

Creative Industries: Analysis and Potential Strategic Directions for Albany

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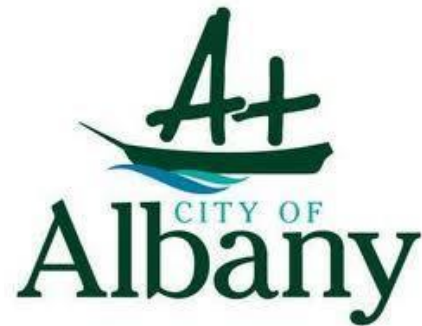
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Presentation to the 2015
Great Southern Future Forum

Albany, March 27th 2015



Creative Industries Scoping Study



SC Lennon & Associates

economics • planning • policy • strategy

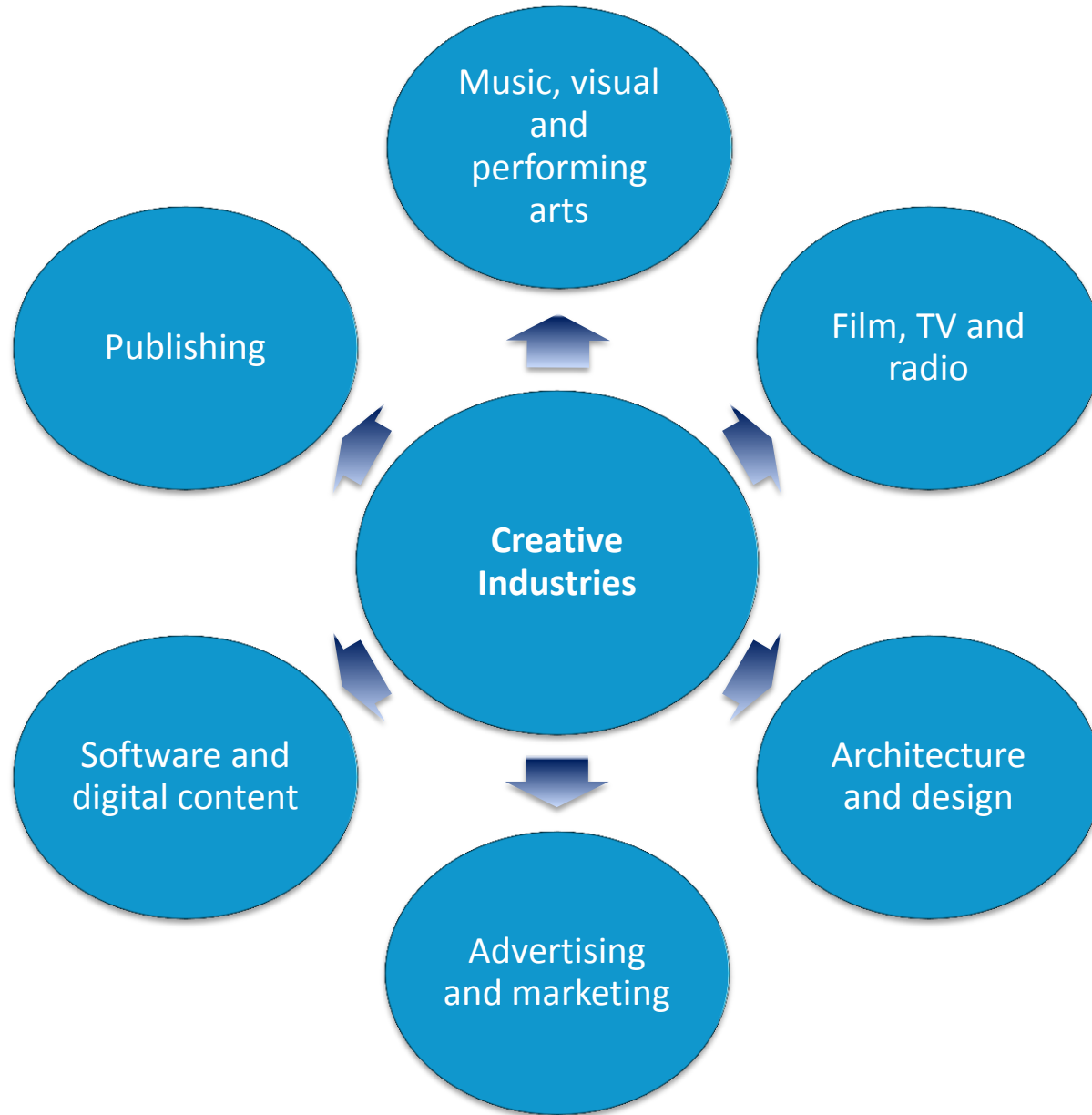
Creative Industries Defined



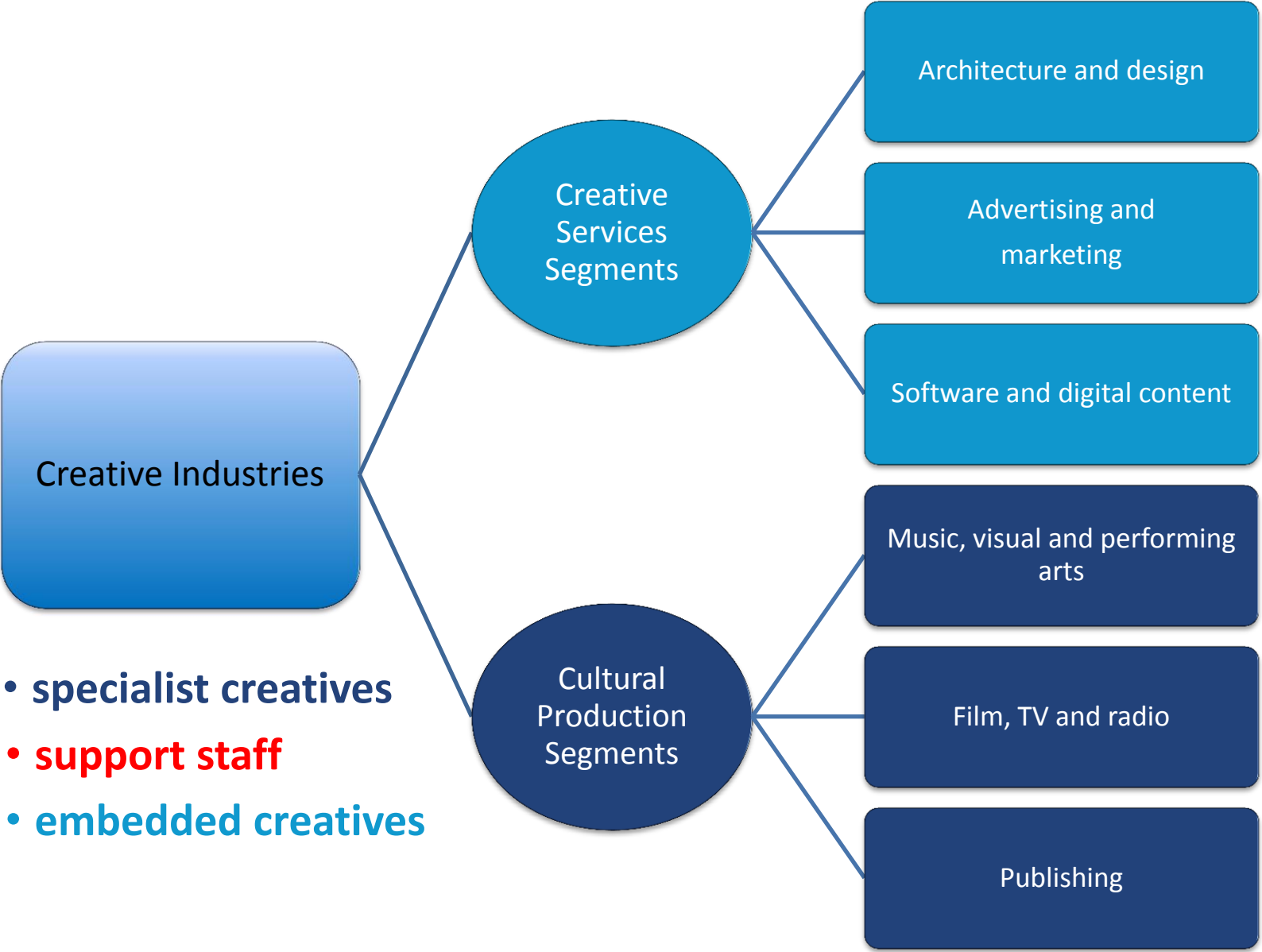
Creative Industries

- 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



Creative Services and Cultural Production Segments



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.



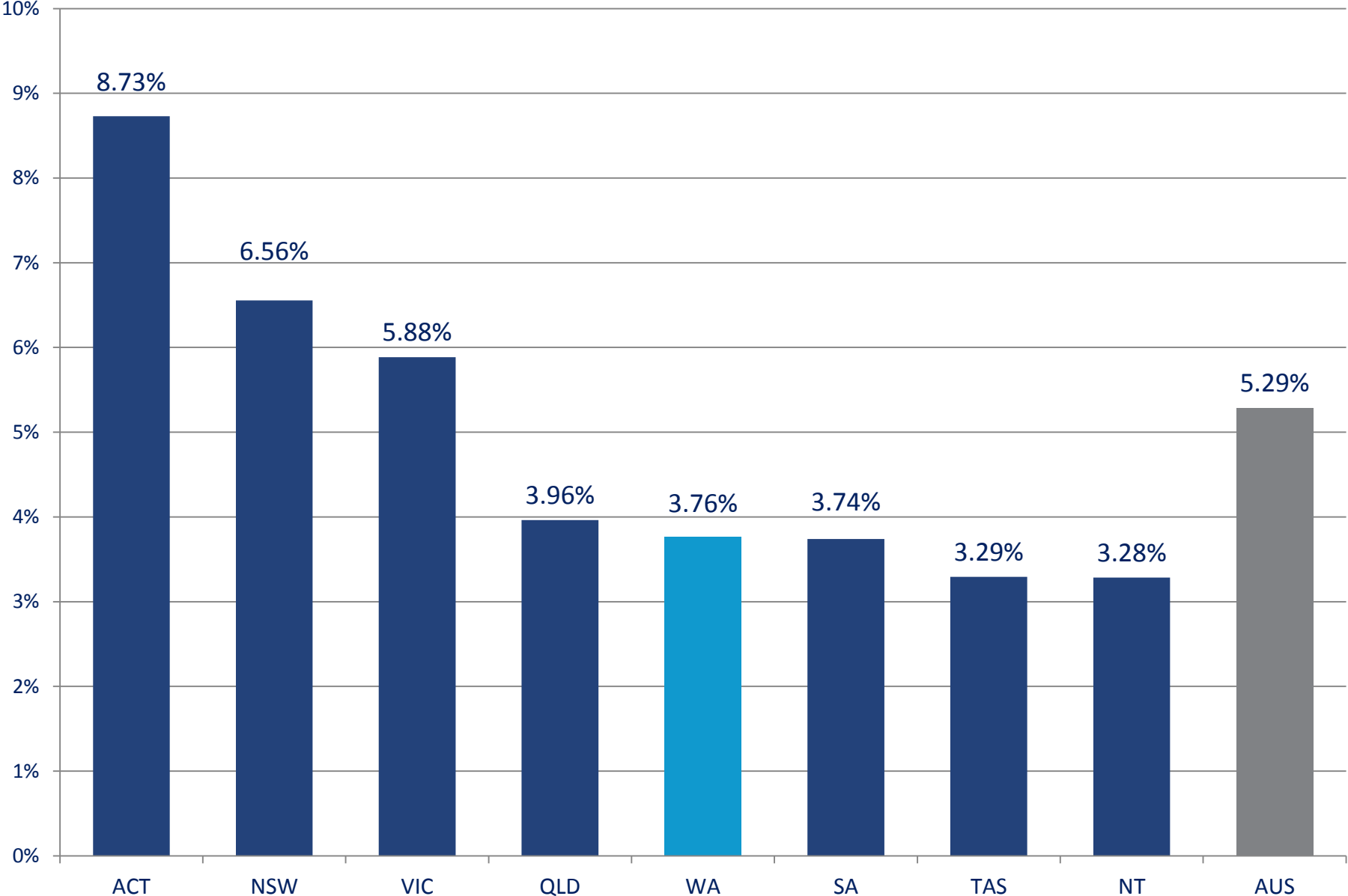
Australia's Creative Economy



Economic Contribution

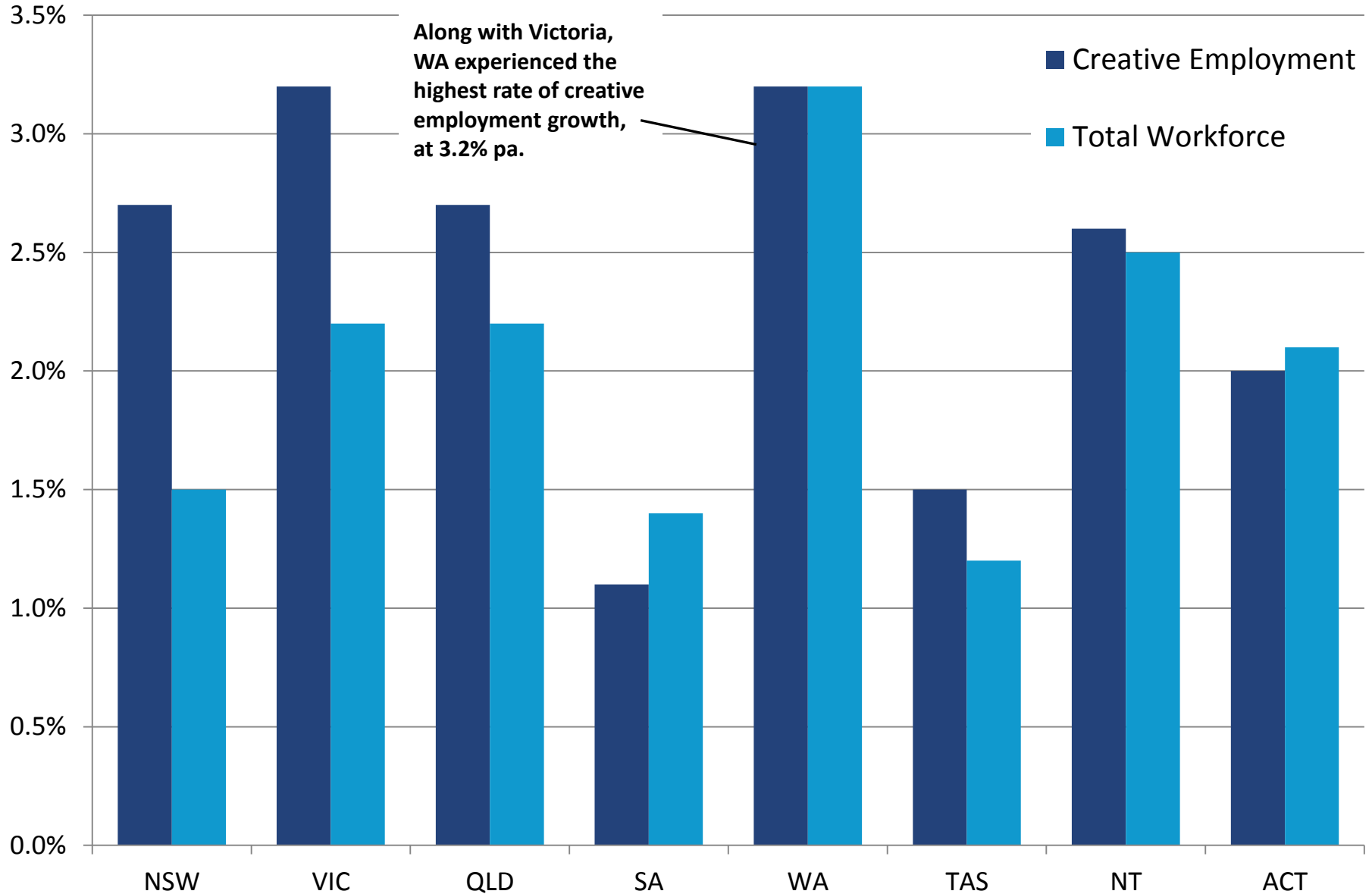
- According to the Enterprise Connect Creative Industries Innovation Centre (CIIC), the creative industries contributed around \$45 billion to Australia's GDP in 2012/13.
- Biggest CI segment is the Software and Digital Content segment, in terms of its contribution to GDP and employment.
- The growth 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

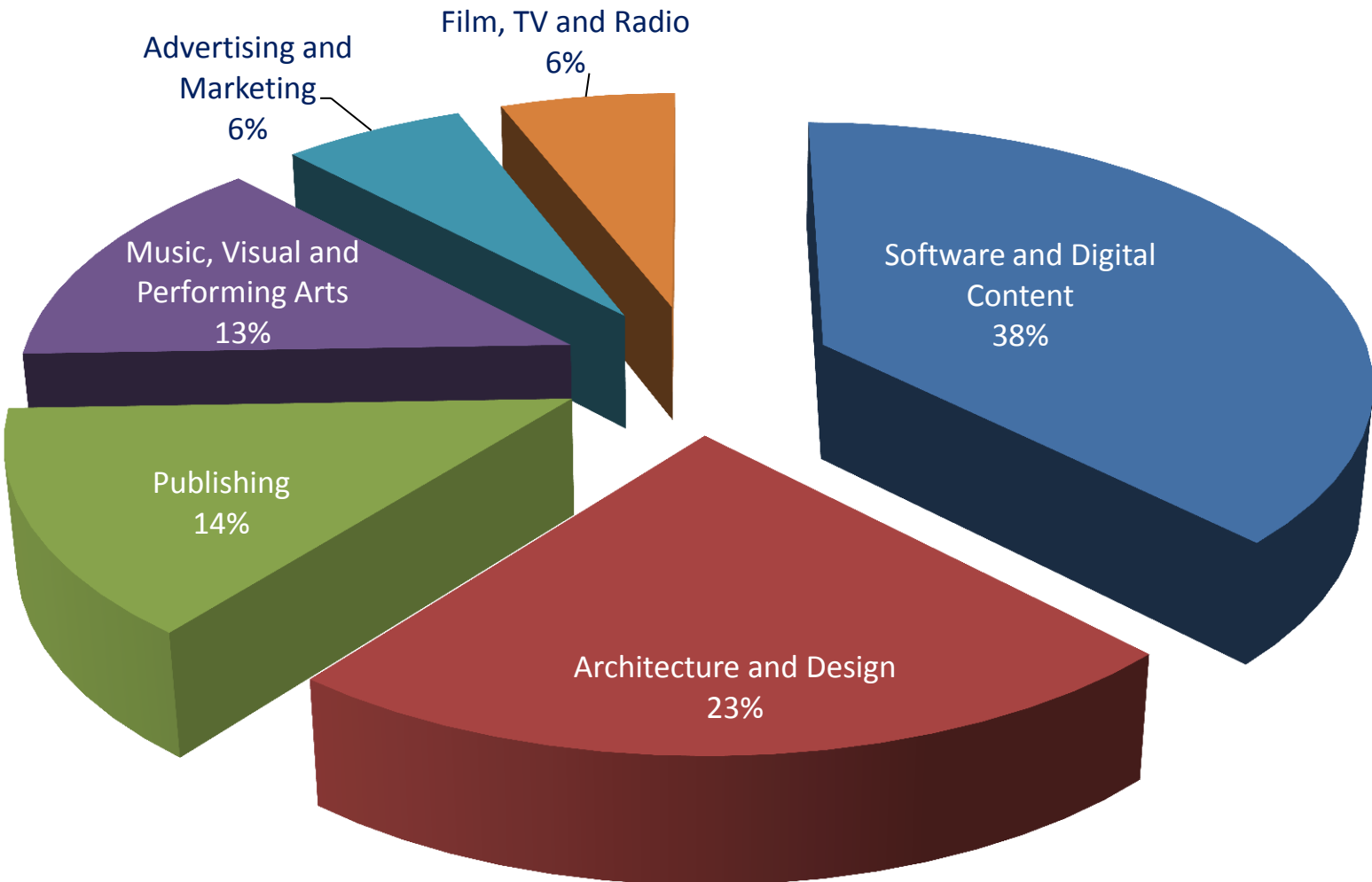


Source: SC Lennon & Associates and CCI using ABS Census data

Creative Employment Growth by State/Territory, 2006-2011



WA's Creative Industries Employment by Segment (%), 2011

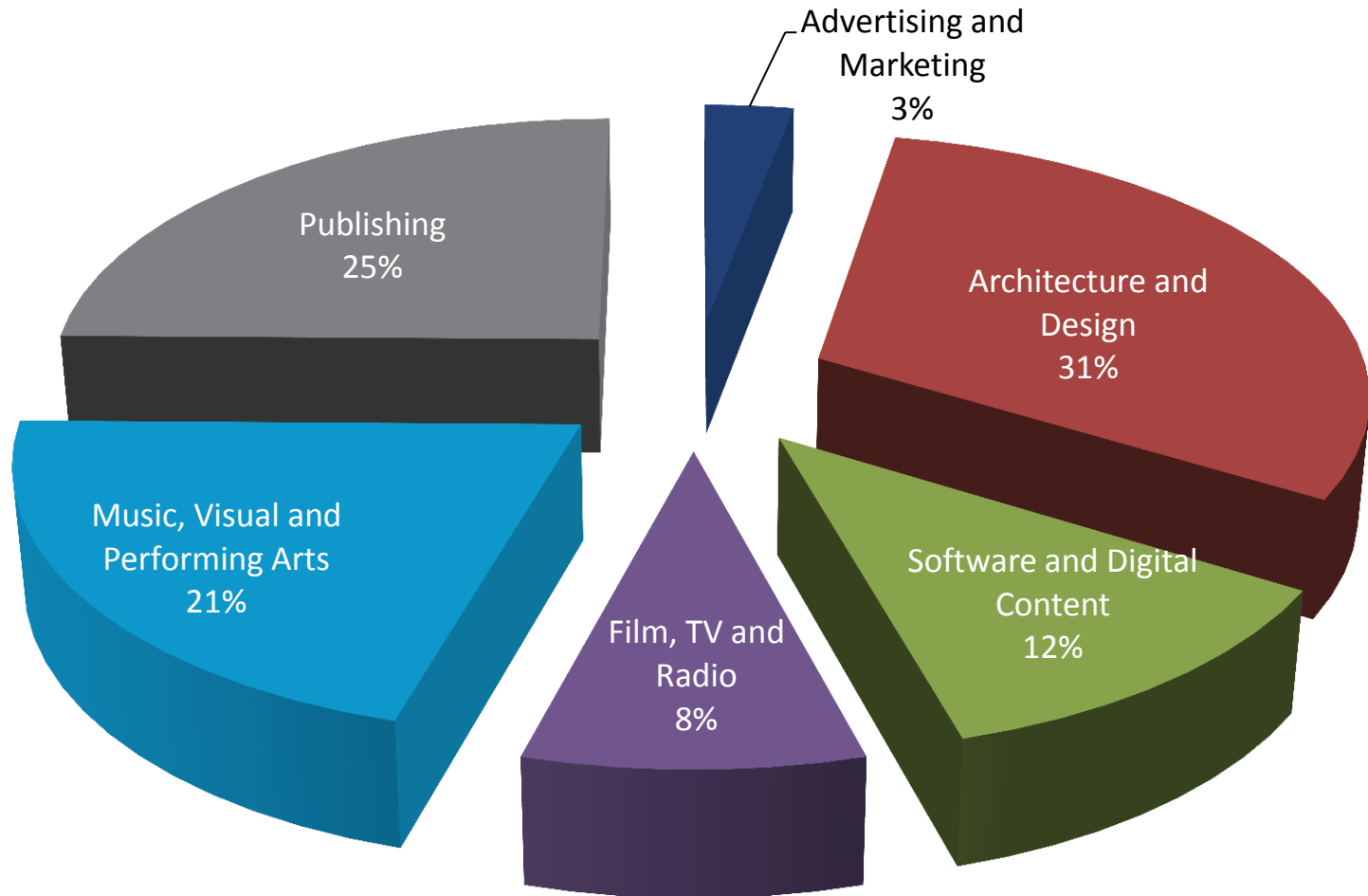


Source: SC Lennon & Associates and CCI using ABS Census data

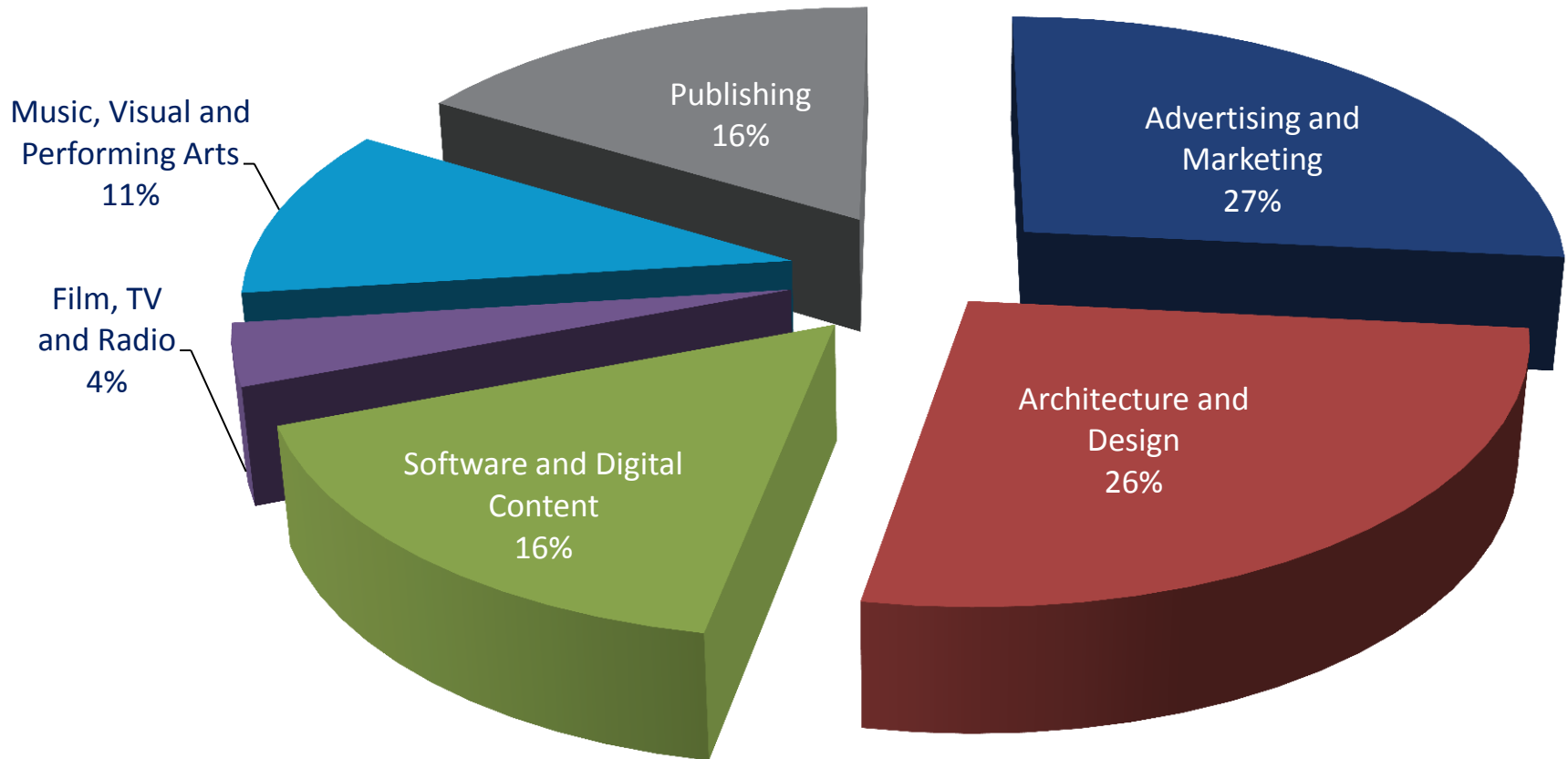
Albany and The Great Southern Region



Albany's Creative Industries Employment by Segment (%), 2011

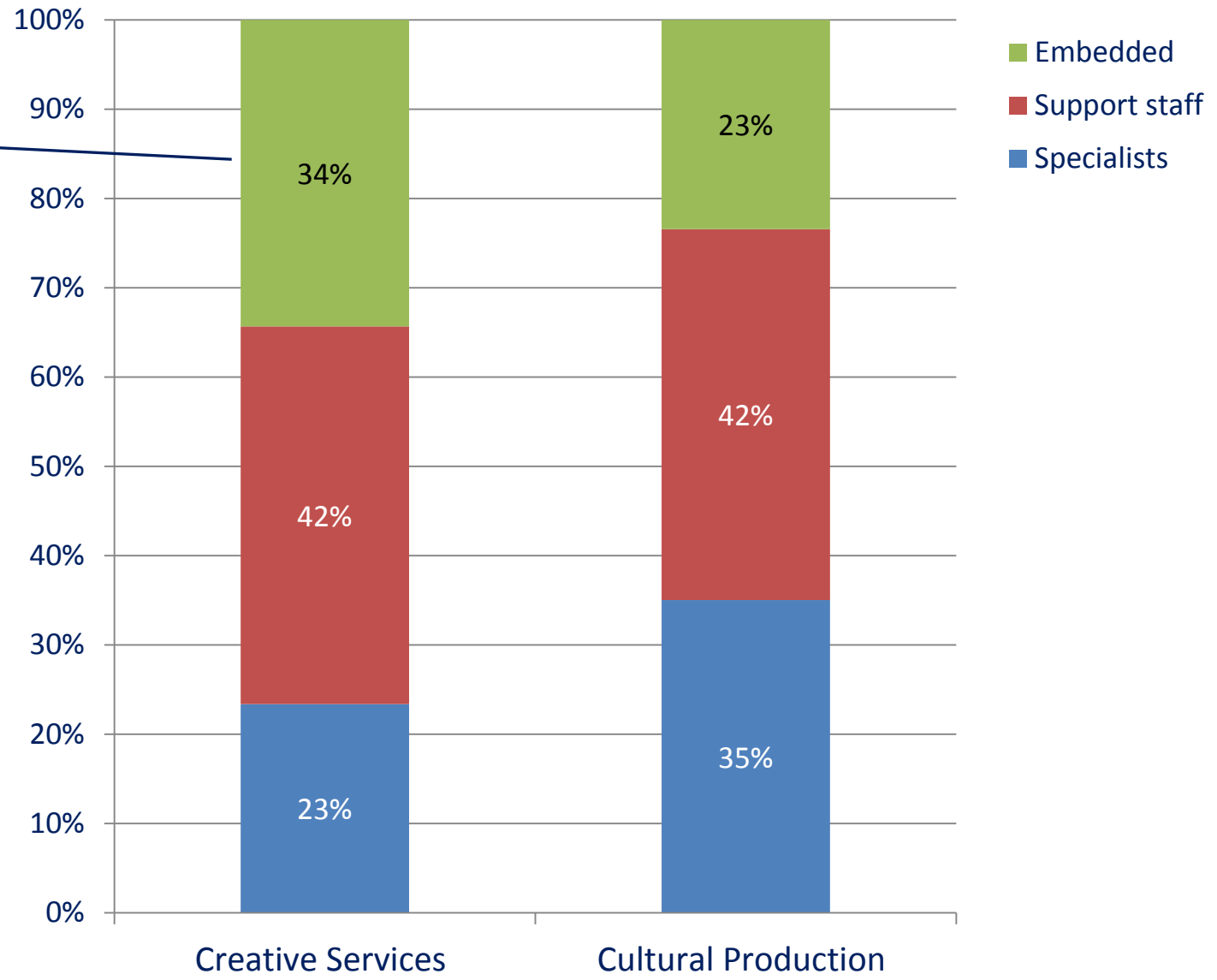


Albany's Creative Occupations by Segment (%), 2011

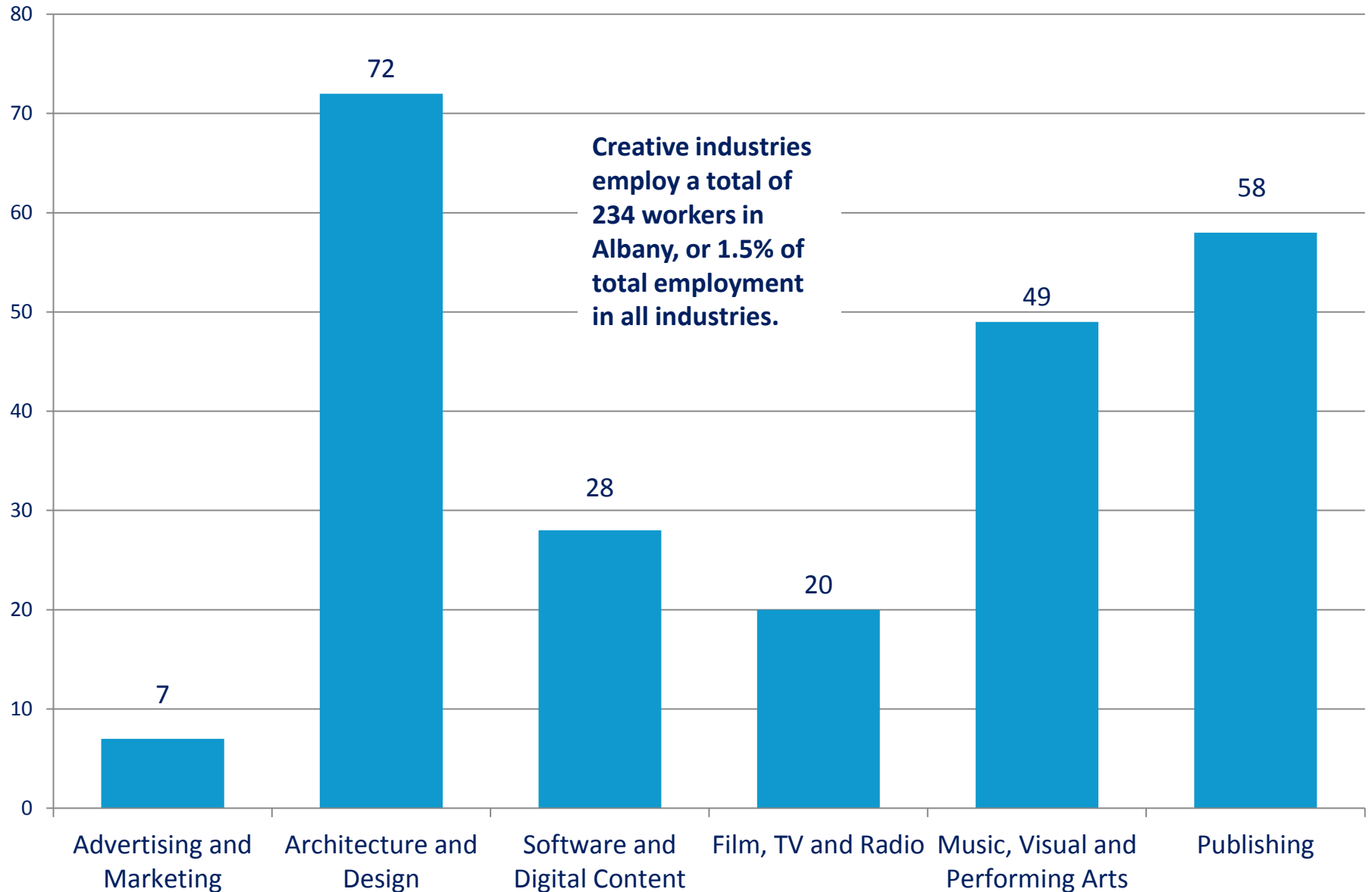


Creative Services and Cultural Production Trident Employment Breakdown (%), Western Australia, 2011

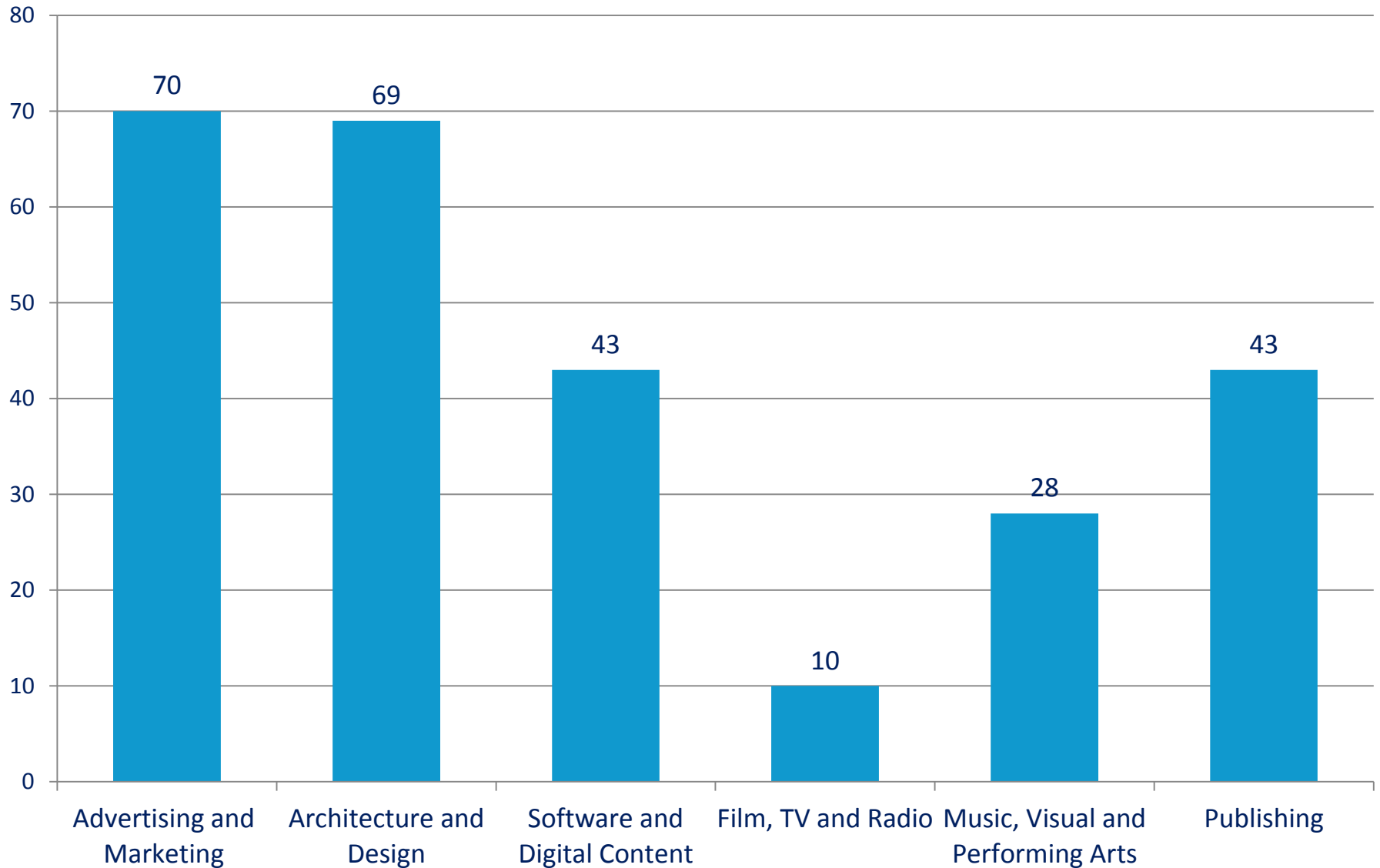
About one-third of WA's creative services workers are 'embedded' in other (non-creative) industry sectors. This is relevant to the City of Albany.



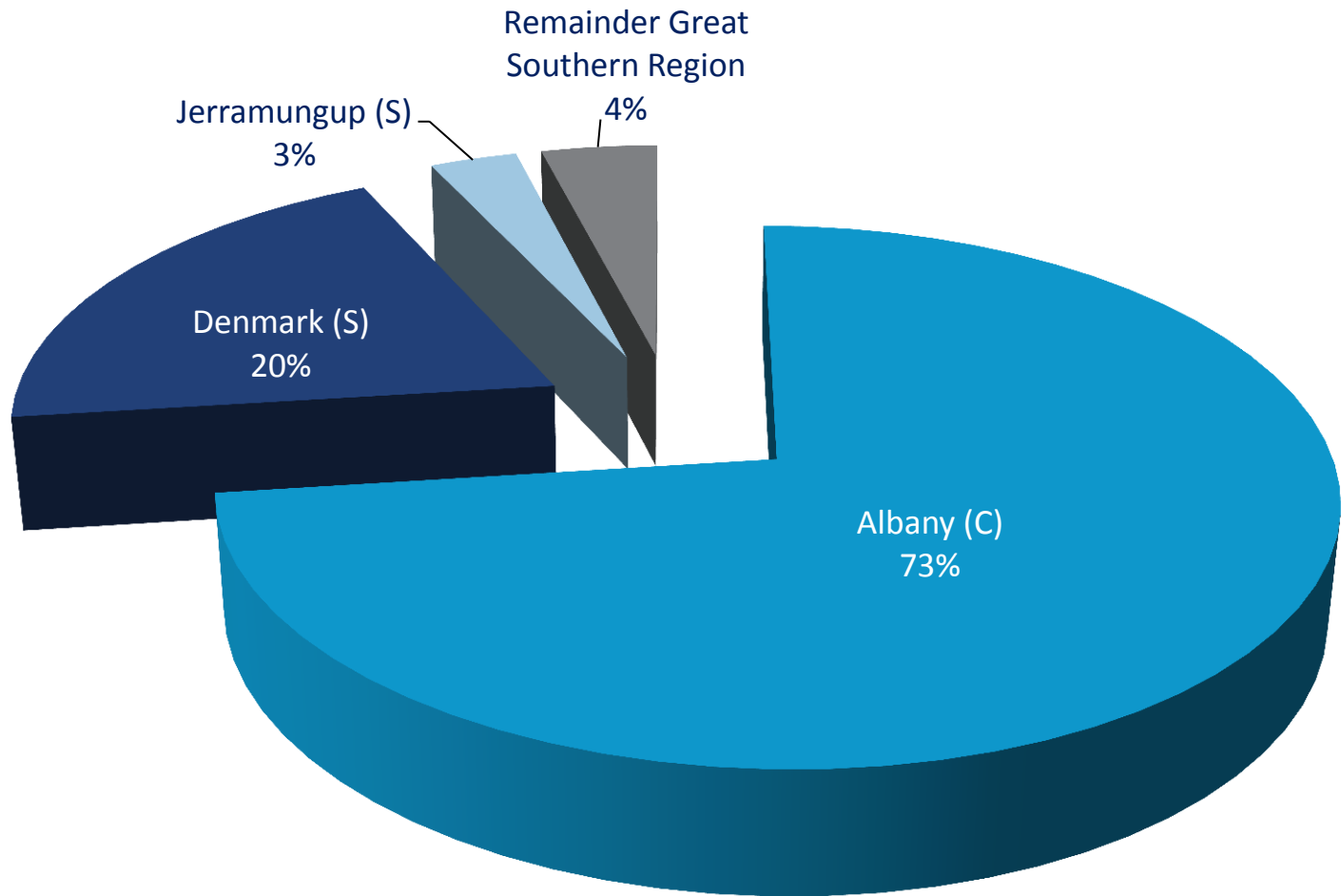
Albany's Creative Industries Employment by Segment, 2011



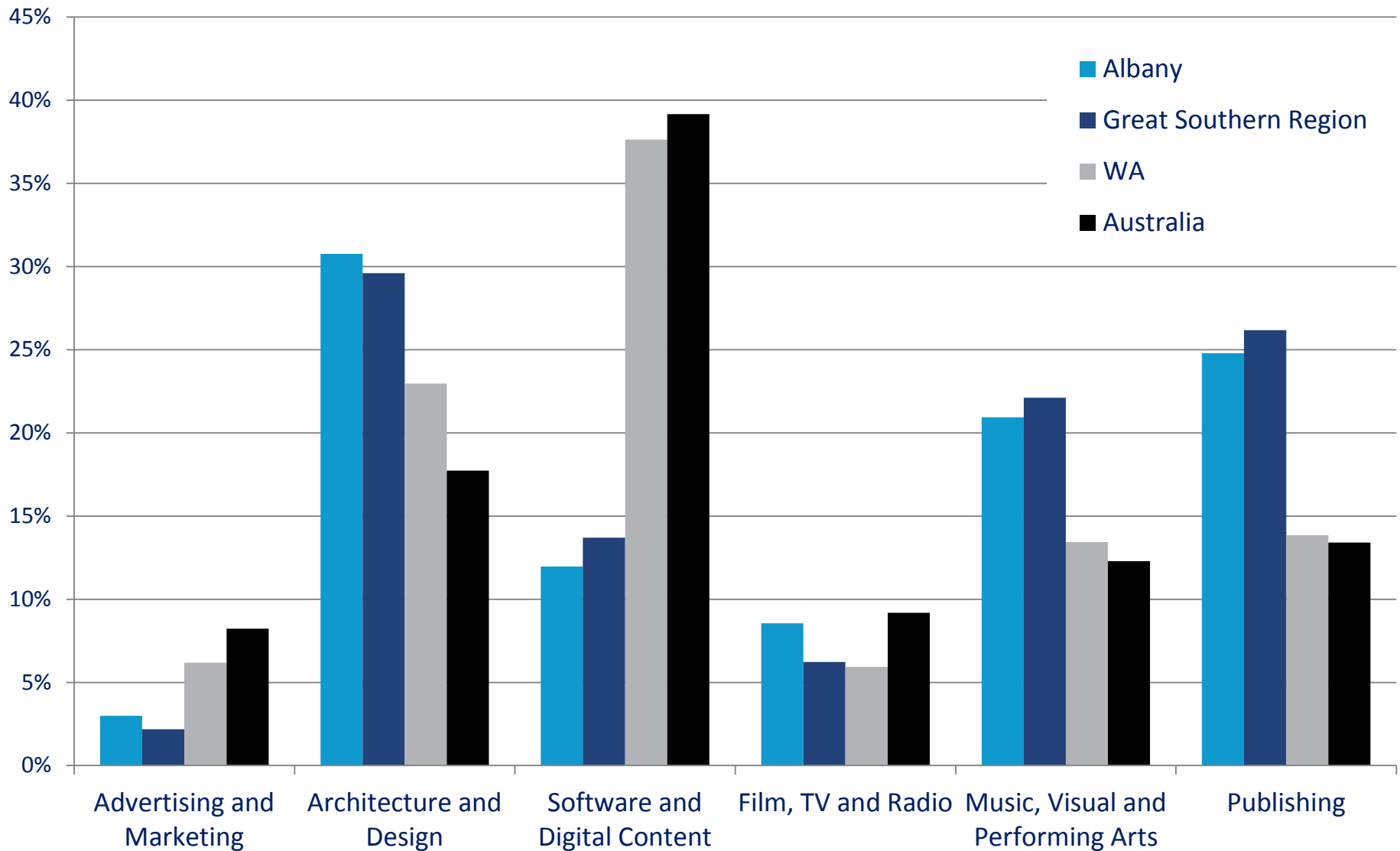
Albany's Creative Occupations by Segment, 2011



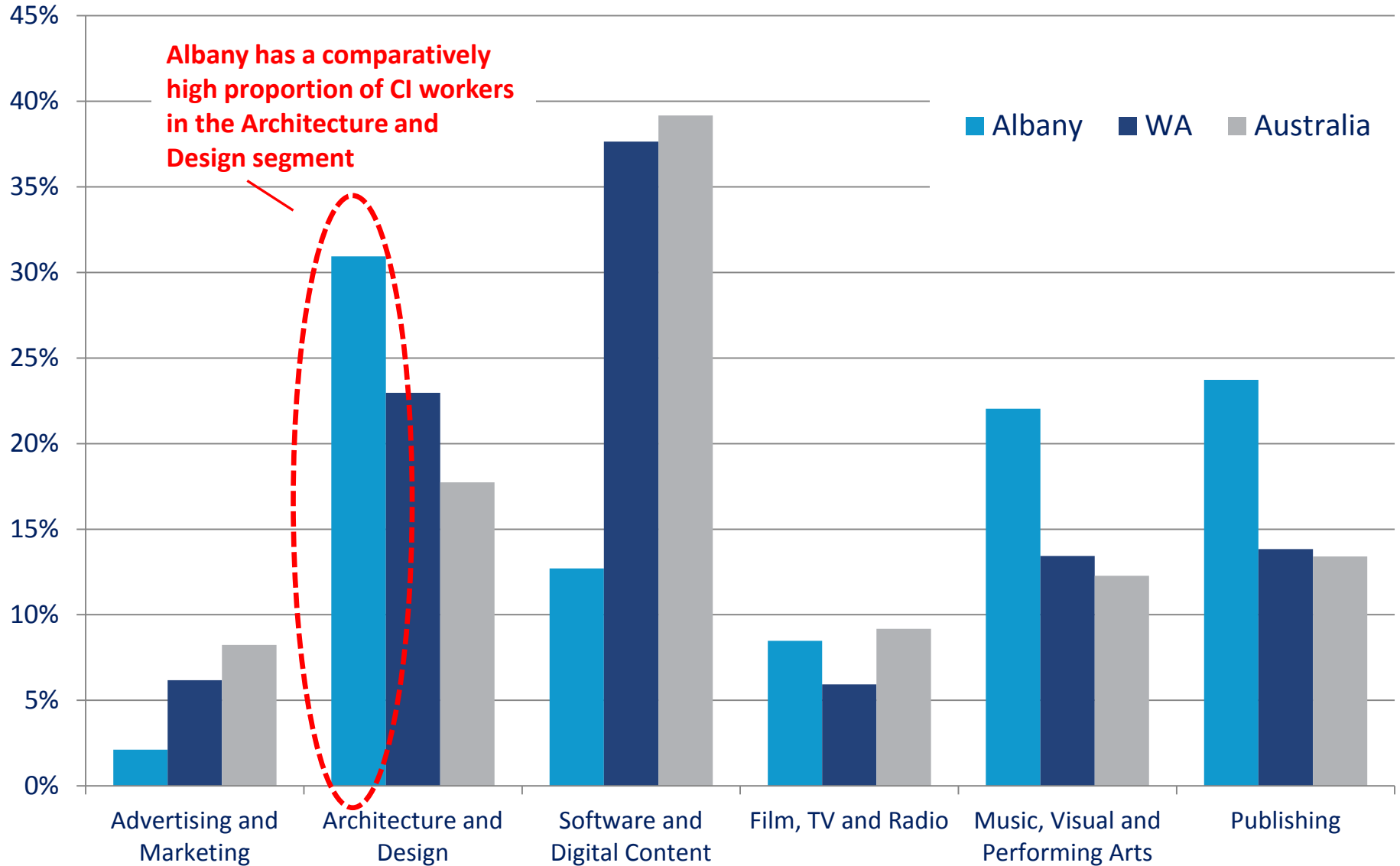
Creative Industries Employment by LGA (%), Great Southern Region, 2011



Creative Industries Employment by Segment (%), Albany and Great Southern Region, 2011

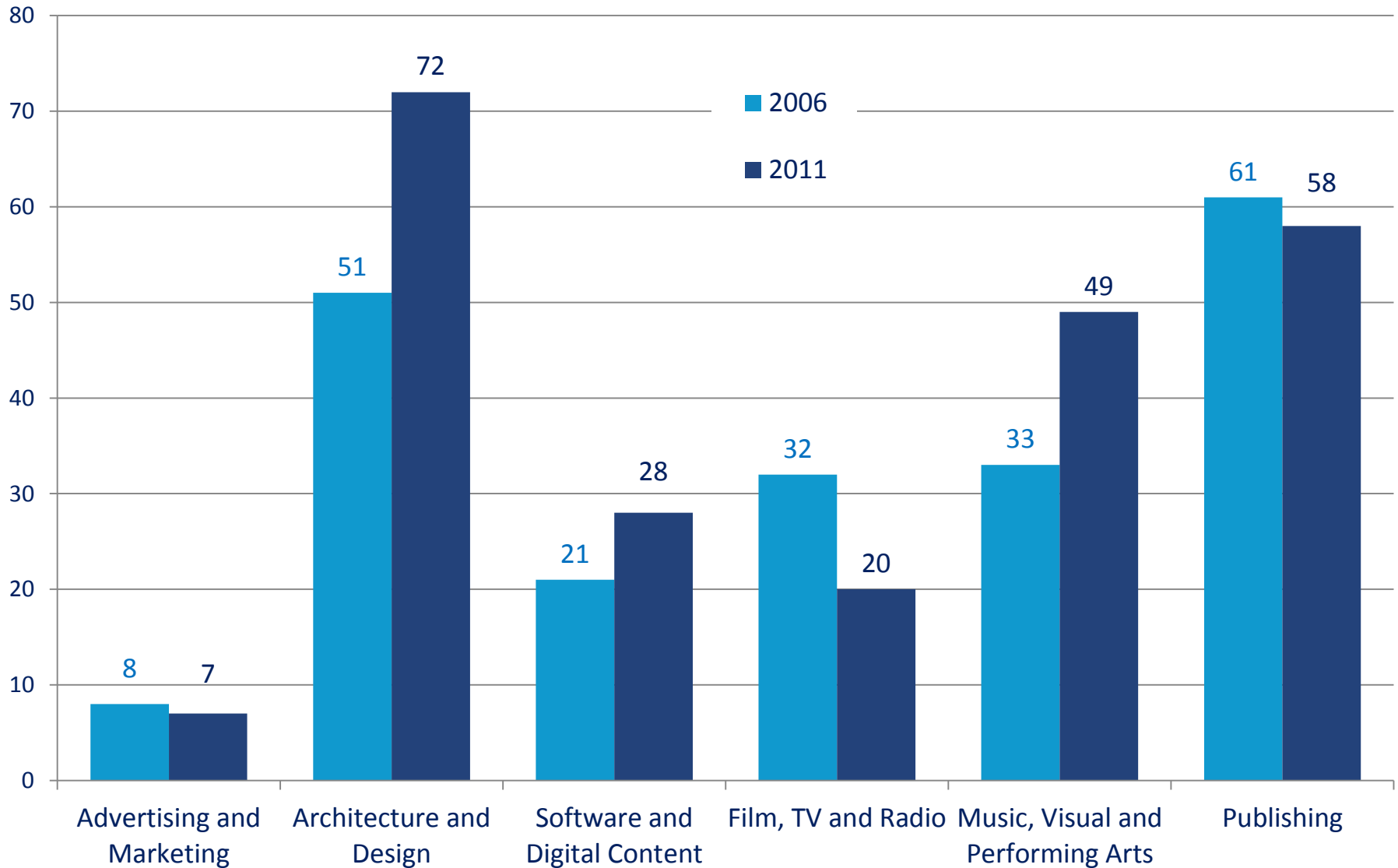


Creative Industries Employment by Segment (%), Albany, WA and Australia compared, 2011

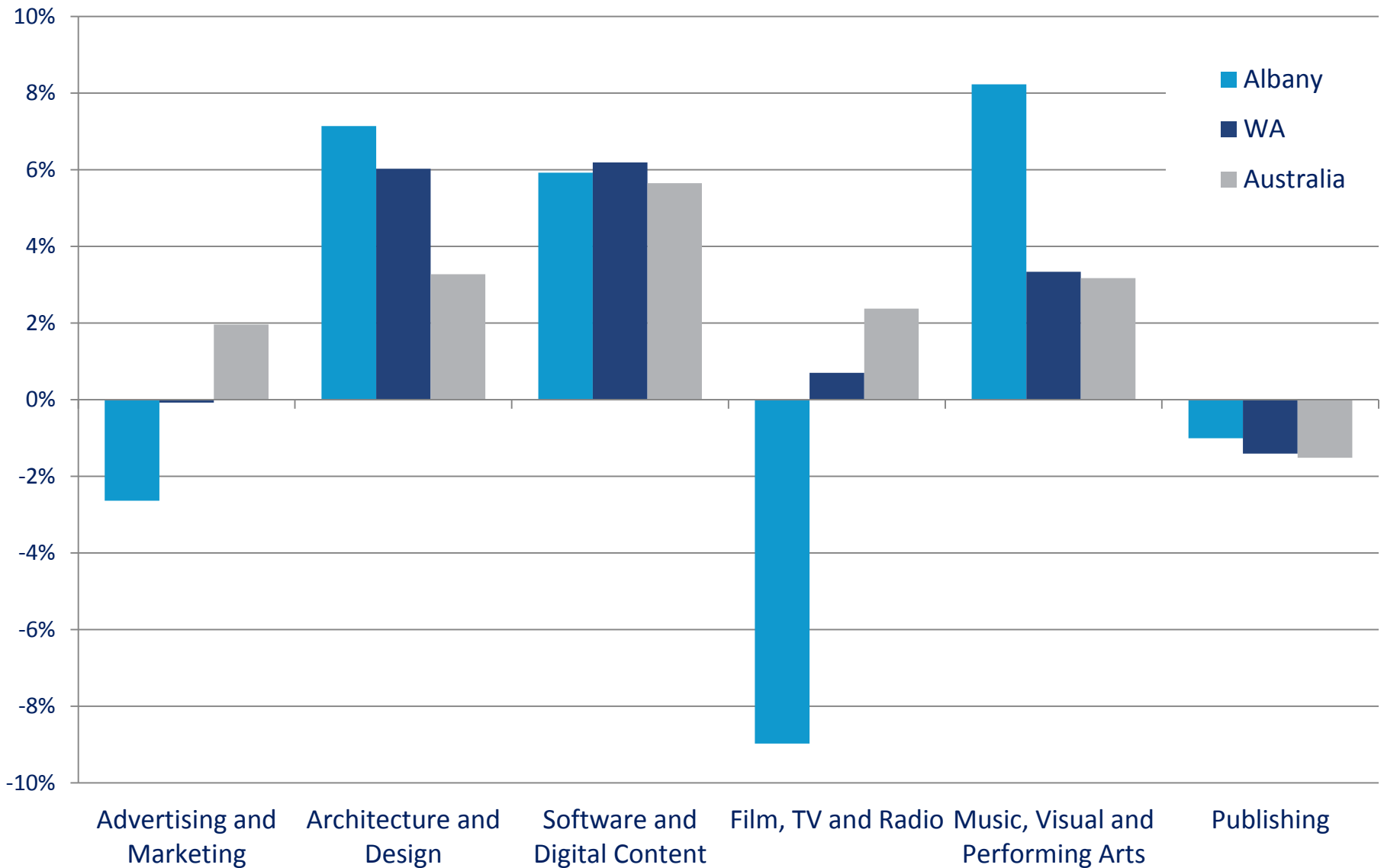


Albany has a comparatively high proportion of CI workers in the Architecture and Design segment

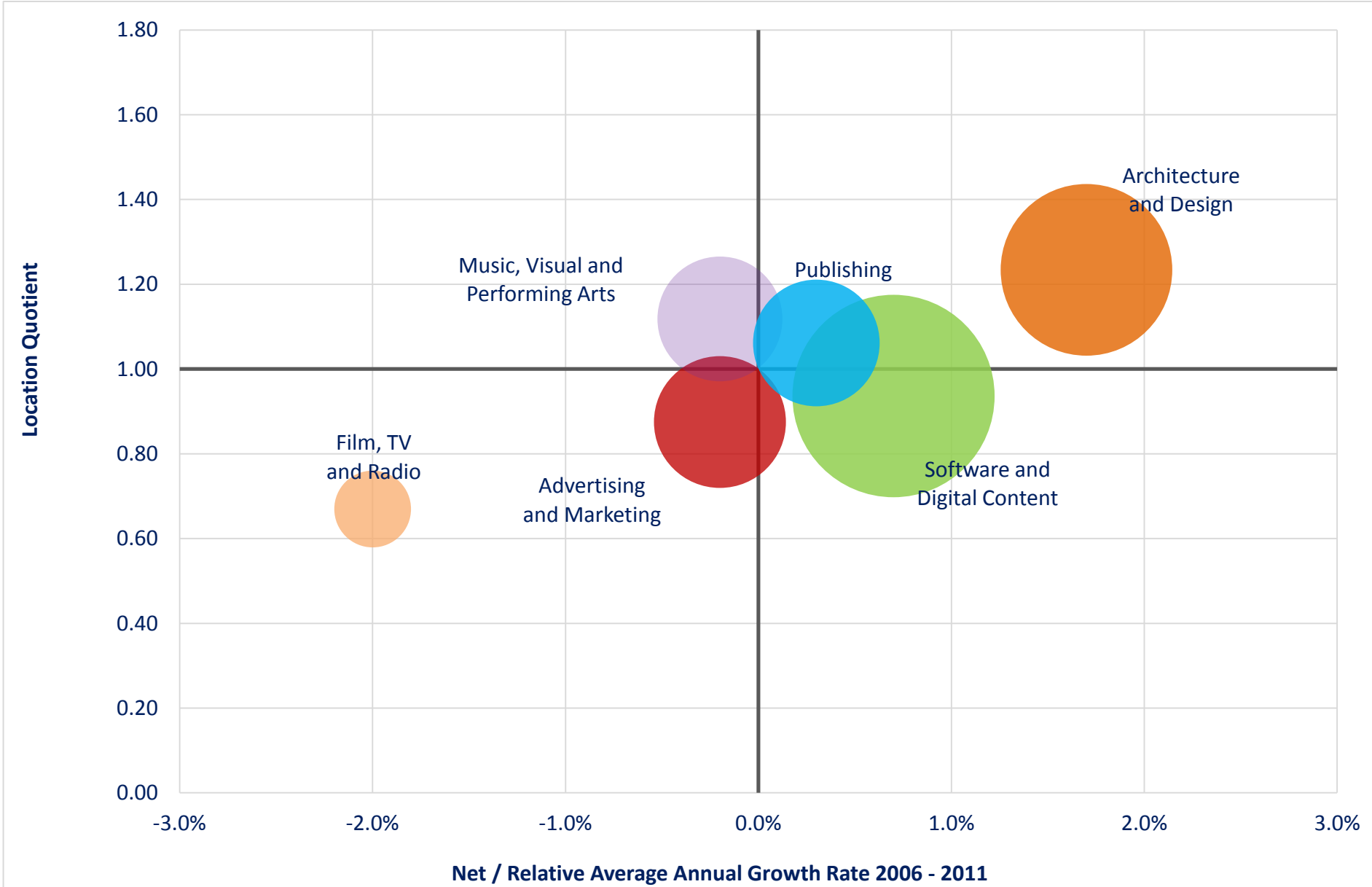
Albany's Creative Industries Employment by Segment, 2006 and 2011



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



Creative Segments Employment Growth and Share, Western Australia, 2006-2011



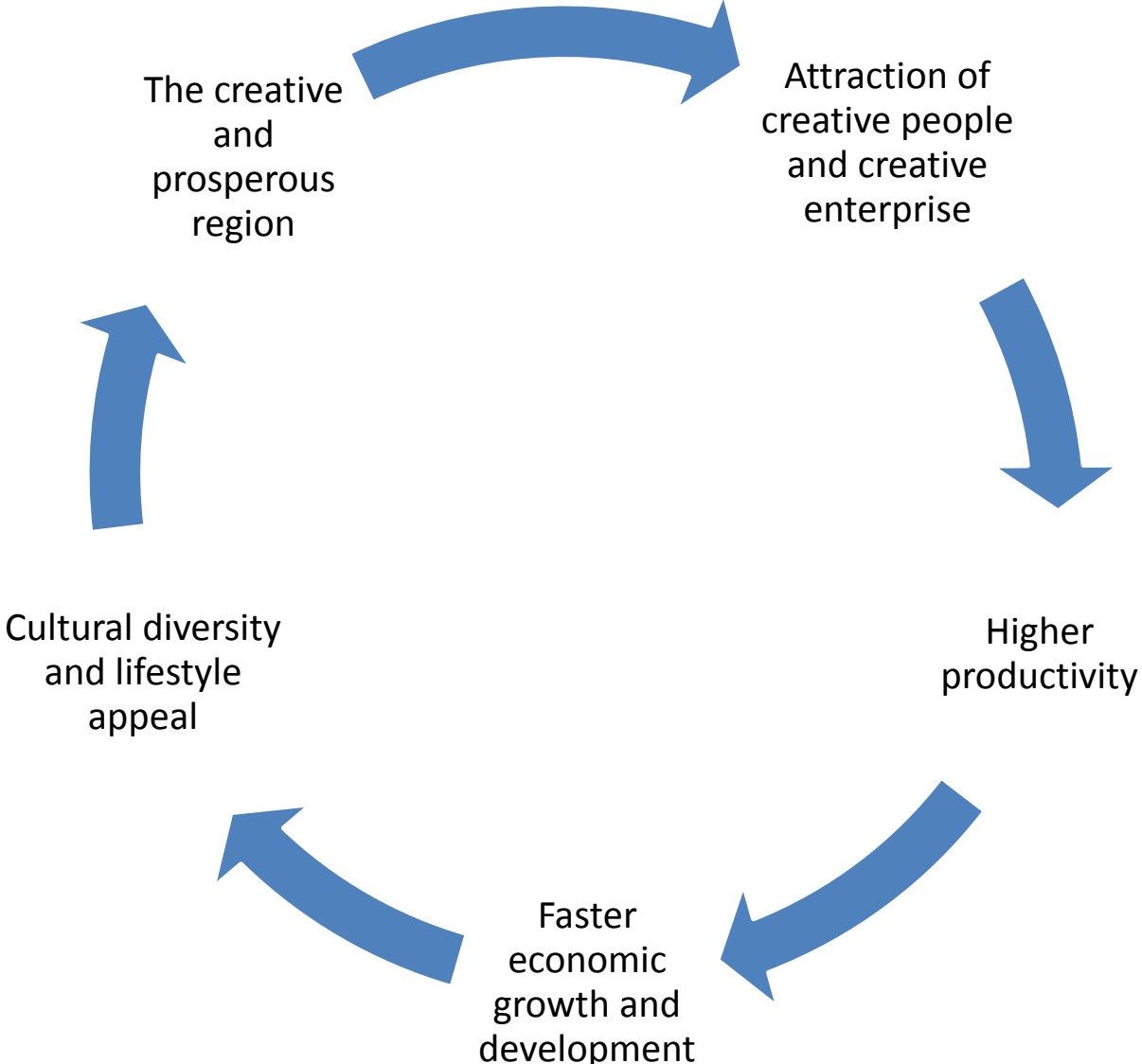
Creative Industries Strategies



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



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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