Creative Industries: Analysis and Potential Strategic Directions for Albany

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Creative Industries Scoping Study

City of Albany

SC Lennon & Associates
economics • planning • policy • strategy
Creative Industries Defined
Creative Industries

- Creative industries are emerging as key contributors to economic prosperity.
- Creative industries outputs can be products or services.
- CIs link creativity with commercial markets.
- Served by technology and are ‘knowledge based’.
- Highly dependent on creative talent - creativity is their primary source of value.
- Creative employment is dispersed across creative segments and non-creative industries.
Creative Segments

- Music, visual and performing arts
- Film, TV and radio
- Architecture and design
- Advertising and marketing
- Software and digital content
- Publishing
Creative Services and Cultural Production Segments

- Creative Services Segments
  - Architecture and design
  - Advertising and marketing
  - Software and digital content

- Cultural Production Segments
  - Music, visual and performing arts
  - Film, TV and radio
  - Publishing

- Creative Industries
  - • specialist creatives
  - • support staff
  - • embedded creatives
Creative Services and Cultural Production

- **Creative services** add value through design, technical performance, packaging, branding, etc.

- **Cultural production** enhances community wellbeing by contributing to an active and engaging cultural life which in turn attracts investment.
Australia’s Creative Economy
Economic Contribution

- According to the Enterprise Connect Creative Industries Innovation Centre (CIIC), the creative industries contributed around $45 billion to Australia’s GDP in 2012/13.

- Biggest CI segment is the Software and Digital Content segment, in terms of its contribution to GDP and employment.

- The growth fortunes of the creative industries have varied across the CI segments.

- Overall, the creative industries have experienced an increase in employment of around 3% per annum (2006-2011)

- But, CIs have shown a decline in their Industry Gross Product of 1% per annum (since 2007/08).
Creative Employment as % of Total Workforce by State/Territory, 2011

Source: SC Lennon & Associates and CCI using ABS Census data
Along with Victoria, WA experienced the highest rate of creative employment growth, at 3.2% pa.
WA’s Creative Industries Employment by Segment (%), 2011

Source: SC Lennon & Associates and CCI using ABS Census data
Albany and The Great Southern Region
Albany’s Creative Industries Employment by Segment (%), 2011

- Architecture and Design: 31%
- Music, Visual and Performing Arts: 21%
- Publishing: 25%
- Software and Digital Content: 12%
- Film, TV and Radio: 8%
- Advertising and Marketing: 3%

Source: SC Lennon & Associates using ABS Census data
Albany’s Creative Occupations by Segment (%), 2011

- Advertising and Marketing: 27%
- Architecture and Design: 26%
- Publishing: 16%
- Software and Digital Content: 16%
- Film, TV and Radio: 4%
- Music, Visual and Performing Arts: 11%

Source: SC Lennon & Associates using ABS Census data
About one-third of WA’s creative services workers are ‘embedded’ in other (non-creative) industry sectors. This is relevant to the City of Albany.
Albany’s Creative Industries Employment by Segment, 2011

Creative industries employ a total of 234 workers in Albany, or 1.5% of total employment in all industries.

- Architecture and Design: 72 workers
- Software and Digital Content: 28 workers
- Film, TV and Radio: 20 workers
- Music, Visual and Performing Arts: 49 workers
- Publishing: 58 workers

Source: SC Lennon & Associates using ABS Census data
Creative Industries Employment by LGA (%), Great Southern Region, 2011

- **Albany (C)**: 73%
- **Denmark (S)**: 20%
- **Jerramungup (S)**: 3%
- **Remainder Great Southern Region**: 4%

Source: SC Lennon & Associates using ABS Census data
Creative Industries Employment by Segment (%), Albany and Great Southern Region, 2011

Source: SC Lennon & Associates using ABS Census data
Albany has a comparatively high proportion of CI workers in the Architecture and Design segment.
Albany’s Creative Industries Employment by Segment, 2006 and 2011

Average Annual Change in Creative Industries Employment by Segment (%), Albany, WA and Australia, 2006-2011

Source: SC Lennon & Associates using ABS Census data
Creative Segments Employment Growth and Share,
Western Australia, 2006-2011
Creative Industries Strategies
CIs and the Importance of Place

- Place a premium on an area’s lifestyle attributes – the community infrastructure - recreation, leisure, culture.
- Appreciate diversity and difference.
- Inner urban areas and lifestyle regions favoured.
- Dispersed and not tied down to commercial nodes.
- ICT is a critical enabler.
- Creative services are an integral component of the ‘knowledge economy’.
- Cultural production activities form part of a region’s ‘enabling infrastructure’.
The Dynamic Cycle of Creativity and Prosperity

The creative and prosperous region

Attraction of creative people and creative enterprise

Cultural diversity and lifestyle appeal

Higher productivity

Faster economic growth and development

Source: SC Lennon & Associates
Possible CI Strategies for Albany: 5 Themes

1. Creative Enterprise Business Assistance
2. Creative Industries Incubation Space and City Centre Activation
3. Creative Industries Marketing and Promotion
4. Creative Industries and Tourism Development
5. Creative Learning
6. Support Infrastructure
Possible ‘Quick Wins’

- Local Creative Industries Survey
- Formalise Local Creative Enterprise Networks
- Audit Available Building Spaces
- Creative Industries Incubator Feasibility
- Promote the creative industries; leverage cultural assets; tourism
- Public art
Possible CI Strategies for Albany: 5 Themes

...these are prompts for further thinking.
Thank You

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