Blue Mountains Creative Industries Profile

Issue 2: 2018

Contents

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1.0 Introduction

In 2001, the UK Department of Culture, Media and Sport defined the Creative Industries as "those industries which have their origin in individual creativity, skill and talent, and that have a potential for wealth and job creation through the generation and exploitation of intellectual property."

Whilst there is no official definition of Creative Industries for Australia, various state governments and organisations are developing definitions. In 2013, the NSW Creative Industries Action Plan used two broad groupings, namely: Cultural Production and Creative Services.

Cultural Production includes:

- Music, performing and visual arts
- Libraries, archives and museums
- Publishing
- Media production and broadcasting

Creative Services includes:

- Internet and digital services — service providers and computer system design and related services
- Advertising
- Design (including architectural and industrial design)

The NSW Department of Industry is currently developing a Creative Industries Strategy. Its draft document further refines the definition using the "creative intensities" approach and also notes some industry sectors for possible future inclusion demonstrating the dynamic nature of this industry. The NSW document also references classifications used in Victoria, many of which are in line with BMEE's view of what is included in the local Creative Industries.

† As the NSW Creative Industries Strategy is currently in draft form, we have referenced throughout this document the most recently available data for Creative Industries in NSW, the NSW Creative Industries Economic Profile (2013) by the Department of Industry and Investment (incorporating ABS Census 2011 data).

Background to Creative Industries

The Blue Mountains has long been recognised as a creative hub and was named the inaugural 'City of the Arts' in 1998. Much of the success of the region as a premier tourism destination is linked to arts and cultural experiences. A residence and retreat destination for many of Australia's pre-eminent artists across all disciplines, and a renowned festival location, the Blue Mountains' reputation as an arts and cultural hub is well established.

The 2012 opening of the Blue Mountains Cultural Centre in Katoomba further cemented the region's competitive advantage by providing a world-class exhibition program, the world-heritage interpretive centre and a focal point for creative industry development. The Blue Mountains Theatre and Community Hub, opened in 2015 at Springwood adds strength to the region's appeal as a creative destination.

In 2015, BMEE developed the MTNS MADE brand and campaign to showcase the Creative Industries cluster by facilitating collaboration and positioning the Blue Mountains as a hub of creative excellence.

Creative Industry Sectors

As there is no official definition given to industries classified as 'creative' in Australia, the industries listed in Table A below in the Blue Mountains LGA, have been identified as contributing to the local Creative Industries sector using Australian Bureau of Statistics (ABS) Industry Codes — ANZSIC 2006. The Creative Industries in the Blue Mountains has been divided further into two sectors: Cultural Production and Creative Services, as suggested by the NSW Department of Industry and Investment, 2013. Nfd (Not further defined) and Nec (Not elsewhere classified) sectors have been included where it is considered to be appropriate and likely to refer to Creative Sector activities.

Table A Sectors classified as Creative Industries in the Blue Mountains

CULTURAL PRODUCTION	CREATIVE SERVICES
Music, Performing and Visual Arts	**Internet and Digital Services**
Music and Other Sound Recording Activities	Internet Service Providers and Web Search Portals
Performing Arts Operation	Data Processing and Web Hosting Services
Performing Arts Venue Operation	Computer System Design and Related Services
Creative Artists, Musicians, Writers and Performers	Software Publishing
Creative and Performing Arts Activities, nfd	Internet Publishing and Broadcasting
Arts and Recreation Services, nfd	Internet Service Providers, Web Search Portals and Data Processing Services, nfd
Publishing	**Design**
Music Publishing	Jewellery and Silverware Manufacturing
Directory and Mailing List Publishing	Architectural Services
Newspaper Publishing	Other Specialised Design Services
Magazine and Other Periodical Publishing	Professional Photographic Services
Book Publishing	Engineering Design and Engineering Consulting Services
Other Publishing (except Software, Music and Internet)	Other Professional, Scientific and Technical Services, nfd
Printing	Architectural, Engineering and Technical Services, nfd
Printing Support Services	Other Professional, Scientific and Technical Services, nec
Publishing (except Internet and Music Publishing), nfd	Professional, Scientific and Technical Services, nfd
Newspaper, Periodical, Book and Directory Publishing, nfd	**Miscellaneous Creatives**
Sound Recording and Music Publishing, nfd	Clothing Manufacturing
Media Production and Broadcasting	Footwear Manufacturing
Motion Picture and Video Production	Textile, Leather, Clothing and Footwear Manufacturing, nfd
Post-production Services, Other Motion Picture and Video Activities	Textile Manufacturing, nfd
Free-to-Air Television Broadcasting	Natural Textile Manufacturing
Cable and Other Subscription Broadcasting	Synthetic Textile Manufacturing
Radio Broadcasting	Leather Tanning, Fur Dressing and Leather Product Manufacturing
Reproduction of Recorded Media	Textile Product Manufacturing, nfd
Motion Picture and Sound Recording Activities, nfd	Textile Floor Covering Manufacturing
Motion Picture and Video Activities, nfd	Cut and Sewn Textile Product Manufacturing
Motion Picture and Video Distribution	Textile Finishing and Other Textile Product Manufacturing
Motion Picture Exhibition	Knitted Product Manufacturing
Broadcasting (except Internet), nfd	Clothing and Footwear Manufacturing, nfd
Television Broadcasting, nfd	Wood Product Manufacturing, nfd
Information Media and Telecommunications, nfd	Other wood Product Manufacturing, nec
Libraries, Archives and Museums	Arts Education
Libraries and Archives	Adult, Community and Other Education, nfd
Museum Operation (includes Art Gallery Operations)	Adult, Community and Other Education, nec
	Education and Training, nfd
	Advertising
	Advertising Services

2.0 Employment within the Creative Industries Sector

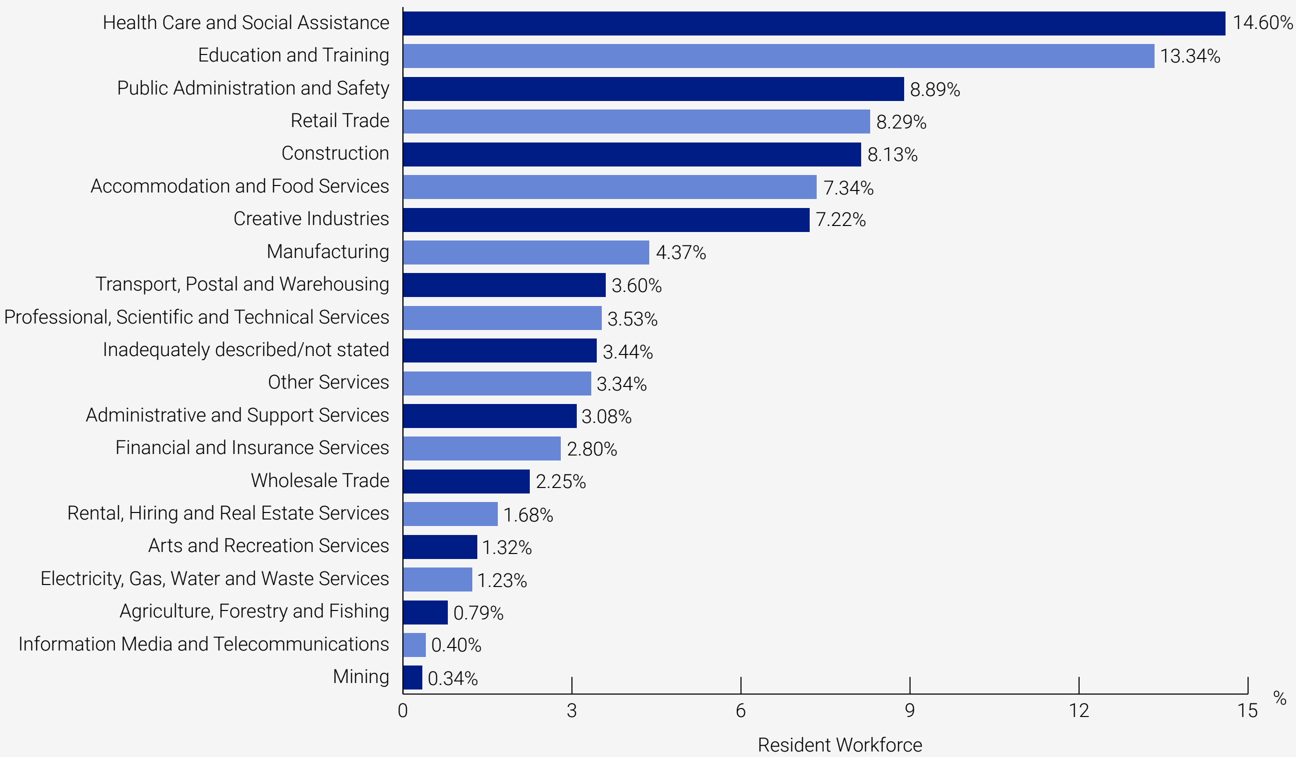
According to Infrastructure NSW (Infrastructure NSW Cultural Infrastructure Strategy 2016), the state is home to close to 40% of Australia's jobs in the Creative Industries and the majority of Australia's creative industry businesses. NSW contains almost half of all film, television and radio businesses in Australia and nearly 40% of all music and performing arts jobs in Australia. Creative Industries directly employ almost 148,000 people in NSW (around 4.7% of total employment in the State) and account for 6.8% of NSW's total services exports, worth around $1.38 billion.

Within the Blue Mountains LGA there were 35,875 working residents in total, i.e. people who live in the Blue Mountains and are employed either within the LGA or elsewhere. The three industry sectors (not including the Creative Industries[1]) which employed the majority of Blue Mountains residents were:

1. Education and Training (5,305 people or 14.8%)
2. Health Care and Social Assistance (5,238 people or 14.6%)
3. Public Administration and Safety (3,191 people or 8.9%)

When the Creative Industry Sector is included as a separate sector of employment (as defined in Table A within the Blue Mountains LGA), it ranked seventh, employing an estimated 2,590 working residents. This equates to approximately 7.22% of the total working residential population positioning the Creative Industries sector in the top ten of all employing sectors as illustrated in Figure A below.

Figure A Blue Mountains resident workforce by industry sector of employment incorporating the Creative Industries, 2016



Source: ABS Census 2016, A.P. SHEERE CONSULTING

[1] Note: industry employment figures have been adjusted to take account of the sub-industry sectors identified as making up the Creative Industries in the Blue Mountains.

NSW Summary of Creatives' place of work†

Research undertaken by the Department of Industry and Investment (2013) has identified the presence of 'creative hotspots' where the concentration of Creative Industries activity is high and concentrated in a small area. The Blue Mountains was identified as a regional creative hotspot.

The largest and 'hottest' area of creative activity is around central Sydney, in particular the local government areas (LGAs) of North Sydney, Willoughby, Lane Cove and the City of Sydney. The number of creatives who work in these areas, as a proportion of total workers, exceeds 12% — that is, over 12% of people who go to work in these LGAs work in the Creative Industries.

Outside of the Sydney metropolitan area, there are a number of regional Creative Industries hotspots identified by the Department of Industry and Investment as shown in Table B.

Table B NSW Dept of Industry and Investment regional Creative Industries 'Hot Spots', 2013

REGIONAL NSW AREA	SECTOR OF CONCENTRATED ACTIVITY
Byron Bay	Concentrated activity in terms of the proportion of workers that are active in the Creative Industries in general.
Byron Shire	In terms of the concentration of design workers, as well as music, visual and performing artists (MVPA).
Palerang LGA and Blue Mountains LGA	Regional hotspots for music, visual and performing artists (MVPA) activity.
The Northern Rivers, Port Macquarie, Coffs Harbour, and a south eastern "creative belt" stretching from south of Sydney into the Yass Valley	Higher concentrations of Creative Industries activity than the majority of regional NSW.

Source: NSW Creative Industries economic profile, Dept Industry and Investment, 2013.

Where are Blue Mountains resident Creatives employed?

Based on ABS Census data, 20,360 or 57% of Blue Mountains LGA resident workers travel outside of the area to work. 43% (15,290 persons) of working residents worked within the Blue Mountains LGA itself followed by Penrith — 18% (6,582 persons) and Sydney — 6% (2,314 persons).

The number of Blue Mountains residents working within the Creative Industries sector in the Blue Mountains LGA is estimated to be 1,289 persons in 2016 or 53%.

Those employed outside the Blue Mountains LGA in the Creative Industries was approximately 1,126 persons or 47% using ABS 2016 Journey to Work data.

Sydney LGA followed by the Penrith LGA provided most jobs for Blue Mountains Creative Industries sector workers outside the Blue Mountains.

The top 10 identified regions which employed most Blue Mountains residents in the Creative Industries are shown in Table C.

53% of residents working in the Creative Industry sector, work within the Blue Mountains LGA

Table C Top 10 LGAs employing most Blue Mountains residents in the Creative Industries, 2016

RANK	PLACE OF WORK	WORKERS
1	Blue Mountains	1,289
2	Sydney	349
3	Penrith	236
4	Parramatta	83
5	North Sydney	65
6	Blacktown	57
7	Ryde	43
8	The Hills Shire	31
9	Willoughby	27
10	Cumberland	20

Source: ABS 2016 Journey to Work data,
A.P. SHEERE CONSULTING

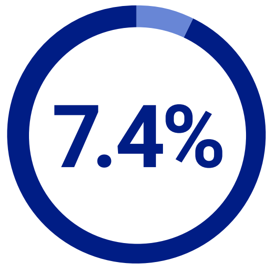
Note: industry employment figures have been adjusted to take into account the sub-industry sectors identified as making up the Creative Industries in the Blue Mountains thus avoiding any double counting of figures.

Creative Industries jobs available locally

The employment data in Figure B represents the number of people employed by businesses/organisations in each of the industry sectors within the Blue Mountains LGA. This 'place of work' data represents the total number of jobs without conversion to full-time equivalent employment.

In total there were 18,457 jobs identified in the Blue Mountains LGA (as opposed to outside the LGA) based on Census 2016 data. Health Care and Social Assistance provide the most employment with 3,193 local jobs or 17% of the total number of jobs within the Blue Mountains LGA. This is followed by Accommodation and Food Services (2,514 jobs or 14%), Retail Trade (2,031 or 11%) and Education and Training (1,888 jobs or 10%).

By comparison the Creative Industries sector with an estimated 1,374 jobs lies within the top five employing sectors providing 7.4% of the locally available jobs (i.e. within the Blue Mountains LGA) — see Table D and Figure B.



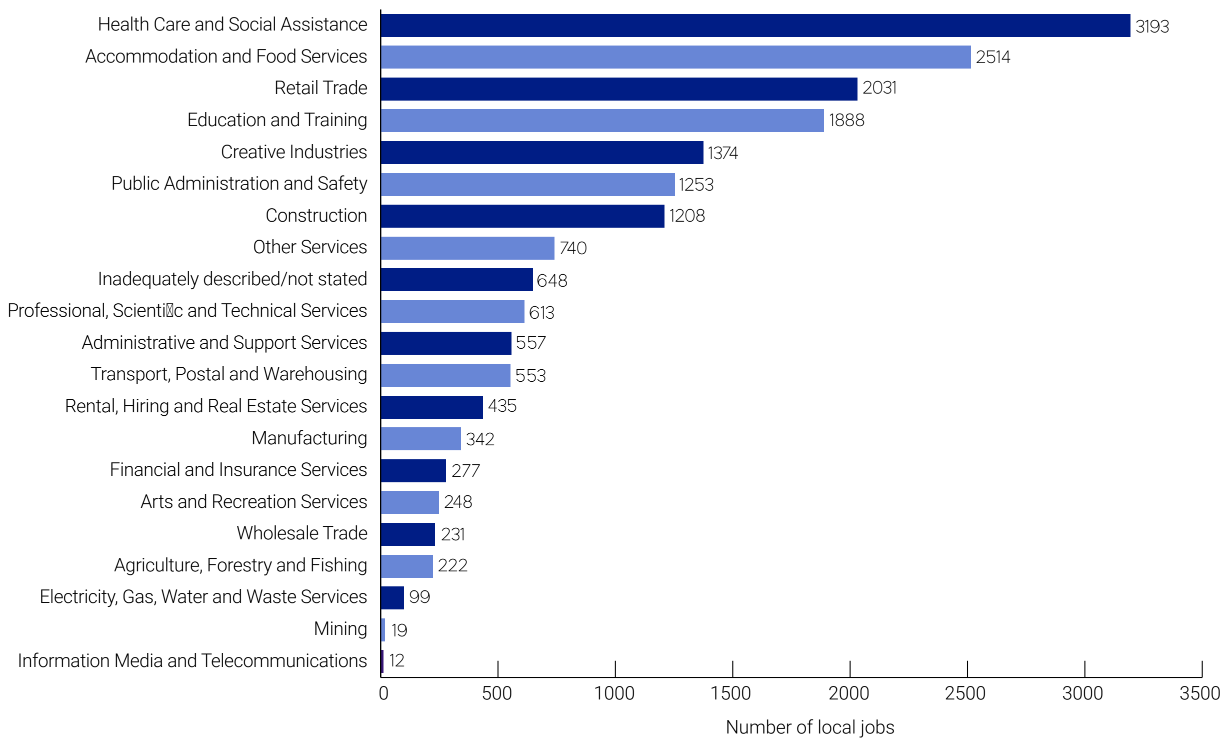
The Creative Industries sector provides 7.4% of the locally available jobs (i.e. within the Blue Mountains LGA).

Table D Top 5 local employing sectors 2016

INDUSTRY SECTOR	NUMBER OF LOCAL JOBS	% OF TOTAL NUMBER OF LOCAL JOBS
Health Care and Social Assistance	3,193	17.30
Accommodation and Food Services	2,514	13.62
Retail Trade	2,031	11.00
Education and Training	1,888	10.23
Creative Industries	1,374	7.44

Source: ABS 2016 census of population and housing, A.P. SHEERE CONSULTING

Figure B Employment within the Blue Mountains LGA incorporating the Creative Industries sector, 2016



Source: ABS 2016 Census of Population and Housing, A.P. SHEERE CONSULTING

Note: industry employment figures have been adjusted to take into account the sub-industry sectors identified as making up the Creative Industries In the Blue Mountains.

3.0 Business activity within the Blue Mountains

In 2013 BMEE surveyed Blue Mountains Creative Industries workers. The results of this survey showed that most people were employed in Writing and Publishing followed by Creative Makers such as handicraft, jewellery, furniture, ceramics, and textiles.

Table E Top 5 employing sectors

INDUSTRY SECTOR	% OF RESPONDENTS
Writing & Publishing	23.84%
Creative Makers (handicraft, jewellery, furniture, ceramics, textiles, design pieces etc)	19.87%
Performing Arts	15.89%
Painting	13.91%
Graphic design	13.25%

Key Results Summary

82% of respondents lived in either Katoomba (52%), Blackheath or Leura (15% each).

77% worked from home and 84% did not employ any staff.

70% were Business Owners established as Sole Traders.

50% of respondents had a source of income other than the work they did in the Creative Industries.

84% distributed their products online and 40% sold their goods to international markets.

Image: © Annie Spratt

4.0 Economic impact of the Creative Industries

Industry Value Added — NSW

Industry Value Added (IVA) is a measure of an industry's economic size in terms of its contribution to the value of goods and services produced in a country or region.

Estimates for the IVA of Australia's Creative Industries indicate that the size of the sector was over $36 billion in 2012. This ranks the Creative Industries 13 out of 20 among Australian industries in terms of economic size. Creative Services accounts for two thirds of the Industry Value Added of the total Australian Creative Industries, with Cultural Production making up the remainder.

Based on this IVA data, internet and digital services was by far the largest segment, accounting for half of all Australia's Creative Industries IVA. Music, print and other publishing, followed by design, and media production and broadcasting were the next largest segments by IVA. Source: IBISWorld; ABS cat. no. 5204.0; NSW Trade & Investment 2013 estimates.

Industry Value Added — Blue Mountains LGA

To estimate the Industry Value Added for Creative Industries in the Blue Mountains LGA, input/output data was analysed using the REMPLAN tool. Each sector identified as a Creative Industry in the Blue Mountains was reviewed and numbers adjusted where necessary to avoid double counting to create values for the Creative Industries sector.

This analysis showed (see Table G), for output of $372.039 million resulting from 1,374 Creative Industries jobs based in the Blue Mountains LGA, the direct value-added to the local Blue Mountains economy is estimated at $166.456 million. From this direct effect, flow-on supply-chain effects in terms of local purchases of goods and services are anticipated. It is estimated that these indirect impacts would result in a further increase to value-added of $80.815 million.

The increase in direct and indirect output and the corresponding jobs in the economy result in wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario are expected to further boost value-added by $63.249 million.

Total value-added to the local economy by the Creative Industries sector therefore, including all direct, supply-chain and consumption effects is estimated to be $310.520 million (see Table G).

Taking the estimate of direct Value Added ($M) to the economy, comparatively speaking the Creative Industries sector was the sixth greatest contributor at approximately $166.46 million in Dec 2017 (see Table F).

Table F Estimated value added to local economy by industry sector, Dec 2017

INDUSTRY SECTOR (EXCLUDES INADEQUATELY DESCRIBED/ NOT STATED)	VALUE ADDED ($M)	VALUE ADDED (%)	FULL TIME EQUIVALENT LOCAL JOBS	% SHARE OF LOCAL EMPLOYMENT
Rental, Hiring and Real Estate Services	596.23	23.91	435	2.44
Health Care and Social Assistance	296.24	11.88	3,193	17.93
Public Administration and Safety	193.68	7.77	1,253	7.04
Education and Training	175.89	7.05	1,888	10.60
Accommodation and Food Services	171.03	6.86	2,514	14.12
Creative Industries	**166.46**	**6.68**	**1,374**	**7.72**
Construction	166.05	6.66	1,208	6.78
Retail Trade	144.08	5.78	2,031	11.40
Financial and Insurance Services	118.16	4.74	277	1.56
Professional, Scientific and Technical Services	82.00	3.29	613	3.44
Transport, Postal and Warehousing	76.78	3.08	553	3.11
Administrative and Support Services	65.78	2.64	557	3.13
Other Services	58.07	2.33	740	4.16
Wholesale Trade	44.32	1.78	231	1.30
Agriculture, Forestry and Fishing	40.26	1.61	222	1.25
Electricity, Gas, Water and Waste Services	37.90	1.52	99	0.56
Manufacturing	35.78	1.43	342	1.92
Arts and Recreation Services	16.71	0.67	248	1.39
Mining	5.59	0.22	19	0.11
Information Media and Telecommunications	2.28	0.09	12	0.07
Total	**$2,493.29**		**17,809**	

Source: REMPLAN, incorporating data sourced from the ABS 2016 census, 2008/2009 ABS national input/output tables, and ABS gross state product (Dec 2017)
A.P. SHEERE CONSULTING

Impact on output

Output data represents the gross revenue generated by businesses/ organisations in each of the industry sectors in a defined region. Gross revenue is also referred to as total sales or total income.

For output of $372 million resulting from the 1,374 local Creative Industries jobs, it is estimated that the demand for intermediate goods and services is $173.824 million.

These supply-chain effects include multiple rounds of flow-on effects, as servicing sectors have output and demand for local goods and services in response to the direct output.

Direct and indirect output would typically correspond to jobs in the economy. Corresponding to this employment would be wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario are estimated at $104.804 million.

Total output, including all direct, supply-chain and consumption effects is estimated to be impacted by the Creative Industries by up to $650.668 million.

+ $372.039 million

gross revenue resulting from the 1,374 local Creative Industries jobs

+ $173.284 million

estimated demand for intermediate goods and services

+ $104.804 million

estimated consumption effects from Creative Industries employment

= $650.668 million

estimated total output impacted by the Creative Industry sector

Impact on employment

It is estimated that the flow-on industrial effects of the 1,374 local Creative Industries jobs in terms of local purchases of goods and services, is a further 587 jobs.

A proportion of the wages and salaries paid to these employees are again typically spent on consumption and some of this expenditure is consequently captured in the local economy. The consumption effects of the local Creative Industries under this scenario are estimated to be a further 408 jobs.

Total employment therefore, including all direct (1,374 jobs), industrial and consumption effects is estimated to total up to 2,369 jobs.

Impact on wages and salaries

Wages and salaries in this report refers to the value of entitlements earned by employees from their employers for services rendered and includes wages and salaries received by employees in cash and in kind (e.g. provision of food, accommodation or motor vehicles), and employers' social contributions such as superannuation contributions and workers' compensation premiums.

The flow-on industrial effects of 1,374 jobs in terms of local purchases of goods and services, is estimated to result in wages and salaries of $50.009 million.

The increase in direct and indirect output and the corresponding creation of jobs in the economy are expected to result in wages and salaries paid to employees. A proportion of these wages and salaries are typically spent on consumption and a proportion of this expenditure is captured in the local economy. The consumption effects under this scenario are expected to support employment (in sectors such as retail) with wages and salaries of $26.030 million.

Total wages and salaries, including all direct, supply-chain and consumption effects is estimated to be $181.981 million.

Image: © Ona Janzen www.onajanzen.com.au

Creative Industries Economic Impact Summary

Table G below provides a summary of the estimated economic impact of the Creative Industries sector in the Blue Mountains in 2017.

Once flow-on industrial and consumption effects are also taken into consideration, the total contribution to GRP is estimated at up to $310.520 million (includes all direct, plus flow-on industrial and consumption effects.)

The Creative Industries is estimated to make a direct contribution of $166.456 million to the Blue Mountains' Gross Regional Product (GRP).

Table G Blue Mountains Creative Industries economic impact summary

IMPACT	DIRECT EFFECT ($M)	INDUSTRIAL EFFECT ($M)	CONSUMPTION EFFECT ($M)	TOTAL EFFECT ($M)	TYPE 1 MULTIPLIER	TYPE 2 MULTIPLIER
Output ($M)	$372.039	$173.824	$104.804	$650.668	1.467	1.749
Employment (Jobs)	1,374	587	408	2,369	1.427	1.724
Wages and Salaries ($M)	$105.942	$50.009	$26.030	$181.981	1.472	1.718
Value added ($M)	$166.456	$80.815	$63.249	$310.520	1.486	1.865

Source: REMPLAN 2017

5.0 Business counts

Business counts NSW

Like most industries, there are a high proportion of small businesses to total businesses in the creative sector. According to the ABS, the Creative Industries accounted for 7% of all NSW small businesses in 2011.

Of the approximately 50,000 businesses operating within the NSW Creative Industries, 97.4% were small businesses (0-19 employees), 2.3% were medium (20-199 employees) and 0.3% were large.

NSW had the largest share of creative businesses, with 36.6% of Australia's creative enterprises based in the State.

This is above NSW's share of all businesses (33.1%), indicating a higher concentration of creative organisations.

Creative Services accounted for over three quarters of Creative Industries businesses, with Cultural Production organisations making up the remaining quarter. By sheer numbers of organisations, the largest segment in the NSW Creative Industries according to the Creative Industries Profile, Dept Industry and Investment, 2013[†], was Internet and Digital Services, followed by Design, and Music and Performing Arts.

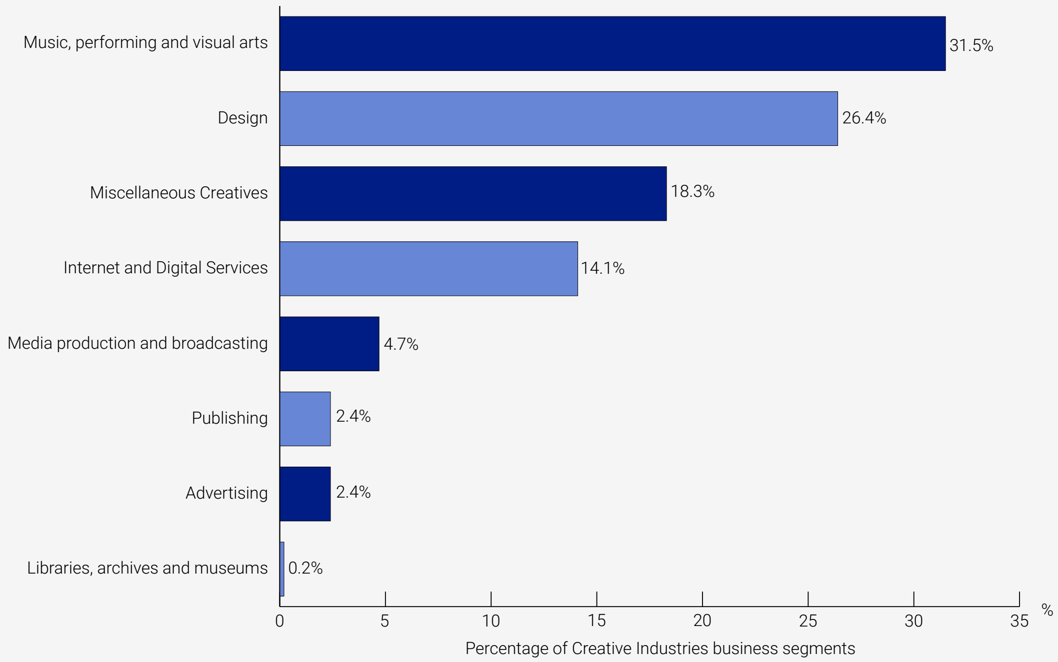
Business counts Blue Mountains

The ABS "Counts of Australian Businesses" of June 2016 shows that there were 5,354 actively trading businesses in the Blue Mountains LGA. ABR Registrations show (at August 2018) there are 20,925 Australian Business Numbers registered. The ABS use a methodology to establish how many of those ABNs are currently actively trading at an LGA-wide level. As ABN registration information is accessible to a higher level of detail we have used this information to drill down further within the Creative Industries sector.

In the Blue Mountains there were 4,469 businesses (registered ABNs) classified as Creative Industries in August 2018. Of these, Creative Services accounted for 61% of all Creative Industries businesses with Cultural Production organisations making up the remainder. The largest segment in the Blue Mountains Creative Industries was Music, Performing and Visual Arts at 31.5%. (see Figure C). There were in fact 1,188, businesses classified as Creative Artists, Musicians, Writers and Performers.

Note that these figures are derived from the raw ABR data that councils and other government agencies, including the ABS, have access to. The ABS Business Counts which are publicly available and also presented in the Blue Mountains Demographic Profile, relate to the ABS Business Counts (using the ABS methodology to identify which businesses are currently actively trading). These figures filter out many public, community and not-for-profit organisations. It should further be noted that some of the businesses counted here could be individuals primarily employed in other industry sectors and therefore, may not be included in the total for Blue Mountains residents employed in the Creative Industries.

Figure C Creative Industries business count by percentage share of total sector, 2018



Source: ABR data 2018; REMPLAN; A.P. SHEERE CONSULTING

6.0 Sector trends

Image: © Ian Espinosa

According to the NSW Creative Industries Economic Profile published in 2013 by the Department of Industry and Investment (based on ABS Census 2011 data), the Creative Industries directly employed almost 148,000 people in NSW[†].

This report identified that the Creative Industries were more important to the NSW economy than for any other state, making up 4.7% of total NSW employment, which was above the concentration for Australia as a whole (3.7%) and Victoria (4.1%), which has the second highest concentration of Creative Industries of the Australian states. The Creative Industries also accounted for around 6.8% of NSW's total services exports, worth around $1.38 billion in 2011-12.

The Creative Industries in the Blue Mountains comprises of two sectors: Cultural Production and Creative Services. The Creative Services sector employs by far the most resident workers totalling 1,670 persons or 64% of the sector's workforce in 2016, with Cultural Production employing 920 working residents. See Table H.

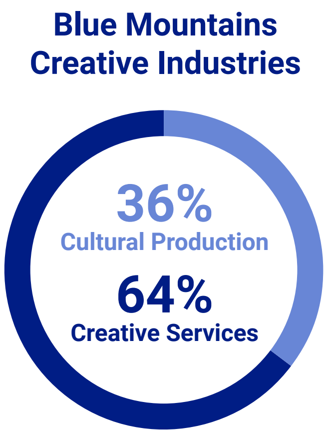
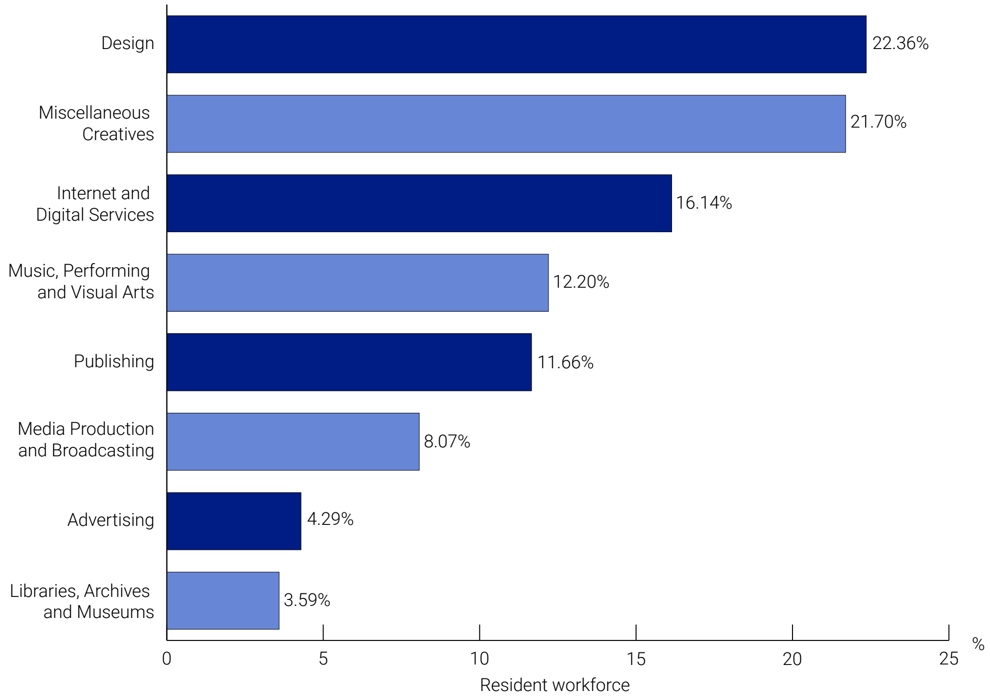


Table H Creative Industries sector summary

CULTURAL PRODUCTION	NO. RESIDENTS EMPLOYED, 2016	CREATIVE SERVICES	NO. RESIDENTS EMPLOYED, 2016
Music, Performing and Visual Arts	316	Internet and Digital Services	418
Libraries, Archives and Museums	93	Advertising	111
Publishing	302	Design	579
Media Production and Broadcasting	209	Miscellaneous Creatives	562
Sector totals	920	Sector totals	1,670
		TOTAL BLUE MOUNTAINS RESIDENT WORKERS IN THE CREATIVE INDUSTRIES	**2,590**

Source: Based on ABS Census 2016, A.P. SHEERE CONSULTING

Figure D Percentage of Blue Mountains resident workforce by Creative Industries sector, 2016

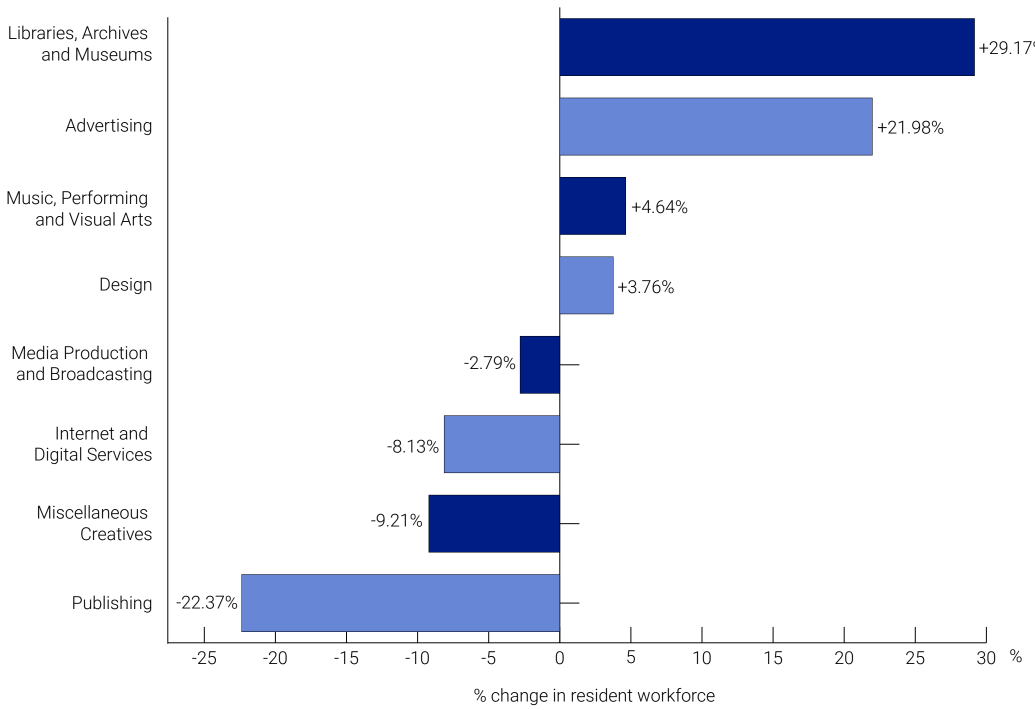


The majority of Blue Mountains resident workers in the Creative Industries in 2016 worked in the Design sector at 22.36% followed by the Miscellaneous Creatives sector at 21.7%, which includes a range of creative product manufacturing and arts education.

Source: Based on ABS Census 2016, A.P. SHEERE CONSULTING

Between 2011 and 2016 the Creative Industries sector decreased by 4% in terms of residents employed. The Libraries, Archives and Museums segment experienced the most growth between 2011 and 2016, increasing by 29.17% followed by Advertising. Publishing experienced the greatest decline in number of residents employed over the same period equalling minus 22.36%.

Figure E Resident employment in Creative Industries change over time 2011-2016



Source: Based on ABS Census 2011 and 2016, A.P. SHEERE CONSULTING

7.0 Sector analysis — Cultural Production

The Cultural Production sector within the Creative Industries includes businesses involved in producing creative outputs predominantly to consumers (B2C).

Cultural Production — NSW summary based on the NSW Creative Industries Economic Profile 2013†

Cultural Production employed 51,000 workers in NSW, or 35% of total Creative Industries employment in 2011.

Based on this NSW publication, employment growth over the previous five years had averaged 2.1% per annum in NSW, which accounted for 41.9% of Australia's Cultural Production employment during the same period.

- Australian Industry Value Added (IVA) for Cultural Production industries in 2012 was $12.3 billion, or 34% of total Creative Industries IVA. This was expected to grow at 0.4% per annum over the following five years.
- Total household spending on cultural expenditure items was estimated at $886.7 million in 2009-10 in Sydney. This was nearly 20% more than the expenditure of Melbourne households. On a per household basis, Sydney households spent more on cultural expenditure than any other city with the exception of Canberra.

Cultural Production — Blue Mountains 2016/2018

36%

Cultural Production employed an estimated 920 resident workers, or 36% of total Creative Industries employment in 2016.

5.93%

Employment in Cultural Production decreased by 5.93% between 2011 and 2016.

7.1 Music, Performing and Visual Arts

Major activities undertaken within the Music, Performing and Visual Arts (MPVA) segment include music performance and recording; artistic performances and venue operation (e.g. theatres), motion picture production and exhibition and artistic activities such as writing and visual arts.

NSW summary based on the NSW Creative Industries Economic Profile 2013†

Within the MPVA sector defined by the Department of Industry and Investment, there were over 12,000 people employed in 2011 in NSW, representing 40% of Australia's workers in the segment. Employment growth in NSW averaged 7.5% per annum from 2006-2011, above the Creative Industries average of 2.1%. This growth was largely driven by strong growth in the number of creative artists, musicians, writers and performers, as well as a corresponding increase in employees of performing arts venues over the five years to 2011. Specialists also make up the majority of workers in this segment (66%).

Of the 16,500 MPVA businesses in Australia, over 40% were located in NSW. There was a higher concentration of small businesses within this sector than in the Creative Industries as a whole, with 99.1% of MPVA firms employing less than 20 workers (the Creative Industries average was 97.4%).

Blue Mountains summary 2016/2018

The Music, Performing and Visual Arts (MPVA) segment employed approximately 316 Blue Mountains residents in 2016, representing 12.2% of workers in the Creative Industries sector. The resident workforce employed within the MPVA segment increased by 4.6% between 2011 and 2016. In August 2018, there were 1,407 registered Music, Performing and Visual Arts businesses in the Blue Mountains. See Table I.

Table I Music, performing and visual arts summary

MUSIC, PERFORMING AND VISUAL ARTS	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Music and Other Sound Recording Activities	11	0.42	6	73
Performing Arts Operation	30	1.16	33	129
Creative Artists, Musicians, Writers and Performers	237	9.15	241	1,188
Performing Arts Venue Operation	17	0.66	12	17
Creative and Performing Arts Activities, nfd	10	0.39	0	na[1]
Arts and Recreation Services, nfd	11	0.42	10	na
Total	**316**	**12.2**	**302**	**1,407**

Source: Based on ABS Census 2016, REMPLAN 2018, A.P. SHEERE CONSULTING

[1] na — data was not available for these industry sectors

7.2 Libraries, Archives and Museums

Libraries, Archives and Museums (LAM) is a mixed segment, with organisations receiving both public and private funding.

Museums are involved in the preservation and exhibition of heritage objects, and/or visual arts and crafts with aesthetic, historical, cultural and/or education value. Libraries and archives maintain collections of documents (such as books, journals, newspapers and music) and facilitate the use of such documents, physically and/or electronically.

NSW summary based on the NSW Creative Industries Economic Profile 2013†

In NSW, there were nearly 4,000 people employed in the LAM segment in 2011, making this the smallest Creative Industries segment by workforce. NSW only accounted for 27% of Australia's LAM employment, making it the only segment for which NSW was responsible for a lower share than its share of total Australian employment.

Estimated IVA for the LAM segment was $1.4 billion in 2012 (3.9% of total Creative Industries IVA).

Based on this NSW publication, this was expected to grow to $1.5 billion over the following five years, representing 1.2% growth per annum (below the Creative Industries average of 4.1% growth per year). IBISWorld noted that high levels of government assistance and low levels of competition were the key drivers of these performance estimates.

Blue Mountains summary 2016/2018

The Libraries, Archives and Museums segment employed 93 Blue Mountains residents in 2016, representing 3.59% of workers in the Creative Industries sector. The resident workforce employed within the Libraries, Archives and Museums segment increased by approximately 29.17% between 2011 and 2016. This was due to the Museum Operation segment, where the number of workers changed from 32 persons in 2011 to 54 persons in 2016. In August 2018, there were 10 registered Libraries, Archives and Museums the Blue Mountains. See Table J.

The Libraries, Archives and Museums segment employs 3.59% of workers in the Creative Industries sector.

Table J Libraries, archives and museums summary

LIBRARIES, ARCHIVES AND MUSEUMS	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Libraries and Archives	39	1.51	40	4
Museum Operation	54	2.08	32	6
Total	**93**	**3.59**	**72**	**10**

Source: ABS Census 2011 and 2016, REMPLAN 2018, A.P. SHEERE CONSULTING

7.3 Publishing

The Publishing segment is comprised of organisations engaged in music publishing, printing and traditional media publishing (e.g. newspapers and books but excluding digital publishing). These firms are integral in bringing creative work to a broad consumer audience. However, the rise of self-published artists and the growing preference for digital media has threatened the business models upon which many of these organisations have traditionally relied.

NSW summary based on the NSW Creative Industries Economic Profile 2013†

In NSW, there were approximately 18,000 people employed in the Information Media segment in 2011 which accounted for 11% of NSW's total Creative Industries employment in 2011. 41% were specialists, with the remainder support workers.

Based on this NSW publication, employment had fallen over the past five years, at an annual average rate of 1.6%. This reflected the transference from traditional (e.g. print) media to digital, which is inherently a less labour intensive method of delivering content.

Forecasts indicated that the total value of this industry was set to decline by 3.4% per annum nationally over the following five years as more content migrated to online publishing.

Global revenues were expected to rise, however, on the back of continuing demand from emerging markets for traditional, as well as new media, IBISWorld analysis indicated that increasing global competition, and the status of traditional media publishing as either mature or declining industries would be major factors affecting the performance of this segment into the medium term.

Blue Mountains summary 2016/2018

The Publishing segment employed approximately 302 Blue Mountains residents in 2016, representing 11.66% of resident workers in the Creative Industries sector. The resident workforce employed within the Publishing segment decreased by 22.36% between 2011 and 2016. In August 2018, there were 108 registered Publishing businesses in the Blue Mountains. See Table K.

Table K Publishing summary

PUBLISHING	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Music Publishing	3	0.12	5	0
Directory and Mailing List Publishing	0	0.00	7	1
Newspaper Publishing	74	2.86	123	1
Magazine and Other Periodical Publishing	42	1.62	49	23
Book Publishing	45	1.74	51	32
Other Publishing (except Software, Music and Internet)	0	0.00	0	1
Printing	113	4.36	123	36
Printing Support Services	9	0.35	11	14
Publishing (except Internet and Music Publishing), nfd	16	0.62	20	na
Newspaper, Periodical, Book and Directory Publishing, nfd	0	0.00	0	na
Sound Recording and Music Publishing	0	0.00	0	na
Total	**302**	**11.66**	**389**	**108**

Source: ABS Census 2011 and 2016, REMPLAN 2018, A.P. SHEERE CONSULTING

7.4 Media Production and Broadcasting

Organisations in the Media Production and Broadcasting (MPB) segment engage in a range of creative activities including movie and television production, post production services, and television and radio broadcasting.

NSW summary based on the NSW Creative Industries Economic Profile 2013†

In NSW, there were approximately 18,000 people employed in the Media Production and Broadcasting segment in 2011 with 60% being specialist creative workers, which is well above the Creative Industries average of 46.5%.

Based on this NSW publication, NSW also accounted for the largest share of Australian MPB employment — 50.6% (the highest NSW concentration of any Creative Industries segment employment).

The MPB segment in NSW also experienced strong growth in employment averaging a 3.4% annual increase in employment from 2006 to 2011. This is despite falls in employment in radio broadcasting and the reproduction of recorded media.

Blue Mountains summary 2016/2018

In the Blue Mountains, the Media Production and Broadcasting segment employed 209 persons in 2016 representing 8.07% of workers in the Creative Industries sector.

The resident workforce employed within the Media Production and Broadcasting segment declined slightly by 2.79% between 2006 and 2011. In August 2018, there were 210 registered Media Production and Broadcasting businesses in the Blue Mountains. See Table L.

Table L Media production and broadcasting summary

MEDIA PRODUCTION AND BROADCASTING	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Motion Picture and Video Production	54	2.08	54	148
Post-production Services and Other Motion Picture and Video Activities	7	0.27	6	39
Free-to-Air Television Broadcasting	56	2.16	60	1
Cable and Other Subscription Broadcasting	16	0.62	4	1
Radio Broadcasting	9	0.35	11	6
Reproduction of Recorded Media	11	0.42	18	6
Motion Picture and Sound Recording Activities, nfd	0	0.00	4	na
Motion Picture and Video Activities, nfd	0	0.00	4	na
Motion Picture and Video Distribution	0	0.00	0	3
Motion Picture Exhibition	32	1.24	38	6
Broadcasting (except Internet), nfd	7	0.27	3	na
Television Broadcasting, nfd	0	0.00	0	na
Information Media and Telecommunications, nfd	17	0.66	13	na
Total	**209**	**8.07**	**215**	**210**

Source: ABS Census 2011 and 2016, REMPLAN 2018, A.P. SHEERE CONSULTING

8.0 Sector analysis — Creative Services

The Creative Services sector of the Creative Industries includes businesses involved in bringing creative outputs to a mix of business and consumer customers, but is predominantly involved in business-to-business (B2B) activities.

Creative Services — NSW summary based on the NSW Creative Industries Economic Profile 2013†

- Creative Services employed 97,000 workers in NSW, or 65% of total Creative Industries employment in 2011.
- Based on this NSW publication, employment growth over the past five years averaged 4.1% per annum in Australia's Creative Services employment.
- Australian Industry Value Added (IVA) for Cultural Production industries in 2012 was $12.3 billion, or 34% of total Creative Industries IVA. This was expected to grow by 0.4% per annum over the following five years.
- Australian IVA for Creative Services was $23.9 billion in 2012 — 66% of the nation's total Creative Industries' IVA. Creative services were forecast to be the major driver of future Creative Industries growth, (5.9% per annum to 2017).
- Global Creative Services revenue growth was tipped to be even stronger at 6.2% per annum from 2012 to 2016, growing from $609 billion to $774 billion.

Cultural Services — Blue Mountains 2016/2018

64%

Creative Services employed an estimated 1,670 resident workers, or 64% of total Creative Industries employment in 2016.

3.0%

Employment in Creative Services declined by 3.0% between 2011 and 2016.

8.1 Internet and Digital Services

Certain areas of the Internet and Digital Services segment involve intrinsically creative activities, such as internet publishing and broadcasting, and software publishing (in the case of electronic games).

Some Creative Industries definitions include firms which do not directly produce or significantly affect creative content. For example, businesses such as Internet Service Providers (ISPs), data processors and web hosting businesses which are considered to be enablers for the transmission of creative output.

NSW summary based on the NSW Creative Industries Economic Profile 2013†

The global size of Internet and Digital Services Segment is difficult to accurately quantify given the diverse nature of the segment. According to PricewaterhouseCoopers, global ISP and interactive games industry revenue alone stood at over $500 billion in 2012. Of this, Australia was estimated to have accounted for 2.3% (or 12% of the Asia-Pacific region's share) of global revenue.

Within NSW and Australia, the Internet and Digital Services segment was the largest of the Creative Industries. In NSW alone it employed nearly 60,000 people in 2011, up from 47,000 in 2006. This represented 4.6% annual average growth over the five year period. The Internet and Digital Services segment accounted for 41.1% of all NSW Creative Industries firms in 2011, with 92% of those businesses classified as computer system design and related services, largely as a result of a lack of greater definition in the ABS's industry classification.

Blue Mountains summary 2016/2018

The Internet and Digital Services segment employed approximately 418 Blue Mountains residents in 2016, representing 16.14% of workers in the Creative Industries sector. The resident workforce employed within the Internet and Digital Services segment decreased by 8.13% between 2011 and 2016. This was largely due to the Computer System Design and Related Services segment, where the number of workers changed from 425 to 377 persons in 2016. In August 2018, there were 628 registered Internet and Digital Services businesses in the Blue Mountains. See Table M.

Table M Internet and digital services summary

INTERNET AND DIGITAL SERVICES	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Internet Service Providers and Web Search Portals	14	0.54	9	25
Data Processing and Web Hosting Services	18	0.69	7	29
Computer System Design and Related Services	377	14.56	425	535
Software Publishing	3	0.12	5	10
Internet Publishing and Broadcasting	6	0.23	9	29
Internet Service Providers, Web Search Portals and Data Processing Services, nfd	0	0.00	0	na
Total	**418**	**16.14**	**455**	**628**

Source: ABS; Census 2011 and 2016; REMPLAN 2018, A.P. SHEERE CONSULTING

8.2 Advertising

Much of the advertising industry work is of a creative nature.

The global advertising industry recorded global revenues of US$105.2 billion in 2012, of which Australia accounted for US$1.2 billion (or 1.1%). This demonstrates that the global industry recovered from a severe revenue decline in 2009 associated with the GFC and its aftermath, and it was predicted that global advertising revenue would continue to grow strongly to US$133 billion by 2016 (6% per annum growth).

NSW summary based on the NSW Creative Industries Economic Profile 2013†

Advertising is a significant employer in NSW, with 14,000 people in 2011 working either as support workers (7,700) or creative specialists (6,200). NSW dominated Australia's Advertising employment, with 45.8% of the workforce based in this state, having grown by 3.3% per annum over the five years to 2011.

There were over 4,600 advertising businesses in NSW in 2011, or 41% of the national total. Advertising's estimated net contribution to the Australian economy was $745 million in 2012, or 2.1% of total Creative Industries IVA.

Based on this NSW publication, growth was expected to slow over the following five years, at 1.8% per annum through to 2017 due to increased industry and pricing competition.

Blue Mountains summary 2016/2018

The Advertising segment employed 111 Blue Mountains residents in 2016, representing 4.29% of workers in the Creative Industries sector. The resident workforce employed within the Advertising Services segment increased by 21.98% between 2011 and 2016. In August 2018, there were 107 registered Advertising Services businesses in the Blue Mountains. See Table N.

Table N Advertising summary

ADVERTISING	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Advertising Services	111	4.29	91	107
Total	**111**	**4.29**	**91**	**107**

Source: ABS Census 2011 and 2016; REMPLAN 2018, A.P. SHEERE CONSULTING

8.3 Design

The Design segment predominantly consists of architectural services, and other specialised design services, such as graphic and industrial design. One of the key characteristics of the design segment is that many design workers do not work in design related industries, but rather add value to other sectors of the economy from public administration to manufacturing.

NSW summary based on the NSW Creative Industries Economic Profile 2013†

There were 24,000 people directly employed in design-related industries in 2011, making design the second largest employing Creative Industries segment in NSW. Of those, 16,600 were specialist creative workers — 69.5% — the highest ratio of any creative segment. When design workers employed in non-design industries are also included, the total employed in the segment reached 44,000.

Design workers are scattered throughout the general economy, with the largest contingent as a proportion of total employment working within the public administration and safety industry. The largest concentration of design workers here is in local government, (mostly urban and regional planners).

There were nearly 13,000 design businesses in NSW in 2011, which represented 35.6% of the Australian total. This is above NSW's share of all businesses, indicating a design concentration in the State. The concentration of other specialised design services (including graphic design) is particularly acute.

Design was estimated to have directly contributed $5.1 billion to the Australian economy in 2012 (14% of Creative Industries' total IVA). Based on this NSW publication, growth was predicted to be steady at 2.4% per annum, with design IVA tipped to reach $5.8 billion by 2017.

Globally, design was estimated to have recorded revenue in excess of US$170 billion, with architectural services accounting for US$129 billion, and graphic design US$44 billion.

The NSW Creative Industries Economic Profile estimated that Australia accounted for 6% of design revenue, and 4.8% of architectural services revenue worldwide. Global design revenue was expected to grow to US$190 billion by 2016 (equivalent to 2.5% annual growth), and Australia's share of this increased total would rise to 6.1%.

Blue Mountains summary 2016/2018

The Design segment employed approximately 579 Blue Mountains residents in 2016, representing 22.36% of workers in the Creative Industries sector.

The resident workforce employed within the Design segment increased by 3.76% between 2011 and 2016. This was largely due to the Architectural Services segment. In August 2018, there were 1,179 registered Design businesses in the Blue Mountains. See Table O.

Table O Design summary

DESIGN	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Jewellery and Silverware Manufacturing	18	0.69	25	35
Architectural Services	145	5.60	124	146
Other Specialised Design Services	114	4.40	112	399
Professional Photographic Services	59	2.28	40	270
Engineering Design and Engineering Consulting Services	178	6.87	221	278
Other Professional, Scientific and Technical Services, nfd	0	0.00	0	na
Architectural, Engineering and Technical Services, nfd	25	0.97	14	na
Other Professional, Scientific and Technical Services, nec	23	0.89	19	51
Professional, Scientific and Technical Services, nfd	17	0.66	3	na
Total	**579**	**22.36**	**558**	**1,179**

Source: ABS; Census 2011 and 2016; REMPLAN 2018, A.P. SHEERE CONSULTING

8.4 Miscellaneous Creatives

The Miscellaneous Creatives sector consists of businesses mainly engaged in the creative manufacturing of products and arts education.

Creative manufacturing of products includes activities such as clothing manufacturing, footwear manufacturing, textile and leather manufacturing and wood product manufacturing.

Arts education covers the teaching of skills specific to the fields of literature, television, radio, film, visual arts and crafts, design, music, performing arts and other arts. Skills taught include creative writing, acting, dancing, singing, music composition, music playing, visual design, radio, television and film production, post-production and direction, photography, and sound engineering and recording.

NSW summary based ABS Census 2016 data

The Manufacturing sector provided 197,335 jobs (5.8%) to total employment in NSW in 2016. This represents a decline of 25% since 2011.

Formal education in Australia may be categorised into four broad areas: early childhood education, schooling, vocational education and training (VET) and higher education. The Education and Training sector provided 282,567 jobs (8.4%) to total employment in NSW in 2016. This represents an increase of 13.5% since 2011.

Blue Mountains summary 2016/2018

The Miscellaneous Creatives segment employed approximately 562 Blue Mountains residents in 2016 representing 21.70% of workers in the Creative Industries sector. The resident workforce employed within the Miscellaneous Creatives segment decreased by 9.21% between 2011 and 2016. In August 2018, there were 820 registered Miscellaneous Creatives businesses in the Blue Mountains. See Table P.

Table P Miscellaneous creatives summary

MISCELLANEOUS CREATIVES	CREATIVES RESIDENT WORKFORCE 2016	% OF TOTAL CREATIVE RESIDENT WORKERS 2016	CREATIVES RESIDENT WORKFORCE 2011	NUMBER OF BUSINESSES AUG 2018 (SOURCE: REMPLAN ABR)
Clothing Manufacturing	19	0.73	41	62
Footwear Manufacturing	3	0.12	3	0
Textile, Leather, Clothing and Footwear Manufacturing, nfd	3	0.12	11	na
Textile Manufacturing, nfd	0	0.00	0	na
Natural Textile Manufacturing	0	0.00	0	1
Synthetic Textile Manufacturing	0	0.00	3	0
Leather Tanning, Fur Dressing and Leather Product Manufacturing	3	0.12	7	7
Textile Product Manufacturing, nfd	0	0.00	0	na
Textile Floor Covering Manufacturing	0	0.00	3	0
Cut and Sewn Textile Product Manufacturing	9	0.35	22	24
Textile Finishing and Other Textile Product Manufacturing	5	0.19	3	6
Knitted Product Manufacturing	0	0.00	0	3
Clothing and Footwear Manufacturing, nfd	0	0.00	0	na
Wood Product Manufacturing, nfd	0	0.00	3	na
Other wood Product Manufacturing, nec	0	0.00	18	11
Arts Education	187	7.22	175	291
Adult, Community and Other Education, nfd	3	0.12	3	na
Adult, Community and Other Education, nec	211	8.15	230	415
Education and Training, nfd	119	4.59	97	na
Total	**562**	**21.70**	**619**	**820**

Source: ABS; Census 2011 and 2016; REMPLAN 2018, A.P. SHEERE CONSULTING

9.0 Summary

The Blue Mountains LGA is a hub of creative activity, clearly illustrated by the economic data provided in this profile.

Both Cultural Production and Creative Services are well established within the region.

The Creative Industry Sector as a whole (according to Census 2016 data) employs an estimated 2,590 residents who live within the Blue Mountains LGA, equating to approximately 7.22% of the total working resident population. This places the Creative Industries sector in the top ten of all employing sectors for Blue Mountains residents.

In terms of jobs available within the Blue Mountains LGA itself, the Creative Industries sector provides an estimated 1,374 local jobs and lies within the top five local employing sectors. The Creative Industries subsequently provide 7.44% of the locally available jobs (i.e. within the Blue Mountains LGA itself).

Taking the estimate of direct Value Added ($M) to the economy, comparatively speaking the Creative Industries sector was the sixth greatest contributor at approximately $166.46 million in December 2017.

Once flow-on industrial and consumption effects are also taken into consideration, the total contribution to GRP is estimated at up to $310.520 million (includes all direct, plus flow-on industrial and consumption effects.)[2]

The NSW Department of Industry and Investment in 2013 clearly identified the Blue Mountains LGA as a regional 'hot spot' in terms of creative activity in particular within the Music, Visual and Performing Artists (MVPA) sector.

In the Blue Mountains LGA there were 4,469 businesses with active ABNs classified as Creative Industries in August 2018. Of these, Creative Services accounted for 61% of all Creative Industries businesses with Cultural Production organisations making up the remainder. The largest segment in the Blue Mountains Creative Industries sector was Music, Performing and Visual Arts at 31.5%.

The Blue Mountains is an established Creative Industries hotspot. Increasing living costs in nearby Sydney, subsequent demographic shifts, continuous improvement in communications technology, easy access to international markets and collaboration with education providers and other agencies means further expansion and development opportunities exist for the Blue Mountains Creative Industries sector.

Image: © William White

[2] Source: REMPLAN, Dec 2017

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