

‘Creating’ Creative Industries:

Creative Industries profile for the Coffs Harbour Local Government Area

Prepared for:



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One of the most important roles of artists, performers, musicians, writers, and other creative makers in society has always been to redefine in contemporary ways who we are as individuals and communities and who we must become, if our communities are to flourish and be strong (Berg 2005, p12).

Executive Summary

Purpose of the project:

The Office of Regional Engagement, Southern Cross University was commissioned by Coffs Harbour City Council (CHCC) to undertake research into the Creative Industries. This report seeks to investigate the Creative Industries from two perspectives. Firstly from a general perspective, by reviewing the reports listed in Table 1.2 (p.1) and secondly, by conducting specific field research in the Coffs Harbour LGA in order to:

- a. Describe the creative industries;
- b. Evaluate the creative industries impact on communities (economic, social and cultural);
- c. Make recommendations to CHCC for developing the creative industries by drawing on the information gathered in the literature review; as well as the data and other information gathered during the Coffs Harbour specific field research;
- d. Develop a data base that can be distributed in hard-copy or be available on the CHCC web-site, with the view that on-line registration by Creative Industries professionals be on-going with annual audits and reporting;
- e. Investigate marketing opportunities to develop and promote the Creative Industries.

The creative industries defined and described:

The term 'Creative Industries' was coined by a task force set up by the Blair government in Britain in 1997. The task force defined creative industries as (CIRAC 2002, p.12):

'...activities which have their origin in individual creativity, skill and talent and which have the potential for wealth and job creation through generation and exploitation of intellectual property.'

Various researchers have viewed the creative industries as comprised of many sectors, including: advertising, architecture, antiques, crafts, design, fashion design, film, interactive leisure software, music, television and radio, performing arts, publishing, software development, literature and print media, visual arts and crafts, broadcasting, electronic media and film, screen industries, writing and communication (cf CIRAC 2002; Cox, Ninan & Keane 2003; Henkel 2006).

It can be seen then that the creative industries are intrinsically hybrid ranging from commercial to non-commercial with a big distinction in output from these sectors: artistic output, informational output, and intellectual property development (Cunningham 2002). Cunningham (2002, p.14) gives a useful summary:

'the creative industries are simultaneously cultural industries delivering crucial representation, self-recognition and critique in a globalising world. They are service industries delivering basic information and entertainment services in a converging services environment and knowledge industries requiring very significant levels of R&D to continue to innovate and to provide content and applications...'

The creative industries bring benefits to communities, regions, and countries. They increase economic activity and employment (DOTARS 2001; Berg 2005; CIRAC 2002; Cox, Nina & Keane 2003; Cunningham 2003; Henkel 2006; Strom 2005), contribute to cultural image and richness (CIRAC 2002; Henkel 2006); promote diversity, increasing innovation and skills (DOTARS 2001; CIRAC 2002; Cunningham 2003; HVRF 2005), and improve the quality of

peoples lives (Berg 2005; Henkel 2006). Overseas the creative industries are being developed in various ways, through a combination of government policy and investment in infrastructure (communications and other), which largely focuses on information and communications technology, education, and research and development. Australia is also beginning to recognise the creative industries in policy and research (Cunningham 2002).

Characteristics shaping the future of the creative industries

Worldwide, the creative industries sector has been among the fastest growing sectors of the global economy. This trend has been tracked globally, nationally and in regional Australia (Cox, Ninan & Keane 2003; CIRAC 2002, Henkel 2006). As part of the cultural, service and knowledge sectors the creative industries play a crucial role in the new economy (CIRAC 2002; Cunningham 2002). This role is set to increase in the future, as the creative industries are being changed and shaped by the combined effects of convergence, globalisation and digitisation (Cunningham 2002).

The future is one in which the rapid pace of technological change, particularly digitalisation and the Internet, will fundamentally alter how television, film software and entertainment is distributed, stored and viewed (CIRAC 2002). Consequently the creative industries are being recognised as drivers of new technology and innovation (CIRAC 2002; Cunningham 2002) and recognized as ‘...the sector that will deliver the content essential for next generation information and communication sector growth’ (Cunningham 2002, p.8). It is contended that Governments have an appropriate role to support such R&D in order to position Australia for the emerging wave of innovation needed to meet demand for content creation in entertainment, education, government, and health information; and to exploit universal networked broadband architectures currently in development (Cunnigham 2002; CIRAC 2002).

Field research

For the purposes of this project the Coffs Harbour Creative Industry sector was divided into six categories. The ‘creative’ categories being: Visual Arts, Performing Arts, and Literary Arts, with the three other categories being: Support Services, Education and Training, and Venues and Facilities.

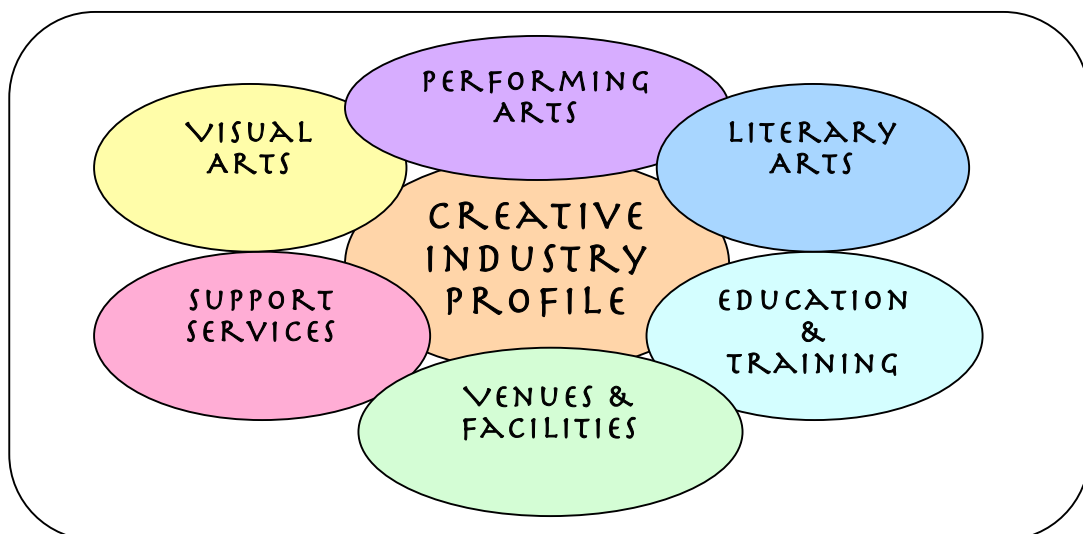


Diagram 1 - CHCC Creative Industry Profile

Summary of Field Research

Registrant Profile

There were a total of 228 registrations on the CHCC 'Creative Industries Register', between 1 July and 4 September 2007, and the gender profile was a almost 50/50split, with 50.6% of registrants women and 49.4% men. Respondents were also given the option of nominating their year of birth and 147 respondents completed this question, and the dominant Baby Boomer category attracted 56%.

Category	Year of Birth	No. of Responses	% of Respondents
Pre-Boomers	Prior to 1945	14	10
Baby Boomers	1946-1963	83	56
Generation X	1964-1980	43	30
Generation Y	1981-2000	7	4

Table 1 - Respondent Profile

The high number of Baby Boomers provides both opportunities and threats to growth in the Creative Industries. 'Boomers' could provide opportunities by bringing strong Creative Industry skills they can share with others, including Generations X and Y, through direct employment, partnerships, training, and business development. Conversely if they do not come *skilled*, they may require business development, creative skill training and other support not currently available. Like all threats the latter situation also creates opportunities for others to provide services to fill these gaps. Therefore CHCC could play a strong facilitation role, linking the former with the latter, and in identifying funding, training and development opportunities.

Employment Profile

The employment profile indicates that 40.6% of Creative Industry workers are employed full-time, a further 21.9% of workers are employed part-time, 19.6% are casually employed and 17.9% of 'workers' volunteer their services. Significant industry development, particularly in the business management, technology uptake, and marketing skills, should result in a growth of full-time employment opportunities. There were five businesses that employed more than 15 staff, and the North Coast Institute of TAFE being the highest with 29 Creative Industry employees, 4 employed full-time and 25 on a part-time basis. There is an opportunity for CHCC to investigate the profile of this high level of volunteers who are generally 'gifting' their time in galleries, museums and other community based activities. It would be interesting to determine if they are 'emerging' creative industry practitioners, highly experienced Baby Boomers providing mentorship to others in the sector, or members of the community interested in the social and cultural aspects of the Creative Industries.

Organisational Status

The majority of the respondents identified as being owner/operators, and 80.5% of respondents registered as a business or organisation, with the remaining 19.5% identifying as Sole Traders. CHCC could facilitate training opportunities particularly in business skill development, as well supporting or facilitating Creative Industry 'business-to-business' clustering, incubation, networking or collaboration opportunities in order to create economies of scale, and improve the efficiency, marketing and distribution aspects of many of these small businesses.

Technology Uptake

The basic technology uptake¹ was high with 87.2% of respondents having an email address

¹ See page 15 Table 4.1 Stages in commitment to networked economy

and 52.4% utilising a web-site, indicating that they are at the communication and information stages of participation in the networked economy. There are opportunities to develop on-line transactions, resource sharing and best practice involvement in technology enabled business activities.

Professional Status

Category	Criteria	Respondent %
Professional	Earning more than 50% of income from Creative Industry activities	46.5
Semi-professional	Earning 10-50% of income from Creative Industry activities	24
Emerging	Earning less than 10% of income from Creative Industry activities	29.5

Table 2 - Professional Status

Respondents were asked to nominate their 'professional' status. There were 417 responses to this question, which indicates a high level of 'cross-over' in the sector. For example a professional potter may also be an emerging painter within the Visual Arts, while other practitioners may work across categories, such as a professional musician who is also a semi-professional filmmaker.

Respondents per Category

The chart below depicts the percentage of respondents per category. The Visual Arts had the highest representation across all categories with 34.9% and the Support Services was next with 27% of respondents. The Performing Arts attracted 22.4%, the Literary Arts 8.7% and 7% registered as Other, and are both Education and Training providers or Venue and Facility operators.

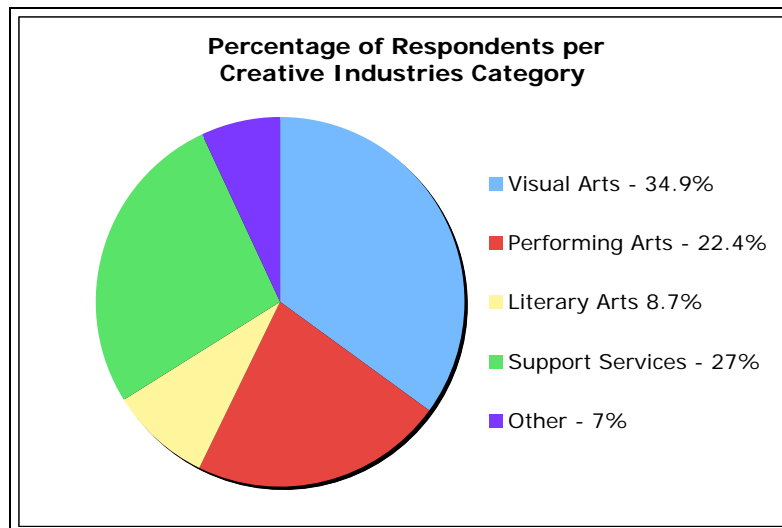


Chart 1 - Percentage of Respondents per Category

The Visual Arts² had the most sub-categories with 15, and Painter/Illustrator the highest level of response across all three categories attracting 23% of respondents. In the Performing Arts³ the Musician sub-category had the highest registrations at 15%, followed closely by both Production and Band/Choir/Group sub-categories, with each attracting 14%. While the

² See chart on page 38

³ See chart on page 39

production/publishing aspect of the Literary Arts⁴ attracted the most respondents at 29%, while the combined 'writing' sub-categories attracted 71%. As noted earlier Support Services was the second largest category after the Visual Arts, and at 16% the Retail sector was the highest single sub-category; but combined management activities (Event Management and Arts Business Administration) attracted 28%. It should be noted that Support Service businesses may undertake 'creative' activities in their own right, or provide support and resources to those in the Visual, Performing and Literary Arts.

Education & Training

A total of 46 tutors/teachers registered and the North Coast Institute of TAFE and the Coffs Harbour Conservatorium are the two largest training providers in the Creative Industries sector to register. The remainder of the training is provided by dance studios, for example, who employ part-time and casual staff; or other individual tutors/teachers.

Tutors/Teachers	Visual Arts	Performing Arts	Literary Arts
46	23	22	1
Level of Learning	Certified	Non-certified	External Support
	11	28	3

Table 3 – Education & Training

Respondents were asked to nominate the 'stage' of their students learning. The secondary level attracted the highest percentage of respondents at 32%. It is clear that CHCC could facilitate the development of training on a 'fee-for-service' basis by the Tertiary (23%) and ACE/RTO/VET (8%) sectors to support the growth and development of the Creative Industries. This would have the added bonus of providing growth in this sector. The current 'tertiary level' education and training is provided by the North Coast Institute of TAFE but there may be an opportunity to work with Southern Cross University to identify a specific area that could be delivered by the University to this growth sector.

Venues & Facilities

Public Venues are defined as being those owned by a government body, and the 8 venues that registered belong to CHCC. All are available for private hire, 1 is licensed and 2 indicated that Creative Industry activities are their secondary, rather than their primary function.

Private Venues are defined as those in private (non-government) ownership. A total of 47 Private Venues registered and 30 identified Creative Industries activities as their 'primary' function, while the remaining 17 nominated it as their secondary function. Additionally, 8 of the venues are licensed and 15 indicated that they are available for private hire. CHCC, through its Economic Development Unit, is currently undertaking a full-scale audit of all venues and facilities in the Coffs Harbour LGA.

Recommendations

The review of previous research and literature pertaining to the Creative Industries; coupled with the Coffs Harbour field research and findings, has resulted in the development of the following recommendations. The implementation of these recommendations should enable Coffs Harbour City Council to facilitate and support the development of the Creative Industry sector within the LGA across ten key result areas.

⁴ See chart on page 39

Recommendation 1: On-line data collection and management

a) Data Collection

Ensure that data on the Creative Industries in the Coffs Harbour LGA is collected on an ongoing basis; and analysed and reported annually.

b) Data availability

Ensure that data is available on-line via the CHCC web-site and in hard-copy form

c) On-line registration

Ensure that Creative Industry on-line register is permanently available to professionals to ensure that all Creative Industry professionals can be encouraged to register and/or change their details if required in order to maintain an up-to-date service.

Recommendation 2: Utilise the 'ScreenLinks' model to develop the Creative Industries sector, with a particular focus on:

a) Creative Industry Development Project Manager

Employing a person to manage the development of the Creative Industries over a 3-year period.

b) Communication

Establish a communication plan with regular Creative Industry e-newsletters (*suggest quarterly or twice-yearly*) to keep Creative Industry data-base registrants informed as to activities within the sector.

c) Networking

Initiate a process to establish Creative Industry networks (*that could utilise mentoring*), either within specific industry sub-sectors such as the Visual Arts or across the creative industries sector as a whole.

d) Training and business skill development

Facilitate the provision of training (*business and creative*) to Creative Industry professionals and practitioners through partnerships with Department of State & Regional Development, North Coast Institute of TAFE or private sector providers.

Recommendation 3: Cluster/network collaboration and enterprise incubators

Identify Creative Industry hubs (*physical or virtual*) and facilitate the provision of incubators to assist micro and small enterprises start up, grow and/or become sustainable.

Recommendation 4: Investment, funding options and partnerships

Review current funding sources available to the Creative Industries micro-businesses; and facilitate the development of partnerships between the Creative Industries and private industry, the public and community sectors. To achieve this CHCC could:

a) Appoint a Funding Officer, to work on a whole-of-Council basis, including the Creative Industries; or

b) Liaise with Bellingen Shire Council and Nambucca Shire Council (*who are currently sharing the cost of a Funding Officer*) to explore the option of expanding this collaborative sub-regional approach.

Recommendation 5: Marketing, including market development and expansion

Develop a marketing strategy to attract consumers to utilise Creative Industry 'product'; collaborate with other sectors such as Tourism and Economic Development on joint marketing

opportunities; and assist the creative industries to develop and expand their markets in order to grow their businesses and to develop a stronger economic impact.

Recommendation 6: Telecommunications infrastructure advocacy (high quality broadband)

Lobby the Federal Government for the better provision of telecommunications infrastructure – effective, high speed, affordable broadband; to facilitate in creative innovation, development, production, distribution, and on-line access to new markets.

Recommendation 7: Development of multimedia production centre

Support the establishment of a multimedia production company (possibly as a community-based initiative) in order to assist businesses, within and beyond the Creative Industries, to adapt to changing markets and conditions.

Recommendation 8: Liveability and diversity

Aim to attract and retain Creative Industry professionals and practitioners through the promotion of diversity, the facilitation of an environment that is conducive to the creative industries and establish Coffs Harbour as a creative centre.

Recommendation 9: Cultural development

Facilitate a broad range of cultural development activities (*utilising the Regional Gallery, the Museum, the Jetty Theatre, the Bunker Gallery and others*) to grow demand for and appreciation of Creative Industries from within the community.

Recommendation 10: CHCC and SCU collaboration

Continue to build on the strong collaboration that has developed between Coffs Harbour City Council and Southern Cross University to enable Creative Industry sector development.

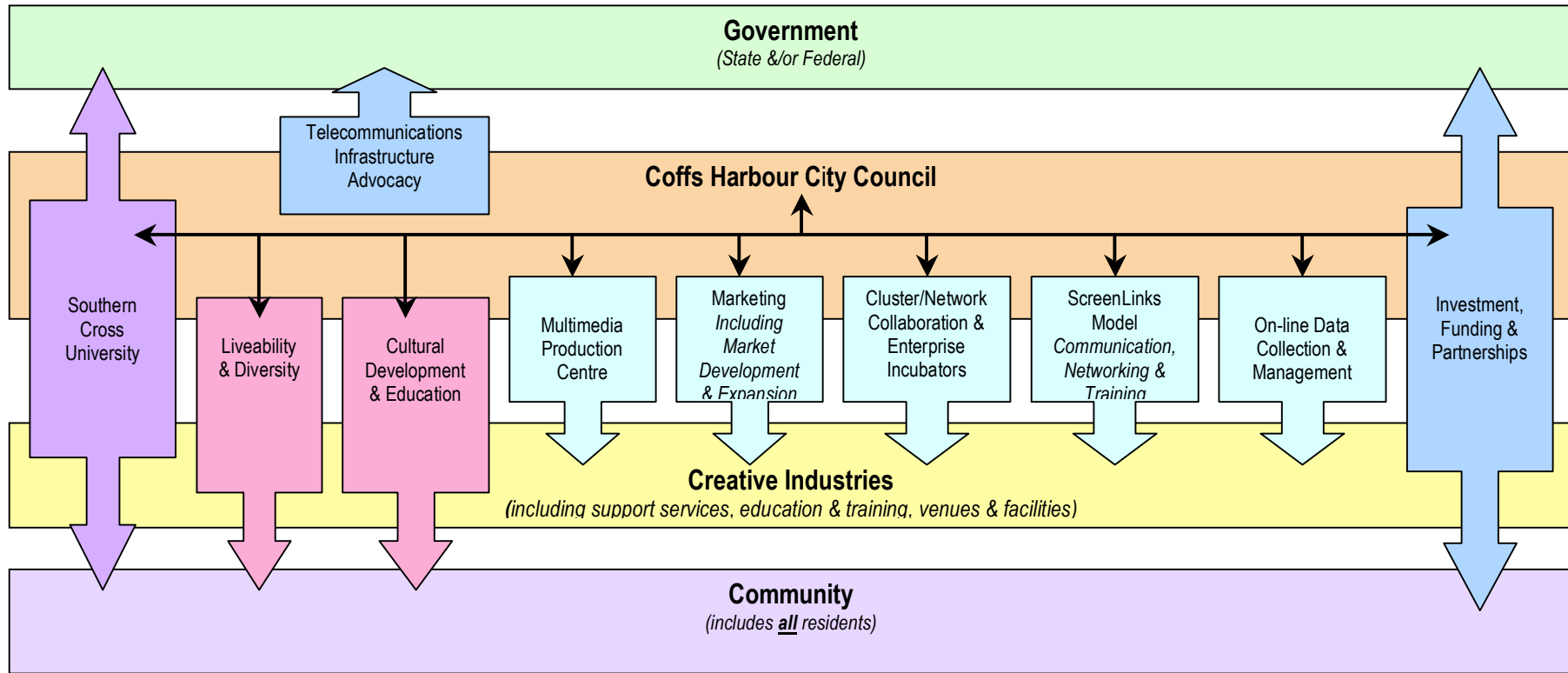
Summary

By actively enabling the growth of the Creative Industries sector in a *myriad of ways* the Coffs Harbour City Council can contribute significantly to:

- Enhancing the liveability of people in the community through cultural, social and economic development activities that do not impact the natural environment, and
- Increasing both business and industry development, and a greater diversity in employment opportunities.

While the focus of this report relates particularly to the growth of the Creative Industries sector, it sits within the context of arts and cultural development and economic development, and impacts on the overall 'health' of those within the community, be they permanent resident or a visitor. Therefore it is important to note that an integrated *'whole-of-council, whole-of-community and whole-of-government'* approach will be required, with Coffs Harbour City Council undertaking the key facilitation and engagement role.

CHCC 'Creating' the Creative Industries: Utilising and integrating the 10 Recommendations



CHCC has a pivotal role in: Community Engagement, Facilitation, Lobbying and collaboration to ensure an integrated approach to achieving the recommendations in the 10 key result areas

ACTIVITY LEGEND: Community Engagement: ■ Facilitation: □ Lobbying: ■ CHCC/SCU Collaboration: ■ Integrated approach: ↔