesses, not-for-profits and government) and the individual survey clearly stated it was for people with some income from their creative work, not creative hobbyists. The surveys were primarily designed and undertaken on-line, but printed copies and self addressed stamped envelopes were made available in all regional libraries and the VAC for people with poor internet connections.

A full description of creative jobs and organisation types was included on the web link, along with privacy information. The survey period ran for 5 weeks. In addition to the bespoke regional surveys, ABS data was interrogated to provide base-line data and augment the anecdotal information collected from survey respondents and interviews with individuals and organisations.

At the close of the surveys, a workshop was held with the steering group and selected creative professionals to discuss the findings and interpret the barriers, trends and opportunities identified for the creative sector. This information, along with the literature review, data collected, interviews with creative practitioners and anecdotal comments were collated to inform the final recommendations for strategies and actions in this report.

2.5.4. Report Structure

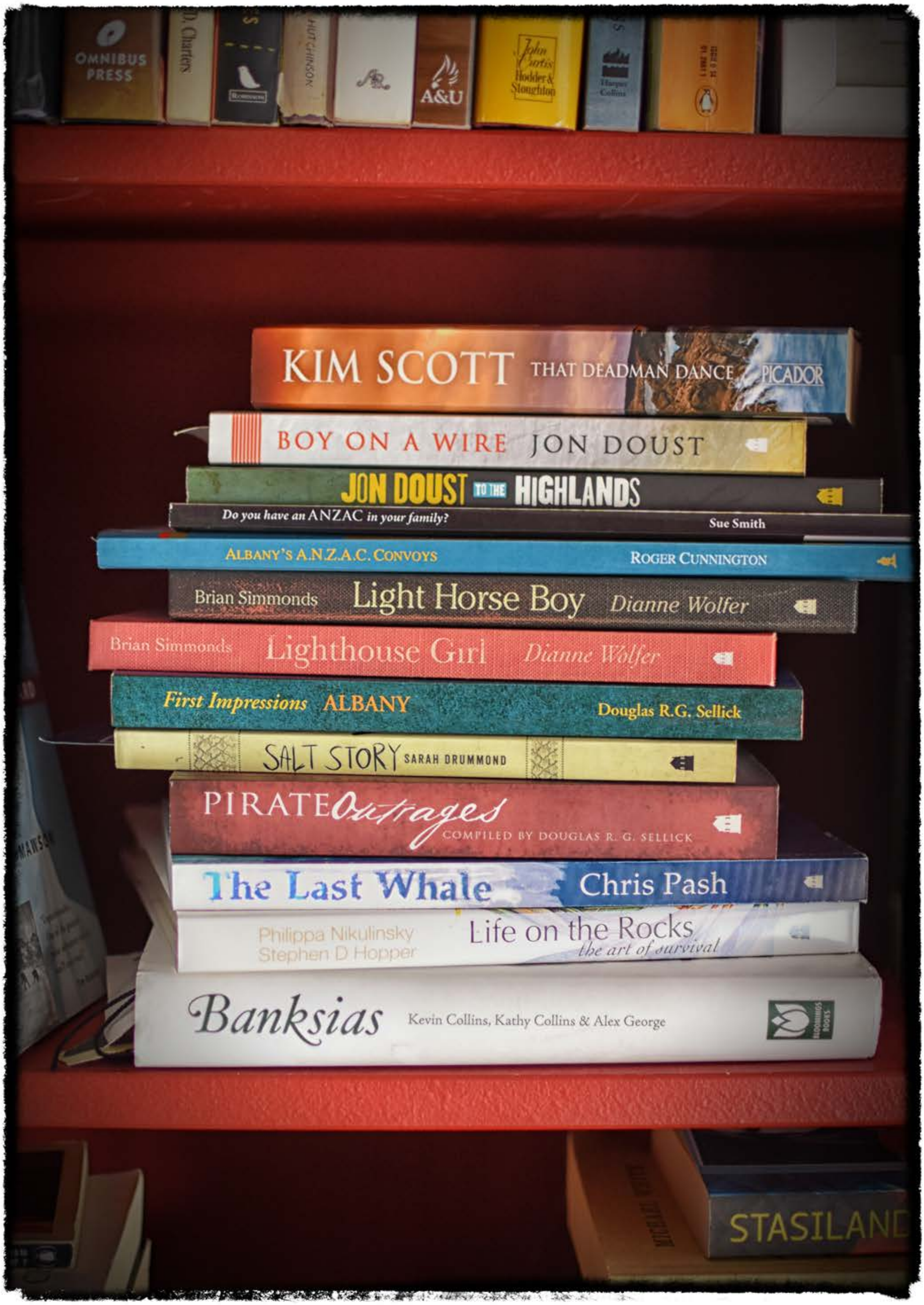
Section 3 provides a snapshot of the Australian creative economy context in which the Great Southern sits, outlines the shortfalls of ABS data and defines Cultural production and Creative services.

Section 4 outlines the survey and ABS findings for the Great Southern and lists the conclusions reached from the evidence collected. A brief discussion on the economic input of the creative sector to the Great Southern economy concludes the section.

Section 5 brings together the threats, weaknesses and strengths of the sector, and translates these into a set of opportunities which address weaknesses and use strengths to leverage positive change.

Section 6 provides a summary of case studies from elsewhere in the world and provides examples of how other communities have activated their creative economies.

Section 7 draws the opportunities identified in Section 5 and 6 together into a Table of Actions, structured around five key areas, and Section 8 provides a concluding summary for the report.



Great Southern Authors
Image © Malone Ink

3. The Creative Industries in a National Context

3.1 Australia, Western Australia and the South West

As noted previously, there have been a number of research documents written in the last two years which have provided current and accurate information on the character of the creative economy at the national, state and neigbouring South West regional level.

Nationally, the creative sector represents between 5.29% and 6.22% (1) of the workforce and adds approximately $90.19 billion to the economy annually in turnover (from 2009 figures). It provides over $45 billion in gross domestic product (GDP) and contributes to exports of $3.2 billion dollars annually (2). In addition, creative industries employ many volunteers, whose economic contributions are difficult to measure but should not be discounted.

Nationally, the creative sector represents up to 6.22% of the workforce and adds approximately $90.19 billion to the economy annually in turnover.

The sector's major contributors to revenue nationally are Software development and interactive content, followed by Writing, publishing and print media. In terms of flow-on effects, creative industries perform above the national average in multiplier effects for value-adding and employment with Advertising and marketing and Architecture having the highest total output and value-added multipliers (3). For employment generation, the Film, television and radio segment has the highest flow-on effect. The Industry Gross Product growth for the creative industries however, is significantly lower than the GDP average growth rate for all the industries within the Australian economy, declining over the past seven years at around negative 1% per annum (4).

Looking at the location of the creative workforce, research by others shows that workers are concentrated within a few states in Australia. New South Wales has the largest share of the workforce at almost 40%, followed by Victoria with 28%, Queensland with 15% and Western Australia with 7.8% (5). A further concentration of the workforce occurs at the population level, with the majority of workers concentrated in the capital cities of each state. While this is logical given that these areas also have the largest general populations, the data indicates that certain sectors of the creative industries are more concentrated in the capital cities, these are Software development and digital content, and Advertising and marketing.

In Western Australia, the creative workforce represents between 3.35% and 3.76% (1) of the state's total workforce. Of the state's 41,317 creative workers, over two-thirds are employed in the creative industries as 'specialist' creatives or support staff; and just under a third are 'embedded' creatives working in other (non-creative) industry sectors (6). Support staff account for 42% of total creative employment of Western Australia's creative industries.

1 Note: These percentages vary slightly between reports due to differences in employment categories used by their authors.

2 Source: Page 5. Valuing Australia's Creative economies. SGS. 2013.

3 Source: Page 64. Valuing Australia's Creative economies. SGS. 2013.

4 Source: Page 9. Valuing Australia's Creative economies. SGS. 2013.

5 Source: Page 90. Valuing Australia's Creative economies. SGS. 2013.

6. See Figure 3 for a description of the Creative Trident.

Western Australia's largest creative segment is Software and digital content with 33% of the state's total creative workforce. This is followed by Architecture and design at 23%. The smallest creative segment is Film, TV and radio - which accounts for fewer than 2,000 jobs statewide.

Western Australia's creative workforce grew at an average annual rate of 3.2% between 2006 and 2011; comparable to the state's total workforce growth. The Software and digital content segment experienced the highest average annual rate of creative employment growth at 5.3%, followed by Architecture and design. Advertising and marketing, Music, visual and performing arts, Publishing and writing, and Film, TV and radio grew at a rate below Western Australia's average workforce growth over the same period.

Most (89%) of Western Australia's creative workforce is located in the Perth metropolitan area, but despite the majority of the state's creative workforce being located in the capital, only 1.2% of Perth's workforce is employed in creative occupations. This is a smaller proportion than in all other major capital cities (Brisbane has 1.3%, Sydney has the largest proportion at 2.5%). Compared to the other capitals however, Perth has the highest number of Architecture and Design workers by proportion (1).

Drilling down to a more regional level, SGS Economics and Planning's 2013 report on the South West's creative industries (2) suggests that while the majority of creative work is taking place in our capital cities, the creative sector is anything but inactive in regional communities. They report that the sector contributes $306 million to the South West (SW) regional economy and adds almost $150 million in gross regional product, helping to generate exports of $70 million dollars annually.

The SW is something of a 'hot spot' for specialist employment in the Film, TV & radio segment and also hosts 7% of West Australia's employment in Publishing and writing. Its creative sector employment is out-pacing employment growth in several other traditional industries, with 1095 workers employed in the creative sector (2). The South West is generating clusters of creative activity in the areas around Bunbury, and a similar pattern can be seen in the Great Southern around Albany and the lower Great Southern.

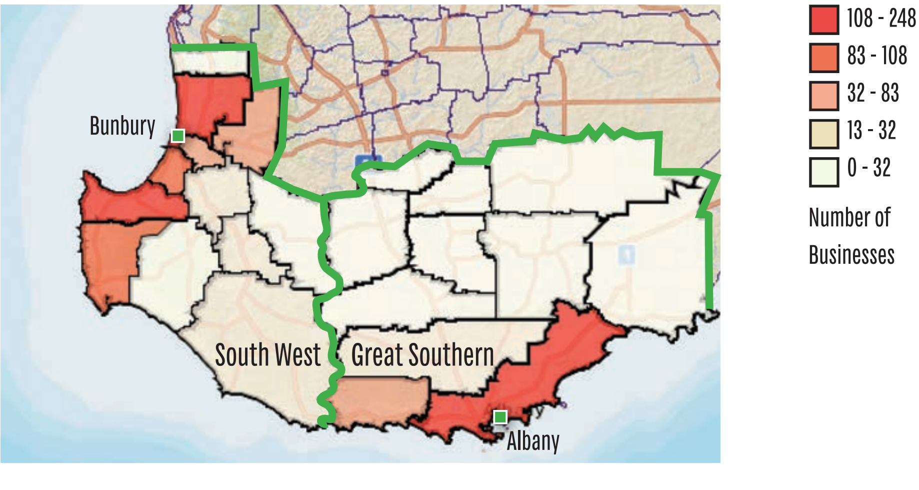


Figure 4.

Creative Economy Density Map

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories.

1 Source: Page 30. Creative Industries Statistical Analysis for WA. S C Lennon and Assoc. 2013.

2 Source: Economic Opportunities for Creative Industries in Western Australia's South West Region. SGS Economics and Planning. 2013

3.2 Cultural Production and Creative Services Definition

In addition to geographical divisions and comparisons, some researchers also split the creative sector by character. S C Lennon and Assoc. in reports on Western Australia and Albany, divides the creative industries into two sub-sectors with different economic and social characteristics.

Creative services include Software and digital content; Architecture and design; and Advertising and marketing. Creative services provide design and innovation services to businesses across many industries, from manufacturing and construction to retailing and entertainment.

Cultural production segments include Film, TV and radio; Music, visual and performing arts; and Publishing and writing. As well as generating economic value and employment, these sectors embody the role of arts and cultural assets as contributors to quality of life and community well being.

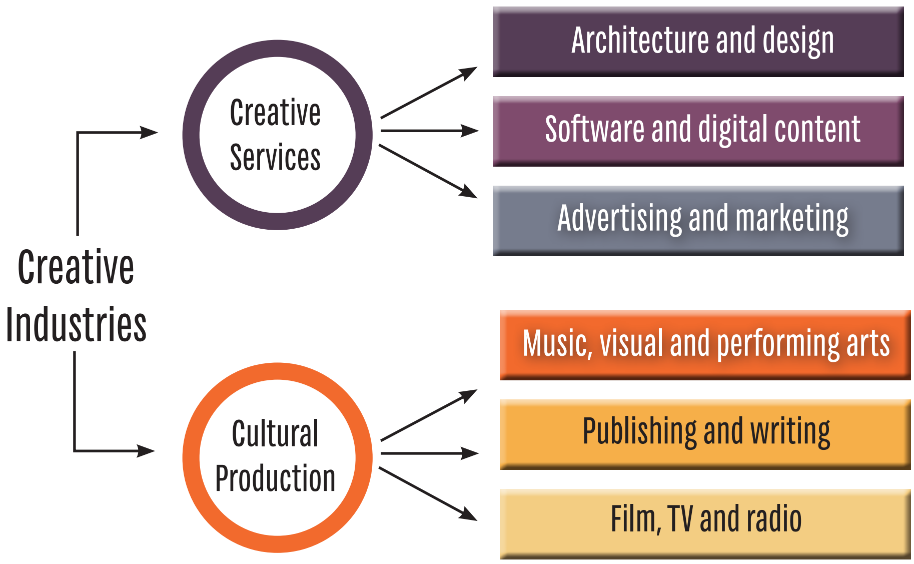


Figure 5.

Cultural Production and Creative Services Sub-sectors

Source: Adapted from Creative Industries Statistical Analysis for WA. S C Lennon and Assoc. 2013.

Cultural production is also being increasingly understood in the context of its value to the 'Experience Economy', in which goods and services are marketed on their value in enriching peoples' lives. This economic driver can be seen in trends such as farmers' markets where consumers want more than the raw product, they want to enjoy the experience of meeting the grower and knowing the provenance of their purchase. The creative sector and Cultural production in particular has been shown to be able to add a premium value to goods and services and is potentially a significant driver of experience economies (1).

In most of Australia's states and territories, 70% of all creative occupations are in the Creative services segments and the remaining 30% are employed in the Cultural production segments. The Cultural production segments employ a proportionally larger number of specialists (31% of total segment employment) than the Creative services sectors, which may include up to 50% of non-creative support workers as employees. Notably, 92% of Western

1 Source: Marcus Westbury in ABC Life Matters. 10 July 2015.

Australia's Creative services jobs are located in the Perth metropolitan area, while a comparatively higher proportion of the state's jobs in the Cultural production segments (17%) are located in non-metropolitan Western Australia (1).

This report explores the proportion of these two sectors in the Great Southern further in Section 4, based on the survey and ABS data collected.

3.3 Shortfalls in Census and ABS Data

There are a number of well-recognized limitations to the ABS data available on the creative industries, which is in part the reason that this study chose to also conduct a bespoke survey for the sector in the Great Southern. Anecdotally there was evidence that the sector was larger than apparent in the ABS figures and the survey was therefore designed to capture creative workers in the Great Southern (not hobbyists) who may not have been recorded in the Census.

SGS Economics and Planning have also noted issues with the ABS data, and provide the following succinct summary of the Census' limitations:

- "Creatives may be hidden in other occupations and may not be accounted for. This limitation is associated with the subjective assessment of creative occupations;
- Volunteers and workers who are not paid may not have been accounted for;
- Some people may work in more than one occupation;
- Many people who could be viewed as creative may not identify themselves as creative, and
- Those who have retired or no longer work within the creative industries might still associate themselves within the industry". (2)

The 'subjective assessment of creative occupations' is also an issue for comparing like with like, as noted in Section 2.5. In view of this potential issue, a list of the occupations this study used in collating ABS figures and collecting survey data is included in the Appendices, so that future studies will be able to reproduce the selections and make accurate comparisons.

Creatives may be hidden in other occupations and may not be accounted for.

1 Source: Page 29. Creative Industries Statistical Analysis for WA. S C Lennon and Assoc. 2013.

2 Source: Page 69. Valuing Australia's Creative Economies. SGS. 2013.

DCD Graphic and Web page design studio

Image © Donna Cameron

4. Census and Survey Findings

4.1 Introduction

As outlined previously, this creative economy research project differs from many others in that it has attempted to reveal and reach creatives who are not identified in the Census because their creative work is not their main work.

This section of the report aims to summarise the findings of both the bespoke surveys undertaken in the Great Southern, and the ABS data for the Region. These findings will be compared to each other, and to other research projects undertaken in Australia.

Background

The method used for undertaking the surveys and interrogating the ABS data has been outlined previously in Section 2.5, but it is worth reiterating that for both the bespoke surveys and the ABS data, some of the sample numbers are small and drawing accurate conclusions is not always possible. However, clear trends have emerged, and where possible these have been crosschecked with other studies to gain some veracity and confidence about the statements made.

The aim of the bespoke surveys was to provide some anecdotal and qualitative data to supplement the quantitative data collected by the Census. The surveys reveal interesting issues and some contrasts to the widely accepted structure of the creative industries.

The surveys aimed to reveal creative workers who are not captured in the Census.

The Surveys

Two surveys were undertaken - one for individual and one for organisations (including government organisations, not-for-profit community groups and commercial businesses). 141 creative workers responded to the individual survey and 26 organisations completed the organisation survey.

The 2011 ABS census identifies 351 people working in creative occupations in the Great Southern, therefore 141 individual responses to the survey equates to a response rate of 40%. A sample size of 140 creative workers from a population up to 1000 (creative workers) would provide better than 95% level of confidence (1), indicating that the response rate to the survey is well within the range to provide accurate data.

4.2 Individual Survey Findings

The individual survey opened by asking respondents for quantitative data to help measure the character of the creative sector. Of the 141 responses, 10 were discounted as they were from people who did not receive an income from their creative work or failed to answer most of the questions. Most of the percentages below are relative to the remaining 131 responses.

1 Source: National Statistical Service; www. nss.gov.au, an ABS website.

Key data collected indicated:

72% of responding creatives were aged between 40 and 69 years;

72% listed a broader Albany postcode as their home postcode, with 'Denmark' being the next most common home postcode;

75% worked from home; and

37% listed their creative work as their main source of income.

With regard to the various sources and avenues of income for freelance and self employed creative workers, respondents identified several - with most having more than one source of income;

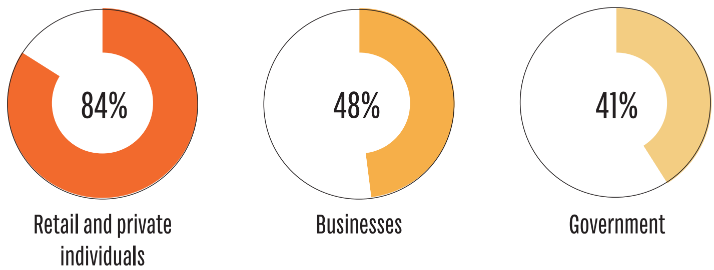


Figure 6.

Sources of Income

Source: Creative Albany using Great Southern Audit survey data. 2015. Percentages do not add to 100% they represent the proportion of respondents for each income source.

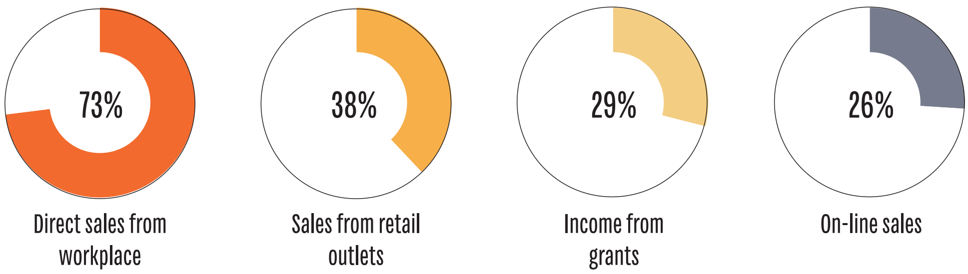


Figure 7.

Avenue of Income

Source: Creative Albany using Great Southern Audit survey data. 2015. Percentages do not add to 100% they represent the proportion of respondents for each income avenue.

In terms of their on-line presence, 34 individuals had no on-line presence, 62 used a social media site and 52 had their own website.

In terms of employment: over 90% of respondents were freelance or self employed - of this group a quarter were also employed as a specialist creative in a 'second' job.

Respondents were asked to identify their main creative specialty:

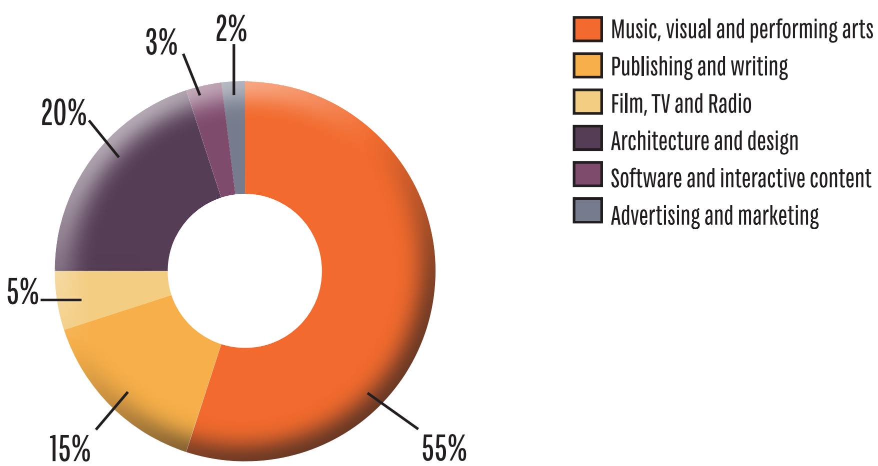
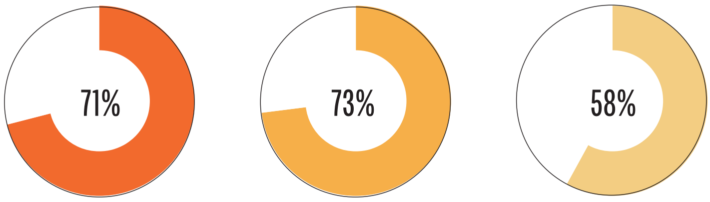


Figure 8.

Individual Creative Occupation Specialty Breakdown: Survey

Source: Creative Albany using Great Southern Audit survey data. 2015.

The survey also attempted to get a more accurate picture of work hours, creative income and location;



Worked less than 30 hours per week on their creative work

Worked from home

Earned less than $20,000pa (1)

Figure 9.

Work Character

Source: Creative Albany using Great Southern Audit survey data. 2015.

The survey went on to ask some more qualitative questions aimed at revealing specific issues for the sector in the Great Southern. Respondents replied to the request to:

"... select up to five (options) that are the most important weaknesses or threats for you or your success in your creative work...." with the following five responses rating the most commonly selected:

86 (62%) "size of the Regional market (e.g. local customer numbers, work opportunities....)"

50 "distance from markets and customers"

48 "work opportunities"

38 "transport (travel or freight) links (e.g. flight costs or frequency....)"

34 "finance (e.g. costs, access....)"

62% of respondents said the size of the Regional market was the main issue for their businesss.

69% identified lifestyle and cost of living as a strength for their creative work.

Their top five selections for "....strengths or opportunities for you or your success in your creative work..." were:

91 (69%) "lifestyle and cost of living"

77 "environmental assets (e.g. natural beauty, resources...)"

59 "local support, connections and networks"

34 "new telecommunications technologies"

32 "built and cultural heritage"

The survey, ABS and anecdotal research have led to the following conclusions.

1 Note: By way of comparison, the ABS notes that $58,692 is the average annual income in Australia in 2015 - and SGS in their Valuing Australia's Creative Industries research report found that 11% of creative workers nationally earn below $20,000 per annum (Page 37).

Conclusion One: at least half of all creative workers in the Great Southern are not revealed in published Census data.

The survey has revealed a significant proportion of 'emergent' creatives; that is, creative workers unlikely to have been captured in standard ABS data.

The survey shows:

> 37% identified their creative work as their main source of income; and
>
> 63% (87 respondents) relied on another source of income that was not from creative work - 36 were managers or professionals including 16 education or health professionals.

Studies undertaken by the Australia Council into one sector of the creative economy also show that nationally 37% of artists have only a single 'arts' job (1) (therefore their 'main' source of income for ABS purposes) which appears to concur with the survey findings.

The Census asks people only about their main job and is likely to have counted the 37% of 'main source of income' respondents to the survey - but not the 63% who rely on other income or a 'day job'. While this suggests a one-third to two-thirds proportion, a conservative estimate of the actual number of people involved in the creative sector may be reached by doubling the published ABS number (2).

Therefore, using the ABS data for the Great Southern which identifies 351 'Creative Occupation' workers, the true figure may be closer to 700.

There is only a small amount of published research in Australia on the proportion of emergent creatives in the industry, and some of it is based on the Arts sector alone. It would be interesting for further research to be undertaken in this area to improve the accuracy of this finding (3).

> "It is difficult to reach one's full artistic potential when we are just so busy trying to survive financially. I spend more time and energy teaching .... as it brings in a regular income. This doesn't leave much time for painting or trying to market one's work."
>
> "Basically I cannot afford to 'put myself out there' or rely on my creative income (I rely on my regular wage income to make ends meet) so I am reluctant to 'put myself out there' in case I get more creative work than I can handle as a sole operator."

Survey Quotes

1 Source: Page 6. Creative Industries Statistical Analysis for WA. S C Lennon and Assoc. 2013.

2 Note: Studies undertaken on Artists for the Australia Council (Do you really expect to get paid? Throsby & Zednik. 2010. Macquarie University) indicate that roughly half of artists are able to work 100% of their time on creative work; again suggesting that a doubling of the ABS figure is appropriate. Some research has also been done by Higgs for Nesta in the UK (Beyond the Creative Industries. Higgs et al. 2008), which shows high 'second job' percentages in some sectors, but this research works with groups who are already likely to have been 'counted', as creative in their first job, and so does not theorize on a percentage.

3 Note: Higgs (currently of the Creative Industries Faculty at Queensland University of Technology and also associated with the CCi) acknowledges this is an area which needs further clarification, and has used the terms emergent and 'on-ramp' for creatives building up their 10,000 hours of skills so/before they can go 'commercial' or professional. This study has chosen to continue the use of 'emergent' to describe this cohort in this report.

Conclusion Two: The Great Southern has a higher proportion of architects, designers, visual artists, musicians, performers and writers than the state and national averages.

The respondents to the survey were mostly working in the following creative occupations:

38% Visual arts and crafts

20% Architecture and design

18% Music and performing arts

15% Publishing and writing (the majority of whom were writers)

The ABS data also shows that as a proportion of all creative occupation types (counting specialists and embedded creatives), the Great Southern has relatively more creative workers in these groups than the state and national averages.

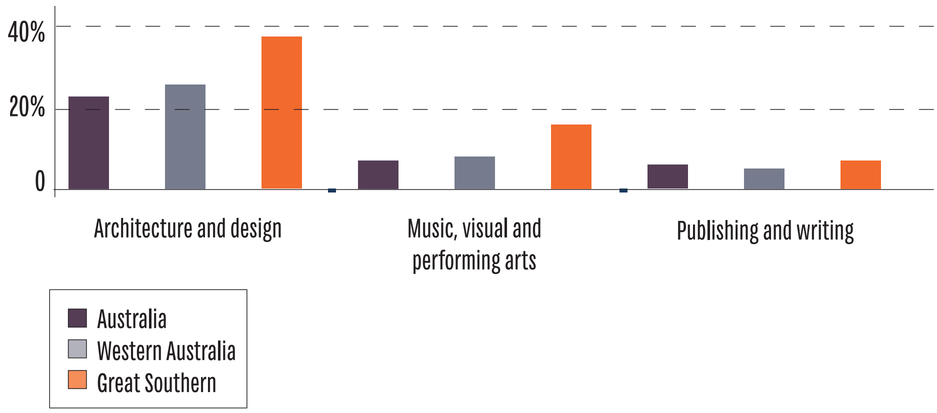


Figure 10.

Comparative Sector size by region, state and national counts: ABS

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories.

While the proportion for Publishing and writing is only slightly larger in the Great Southern than for the state and national figures, when the ABS data for the size of the sector by creative 'industry' is analysed, Publishing and writing is almost twice as large in the Region than in the national average. Creative occupation trends in Architecture and design, and Music, visual and performing arts hold true by industry as well (see Figure 20).

Only a small number of responses to the survey were received from creatives in the Advertising and marketing (2%) and Software and digital content specialties (3%). By comparison, the ABS data indicates that 30% of the creative sector specialists work in Advertising and marketing in the Great Southern (the national figure is 38%). However, the ABS also shows that there has been a marked contraction in this sector (see Figure 16) and other research has suggested that these professions tend to be under-represented in regional areas and may struggle to expand (1).

1 Source: Page 29. Creative Industries Statistical Analysis for WA. S C Lennon and Assoc. 2013.

Census figures for creative workers in the whole creative sector are:

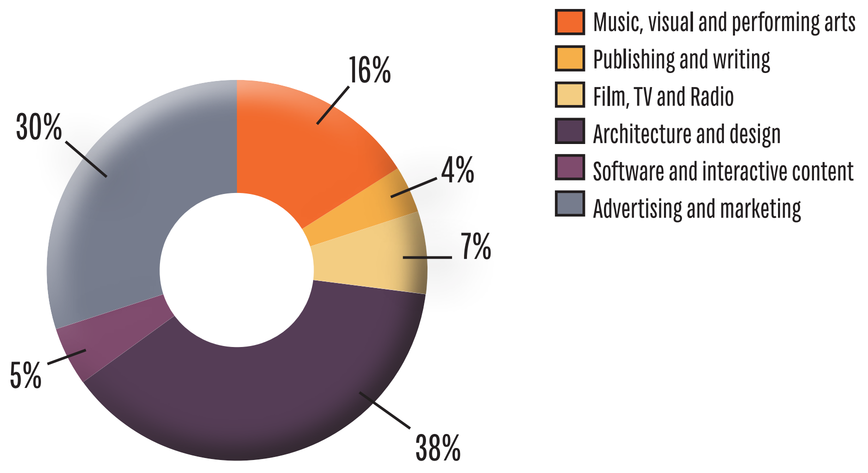


Figure 11.

Individual Creative Occupation Specialty Breakdown: ABS

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories.

This study concludes that creative workers in the Great Southern are predominantly Visual artists & craftspeople, Architects and designers, Musicians & performing artists and Writers - and that the creative sector in the Region is particularly active in these specialties.

As outlined in Section 3 - the sectors of Advertising and marketing, and Software and interactive content tend to be more concentrated in capital cities. Film, TV and radio is a small sector only and is focused in Albany.

> "There is a very progressive culture here in GS regarding the arts. We are blessed with many individuals who follow their own thoughts and ideas, unimpeded by whether it will sell or be accepted. True democracy! We lack the base that Perth has for graphic design, but do have smaller rentals and a different clientele!"

Survey Quote

Conclusion Three: The Lower Great Southern is weighted towards Cultural Production.

As outlined in Section 3.2, creative occupations can be divided into two broad types: Creative services (such as architectural services) and Cultural production (e.g. writing or visual art). Typically at the national and state level, the split shows over 70% of the sector are engaged in Creative services and fewer than 30% are involved in Cultural production. The ABS data for the Great Southern and Albany shows that for occupations (creative specialists + embedded creatives), the national trend holds true.

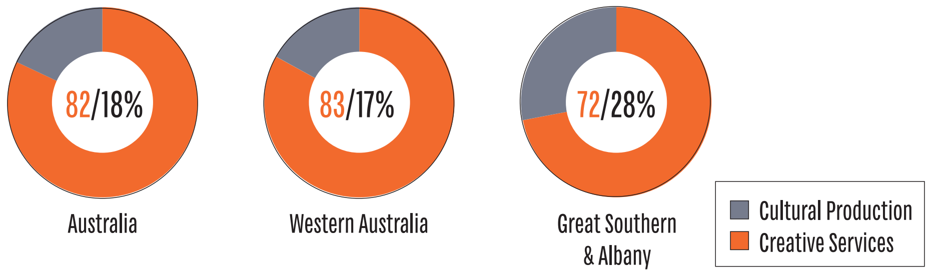


Figure 12.

Cultural Production and Creative Services by Occupation: ABS

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories.

In the survey data collected for the Great Southern however, (which identified emergent creative workers), the national proportion is reversed with Cultural production occupations outweighing Creative services.

Of further interest, is that if the ABS figures for industry (creative specialists + non-creative support staff, which captures creative organisations and businesses) are used, the proportion also differs from the ABS figures for occupation and from national trends. This further suggests that the trend in the Great Southern is particularly strong in this sector - well beyond the 17% that would be expected for a regional area (1).

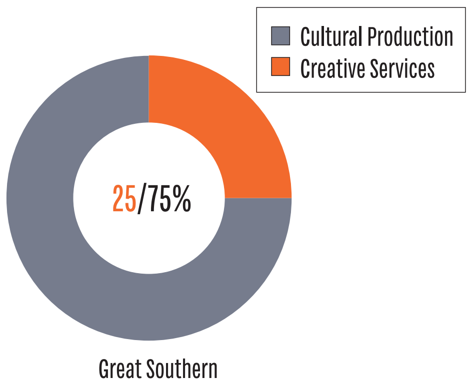


Figure 13.

Cultural Production and Creative Services by Occupation: Survey

Source: Creative Albany using Great Southern Audit survey data 2015.

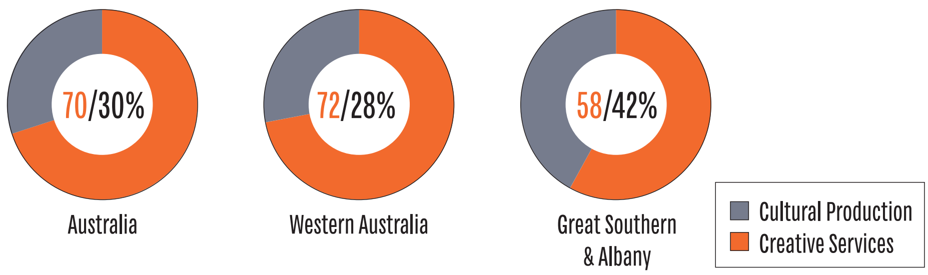


Figure 14.

Cultural Production and Creative Services by Industry: ABS

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories.

This study concludes that the character of the creative economy in the Great Southern is different from the national average and is significantly more engaged in Cultural production.

1 Source: Page 29. Creative Industries Statistical Analysis for WA. S C Lennon and Assoc. 2013.

> "I see a lot of potential for creatives here in the Great Southern. I do feel the overall creative presence in Albany so far is more art orientated (as in fine arts), rather than design."

Survey Quote

Conclusion Four: There is a creative cluster in the lower Great Southern area.

Of the 63% of respondents who relied on another occupation for their main income, 70% worked in Albany postcode areas, suggesting that they live within 50 - 100km of Albany's CBD. Additionally, 64% of all survey respondents listed Albany postcode areas as their home postcode and over 78% of respondents live in the zone encompassing the Shires of Albany, Plantagenet and Denmark.

The ABS data supports the survey results, identifying Albany as having 214 Creative Industry jobs (specialists + support staff) or 70% of all creative industry jobs in the Great Southern, followed by Denmark with 20% (1). The majority (69%) of the Architectural sector in particular is located in Albany (2).

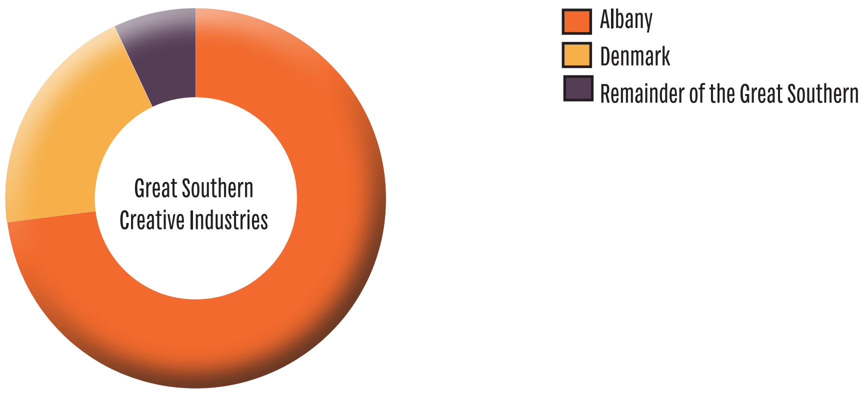


Figure 15.

Lower Great Southern Creative Cluster

Page 9. Creative Industries Analysis for the City of Albany. S C Lennon and Assoc. 2014.

This study concludes that the lower Great Southern (LGS) has a proportionately higher number of creative workers compared to the remainder of the Region.

> "Over many years I have seen the creative arts in Albany move from strength to strength. There are many opportunities to expand things further, particularly in my current area of expertise. I feel that in recent years the VAC has been injected with new life and acts as a real creative hub for events and opportunities, largely due to some key people who have brought excellent skills. Although living between Perth and Albany at present, I plan to fully move back next year and hope that there will be some opportunities for me..."

Survey Quote

1+2 Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories.

Conclusion Five: The lower Great Southern creative cluster is growing.

The ABS data shows that between the 2006 and 2011 creative occupation jobs (specialist and embedded creatives) in the Great Southern grew by an average of 14% with the majority of this growth occurring in the lower Great Southern. The national average growth in the creative sector was 16%. By contrast, the growth for all occupations over the Great Southern was 4.8% in the same period (1).

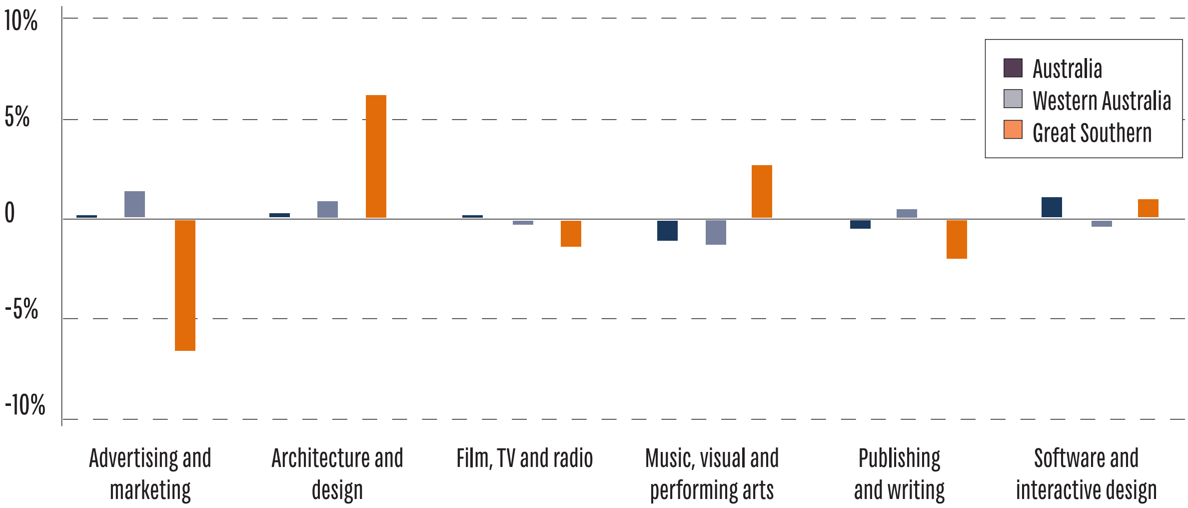
While growth is recorded as 14%, the creative workforce remains a relatively small section of the whole workforce in the Region at 2%. In the Great Southern, creative occupations grew by 0.12% as a share of total employment in the Region. Nationally the creative occupations grew by 0.20% but fell in Western Australia by 0.01% between the Census periods.

There is clear evidence in the ABS figures that an increase in the cluster of creative employment has taken place in the Great Southern but a more detailed analysis of the figures shows that growth is occurring unevenly across the creative sector. The table below compares change within the six sectors by occupation between 2006 and 2011.

Figure 16.

Occupation growth by creative sector and geography; 2006 to 2011

Source: Creative Albany using the ABS Census of Population and Housing 2006 and 2011; Nesta categories.



It is apparent that the Great Southern has grown proportionately higher than the national average in the areas of Architecture and design and Music, visual and performing arts, but has contracted in Advertising and marketing, Film, TV and radio, and Publishing and writing.

The majority of growth has been focused in the lower Great Southern, which is suggestive of the development of a creative cluster forming around specific creative specialties in the locale.

> Its a place where I have been able to do the most satisfying and innovative work and I think the space and distance from the metro 'arts sector' has helped me be more fearless, (as well as) the attitude of local people to try something new and support community development through the arts.

Survey Quote

1 Source: Creative Albany using the ABS Census of Population and Housing 2006 and 2011; Nesta categories.

Conclusion Six: The local (Great Southern) market alone is not large enough or developed enough to support sustained growth for this cluster.

Survey respondents were asked to list up to five "threats and weaknesses for you or your creative work" from a list collated from other creative studies. The top three most commonly selected were:

1. Size of regional market (e.g. local customer numbers, work opportunities,...)
2. Distance from markets/ customers
3. Work opportunities

These responses indicate that the respondents believe that the number of customers, retail and performance spaces and the level of demand for design and craft skills are insufficient to sustain a broad base of creatives. They also need work opportunities to provide 'day jobs' to supplement their creative work and supply employment for their families.

As outlined in the introduction, the Great Southern is only experiencing modest economic growth, which suggests local demand for services and products from the creative sector would also be modest. Geographically, towns in the Region are a minimum of three hours drive from Perth and the market there, with Albany and the lower Great Southern being up to 5 hours drive. Daily flights are available but the cost of flights (and of accommodation in Perth if business can't be conducted in a day), have a significant impact on business costs.

The majority of freelance individual survey respondents indicated that while most income is from the Great Southern, over half also earn some income from elsewhere in WA and over a third from elsewhere in Australia. Significantly nearly a quarter have income from international sources (1).

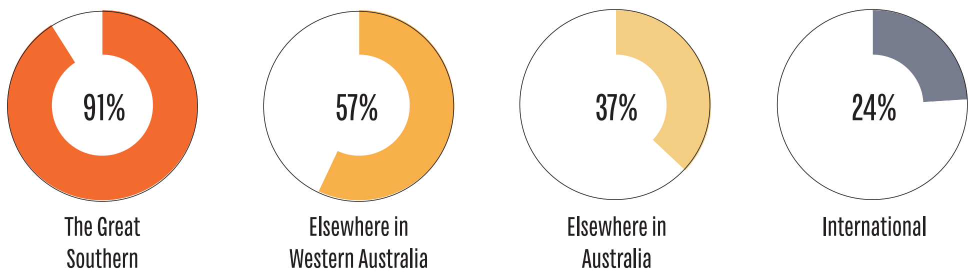


Figure 17.

Income Source; Local to International

Source: Creative Albany using Great Southern Audit survey data. 2015. Percentages will not add up to 100%, figures indicate the proportion of individuals who earn income from each market.

In regard to their 'clients', 41% received some income from government clients for their creative work, while over 80% received some of their income from private or retail clients.

1 Note: A small percentage (6%) could not identify their income source. These were generally authors, who if published, may not know where their books are being sold.

Throughout Australia, other regional centres of similar workforce size as Albany have a percentage of their creative workforce (as a proportion of their total workforce) consistently between 2.20% and 3.40% (1). There is one notable and somewhat startling exception. The Blue Mountains urban area outside Sydney has 7.70% of their total workforce involved in the creative industries, higher even than the national average calculated in this study at 6.04%.

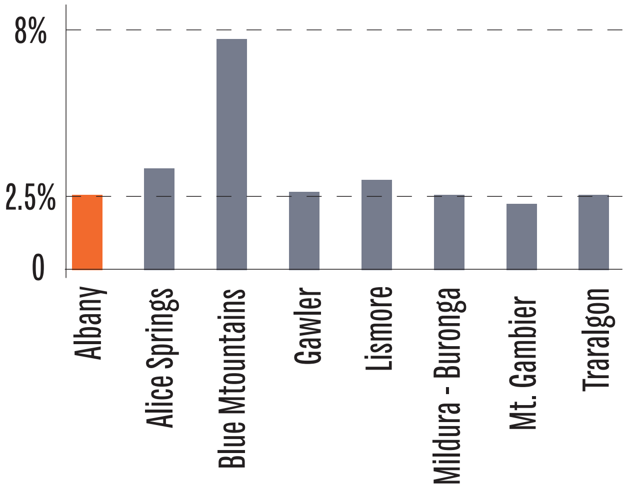


Figure 18.

Comparative creative sector size by total workforce size.

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories and counts by urban population rather than Local Government Boundary area.

The Blue Mountains have a healthy digital/ software sector, nine galleries and retail outlets and a rich variety of creative industries. They are also only approximately 100kms from Sydney, which provides a massive market and is within easy commuting distance via public transport. The Blue Mountains example highlights the effect of relative remoteness on the creative economy in regional areas - and reinforces why the size of regional market and distance from markets / customers are key issues for Great Southern creatives.

This study concludes then that the Great Southern 'market' alone is too small and remote to sustain the creative workforce on its own.

> "Size of market - tourist numbers visiting local galleries fall dramatically over the winter."
>
> "Accessing appropriate markets is a problem, particularly with the rural restrictions on internet use. Physical travel, due to cost is not always possible. Information about local markets is not always easily obtained."
>
> "Until there is a large-scale population increase (which is unlikely) there is not really enough work in the Great Southern to sustain a professional musician unless they take a "day job" to sustain their artistic endeavors."

Survey Quote

1 Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories and counts by urban population rather than Local Government boundary area. Workforce +/- 1000 of Albany at 11,582.

Summary of Individual Survey and ABS Findings

These six conclusions build a picture of a creative sector heavily weighted towards Cultural production. At a more detailed level the specialties of Architecture and design, and Music, visual & performing arts are over-represented compared to state and national averages.

An active and growing creative cluster is located in the lower Great Southern (within the shires of Denmark, Plantagenet and Albany) and the Great Southern as a whole is characterized by a high proportion – possibly over double the ABS figure – of 'emergent' creatives who are actively contributing to the sector but are not identified in the Census data.

Despite above average employment growth in some industries in the creative sector in the Great Southern, the local market is not large enough to support the creative sector, and creatives must work beyond the Great Southern's boundaries to be financially viable.

4.3 Organisations Survey Findings

Organisations who completed the survey included government organisations, not-for-profit (NFP) community groups and commercial businesses. Based on the email addresses provided, roughly half the organisations who responded to the survey appeared to be commercial businesses, the other half were NFP groups or government organisations.

From 26 responses; 14 organisations had 5 or less full time or equivalent staff (FTE) and a turnover of less than $250,000 pa. In terms of their internet presence, 16 used social media, 21 had their own website and only 2 had no on-line presence. The majority (88%) had private or retail customers and also sold their services or products directly from their own premises. 10 had some reliance on grants for income and 10 had some income from overseas sales.

The majority of the commercial organisations who responded were from the Architecture/ design industry (7), followed by Advertising and marketing (3). From the NFP and government sectors the majority were predominantly from the creative (visual) artists, writers and performers group (8). The next sector represented was Film, TV and radio (4).

As with the individual survey, the organisational survey asked some qualitative questions aimed at revealing specific issues for the sector in the Great Southern. Respondents replied to the request to:

"... select up to five (options) that are the most important weaknesses or threats for you or your success in your creative work...." with the following responses:

- 12 (46%) size of the Regional market (e.g. local customer numbers, work opportunities....)
- 10 State/ Federal Government policy and support,
- 9 availability of skilled workers in my industry
- 9 training and professional development
- 9 finance (e.g. costs, access...)

46% of organisations said the size of the Regional market was the main issue for their business.

50% said local support and networks are a strength for their creative organisations.

The most commonly selected five strengths or opportunities for their creative work were, in order of importance:

- 13 (50%) local support, connections and networks
- 10 built and cultural heritage
- 9 State/ Federal Government policy, support and incentives
- 9 regional branding
- 8 lifestyle and cost of living

The survey, ABS and anecdotal research have lead to the following conclusions.

Conclusion One: Organisations in the Great Southern are small but well established.

The Survey showed that 70% of the respondents:

- had 10 or less FTE staff;
- a turnover of under $500,000, and
- had been operation for more than 10 years - including 50% that had been operating more than 20 years.

Nationally 98% of creative businesses have less than 20 employees, the survey showed this figure to be 88% in the Great Southern (1). Nationally 75% of creative businesses have a turnover of less than $200,000pa, for the Great Southern this figure is approximately 61% (the average for all businesses nationally is 65%).

This study concludes that creative organisations within the Great Southern are typical of national businesses in their small scale and turnover, and that they appear to be sustainable.

Conclusion Two: The Great Southern has a relatively high number of Architecture and design, Visual and performing arts, and Publishing and writing organisations.

The two largest organisation groups responding to the survey were Architecture and design, and Music, visual and performing arts. Of the Music, visual and performing arts organisations, only one was a music organisation.

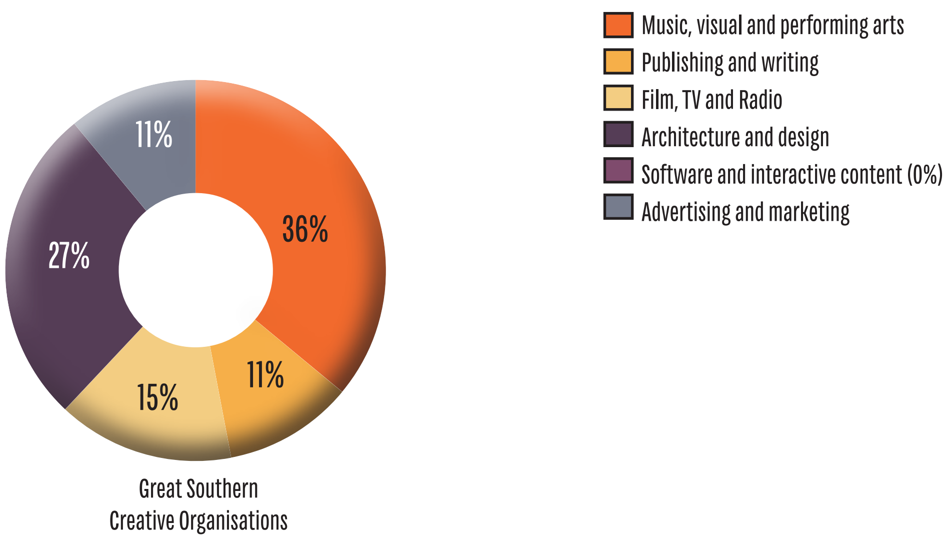


Figure 19.

Creative Sector Organisation Breakdown; Survey

Source: Creative Albany using Great Southern Audit survey data. 2015.

1 Source: Page 45+ 46. Valuing Australia's Creative Economies. SGS Economics and Planning. 2013.

No organisations in the software and interactive content sector responded to the survey. The ABS data confirms comparatively low numbers employed by this industry segment in the Region. The ABS data also confirms the survey findings that the Great Southern has a proportionately high number of architecture / design / visual arts organisations.

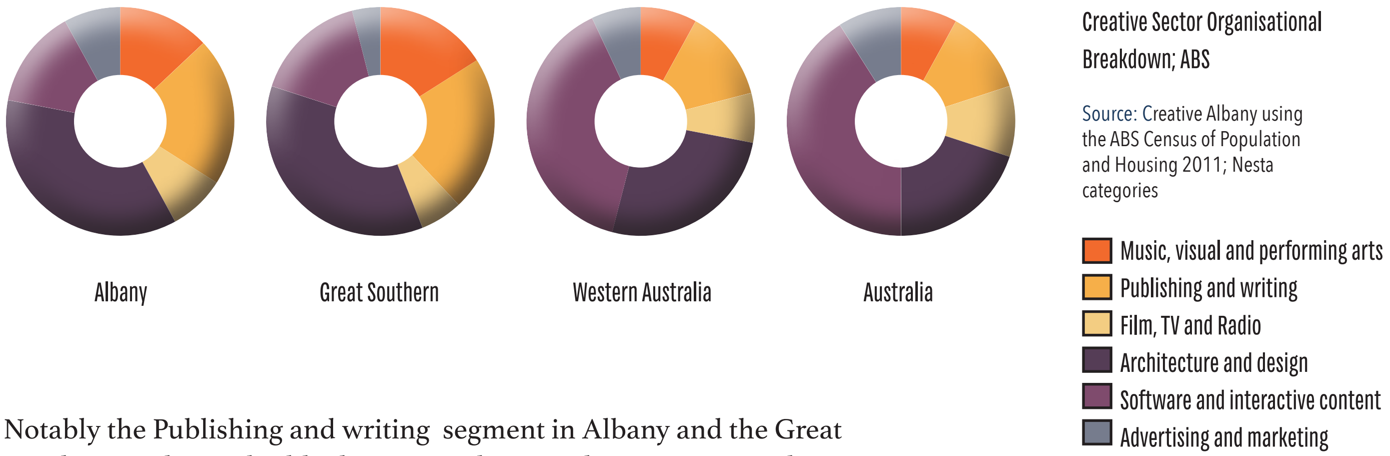


Figure 20.

Creative Sector Organisational Breakdown; ABS

Source: Creative Albany using the ABS Census of Population and Housing 2011; Nesta categories

Notably the Publishing and writing segment in Albany and the Great Southern is almost double the state and national proportions and most likely reflects employment in newspaper publishing (1). While organisation numbers in this sector fell in the Great Southern between 2006 and 2011 (see Figure 16), following national trends (2), it still represents a significant proportion of the creative sector.

This study concludes that the Great Southern has a comparatively high proportion of Architecture and design, Visual and performing arts, and Publishing and writing organisations compared to state and national averages.

Conclusion Three: Albany is acting as a regional centre for the majority of organisations.

In the survey 76% of the organisations identified Albany postcodes as their principal work place. Of the remainder, all but one were located in either the Denmark or Plantagenet postcode areas.

ABS data that shows 70% of workers in the Great Southern creative industries (creative specialists + support workers) are employed in Albany. It is also an administration centre for Government and NFP organisations for the Region.

In conclusion, the lower Great Southern is the creative hub for creative organisations, with Albany acting as the Regional centre for the Great Southern.

1 Source: Page 7. Creative Industries Analysis for the City of Albany. S C Lennon and Assoc. 2014.

2 Source: Page 70. Valuing Australia's Creative Industries. SGS. 2013.

Conclusion Four: The Great Southern market alone is too small to sustain commercial creative businesses.

Three quarters of businesses identified market size as the number one weakness for the sector in the survey. While all but one organisation had clients in the Great Southern, 88% also had clients from elsewhere in WA, 50% from elsewhere in Australia and 38% had international clients. This suggests that while the organisations are based in Albany and servicing the whole Great Southern, they are regularly working beyond its borders. Having a significant client base outside the Region may be an economic imperative to offset the small local market for commercial businesses, but as 50% of the respondents were NFP groups or Government organisations, it appears that these organisations are also promoting their members and gaining income from outside the Region.

This study concludes that the Great Southern market alone is too small to sustain creative organisations.

> "There is not enough work for my business in the Great Southern. I also do not benefit from 'buy local' Govt. policies as my jobs fall below the price threshold for Buy Local - this would be a common problem for creative businesses as most of them are small and not submitting for large tenders."

Survey Quote

Conclusion Five: Training and Professional Development is a key issue for all organisations.

Skills development was the third most common response to threats to the creative sector in the survey. When the responses are analysed - half of the NFP / Government organisations identified 'access to training and professional development' (PD) as one of their top five weakness, and half of the commercial businesses listed 'accessing skilled staff' as one of their top five threats. While slightly different, these responses suggest that there is a paucity of appropriate training opportunities across the whole sector.

The survey did not identify what kind of training is needed, and more investigation could be done in this area, but ABS data shows that Albany (the base for the majority of organisations surveyed) has a significant under-representation of university degrees and over-representation of certificate qualifications (1). In addition, between 2006 and 2011, the total number of people currently studying rose by 6.5% in WA while in Albany, it rose by only 1%. These figures suggest that there may be issues in accessing appropriate training, and in attracting skilled people to the Region.

1 Source: Page 41. Albany Baseline Study For Long Run Socio-Economic Sustainability. Martinus and Tonts. UWA. 2013

Notably, there are few professional development 'creative industry' membership organisations actively meeting and discussing creative work and design in the Great Southern. Groups such as the Australian Institute of Architects provide PD but are essentially capital city centric. The Albany branch of the Institute of Engineers is currently the only professional association regularly meeting to visit innovative development projects - architects, designers and other creatives attend their meetings and site visits. The Creative Exchange (CEX), a joint venture between the City of Albany VAC and Creative Albany, provides quarterly networking opportunities and project presentations for creatives, but is not a professional development organisation per se.

This study concludes that professional development and access to a skilled workforce are key elements for the sustainability of the creative sector.

> "(There is a) lack of Tafe, University or any higher education art degrees running in the area creating a lack of critical and 'visual literacy' for both audiences consumers and makers…."
>
> "(I have a) lack of skill to set up a website for Proofreading."
>
> "I am very disappointed as are many that all the university level art courses and even the TAFE courses have now closed down - making it very difficult and expensive for local people to seek training and keep up professional development."
>
> "(Our) group (was) created due to TAFE cutting the arts programme."

Survey Quotes

Conclusion Six: Financial sustainability is a key issue for NFP and Government organisations

The next most common threat after PD (at just under half) for non-commercial organisations was finance. Anecdotal evidence gathered during research for this report identified that accessing funding, the cost of running programmes and competition for sponsorship are some of the issues facing this sector. The survey indicated that none of the NFP incorporated organisations that responded had a turnover of more than $250,000 (the lowest option provided).

All organisation survey respondents listed State and Federal policy and support as a key weakness (second overall), but also as an opportunity / strength (third overall), suggesting the creative sector is heavily influenced by State and Federal funding programmes and policies.

In conclusion, for NFP and Government organisations in the Great Southern, financial sustainability is a key challenge.

"Getting and managing finance is always an issue and takes up time and energy."

"There have been lots of changes in Government funding, especially in the arts industries, continuity of funding is a problem."

"There may be two different strategies needed to support creative organisations, some will be commercially viable, others will always need public support to pursue 'cutting edge' creativity."

"Sometimes organisations have a role to play as an incubator for creatives, giving them an economy of scale, expertise and access to markets when they are vulnerable at the beginning. These sort of organisations need government funding."

Workshop and Interview Quotes

Summary of organisational survey and ABS findings

The creative sector in the Great Southern shows a relatively high number of Architecture & design, Visual and performing arts, and Publishing and writing organisations when compared to state and national averages. These organisations are small scale but well established, and are predominantly based in Albany - supporting the cluster of creative workers in the lower Great Southern.

Creative organisations are reliant for a significant proportion of their income on work from outside the Great Southern, indicating that the local market alone is too small to sustain them.

Key challenges for creative organisations are access to a skilled workforce and professional development. For NFP and government organisations financial stability was also a significant issue.

4.4 Economic contribution of the creative sector to the Great Southern Region

This study has established that the creative sector accounts for 2% of employment in the Great Southern and 2.51% for the Central Albany urban area (2.31% for the wider Albany Local Government area).

Calculating the exact value of the sector is more difficult, and indeed SGS Economics and Planning in their research reports on Australia and the South West developed a purpose built model based on ABS input-output tables (IO Model). This enabled them to quantify the direct and flow-on contribution of creative industries to the economy. The diagram below illustrates the chain of assessment.

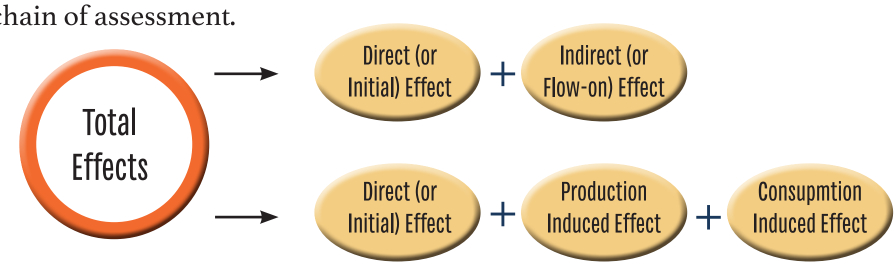


Figure 21.

Economic Impact Assessment

Source: Adapted from Page 61. Valuing Australia's Creative Industries. SGS Economics and Planning. 2013.

SGS do however acknowledge the limitations of an IO model, and it is beyond the scope of this study to replicate the highly complicated 'purpose built' model used by specialist economists. Two broad principles can be taken from previous research however;

1) Investment in the creative sector is good value for money

Creative industries have a greater multiplier effect from initial investment than all other industries at 3.79 times versus 3.59 times (1), and regional creative workers have been shown to add more value to the economy than creative workers elsewhere - and are therefore highly productive. For example; South West creatives are estimated to be 40% more productive than their Perth counterparts (2).

Other studies have attempted to quantify a simple multiplier effect to investment, and this figure is most commonly used in calculating the flow-on benefits from events such as festivals. A 2:1 proportion is often used as a rule of thumb ($2 direct investment results in a further $1 income). This model may be over-simplified but could account for leakage (money going out from the Region to import goods and services for an event).

The design economy in the UK is adding jobs at three times the national average.

There is no doubt however that creative industries have the potential to be an excellent economic lever. By way of a recent example - the City of Nantes (France) identified that for every Euro spent on arts and culture, the community gained between 3 and 6 Euros in value (3). Notably also, the UK Design Council has recently published research which shows that the design economy is adding jobs at three times the national average (4).

1 Source: Page 64. Valuing Australia's Creative Industries. SGS Economics and Planning. 2013.

2 Source: Page 34. Economic Opportunities for Creative Industries in WA's SW. SGS Economics and Planning. 2013.

3 Source: Page 75. Public Art Review Issue 51. 2014.

4 Source: The Design Economy. UK Design Council. 2015.

2) The creative sector contributes significant economic value through volunteerism

Other research studies note that the economic value of volunteer work in the creative sector should not be underestimated. By way of a local example, Creative Albany Inc. (a volunteer organisation) has auspiced and run projects and events that have brought over $500,000 in funding into the creative economy sector, of which approximately $200,000 was money sourced from outside the Region (1). The 'multiplier effects' of this income include increased activity in the restaurant, tourism and service supply sectors. If the multiplier of 3.76 is applied to the income sourced from outside the Great Southern alone, an estimated $752,000 has been contributed to the Regional economy under the auspice of a volunteer organisation.

There are over 20 'creative' not-for-profit groups active in the Great Southern (see Appendix 9.1 for listings) and many of these, like Creative Albany, are run by volunteers and are making a significant economic contribution to the Region through events - such as the Art Trail and the Festival of the Voice - and their support of other organisations including the Perth International Arts Festival in the Great Southern and the Albany Entertainment Centre.

Additional Unquantified Benefits

SGS provides an excellent discussion of economic benefits that are outside the scope of their IO model which is worth reproducing here as a succinct summary of benefits which are also applicable to the Great Southern:

> *Skills development: For the artist, cultural projects and community groups, the opportunity to run a small business grants exposure to a wide range of business management and leadership skills. These could include, but are not limited to: creative and technical skills; general business management skills; sales and accountancy skills; and human resource management and coordination. This 'on the job' training presents savings if compared with formalised skill training sessions, representing a benefit to participants.*
>
> *Improved Brand Value and Enhanced Tourism Visitation: In fostering and encouraging artists, cultural projects and community groups, the Region distinguishes itself within the state as a centre for the arts and artistic communities. This creative element is a strong attraction, both for tourism and in promoting investment in the Region. Exhibitions, fairs, events and concerts hosted by the Region attract visitors from far and wide. Provision of spaces within the Region and an attractive calendar of events acts as a magnet for visitation. This enhances the 'brand value' attached to the Region, consequently leading to higher visitors to the Region and their associated higher expenditures within the Region.*

1 Source: Strategic Plan 2015 ~ 2020. Creative Albany. 2015.

Social Inclusion and Identity: *Creative spaces provide a place for social cohesion, pride and networking - for both practitioners and patrons - creating stronger, healthier and more engaged individuals. These foster local identity and a focus for connecting with communities and institutions for strengthening the community.*

Volunteering: *Participating in group projects fosters networks that create social capital. Community inclusion by volunteers and workers strengthens community resilience, cultural capital, communication, and the mental health of both volunteers and participants. Volunteer opportunities contribute significantly to community cohesion by building resilient communities and social capital. An increase in productivity could occur due to engagement in the workforce for adults (volunteers) who would otherwise be permanently disengaged. These volunteer opportunities enhance the overall social capital of the location/ suburb and may provide stimulation, enjoyment and fulfillment for individual volunteers. In addition, volunteer engagement generates resource savings for projects and society as volunteers' work enhances the productive capacity of the location/ project without any financial outgoings. These are costs that society would have otherwise incurred had it not been for the volunteers.*

Consumer surplus: *Consumer surplus captures the difference in the amount that consumers are willing to pay to consume a product and the prevailing market price. Consumer surplus is represented by the area under the demand curve for an industry's product and the market price. In cases where the consumer's willingness to pay exceeds the market price for the creative industry product, the consumer enjoys a surplus, which is not captured in the analysis presented above. For example, 'free' music concerts and events organised by various councils in the Region result in a positive utility to consumers and patrons, for which they may be willing to pay, but are not required to thus resulting in a positive 'consumer surplus'. (1)*

4.5 Overarching conclusions

There was significant cross-over in the findings from the analysis of individual and organisational data. These reveal a sector which:

- ***Is unusually rich in Cultural production activity.***
- ***Is well represented and active in the creative specialties of Music, performing and visual arts, Publishing and writing, and Architecture and design.***
- ***Is actively working beyond the boundaries of the Great Southern region to supplement the local market and employment opportunities, and is characterized by an unrecognized resource of 'emergent' creative workers.***
- ***Has formed a creative cluster in the lower Great Southern with Albany acting as the support centre for the creative sector in the Region as a whole.***
- ***Is making a significant contribution to the Region's economy through employment and the flow-on effects of creative activity.***

1 Source: Page 35. Economic Opportunities for Creative Industries in WA's SW. SGS Economics and Planning. 2013.

H&H Architects 2010.
Image © Krysta Guille.

5. Great Southern Creative Sector Threats, Weaknesses, Strengths and Opportunities

5.1 Weaknesses and Threats

These can be described as elements that are lacking in the sector, trends which threaten creative employment or issues which are preventing sustained growth.

Interpretation of the surveys and ABS data show that the size of the Great Southern market, financial viability and PD / skilled staff availability are key issues. Interviews, discussions and workshops held during this study revealed an important fourth issue, which is a lack of marketing in and of the creative sector.

5.1.1. The Great Southern market

It is clear that the population base of the Great Southern, and hence critical mass of businesses and potential users of creative services and products, is too small to support the sector. As shown previously, many individuals and most organisations are working outside the Region, which brings issues of remoteness (such as freight costs, transport availability and access to clients) to bear on business viability.

Trends such as improving internet speeds are helping to moderate remoteness disadvantages and provide access to larger markets, but these may not be of much assistance to creatives who are anchored to physical places for their work or creatives working from remote rural areas in the Region with limited internet connectivity.

Fast and reliable internet connectivity is also a two-way system however, and so while it is allowing Great Southern creatives access to clients outside the Region, it is also allowing creative industries elsewhere in the world to access the Great Southern market, increasing competition for an already small client base. This is particularly true for the Creative service sub-sector (which includes Software and interactive media, Advertising and marketing, and Architecture and design) and the research has shown that (with the exception of Architecture and design) this sub-sector is proportionately smaller in the Great Southern than in state and national averages.

Reliable internet connectivity is a two-way system - it is assisting creatives to access clients outside the Region, but is also allowing creative industries elsewhere in the world to compete for an already small local client base.

Although the creative sector as a whole in the Great Southern has been experiencing modest growth - and in some specialties higher employment growth than the national average - the size of the local market remains a key threat to its long term expansion and viability.

5.1.2. Financial viability

Financial viability issues fall into two categories; consistency of funding for NFP and government organisations, and financial launch points for individual creative workers.

NFP and government organisations are heavily dependent on state and federal policies and funding streams, many of which have become increasingly complex to access. Funding organisations may also have dual agendas, for instance an arts project may only get funding if it can show it has health benefits (such as promoting an anti-smoking message). There has also been a trend towards reducing government exposure to risk, which has increased the insurance and risk management burdens in many funding schemes. And finally, many funding organisations need to see matching funds, which can become a major hurdle to overcome for large projects or programmes, or for funding to industries that are not significant employers, such as regional creative sectors.

In addition to the separate effects of these trends, collectively they have increased the skill level and 'grant literacy' required to access funding. This makes securing ongoing financial support more challenging for small NFP organisations - who make up the majority of creative sector NFPs in regional areas - and also for regional government organisations; many of whom are struggling to attract skilled staff and negotiate the changing landscape of state and federal funding objectives.

National research shows that creative workers' total incomes are lower than those of all occupations, placing them in a difficult position from which to grow their creative business.

Individual creative workers too, have difficulty with funding applications, but are facing a more pressing second set of problems related to entering the workforce full time. The surveys revealed that there is a significant cohort of emergent and un-counted creative workers in the Region; possibly as many as twice the official ABS figure for creative workers. The consistent comment made by this group is that they need other employment (usually not creative work) in order to make ends meet and that this leaves them time-poor and unable to develop their skills, to increase their product volume or to implement marketing strategies - effectively blocking entry into full time paid creative work. The need for a day job is in part due to the small market size discussed previously, but there are other factors at play as well, including difficulty accessing skills development, finance and retail opportunities. In addition, national research shows that creative workers' total incomes (including income from non-creative work) are lower on average than those of all occupational groups (1), placing them in an even more difficult position from which to finance growth of their creative business.

Research by the Arts Council strongly supports this issue as a significant area of weakness, identifying that 'the most important factors holding back their professional development nominated by the great majority of artists are a lack of time to do creative work due to other responsibilities, lack of work opportunities and lack of financial return from creative practice.' The study

1 Source: Page 9 + 10. Australia Council for the Arts; Do you really expect to get paid? Throsby & Zednik. 2010. Macquarie.

goes on to note that the most powerful 'financial lever' for their professional development is income maintenance that allows them to buy time to develop their creative work practice (1).

5.1.3. Professional development and skilled staff availability

The creative industries are not alone in the Great Southern in requiring better access to training and further education, but they are a particularly vulnerable sector due to the speed of technological change. Creative work is by definition about ideas generation and innovation and is heavily influenced by new software, changes in manufacturing technologies and design trends. Access to equipment, specialist courses, industry mentors and the creative milieu is an issue for all regional creatives.

The problem has been compounded to some degree by changes in the education sector, which is moving towards a significant proportion of courses being provided on-line. While this does mean a wider variety of courses are available to regional and rural creatives than in the past, the nature of many creative learning processes means that they require 'hands-on' teaching, the ideas-generating energy that a classroom situation provides and access to a variety of specialist equipment at different stages of skills development (such as a 3D printer).

The creative industries are not alone in requiring better access to further education, but they are particularly vulnerable due to the speed of technological change.

The Great Southern has seen a contraction in locally available 'arts & design based' courses, many of which allowed creatives to enter the education stream at a lower level and progress up to higher degrees over time. Disappointment in the reduction in local education choices was a consistent comment received during the surveys. A variety of creative economy workshops, short courses and semi-online courses are available in Perth, but the cost of transport and accommodation needs to be added to the course cost, decreasing affordability.

Reduced access to professional development has a knock-on effect for organisations, in that potential employees may hesitate to re-locate to the Great Southern for work if they feel they will become professionally isolated and de-skilled. There is a risk that this issue will create a feedback spiral of reducing numbers of creative employees, resulting in reduced skills and creative activity, leading to shrinkage of the sector.

Further research is needed to pinpoint exactly what skills development is needed and which education areas would apply the most leverage to lifting the creative sector. Targeted professional development would assist in addressing a critical weakness in the sector.

1 Source: Page 9 + 10. Australia Council for the Arts; Do you really expect to get paid? Throsby & Zednik. 2010. Macquarie.

5.1.4. Marketing

Marketing was not a specifically listed choice in the "threats or weaknesses" question options in the surveys, but comments provided by respondents and interviews and workshops conducted during the research process consistently raised inadequate marketing of creative products and services as an issue. The problem seems to fall into three categories; coordination, outlets and business skills.

There is no central point of coordination for creative activity (such as the Chambers of Commerce provide for the wider business community) and as a result opportunities to work with other sectors of the economy - for example tourism - are lost, leverage points available by 'piggy-backing' onto events are not developed and alliances between creative organisations are not created. There are some specific and well marketed creative events such as the annual ArtsWA Art Trail - which promotes a wide variety of creative workers from throughout the Great Southern - but this event is for a limited period and sees all the participants competing with each other to sell their work over a short space of time. It is however, the closest thing the Region has to a catalogue of creative professionals and the brochure is retained for future reference by many visitors to the Trail.

There is no central point of coordination for creative activity and as a result opportunities to work with other sectors of the economy are lost, leverage points from events are not developed and alliances between creative organisations are not created.

What visitors find if they do return to the Region to look for art, craft and design, is that there are few venues showing or retailing local work. There is an element of critical mass at play in retailing creative work; there has to be a market to make a retail business viable, and the issue of the small Great Southern market has been discussed already. It is also true however, that if local creatives have nowhere local to sell their products or services, it is harder for them to become financially viable. They are forced to try and sell or work outside the Region or remain small scale and reliant on an annual 'open studio' type opportunity. Furthermore, the creative sector becomes invisible to all but those who are closely networked into the sector, perpetuating the myth that there is not much creative activity or choice of product in the Region. By stark contrast, visitors to the Margaret River area of the South West Region are greeted by a rich variety of galleries and retail venues, many of which are embedded in other tourist attractions and place the creative sector into clear view of all visitors and residents.

A lack of retail opportunity notwithstanding, the 'invisibility' of Great Southern creativity is to some extent exacerbated by creative workers' own business practices, and emergents and their difficulties in launching themselves to a more professional level have been discussed already. However, even professional creative workers may have difficulty marketing their skills and services. For example, if a proportion of income needs to be sought from outside the Great Southern for business viability, the survey figures showing only one third of individual respondents have their own web site and nearly a quarter have no internet presence at all - indicates that many are missing a key marketing tool. The power of on-line marketing is underlined by figures which show that 70% of Australian creative product sold on the Etsy website is exported (1). There is also anecdotal evidence that securing a consistent standard of quality and supply from the creative sector in the Great Southern to market and maintain retail sales has been an issue. Again, there is a degree of professionalism that is needed from creatives, which may need further development.

There has been some recent successful retail activity using 'pop-up' store opportunities (by the Make a Scene Collective for example), and government organisations such as the WA Museum Albany and the City of Albany's Vancouver Arts Centre (VAC) are working to provide sales opportunities, but these are comparatively small scale endeavours and a number of survey respondents indicated that they needed more assistance with marketing. They also commented on the lack of understanding by clients of the advantages of using creative services and appropriate fees for services, and the need to educate clients about what high quality design looked like and could achieve for businesses.

70% of Australian creative products sold on-line through Etsy are exported.

Promotion of the Great Southern creative sector's skills within the Region, and marketing of it on a wider scale are therefore one of the main activities lacking in the sector and preventing its development.

5.2 Strengths

Strengths can be defined as elements of an industry that give it a commercial point of difference, build its viability and provide a springboard from which to build resilience.

The surveys have brought into focus several strengths for the Great Southern, identified by respondents as including local support, connections and networks; built and natural heritage assets; supportive government; high lifestyle values; and access to new telecommunication technologies.

The surveys also revealed that there is a significant resource of 'emergent' creative workers who could have a major impact on the sector if they were mobilised. And finally, ABS and survey data identified a sector rich in Cultural production, a grouping of creative work which has a strong influence on community well being and quality of life while also generating economic value in its own right.

A collegiate, well-connected and professional sector would have the ability to address many of the weaknesses identified.

5.2.1. Strong local support and networks

This strength has the potential to provide an exceptional foundation from which to build new businesses, ventures and activities for the creative sector. A collegiate, well connected and professional sector would have the ability to address many of the weaknesses outlined above and may even have the potential to develop the creative sector in the Great Southern in a way which makes it less exposed the changes in government funding and policy.

1 Source: Marcus Westbury in ABC Lifematters. 10 July 2015. www.etsy.com

5.2.2. Rich built, cultural and natural heritage assets

The Great Southern setting has a wealth of environmental diversity and a cultural history that encompasses traditional owners and some of the earliest non-aboriginal settlements in WA. This setting is a key draw-card for creatives who are inspired by it and place a high value on the benefits it brings to their quality of life. 'Regional branding' was also a key strength and while there have been some issues in differentiating the Great Southern Region from the wider southwest area, there is a clear indication that creatives identify strongly with the local setting and see it as a major asset to their practice. It is no surprise then that Cultural production is proportionately higher in the Great Southern creative profile.

5.2.3. Supportive government

While state and federal government policies were identified in the surveys as one of the impediments to creative growth, interestingly 'local, state and federal incentives and support' rated highly as a strength. This reflects a connection between the creative industries and 'grass-roots' local government programmes which are beginning to gain traction in supporting creative development (including the programmes run by the VAC). It may also be an acknowledgment of bigger scale incentive and funding programmes such as the WA Government's 'Royalties for Regions', development of the Albany Entertainment Centre performance facility and project funding via LotteryWest grants; and Federal programmes such as the 'Building the Education revolution' which brought a significant increase in employment in the Architecture and design sector. Support from the various layers of government is to some degree dependent on the ability of the creative sector to market itself, show how it can benefit the community as a whole, and use government funding to leverage additional economic benefits.

Support from government is to some degree dependent on the ability of the creative sector to market itself, show how it can benefit the community as a whole, and use government funding to leverage additional economic benefits.

5.2.4. Lifestyle and cost of living

Individual survey respondents rated 'lifestyle and cost of living' as the number one opportunity or strength for their creative work. Organisations rated it in the top four of their survey responses. Lifestyle and cost of living are key elements of a place's quality of life or "liveability" which is one of the sales points used by some cities to attract residents and business. Economists and social commentators are actively quantifying liveability - and organisations such as the Economist Intelligence Group publish annual liveability indexes, which rank cities against each other and rate lifestyle advantages (1).

1 Source: www.committeeforperth.com.au/pdf/SpecialReports/Liveable Cities Compilation.pdf)

'Lifestyle' is a key component of the Vision for the Region developed by the GSDC:

> *"The Great Southern is recognized internationally as a natural choice for opportunity and lifestyle"*(1)

Notably, the strong rating given to lifestyle benefits by survey respondents may suggest that Great Southern creatives are prepared to take some income and business risks, (associated with the smaller market), as a trade-off against a higher quality of life, indicating that liveability could be a pull factor to encourage new creative businesses and workers to the Region. This hypothesis is supported by the findings of the Arts Council which showed that regional artists see their regional location as benefiting their practice and having a positive effect, even if it makes it more difficult for them to access markets (2).

5.2.5. New telecommunication technologies

Faster internet speeds, better connectivity, more user-friendly platforms and improving affordability in telecommunications are providing opportunities for creatives to work in regional areas and are seen as a trend which will continue to benefit their business. While creative businesses are not the only business types to benefit from improved telecommunication, as previously discussed, creative work is closely networked with new technologies and Great Southern creatives rate telecommunication technologies as a key opportunity.

Research by others (2) confirms that creatives Australia-wide believe new technologies will provide them with more opportunities to improve their income earning ability, reach a wider audience, enhance their creative processes and network and collaborate better.

5.2.6. Untapped creative resources

This study has already discussed the creative 'emergents' in the Great Southern, and their potential to boost the creative sector in the Region. Many of these creative workers are also heavily involved in the volunteer sector, utilising and developing their creative skills to run festivals, manage community art projects, promote creative activity and education in the Region, write funding applications and manage on-line resources for NFP groups. The economic value of volunteering is well recognised, if not well quantified. While volunteer experience is an invaluable tool in skills development, many 'emergent' creatives are ready to enter the creative workforce at a more professional level and as such are an asset which could drive the development of a nationally significant creative cluster in the Great Southern, particularly if they were well marketed.

Many 'emergent' creatives are ready to enter the creative workforce at a more professional level and are an asset which could drive the development of a significant creative cluster in the Great Southern, particularly if they were well marketed.

1 Source: Great Southern Development Commission. Regional Blueprint 2014

2 Source: Page 11. Australia Council for the Arts; Do you really expect to get paid? Throsby & Zednik. 2010. Macquarie.

5.3 Opportunities

The weaknesses and strengths discussed above were workshopped with the project steering group and participants from targeted creative specialties to identify opportunities that would build on strengths and address threats. A number of opportunities were proposed at the workshop, and these have been grouped into four areas:

5.3.1. Marketing

Marketing the creative sector should capitalize on opportunities such as:

- growing local consumers and clients as well as marketing the sector beyond the Great Southern;
- creating alliances;
- making creative work more visible;
- utilising the Region's Cultural production strength to raise the profile of the sector;
- advocating the economic and social advantages that the sector brings the Great Southern;
- capitalising on existing events and structures;
- linking creativity to regional strengths, including natural resource management, the Region's brand, and lifestyle advantages; and
- assisting creatives to enhance their marketing and self promotion skills.

5.3.2. Finances

Finding ways to provide financial support to the creative sector could include:

- partnering with existing financial organisations to provide bespoke financial products for creative businesses;
- investigating cooperative structures which would underwrite development of the sector and provide ongoing funding streams;
- developing commercial relationships between creatives and other businesses to drive economic diversity, innovation, value adding and point-of-difference advantages for the Regional economy; and
- establishing 'launch-pad' programmes to assist emergents in entering the creative market in a financially sustainable way.

5.3.3. Professional development

Opportunities to improve PD include:

- identifying exactly what skills are lacking or in demand, and which courses would provide maximum leverage to the sector;
- exploring a mentoring scheme so that established creative practitioners can help lift less experienced creatives to a more professional level;

- utilising existing training programmes and structures, and supporting creative workers to access quality skills development and tertiary institutions; and
- identifying technological and telecommunication trends, and ensuring 'cutting edge' skill building opportunities are available to creative practitioners.

5.3.4. Creative hubs

Creative hubs can be both physical and virtual, and opportunities include:

- Developing an on-line creative hub to: connect creative businesses and clients; provide links to resources for creatives; support creative workers in smaller and more remote communities; and help promote the industry to a wider market.
- Establishing a physical hub/s to: reduce professional isolation and allow face-to-face networking; provide facilities for creatives visiting from remote areas and infrastructure for local users; and present a visible showcase of creative activity in the Great Southern.

Converting opportunities into positive change is a long-term process, which requires sustained cooperation between organisations, individuals and layers of government. It also requires the development of a stepped strategy that is flexible enough to accommodate new possibilities but structured to deliver incremental coordinated improvements that will build to a significant growth of the creative economy in the Great Southern.

Converting opportunities into positive change is a long-term process, which requires sustained cooperation between organisations, individuals and layers of government.

Denmark Craft Markets 2014.
Image © Steve Pontin

6. Lessons From Elsewhere

An understanding of the impacts and opportunities of developing the creative industries has been building for over twenty years in academia and urban and community planning. During that time a number of cities have developed strategies to support the creative sector as a way of diversifying their economies, attracting new business and promoting their cities as dynamic places.

The following discussion is a summary of selected relevant findings of a three month Churchill Fellowship undertaken by one of the authors that involved visits to creative clusters and interviews with facility and programme managers (1). The goal of the fellowship was to gain an insight into the tools used outside Australia to build creative economies.
A secondary goal was to look at the influence of 'place making' on the creative economy. Place making is more than just creating aesthetically pleasing spaces, is also a powerful tool in Cultural production; making it possible for people to connect socially and economically.

6.1 International Case Studies

Toronto, Canada

The City of Toronto consistently rates highly in liveability indexes and more than 6% of its workforce are employed in the creative economy. Toronto has been working to an adopted Framework which sites 'Place' as a central element in creative city planning, as shown in the illustration below;

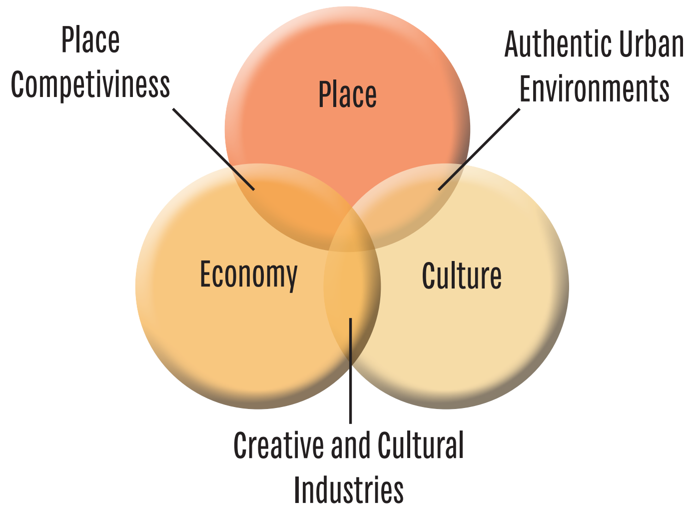


Figure 22.

Creative City Framework

Source: Page 22. Toronto City Planning Framework. 2008.

Toronto has taken the view that the sectors of culture and creativity can be treated as an ***ecology*** that needs to be multi-layered to be sustainable. The elements of this ecology are:

> ***Hubs:*** *Hubs provide support for cultural activity throughout all of the City's diverse communities. They tend to be community driven and nurture cultural activities at a local level. About 60% of hubs tend to be concentrated in the downtown core and about one third are City owned.*

1 Source: The full report is available at https://www.churchilltrust.com.au/fellows/detail/3145/Sally+MALONE

Incubators: Incubators provide support for Toronto's artists. They tend to be artist-run facilities, heavily clustered in specific urban neighbourhoods. Examples include small theatres. More than 90% of existing incubators are not owned by the City of Toronto.

Showcases: Showcases provide support for culture as part of the City's Economic Development and Tourism Strategy. These facilities often have a regional, national or international profile. They are directed to more than a local community and are key tourist destinations or attractions. Examples include the Art Gallery of Ontario. More than 80% of showcases are not owned by the City of Toronto.

Cultural Memory Sites: These sites provide support for culture as a heritage resource, and they include museums, archival collections, and historic buildings that are programmed for cultural uses. A larger percentage of City ownership can be seen with cultural memory sites than in other cultural role categories.

Showcases provide support for culture as part of the City's Economic Development and Tourism Strategy.

Key Lessons
Toronto's City Hall is active and engaged in working with the creative community to grow this sector of the economy and is developing a depth of understanding of the sector that is much further ahead than most other cities. The City appears to take the view that support is about more than grants etc., it is also about reducing the obstacles to creative enterprises that may exist in bureaucracies.

Huddersfield, UK

In 1995 Huddersfield began a project called the ***Creative Town Initiative***; recognising that international competition and rapid technological development were changing the face of local economies. By using a series of pilot projects, it was able to extend innovative thinking throughout the town and set up a network of creative projects that linked different sectors of the economy. The projects have succeeded in creating a marked change in the perception of Huddersfield and the new ways of thinking seem to have become much more mainstream as successful examples of initiatives have been rolled out. One of these has been the establishment of the ***Media Centre***.

Huddersfield's creative industries cluster around the Media Centre, located close to the rail station and the centre of town. The main building houses a variety of creative industry businesses in flexible workspaces that are supported by excellent IT infrastructure and 'on-call' IT support. This IT support is a significant draw-card for smaller businesses that appreciate the expertise and services supplied on-site (for a fee) and gain some security in knowing they don't have to become IT experts when they start a business.

Interestingly, the IT service has now become one of the elements that earns the Media Centre income, along with the rentals from tenants.

The Creative Town Initiative included a raft of other initiatives as well, incrementally stepped out, and has created 168 new jobs and protected the 179 jobs that already existed in the fledgling creative economy of the town.

Key Lessons
An underpinning principal has been to develop a diverse industry during relatively affluent times, so that there is a skills base available if the economy shifts and downturns occur.

Incubator spaces have included flexible leasing arrangements, IT service packages, spaces, and support systems that allow businesses to select only what they need. This means in the early stages of a new business, that the commitments and overheads can be kept manageable. This high degree of flexibility has encouraged tenants to sign up and the centre has been fully leased from its early days and has expanded into other buildings.

The power of 'pilots' has been well used; small scale test projects that are set up to succeed and can then be used as examples to get bigger projects up, or built up in scale as demand increases. These can be very powerful as people can see a working example and can appreciate the long term vision.

The Media Centre CEO recommends getting an advocate on side. Take them with you to bids (private or government), ask them to request their contacts do work for a more competitive rate and make the most of the doors that they may help open.

An accurate survey is essential before starting – look at who's 'home working', do they want to move? What do they need? What would attract them? What can they afford?

Pilot projects can be very powerful as people can see a working example and can appreciate the long term vision.

Sheffield, UK

Sheffield in the late 70's and early 80's experienced a catastrophic loss of jobs as the steel industry (for which it is most well known), went into decline. The local government at the time identified cultural and media industries as a potential growth sector in their Economic Development Strategy and one of their initiatives was the development of an underutilised and semi-derelict part of the city centre as a Cultural Quarter (CIQ).

The financial and management model to grow creative industry and support urban renewal developed in Sheffield has become the template that has been applied in a number of other communities in the UK. That a facility can be developed which will support new, small and innovative businesses in an affordable and flexible way, and still provide a profit for the community's use is an excellent model of sustainability and independence from reliance on ongoing government grants. It represents a great return for public funding of the initial building and start-up, and has benefits that are both economic and social.

Key Lessons
An audit was carried out on existing creative industries before the strategy was finalised. This identified the size of businesses (from micro employing 2 people, to major employing up to 140) and quantified their needs and the issues facing them. The identification of businesses on the fringe made it possible to talk to them about relocation into the city centre to contribute to the vitality of the cultural quarter.

A facility that supports new, small and innovative businesses in an affordable and flexible way, and still provides a profit for the community's use is an excellent model of sustainability.

The City placed the development of the Cultural Quarter within its larger planning and business development strategies, to ensure that the uses would be compatible, and the Economic Development Strategy is seen as a long term plan - a 15 to 20 year programme that would roll out incrementally to form the whole picture.

Urban design was a central tenant of the development of the Quarter, with an understanding that character zones, sense of place, quality streetscapes, transport and access, and opportunities for public spaces would be essential to the success of the area's economic viability. This element of the strategic plan has been the slowest to be implemented, but there is evidence that it is gaining momentum with the City of Sheffield winning two British Landscape Design awards for city centre enhancements.

A clear understanding of the difference between Creative services and Cultural production, and a strong focus on Cultural production has underpinned the success of the quarter.

Boston, USA

Boston is a harbour city with a rich maritime heritage and a focus on education as the base for several large and prestigious universities. In 2005 the Mayor of Boston convened an advisory board and launched a programme called Create Boston which aimed to provide a one-stop shop for companies to tap into city resources, and included assistance with site location and land use approvals, low interest loans and financing, workforce development opportunities, and business advocacy. The Create Boston initiative is partnered with urban and landscape improvements with the added goal of creating a highly liveable, walkable city to attract further residents and investors.

One organisation that is working intimately with Boston's developing creative industries is the Massachusetts Cultural Council (MCC), which aims to embed the arts, sciences and humanities in community life through a programme of grants, partnerships and services for NFP organisations. The MCC is somewhat unusual for an American cultural organisation in that it has a much wider 'toolbox' of assistance packages. It can provide grants to individual artists, has an 'at risk' youth programme and funds cultural facility maintenance programmes to keep important cultural infrastructure functioning.

They also support:

- downtown revitalisation projects;
- cultural tourism;
- strategic cultural plans;
- artist capacity building; and
- creative economy projects that combine arts and science sectors.

Each grant application must have a local partner/s to provide 50% of the funding and work with the applicant on the project.

The Create Boston initiative is partnered with urban and landscape improvements with the added goal of creating a highly liveable, walkable city to further attract new residents and investors.

In addition to managing grants, The MCC provides:

- outreach programmes to cultivate new projects;
- technical assistance on projects and;
- evaluations of the effects of the grant / project;
- conference and workshop organisation and support; and
- education programmes on business skills.

Key Lessons

The MCC is resourced so that it is able to support partnerships that use a community's cultural assets to generate non-cultural economic activity. This crossing of traditional boundaries is a clear indication of their understanding of the leverage that creative industries can provide for local economies, and frees them from the narrow confines that some other arts grant organisation are forced to keep.

The MCC hosts a suite of web sites that allow searches for: an artist, venue or presenter; creative economy employees and employers; studio space and creative tenants; and an on-line showcase of artists. These web sites, and the related blog site, are an excellent resource and a practical way that creative industries in both Boston City and more remote rural towns can be supported and marketed to the wider business community.

The MCC also supports organisations such as CreativeGround which

> *"spotlights the creative people and places at work in New England: To connect them with each other and with you. Because vibrant neighborhoods go hand-in-hand with a vibrant creative sector."* (1)

6.2 Case Study Conclusions

6.2.1. How do communities enter the creative economy and become innovators?

Landry (2) notes that individuals have a good track record for being innovative; communities don't. He suggests that in the successful examples, community volunteers have played a major role as they have been able to respond quickly without bureaucratic ties, are well motivated and are in touch with grass roots support. They are also more likely to take a risk than government organisations.

For this reason, it is essential to cultivate more than one type of capital in a community. Often the focus is on monetary capital, but social, cultural, intellectual, creative, environmental and natural capital can all contribute to innovation and indeed help reduce the dependency of some organisations on outside funding.

By definition, creative capital is the ability to identify, nurture, attract, mobilise and sustain talent, ideas and potential.

Landry also hypothesizes a 'continuum' of innovation in which at one end sits a major shift in a community's thinking that results in a completely new approach to an issue (such has happened as our understanding of climate change has developed), and at the other end is a deliberate blocking of any new practices or initiatives and a resistance to change. He suggests that successful communities enter into 4 stages of cultural change, they:

- describe the possibilities better (i.e. re-couch problems as opportunities and get proper data on issues, not just impressions and truisms);
- develop a guiding ethos to reach these (i.e. the Slow Cities ethos is one which spills into a number of areas and is well defined while being flexible enough to adapt);
- develop innovative projects and processes; and
- work to enable the community to become a learning organisation to sustain the innovative momentum.

Often the focus is on monetary capital, but social, cultural, intellectual, creative, environmental and natural capital can all contribute to innovation.

In many cases though, there appears to have been a trigger, or a set of pre-existing conditions. For a number of cities this was an economic and employment catastrophe, such as the collapse of a traditional industry.

1: www.creativeground.org

2 Source: Being Innovative Against the Odds. Landry in UN-Habitat. 2005.

There are other elements in common also, and these can be summarised as:

- an active group or a power block with the skills and knowledge to guide and drive change – some of these included a strong advocate who acted as a champion;
- a strategy for influencing decision makers and the 'power silos' in the community;
- a mix of both thinkers and people able to act on the ideas and make them happen;
- a commitment to new ideas; and
- alertness to opportunities, often through having excellent communication networks and links to authorities who were nimble enough to support creative initiatives as they arose.

6.2.2. What are the successful ingredients in a creative hub or cluster?

A common theme in the projects reviewed has been the development of creative quarters or creative clusters.

Creative Clusters Ltd. makes the point that creative industries are built in an iceberg structure where the high profile, well marketed companies at the top are visible, but under the surface is a mass of smaller industries and businesses that support the whole but are less well understood (1). This comment is supported by the survey results for the Great Southern, which identified a significant proportion of 'hidden' creative work being undertaken by emergent creatives.

This invisibility often makes it difficult for the smaller members of the sector to access financial and business support – one of the most effective ways other creative communities have addressed this problem is to organise into clusters or hubs.

So, what are the successful ingredients in a creative hub or cluster? The London Development Agency in its "Strategies for Creative Spaces" (2) suggests five elements:

Creative industries are built in an iceberg structure where the high profile companies at the top are visible, but under the surface is a mass of smaller industries and businesses.

1. Enterprise and innovation

Including providing business support to creative industries, physically collecting creative businesses together in one building/complex and providing high quality R&D, education and venue provision.

2. Space

Provision of affordable space for creative businesses which is protected from rent rises that would drive creative tenants out, the use of well designed built form and public places to showcase the city and its innovation, and using the creative elements and people in a community to help regenerate places.

1 Source: www.creativeclusters.com

2 Source: Strategies for Creative Spaces. London Development Agency. 2006.

3. People

Building creative thinking into school programmes, undertaking cultural and creative programmes at the neighbourhood level to build social inclusiveness and, supporting grass roots creative organisations which have good links and can work in a flexible and fast moving way. They note that there is evidence that connecting creative people and supporting cultural entrepreneurs can act as a powerful catalyst for a project.

4. Vision

Support for creative economy growth through all layers of government, this means a shared vision and consensus must be formed and held over an extended period (i.e. not dependent on election cycles). This vision needs to extend across a number of sectors such as planning, economic development and quality of life programmes to be really effective.

5. Connectivity

Provision of infrastructure that works across 'silos' at a regional as well as city level, and financial schemes that provide incentives for investment - or which help groups band together to share resources. There may be a role for tax reduction or other financial assistance as well.

Provide infrastructure that works across 'silos' and financial schemes which help groups band together and share resources.

6.2.3. What do successful creative economies have in common?

Project research suggests that the most successful projects have three key elements:

- strategies for change (supported by policy where possible);
- targeted support programmes flowing from the strategies; and
- physical infrastructure that makes creative work visible and builds connections.

With regard to physical infrastructure – or creative hub facilities - the following recommendations are made:

- Implement a catalyst project, one that is a demonstration of the potential of the creative economy. Don't make this pilot project too ambitious as if it fails, it will be harder to gain support when the next project is launched. A series of small pilots can build towards a larger goal and collect evidence and support along the way.
- Consider developing a facility that is then placed with a creative economy Trust or incorporated body and earns an income for them to continue to work with. This could be an incubator building for new businesses housed in a refurbished old building. This facility needs to be central and visible, not tucked away and inaccessible. As a financial asset, it also needs to be refurbished to a point where all the funds won't be chewed up in maintaining an old run-down building.

- Make the creative economy visible. This can be done by setting up a ‘shop front’ on the main street, running trade stands and makers’ markets, having annual open days at creative economy businesses, housing exhibitions in local businesses or holding a festival.
- Augment physical infrastructure with programmes designed to help implement strategies for growth and enhance the opportunities for innovation. There is evidence that programmes that engage the creative sector in its own growth are an important tool. Top down programmes that don’t empower creative businesses and practitioners to help themselves have been less effective and tend to fall over once the funding has finished. Many communities have also found that bottom up initiatives are able to move faster and be more flexible as they are not as constrained by bureaucratic structures and have more effective networks.

Make the creative economy visible.

The lessons gathered from the case studies, the opportunities identified in the surveys and ABS research, and the information gathered from interviews with individual creatives and organisations during the study have been brought together to inform a set of actions for growth of the creative sector in the Great Southern.

Enigma: Leonardo's Realm by Southern Edge Arts.
Image © Owen Davies.

7. Action Plan

7.1 Rationale for Recommendations

The research for this study has shown that both the ABS and bespoke survey data identifies the Great Southern's creative sector as being weighted towards Cultural production with a larger proportion than the norm in the specialties of Architecture and design, Music, visual and performing arts and to some degree Publishing and writing. It has only small numbers of businesses and workers in the area of Software and digital design - and is on a par with national percentages for Advertising and marketing, and Film, TV and radio workers.

Two approaches might be taken in growing the creative sector in the Region; either to try and bolster the weaker sectors, or to work with the sectors which are already active and dominant. National figures clearly show that the specialties of Software and digital design and Advertising and marketing are heavily concentrated in capital cities, and existing industry trends would suggest that - short of a major national business from one of these areas relocating to the Great Southern - growth in these areas is unlikely; even with significant investment by government.

Support for sectors which have already shown they are sustainable (such as Architecture and design) and/or are characterised by significant numbers of creative workers (as is the case with Music, visual and performing arts) is likely to be a more successful strategy. In addition, these sectors are also ripe with latent resources, revealed in the survey data in the high proportion of emergent creatives in the Region. This is not to say that any of the initiatives recommended following should be withheld from professionals in other specialty sectors, but the emphasis for support programmes should be on the following sectors:

- Architecture and design
- Music, visual and performing arts
- Publishing and writing

Publishing and writing is a difficult sector to understand - nationally there has been a decline in this sector, principally due to changes in media and newspaper publishing. This trend is also reflected in Albany and the Great Southern (see Figure 16). The surveys however, appeared to show a cluster of writers in the Region, many of whom are 'emergent' and have access to small local publishing businesses. Therefore this creative specialty is behaving differently to national trends and can be identified as an active sector in the Region that could be developed.

It is also highly likely that growth in the three strongest sectors will naturally bring advantages to the weaker sectors - particularly if the marketing initiatives recommended utilise local businesses and professionals. Advertising and marketing is a significant proportion of the creative economy in the Region, and this group has the skills to help lift the sector as a whole.

A coordinated set of actions have been developed as a product of consultation and discussions during the preparation of this report, and research into successful strategies undertaken elsewhere. The actions aim to achieve the five over-arching goals for supporting and expanding the creative economy in the Great Southern:

7.2 Goals

To provide a **leadership** structure for the creative sector which:

- brings together the different specialties in the creative sector;
- prioritises initiatives and drives implementation;
- creates partnerships with other sectors of the economy; and
- holds the long-term vision for the advantages that a vibrant creative economy would bring to the community and economy.

To develop a **skilled workforce** who:

- are up to date with technology and trends;
- have access to suitable support staff and business skills;
- have well developed technical and creative skills; and
- are delivering products and services matched to demand, and have the facility to capitalise on new opportunities.

To build on existing **strong networks** to create and support:

- productive connections within the sector;
- links beyond the sector to other industries;
- links beyond the Region; and
- connections and marketing opportunities utilising on-line technology.

To develop and promote the Great Southern as an **innovative region** which is:

- structured to take advantage of international trends and unique local opportunities;
- recognised as creative, inventive and rich in fresh ideas;
- highly liveable with a variety of lifestyle opportunities; and
- known as a region which supports new businesses and ideas.

To ensure **viable** creative practices with:

- strengthened individual and business profiles;
- enhanced financial and business skills;
- financially independent practices and business, which are resilient and can survive economic cycles; and
- reduced reliance on employment outside the creative sector for base income.

7.3 Actions Table

The following table aims to provide a summarised list of high leverage actions that could be considered. Because of the wide variety of opportunities available, the list of projects has the potential to be unwieldy and therefore difficult to implement. This report aims to focus on core actions that could provide a framework for future projects and innovations. The table below is condensed into action headings, more detail on each suggested action is included in 7.3.2.

7.3.1. Summary of Actions

	Action		Goal Met				
Time -frame			Leadership	Skilled Workforce	Strong Networks	Innovative Region	Viability
	Leadership						
1st year	L1	Bring together key stakeholders to act as a 'advocacy team' for the sector, and start the process of prioritising and undertaking actions.	✓		✓		
	Marketing						
1~3	M1	Provide access to marketing and business promotion courses for creatives.		✓			✓
1~3	M2	Develop a marketing strategy promoting Great Southern creativity which builds alliances with other sectors and complements other marketing initiatives in the Region. Secure marketing funding.	✓		✓	✓	
4~6	M3	Implement the Marketing Strategy.				✓	✓
6~10	M4	Establish a regional showcase facility.				✓	✓
	Finance						
1st year	F1	Identify a financial specialist and/or creative business advisor.		✓			✓
1~5	F2	Build a Creative Links programme to build connections to other sectors of the economy.			✓		✓
1~5	F3	Establish an industry development fund to support business and workforce growth.		✓			✓
6~10	F4	Initiate a 'Launch pad' programme to assist emergent creatives and businesses looking to expand.				✓	✓

Time -frame	Action		Goal Met: Leadership	Skilled Workforce	Strong Networks	Innovative Region	Viability
	Professional Development and Skills						
1st year	PD1	Undertake a survey to identify specific professional development shortfalls and opportunities.		✓		✓	
1~5	PD2	Develop a programme to deliver cutting-edge technology skills to the Region.		✓		✓	
6~10	PD3	Provide access to targeted assistance packages for professional development.		✓			✓
	Creative Hubs						
1~5	C1	Resource a Creative Economy Development position to manage and coordinate initiatives.	✓		✓	✓	
1~5	C2	Develop a 'virtual' creative hub for the sector.			✓	✓	
1~5	C3	Investigate opportunities for a physical creative hub facility.			✓	✓	
6~10	C4	Explore opportunities to develop a biennial or triennial creative conference.		✓	✓	✓	

7.3.2. Action Descriptions

A short description of the opportunities in each action follows. Possible partners and stakeholders can be found in Section 9.1: Creative Networks map. Resourcing of each action will depend on connections provided by the 'advocacy team', specific funding programmes available at the time, and the in-kind support of the creative sector itself.

The First Step: Leadership

L1	Advocacy - a 'Create Southern' Collective
In developing the recommendations around the following four action areas, it is apparent that there would be a significant advantage in establishing an 'advocacy team' to support and prioritise the implementation of the recommendations, and that an active and well regarded patron with a high community profile leading the team would be a major asset. The 'collective' will also provide a key contact point for government agencies. Bringing together a Create Southern Collective is a key first step in strengthening the creative economy in the Great Southern. This team could include representatives of each level of government, Arts & Education organisations, creative businesses, creative NFP organisations and community members. The overall task for the team would be to ensure opportunities for economic and employment growth from a vibrant creative sector are realised in the Great Southern.	

Marketing

M1 Marketing Tools

Provide access to marketing and self promotion courses specific to the creative industries to support 'emergent' and creative businesses to expand and become more profitable.

M2 Marketing Alliances and Opportunities

Establish a working group of natural marketing partners, and identify together:

- a database of synergistic events;
- opportunities for co-branding (such as with Taste Great Southern, Hidden Treasures, sporting events etc.)
- images and activities that highlight creativity and innovation in the Region;
- evidence of the positive impacts of the creative sector; and
- future opportunities (such as the filming and production of *Breath*) in the Great Southern.

The initial emphasis should be on marketing the two strongest creative sectors revealed in the research – Music, visual and performing arts and Architecture and design. The goal for the working group is the development of a well developed brief for a marketing strategy (see M3) and sourcing of funding - ideally within a year of their formation.

M3 Marketing Strategy Implementation

Commission and implement a long-term marketing strategy for the creative sector, which complements other marketing initiatives in the Great Southern.

Initiatives could include developing a unique regional brand for creatives, working with key partners (i.e. tourism and NRM organisations), running a rolling programme of traveling exhibits, establishing regular makers' markets, undertaking on-line and media campaigns, publish regular profiles of local creative workers in the regional press, promoting sales outlets, demonstrating the advantages of using creative input in business and highlighting the Cultural production sector.

M4 Regional Showcase

Lobby for the establishment of a significant multi-functional exhibition and showcase facility in the Regional capital; Albany, with out-reach to facilities elsewhere in the Great Southern (such as the Katanning Entertainment Centre, gallery and library). The role of the Exhibition Centre is to make creativity, innovation and culture more visible through a programme of changing exhibitions, gallery opportunities, cultural activities and community engagement.

The facility needs to have flexible spaces, not duplicate available infrastructure, have an active street front façade, provide retail opportunities and be designed to encourage interaction and energy exchange. Development of the Centre could incorporate a public design programme as an 'open air wing' to enrich streetscapes with creative elements and make creativity more visible and accessible throughout the Great Southern. In the short-term, the Centre could be established and 'incubated' as a campus across a number of buildings in the CBD, but in the longer-term needs to be brought together in a central location as a showcase of the Region's creative energy.

Finance

F1 Identify a Creative Finance Specialist

Provide access to a financial industry advisor with knowledge of small business, tax incentives for creative businesses, potential issues for new businesses and start-up grants and loans. The advisor would also be able to help creatives access a schedule of services / events / courses and bespoke resources from a variety of providers and should be able to tailor advice for specialty groups such as 'emergents', established expanding creative businesses, indigenous and migrant creatives.

F2 Creative Link Programme

Develop a programme to embed a creative worker in a non-creative business to spark innovation, expand terms of reference, develop relationships and exchange skills. The programme could be for a limited time (i.e. half a day a week for a month), around a specific business project, part of in-house skills development or as a skills-trade partnership with an organisation (i.e. creating a bespoke graphic element for an accountant in return for financial advice). The aim is to support creatives to become more pro-active in marketing their skills to a wider client base, and to demonstrate the values that a creative can bring to business.

F3 Industry Development Fund

Develop a suite of funding options, such as grants and assistance programmes, time banking, sponsorship, cooperative (membership) organisations, tailored bank finance, product/service provision with an income, promotion of community philanthropy, and in-kind resources. The goal is to establish a financial resource to be used to fund creative economy development and support increased employment in the sector.

Work with all levels of government to strengthen 'buy local' policies so they benefit Great Southern creatives, and to initiate a programme of including a local creative worker in all major and infrastructure projects to build innovation and value add to development. Lobby to ensure that all placemaking projects include an element of locally sourced creative input to make creativity more visible, add to the quality of streetscape and capitalize on the rich resource of Cultural production available.

F4 The Launch Pad

Research and design a specific programme to support 'emergents' and creative businesses that want to grow their workforce. The Launch Pad would provide financial support to a specific number of creatives each year, with a competitive selection process, specific outcomes identified and an ethos that rewards creatives who are actively engaged in developing their practice. This action follows from the three previous actions - building on resources identified and utilising funding secured to provide significant assistance to enable creative workers to improve their finances, enhance employment in the sector and ensure that creative innovation plays a larger role in the Great Southern economy.

Professional Development, Skills and Training

PD1 Skills Survey

Undertake a survey of the Great Southern creative sector to identify what skills employees are looking for, and what professional development creative workers want to access. Crosscheck these against what is or isn't currently available and develop strategies to fill the gaps. Develop a programme to promote training to the sector and encourage up-skilling, possibly focusing on the strong specialty sectors identified in the research.

PD2 At the Cutting Edge

Develop a programme to bring cutting edge / trending technological information to the Great Southern as part of an ongoing 'anti isolation' programme. Initiatives could include lectures, practical demonstrations, test flights of new equipment, workshops from industry leaders and co-operative hire of new technologies to provide opportunities for trial before purchase. The program should also be available to the wider community (schools, universities, manufacturing, etc.) to promote innovation more widely and meet goals of expanding local terms of reference, skills awareness, and networking / collaboration building.

PD3 Professional Development Assistance Package

Investigate available PD assistance programmes and assist creative workers and businesses to access these - targeting specific creatives either because they are part of the high leverage group (where skills are needed by both employers and freelance creatives) or from a specialty identified as an emerging cluster in the Great Southern. The skills survey (PD1) needs to be completed prior to this stage. Investigate providing a financial assistance package to cover transport and accommodation costs for courses not available locally.

Creative Hubs

C1 Creative Economy Development Officer

Investigate ways in which all the stakeholders can come together to fund a Creative Economy Development Officer. The role of the officer is to act as advocate, researcher, coordinator between layers of government and education institutions, liaison with NFP's and community groups and to manage the roll-out of the recommended actions. The position should be 5 year minimum funded FTE to allow for longer-term actions to be developed.

There is an option to allow some of the FTE funding to be used to commission specific support skills (i.e. financial / marketing / events management or web design). Stakeholders should also commit in-kind support time as a realistic reflection of the workload in establishing this position and role, and in the initial stages at least, the position could be hosted with an existing organisation.

C2 Virtual Hub

This hub has the potential to be a directory of creative workers and creative organisations in whole Great Southern – promoting individual practitioners and creative businesses. It should also provide links to funding, PD, creative events, international research and industry trends. Essentially the hub could be built to become a central regional resource for everything creative.

The opportunity for virtual hub to host a comprehensive regional events calendar (in collaboration with other sectors such as tourism) should also be investigated. The hub could also include an on-line retail facility to support creatives who would like to sell on-line but lack the facilities or scale to establish their own site. Ideally in time the virtual hub would become the on-line arm of a regional cooperative utilising the networking strengths identified in the survey and acting as portal for members to access services.

C3 Physical Hub/s

Undertake an audit of infrastructure / facilities needed by Great Southern creatives, and current spaces / facilities available to identify areas of need and opportunities for enhancing existing facilities.

Prepare a business plan with a schedule of goals for hub/s (i.e. networking, meeting space, equipment provision, retail or display, incubator support, specialist services, increasing the visibility and profile of creative work, outreach to remote creatives and 'hot-desk' facilities for them). The audit should identify opportunities to co-locate into related facilities and collaborate with established organisations (such as UWA and CRCs) to ensure that management and funding structures are sustainable and infrastructure and services are not replicated unnecessarily.

The physical hub could be a collective of offices networking throughout the towns in the Region and/or a central facility established in Albany with outreach programmes. It will need to be staffed and a programme run to keep it activated and well managed.

The long-term potential for The Hub is for it to become the core resource centre for the implementation of the recommended marketing, finance, skills development and creative cluster actions.

Creative Hubs Continued

C4	Unleash! Conference

Develop a biennial or triennial conference or 'festival of ideas' with the goals of building networks and collaboration, introducing new ideas, generating energy and encouraging innovation, and assisting local creatives to make connections with creatives outside the Region. Opportunities to dove-tail with existing conferences / festivals / events should be explored.

The conference should include streams for non-creative businesses and government organisations to show how creative workers can help them, and provide sessions tailored to students. The conference's secondary aim is to 'brand' the Great Southern as a leading region in innovative thinking - and collaboration opportunities with CENRM, other NRM organisations and education providers should be pursued. A ten year programme should be established to allow different themes to be explored (such as indigenous creativity), build attendance and the national profile of the conference, and establish collaborative relationships - with a review of the structure and goals undertaken after 10 years.

Welcome to Country PIAF Great Southern 2011.
Image © GSDC

8. Summary

This study has shown that the creative sector in the Great Southern is considerably larger than officially recorded, and is particularly strong in the specialties of Music, visual and performing arts, and Architecture and design. It is also heavily weighted towards the sub-sector of Cultural production.

Cultural production is related to creative work activities that have a direct benefit on community wellbeing and quality of life, while also providing economic production and contributing to the experience economy. This sector therefore has the potential to provide levers that will help brand the Great Southern as a desirable destination for visitors, new residents and new businesses. It also has the potential to enhance liveability for existing residents, encouraging them to stay in the Region, helping to grow employment and providing tools for building community capacity.

Development of the creative sector can be achieved through a staged set of actions aimed at engaging creatives in their own growth, building connections with other industry sectors such as tourism and education, and capitalizing on the strengths identified in this study. Development will however, require engagement from all levels of government, connections with the business sector, and a coordinated approach that brings community based and creative not-for-profit organisations to a point where they can work towards a shared goal, thus activating an energy resource which is currently fragmented.

The excellent response to the surveys conducted for this report in terms of numbers, variety of creative specialties and comments received, suggests that the Great Southern creative community is ready to engage in significant positive change.

Sonia Dezius in Solace and Yearning by Annette Carmichael for Brave New Works; Denmark Arts
Image © Denmark Arts

9. Appendix

9.1 Creative Networks Map

One of the consistent comments received in the surveys, was the strength of networks and connections in the creative sector in the Region. The 'creative' organisations currently working within the Great Southern are:

Government

Albany Entertainment Centre (Managed by the Perth Theatre Trust)
Katanning Library and Art Gallery
Local Government Libraries
Vancouver Arts Centre
WA Museum (Albany)

Industry Associations

Engineers Australia (EA) (1)

NFP Organisations

Adventures in Wood
Albany Art Group Inc.
Albany Film Society
Albany Light Opera
Albany Pottery Group Inc.
Albany Sinfonia
Albany Summer School
Albany Weavers
Art Circle Kendenup
Arts for Gnow
Artsouth WA
Chameleon Textiles Group
Cranbrook Art Group
Creative Albany Inc.
Butter Factory Studios (Collective)
Denmark Arts
Felters in the Great Southern (FIGS)
Frankland River Art & Craft Group
Great Southern Factor (Film)
Mill Art Group
Mix (Visual Art)
Mungart Boodja (Visual Art)
New Arts (Visual Art and Sculpture)
Plantagenet Arts Council (Plantagenet Arts Centre)

1 Note: While not strictly part of the definitions used in Creative work, the Albany branch of EA is currently the only professional association regularly meeting to visit innovative development projects - Architects, Designers and other creatives attend their meetings.

Southern Edge Arts (Performance)
The Lodge Artists (Collective)
Viewpoint (Visual Art)
Woodturners of Denmark

Craft Groups

There are also numerous hobby clubs, craft groups, dance studios, amateur theatrical groups and some Men's Sheds, which have not been listed here as they are primarily hobbyist associations. They should however, be brought into a central creative associations database and be given information on creative activities - as they are likely to be interested in skills development programmes and events. Amateur special interest groups often act as 'incubators' - helping people learn new skills, create support networks and start selling their products and services at fairs and open days.

Inter-regional Networks

Great Southern creative organisations network with neigbouring creative and groups, including the Ravensthorpe Regional Arts Council, the Lake Grace Artists Group and in Walpole via the Arts Trail and Treetop Walk. Inter-regional networks also connect on a state-wide level. For example the PIAF 2015 'Giants' street theatre was partly based on Great Southern author Dianne Wolfer's 'Lighthouse Girl' and Albany performer Cassy Turner joined the performance as a Lilliputian. These opportunities help build skills and enhance the creative profile of the region.

Competitions, Exhibitions and Events

Key events such as the Southern Art and Craft Trail, Albany Art Prize, PIAF Great Southern and the recent ANZAC Centenary commemorations, have a role to play in strengthening regional networks, and also in 'branding' the Great Southern. These events generate opportunities for local creatives to meet, expand their terms of reference and develop activities that use bigger events as a jump-off point. Ideally they also provide opportunities for income generation.

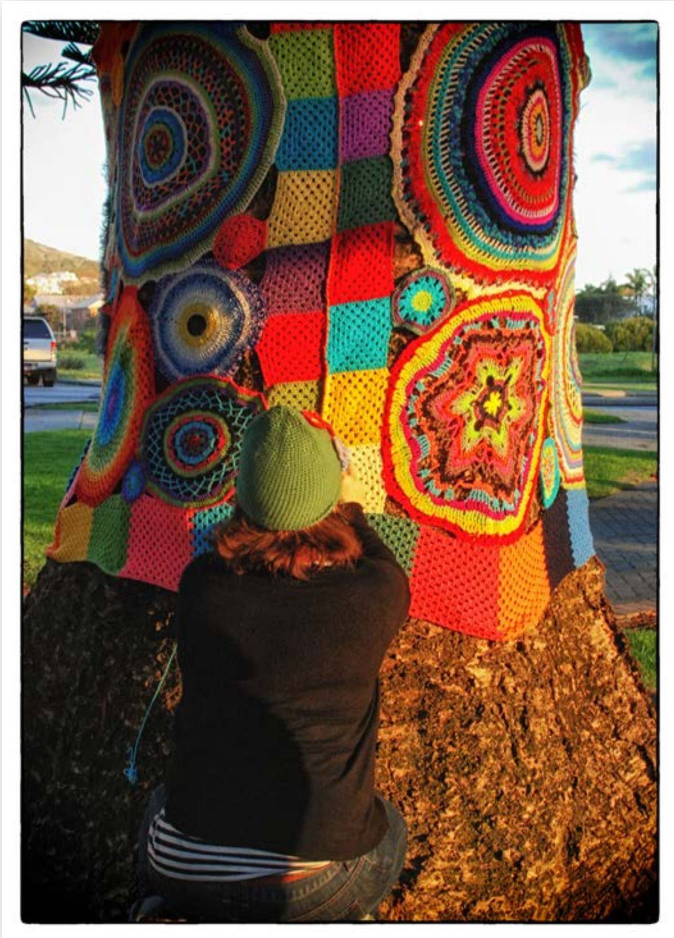
A number of small private galleries also present ongoing exhibitions through the year, including:

Arts for Gnow Gallery, Gnowangerup
Beaufort Pottery Gallery, Denmark
Butter Factory Studios, Denmark
Gallery Aura, Kojonup
Gallery 2, Denmark
Meleah Farrell Gallery, Torbay
THAT Gallery, Denmark
Torbay Glass Studio

Informal Activities

There are also 'off-grid' creative groups such as public place artists and Albany's yarn bombers. The media exposure for Albany generated by the yarn bombers has resulted in over a dozen stories in the national, state and regional press, in print, on TV and via on-line news feeds. The (free) positive branding provided by 'lifestyle' stories from the Region is a flow-on benefit from a vibrant and active creative community and a part of the 'experience economy'.

AMOMA (Albany Museum of Modern Art) 2014
Image © Malone Ink



Purly Queen 'Tree Cosy' yarn bomb 2015
Image © Malone Ink

State and Federal Partners

There are a number of government and NFP art and cultural development organisations working in the regions, these include:

- Artsource
- The Australia Council for the Arts
- Community Arts Network (CAN)
- Country Arts Western Australia
- Creative Partnerships Australia
- FORM
- The Department of Culture and the Arts
- The Perth International Arts Festival
- Education Organisations

9.2 ABS Category Groupings

The Nesta method (1) as applied by SGS (2013) identifies a total of 33 4-digit ANZSCO (occupation) groups involved in the creative industries. For the purposes of this research 27 of those 4-digit occupation groups have been included in the Census extracts. Those selected 4-digit ANZSCO groups have been assigned to six creative segments (Table 1).

There are also 27 ANZSIC (industry) codes in the creative sector and in this report they have also been assigned to these six segments (Table 2). Some of the occupation and industry groups could be allocated to more than one segment and so a decision has had to be made to choose the best segment in which to place them. This is particularly true of photography, signwriting, graphic and web design, and jewellery. These groups have all been placed in the Architecture and Design segment rather than with Visual Arts or with Software.

Visual Arts has been placed with Music and Performing Arts as they are all "Cultural production", rather than with Architecture and Design, a "Creative services" segment.

1 Note: See Page 8 of Valuing Australia's Creative Industries for more information on the Nesta method. Nesta is a UK based organisation, which has set the benchmark for creative economy research.

Table 1 Creative Occupations, 4 digit ANZSCO groups

Segment	Occupation	Code
Advertising and Marketing	Advertising, Public Relations and Sales Managers	1311
	Sales, Marketing and Public Relations Professionals nfd (1)	2250
	Advertising and Marketing Professionals	2251
	Public Relations Professionals	2253
Architecture and Design	Architects and Landscape Architects	2321
	Architects, Designers, Planners and Surveyors nfd	2320
	Urban and Regional Planners	2326
	Fashion, Industrial and Jewellery Designers	2323
	Interior Designers	2325
	Photographers	2113
	Graphic and Web Designers, and Illustrators	2324
	Signwriters	3996
	Jewellers	3994
Film, TV and radio	Media Professionals nfd	2120
	Artistic Directors, and Media Producers and Presenters	2121
	Film, Television, Radio and Stage Directors	2123

1: nfd = not further defined.

Music, Visual and Performing Arts	Arts and Media Professionals nfd	2100
	Arts Professionals nfd	2110
	Actors, Dancers and Other Entertainers	2111
	Music Professionals	2112
	Visual Arts and Crafts Professionals	2114
	Performing Arts Technicians	3995
Publishing and Writing	Authors, and Book and Script Editors	2122
	Journalists and Other Writers	2124
Software and interactive media development	ICT Business and Systems Analysts	2611
	Multimedia Specialists and Web Developers	2612
	Software and Applications Programmers	2613

Table 2 Creative Industries, 4 digit ANZSIC Classification

Segment	Industry	Code
Advertising and Marketing	Advertising Services	6940
Architecture and Design	Architectural Services	6921
	Jewellery and Silverware Manufacturing	2591
	Other Specialised Design Services	6924
	Professional Photographic Services	6991
Film, television and radio	Motion Picture and Sound Recording Activities, nfd	5500
	Motion Picture and Video Production	5511
	Post-production Services and Other Motion Picture and Video Activities	5514
	Motion Picture and Video Activities, nfd	5510
	Broadcasting (except Internet), nfd	5600
	Radio Broadcasting	5610
	Television Broadcasting, nfd	5620
	Free-to-Air Television Broadcasting	5621
	Cable and Other Subscription Broadcasting	5622
Music, Visual and Performing Arts	Creative and Performing Arts Activities, nfd	9000
	Performing Arts Operation	9001
	Creative Artists, Musicians, Writers and Performers	9002
Software development and interactive content	Software Publishing	5420
	Internet Publishing and Broadcasting	5700
	Computer System Design and Related Services	7000

Writing, publishing and print media	Printing Support Services	1612
	Information Media and Telecommunications, nfd	J000
	Publishing (except Internet and Music Publishing), nfd	5400
	Newspaper, Periodical, Book and Directory Publishing, nfd	5410
	Newspaper Publishing	5411
	Magazine and Other Periodical Publishing	5412
	Book Publishing	5413

Most (25) of the 27 selected occupation groups are comprised wholly of creative occupations (Table 3). A further two 4-digit groups comprise people working in some non-creative 6-digit occupations (Table 4). There are six 4-digit groups not included since they include few 6-digit creative occupations (Table 5).

Table 3 Wholly Included Creative Occupations (25)

	Creative Occupations
1311 Advertising, Public Relations and Sales Managers	
	Advertising, Public Relations and Sales Managers, nfd
	Advertising Manager
	Sales and Marketing Manager
	Public Relations Manager
2100 Arts and Media Professionals nfd	
	Arts and Media Professionals, nfd
2110 Arts Professionals, nfd	
	Arts Professionals, nfd
2111 Actors, Dancers and Other Entertainers	
	Actor
	Dancer or Choreographer
	Entertainer or Variety Artist
	Actors, Dancers and Other Entertainers nec
2112 Music Professionals	
	Composer
	Music Director
	Musician (Instrumental)
	Singer
	Music Professionals nec
2113 Photographers	
	Photographer

Table 3 continued overleaf.

Table 3 Cont.

2114 Visual Arts and Crafts Professionals	
	Painter (Visual Arts)
	Potter or Ceramic Artist
	Sculptor
	Visual Arts and Crafts Professionals nec
2120 Media Professionals, nfd	
	Media Professionals
2121 Artistic Directors, and Media Producers and Presenters	
	Artistic Director
	Media Producer (excluding Video)
	Radio Presenter
	Television Presenter
2122 Authors, and Book and Script Editors	
	Author
	Book or Script Editor
2123 Film, Television, Radio and Stage Directors	
	Art Director (Film, Television or Stage)
	Director (Film, Television, Radio or Stage)
	Director of Photography
	Film and Video Editor
	Program Director (Television or Radio)
	Stage Manager
	Technical Director
	Video Producer
	Film, Television, Radio and Stage Directors nec (1)
2124 Journalists and Other Writers	
	Copywriter
	Newspaper or Periodical Editor
	Print Journalist
	Radio Journalist
	Technical Writer
	Television Journalist
	Journalists and Other Writers nec
2250 Sales, Marketing and Public Relations Professionals, nfd	
	Sales, Marketing And Public Relations Professionals, nfd

Table 3 continued overleaf.

1: nec = not elsewhere classified.

Table 3 Cont.

2251 Advertising and Marketing Professionals	
	Advertising and Marketing Professionals, nfd
	Advertising Specialist
	Market Research Analyst
	Marketing Specialist
2253 Public Relations Professionals	
	Public Relations Professional
2320 Architects, Designers, Planners and Surveyors, nfd	
	Architects, Designers, Planners and Surveyors, nfd
2321 Architects and Landscape Architects	
	Architects and Landscape Architects, nfd
	Architect
	Landscape Architect
2323 Fashion, Industrial and Jewellery Designers	
	Fashion Designer
	Industrial Designer
	Jewellery Designer
2324 Graphic and Web Designers, and Illustrators	
	Graphic Designer
	Illustrator
	Multimedia Designer
	Web Designer
2325 Interior Designers	
	Interior Designer
2326 Urban and Regional Planners	
	Urban and Regional Planner
2611 ICT Business and Systems Analysts	
	ICT Business Analyst
	Systems Analyst
2612 Multimedia Specialists and Web Developers	
	Multimedia Specialist
	Web Developer
3994 Jewellers	
	Jeweller
3996 Signwriters	
	Signwriters

Table 4 Included Creative and Non-creative Occupations (2)

	Creative Occupations	Non-creative Occupations
2613 Software and Applications Programmers		
	Analyst Programmer	Software Tester
	Developer Programmer	
	Software Engineer	
	Software and Applications Programmers nec	
3995 Performing Arts Technicians		
	Make Up Artist	Musical Instrument Maker or Repairer
		Broadcast Transmitter Operator
		Camera Operator (Film, Television or Video)
		Light Technician
		Sound Technician
		Television Equipment Operator
		Performing Arts Technicians nec

Table 5 Excluded Creative and Non-creative Occupations (6)

	Creative Occupations	Non-creative Occupations
2242 Archivists, Curators and Records Managers		
	Gallery or Museum Curator	Health Information Manager
		Records Manager
		Archivist
2252 ICT Sales Professionals		
	ICT Business Development Manager	ICT Sales Representative
		ICT Account Manager
2339 Other Engineering Professionals		
	Naval Architect	Aeronautical engineer
		Agricultural engineer
		Biomedical engineer
		Engineering technologist
		Environmental engineer
		Engineering professionals nec
3121 Architectural, Building and Surveying Technicians		
	Architectural Draftsperson	Building Associate
	Architectural, Building and Surveying Technicians nec	Building Inspector Plumbing Inspector
	Architectural, Building and Surveying Technicians nfd	Construction Estimator
		Surveying or Spatial Science Technician
3999 Other Miscellaneous Technicians and Trades Workers		
	Interior Decorator	Diver
		Optical Dispenser
		Optical Mechanic
		Plastics Technician
		Photographer's Assistant
		Wool Classer
		Fire Protection Equipment Technician
		Technicians and Trades Workers nec
4518 Other Personal Service Workers		
	Body Artist	Civil Celebrant
		Hair or Beauty Salon Assistant
		Sex Worker or Escort
		First Aid Trainer
		Religious Assistant
		Personal Service Workers nec

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Create Southern Great Southern Snapshot

The 2015 survey of creative industries in the Great Southern gathered information on the creative specialties of Architecture and design; Advertising and marketing; Film, television and radio; Music, visual and performing arts; Publishing and writing; and Software and interactive media development.
The research has revealed the following picture of the sector.

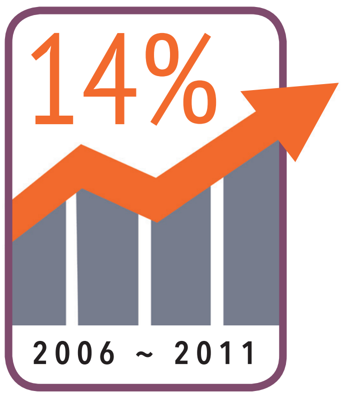
The **Great Southern** has

double the proportion of Musicians, Visual and Performing Artists *and* **66% more** Architects and Designers

than the **national average.**

(1)

The creative sector workforce grew by



compared to the average growth for all occupations in the Region at **4.8%.**

(3)

66% of creative workers said that **Great Southern** *lifestyle and cost of living* advantages brought **opportunities** for their work.

(1)

Regional creatives may be up to **40% more** *productive* than their Perth colleagues.

(2)

There are at least **twice** as many creative workers in the Great Southern than are counted in the National Census.

(1&3)

90% of survey respondents were *freelance* creative workers,

and **73%** of these work from *home*.

(1)

The **majority** of creatives say that the size of the Great Southern market is the main issue for their business.

~

28% of freelance creatives *and* **38%** of creative organisations

are earning some of their income from the **international market.**

(1)

The Great Southern is unusually *rich* in **cultural production,** a sector of the creative economy which has benefits for community well being and quality of life, while also generating economic value.

(1&3)

Professional development and the availability of **skilled staff** were in the 4 most commonly identified problems for creative organisations.

~

In **WA**, the total number of people studying has risen by **6.5%**

In **Albany** it has only grown by **1%**

(1&4)

October 2015

The full report:
Create Southern Great Southern
can be downloaded at **www.creativealbany.org**

Creative Albany would like to thank the following project supporters:

(1) Creative Albany using Great Southern Audit survey data 2015.
(2) Economic Opportunities for Creative Industries in WA's South West Region. SGS Economics and Planning. 2013.
(3) Creative Albany using the ABS Census 2006 and 2011.
(4) Albany Baseline Study For Long Run Socio-Economic Sustainability. Martinus and Tonts. UWA. 2013