Mid North Coast Creative Industries Research Project

March 2009

Acknowledgement of the Traditional custodians of the land

I would like to acknowledge the traditional owners of the land and elders past and present. Research for this report was conducted on the land of the Gumbaynngirr nations to the North spanning Coffs Harbour, Bellingen and Nambucca, Dunghutti Nations in the Macleay, Birpai Nations in the Hastings Biripi Nations throughout Taree and Worimi Nations in the Great Lakes.

Funding bodies

This project was funded by the NSW Department of State and Regional Development, NSW Department of Premier and Cabinet, Port Macquarie Hastings Council, TAFE North Coast Institute, Southern Cross University and Newcastle University. The project was managed by Arts Mid North Coast.

With thanks

The project coordinator thanks Peter Higgs Senior Research Fellow of the Australian Centre for Excellence for creative industries and Innovation and manager of the Creative Economy mapping program for help and support in accessing industry data.

Thanks also to those who participated in the project, Richard Holloway (Arts Mid North Coast) for ongoing support throughout the process and Julia Morrell (Building Blocks Project) for assistance.

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Executive summary

The Centre for International Economics says creativity plays an important role in innovation which in turn is a driver in productivity, a key 'determinant of economic well being'.

In the Mid North Coast the 2008 Regional Economic Profile recognised cultural and recreational services (of which creative industries are a sub-sector) as one of the top four growth industries within the region.

The Mid North Coast Creative Industries Research Project set about developing benchmark data which would assist the future development of creative industries in the region.

Project reach

The research project assessed creative industries within the Mid North Coast of NSW. The geographic boundaries of the project encompassed seven local government areas which were Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie Hastings, Greater Taree and Great Lakes.

The project formally surveyed 204 creative industry participants (who represented individual businesses and groups) and 48 individuals participated in focus groups.

Defining creative industries

The foremost challenge of the project was in defining creative industries. There are ongoing arguments in both academic and business circles around the definition of creative industries which are discussed within the report.

This report analyses creative industries across eight segments which are: advertising, graphic design and marketing; film, television and entertainment software; architecture, visual arts and design; music composition and production; performing arts; writing, publishing and print media; heritage and cultural services.

These segments mirror those utilised in the 2008 Port Macquarie Hastings Council creative industries mapping project which provided a starting point for this research project.

Research streams

In addressing the broad needs of the research project ENA developed the following research streams which guided the implementation of the project.

Industry mapping

- What is the size and scope of creative industries in the region?
- Where and how do customers access creative industries in the Mid North Coast?
- What is the value of creative industries in the region to Gross Regional Product (GRP)?

Stakeholder interest areas

- How do creative industries use technology?
- How do creative industries access education?
- Where do potential creative clusters exist?
- What are the key issues that inhibit the growth of creative industries

Development strategies

- What assistance do creative industries require to grow local markets in the future?
- What assistance do creative industries require to grow export markets in the future?
- How are young people involved in creative industries in the region?

Industry overview

- The industry directly employs 1765 people across the region
- The estimated value of the industry within the region is $80.6Mil
- Employment in creative industries is concentrated in the larger centres of Coffs Harbour and Port Macquarie
- Outside of clusters in screen industries within the Coffs Harbour and Bellingen (identified and supported by ScreenLinks) there were no identifiable industry clusters in the region.

SWOT Analysis

An analysis of the industry strengths, weaknesses, opportunities and threats was conducted by the 48 focus group participants with the following results (in summary):

Strengths	**Weaknesses**
Significant art prize, festivals and events, can compete on global scale, known areas particularly on tourism paths, cafes and restaurants, stronger links govt & cross industry, diversity, level of participation, sharing knowledge, networking, aboriginal artists, passion, sea changers, retiree population (committees), low cost of living, nature, heritage, great locations, inspiring landscapes, supportive people in galleries, supporting committees, strong groups, entrepreneurship	Lack of opportunity in some genres, limited levels of tertiary training Calendar of events, internet connection, easy to fall through networks, venues, high cost of rental space, conservatorium, lack of knowledge of facilities, sustainability, aging volunteers, burnout, no strategic plan lack of cohesion between geographic areas, lack of coordination, few opportunities for youth, consistency, limited by geography, low socio-economic base, parochialism, resistance to attending cultural events by local government, limited cross industry links, awareness, lack of promotion, competitive mentality, access, not connected, no central point of coordination
Opportunities	**Threats**
Growth, arts column in local media, centres for art development, global marketplace via web, young family markets, recreational arts, tourism, cultural shift, collectives and clusters, collaborative funding efforts, collective marketing, industry trails, information and resources, networking, online support, bridging finance, staff	Marketing costs, burnout, the complainers, dropout, succession planning, parochialism, skills dying out, red tape, funding running out, insurance

Key challenges

The key challenges faced by creative industries within the Mid North Coast related to:

- Industry recognition
  - There is a current lack of recognition of the industry which stems both within and outside of the industry itself. Support for creative industry development is limited and governance structures and information networks within the Mid North Coast are disjointed.
- Infrastructure
  - The key challenges relating to infrastructure are affordable accommodation (for production and performance / exhibition space) and cost effective high speed internet access
- Collaboration
  - Incidence of collaboration throughout the industry is limited. Creative industries tend to work in 'silos' which negate opportunities for collaboration in marketing, resource sharing, skill development and information sharing.
- Lack of formal participation by key groups (Indigenous people and youth)
  - 2006 Census data shows Aboriginal people constitute 4% of the region's population. The same data indicates 8.8% of the region's population are people aged 15-24. Entry points to creative industries for both groups are limited through a distinct lack of opportunity for services which cater specifically to assisting these groups to enter the industry.
- Marketing
  - Resources to identify and develop product to cater to specific markets presents difficulties for any business. However, a pragmatic approach to marketing can be difficult for more creative components of creative industries to embrace. Creative industries often experience difficulties in reaching markets both within and outside of the region.
- Education
  - Opportunities for training in creative industries are limited throughout the region. While TAFE NSW has hubs for training in visual arts, screen industries and design the vast spread of the region makes many of these hubs inaccessible for many people. Some segments of creative industries have limited or no formal training opportunities (such as architecture and performing arts). There are also limited opportunities in non accredited training.

Development opportunities

- Enhancing the amount of affordable space
  - Community halls present ongoing difficulties for Local Government. The entities are often not self sustaining and many cases are under utilised. There is capacity in every LGA to utilise at least one community hall to designate a 'creative industries precinct' which will provide affordable space and infrastructure for creative industries business and groups. There are also multiple opportunities in presenting creative industries product (particularly visual arts) within vacant retail space. This both develops exposure for exhibitors as well as playing a role in building industry recognition and improving streetscapes and ultimately the value of retail spaces.
- Establishment of industry wide mentoring opportunities

  - The implementation of mentoring programs is key to linking existing business with students, volunteers and other potential business owners and employees.
- Enhanced opportunities for product exposure
  - The visibility of creative industries within the community is imperative to stimulate product demand and enhance the ability of customers to access product. Recommendations relate to development of accessible product trails, implementation of an ‘art bank’ inspired concept and increased public art
- Enhancing opportunities in education
  - There are gaps in education opportunities available in creative industries throughout the region. Implementation of professional development workshops, general interest courses and mastery courses are included within recommendations
- Improving industry awareness and visibility
  - As an industry grouping creative industries are not widely recognised in the Mid North Coast. This inhibits many opportunities, most profoundly the development of clusters and collaborative opportunities which stem from cluster development. The development of an industry advisory group could improve industry cohesiveness and recognition and in time improve the overall outcomes of the industry.

Project difficulties

The research project experienced difficulties in accessing industry specific economic data mostly because it did not exist in the public realm, however research was also impaired due to ‘commercial confidences’ and sheer lack of collaborative spirit. Economic data presented in this report was supported by the ARC Centre of Excellence for creative industries and Innovation (Creative industries) which should be considered as a key partner in any future research.

However, this research project did not set out to provide comprehensive economic analysis from the outset, rather an overview of the current situation.

This report provides detail of the scope of creative industries in the Mid North Coast, analysis of identified issues and recommendations for future growth.

It is believed further examination of the role of volunteers and hobbyists in the industry would be a worthwhile exercise, particularly in developing strategy around assisting these groups to develop small businesses and industry clusters which support business activities.

Kerry Grace, Evolve Network Australia

Chapter 1
Project background

1.1 Stakeholders

The Mid North Coast creative industries Research Project was funded by the NSW Department of State and Regional Development, NSW Department of Premier and Cabinet, Port Macquarie Hastings Council, TAFE North Coast Institute, Southern Cross University and Newcastle University. The project was managed by Arts Mid North Coast.

1.2 Project timing

The consultant Evolve Network Australia (ENA) was engaged in June 2008 and commenced the contract in July 2008. The contract concluded in February 2009.

1.3 Project aims

The project brief described the research project aims as follows:

- " (to) Define and describe the creative industries in this region in terms of the range of relevant activities, the numbers of persons involved in these activities and their locations; the economic (and other) value of their activities; and the major influences on and facilitators of these activities.
- Describe the unique characteristics of and major trends in the various components of the creative industries in the region, compared to other similar regions, the state and nationally
- Provide an assessment of the implications of the research findings for the future growth of the creative industries in this region, and identify specific opportunities and strategies for intervention to support this growth."

1.4 Research streams

To address the broad needs of the research project ENA developed the following research streams which guided the implementation of the project.

1.4.1 Industry mapping

- What is the size and scope of creative industries in the region?
- Where and how do customers access creative industries in the Mid North Coast?
- What is the value of creative industries in the region to Gross Regional Product (GRP)?

1.4.2 Stakeholder interest areas

- How do creative industries use technology?
- How do creative industries access education?
- Where do potential creative clusters exist?
- What are the key issues that inhibit the growth of creative industries

1.4.3 Development strategies

- What assistance do creative industries require to grow local markets in the future?
- What assistance do creative industries require to grow export markets in the future?
- How are young people involved in creative industries in the region?

1.5 Range

1.5.1 Geographic range

The project assessed the seven local government areas in NSW which are collectively defined as the Mid North Coast. The areas are Coffs Harbour, Bellingen, Nambucca, Kempsey, Port Macquarie Hastings, Greater Taree and Great Lakes.

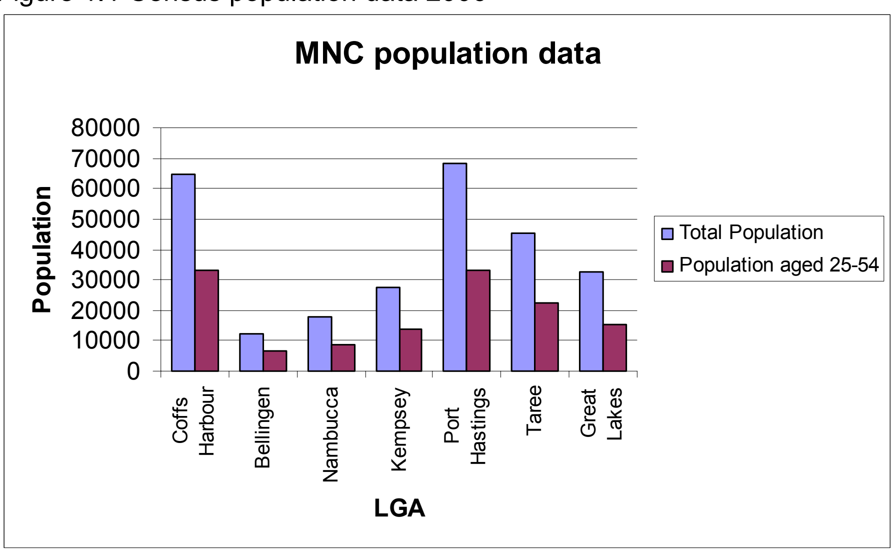
Figure 1.1 Map of Mid North Coast of NSW

Map reference Tourism NSW, 2006

1.5.2 Area population

2006 Census Data indicates the following populations in each local government area (LGA):

Figure 1.1 Census population data 2006



1.5.3 Traditional Owners

The traditional owners of the land are acknowledged as Gumbaynngirr nations to the North spanning Coffs Harbour, Bellingen and Nambucca, Dunghutti Nations in the Macleay, Birpai Nations in the Hastings, Biripi Nations throughout Taree and Worimi Nations in the Great Lakes

1.5.4 Industry range

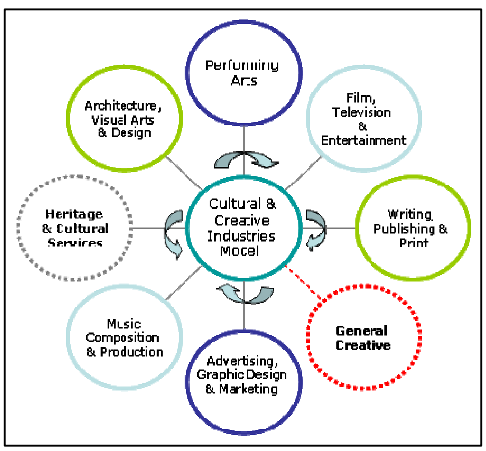
The project brief defined creative industries as per the segments utilised by the SGS group in its 2007-2008 Hastings Shire Council consultancy.

The SGS consultancy aimed to inform future creative industries planning within the Port Macquarie Hastings Local Government Area (LGA) by providing benchmark data and identifying growth opportunities.

SGS defined creative industries to the following sub-segments:
advertising, graphic design and marketing; film, television and entertainment software; architecture, visual arts and design; music composition and production; performing arts; writing, publishing and print media; heritage and cultural services and creative product manufacturing.

These definitions differed slightly from the segments which were defined within the research brief which are outlined below

Figure 1.2 Segment Model of the Mid North Coast creative industries (SGS 2006) in Mid North Coast creative industries Research Project Terms of Reference



1.5.5 Level of industry participation

There are multiple entry points and levels of participation within creative industries. Anecdotally creative industries have a high percentage of volunteers, unpaid workers and hobbyists.

The primary research component of the project targeted creative industry businesses and organisations that have an ABN. Data analysis (ABS Census data) concentrated on individual industry employment.

1.6 Methodology

The project conducted a range of activities which included:

- A photographic survey
- A survey delivered both online and as a hard copy
- A series of focus groups
- Telephone and e-mail interviews
- Council interviews
- Public submissions
- Desk research

Methodology is discussed further in Chapter 7.

1.7 Arts Governance

1.7.1 Local Government

At a Local Government level, the following describes current cultural planning processes within each entity:

Table 1.1 cultural planning tools by local government area

LGA	Cultural Planning tools and recent research
Coffs Harbour	Current Cultural Plan 2006-2009: Consultancy report undertaken to update cultural plan (2008)
Bellingen	Arts and Cultural' plan 2005
Nambucca Shire Council	'Cultural Plan' 2001
Kempsey Shire Council	Cultural Plan updated 2006
Port Macquarie Hastings Council	Cultural Plan updated 2008
Greater Taree Council	There is no Current cultural plan
Great Lakes Council	Great Lakes Arts Network (GLAN) Management Plan 2005-2007

Peak organisations by Local Government area throughout the region include:

Table 1.2 Peak creative industries bodies by LGA

LGA	Organisation
Coffs Harbour	Coffs Harbour Arts Council, Coffs Harbour Arts and Craft Group, Coffs Harbour Visual Arts Group, Woolgoolga Art Group, Gallery Society of Coffs Harbour, Orara Valley Artists, Coffs Calligraphers
Bellingen	Bellingen Local Community Arts Council, Bellingen Arts Society, mid North Coast Woodworks, Dorrigo Woodcrafters
Nambucca Shire Council	Nambucca Valley Arts Council, Valley Arts Group, Nambucca Valley Pottery Group, Nambucca Spinners and Weavers, Bowraville Arts Council Nambucca Valley Community Arts, Crafters Cottage Co-operative LTD

Kempsey Shire Council	Macleay Valley Arts Council, South West Rocks Arts Council
Port Macquarie Hastings Council	Artists Blacksmiths NSW Inc, Hastings Valley Fine Art Association, Bagnoo Artists, Camden Haven Quilters Inc, Camden Haven Arts and Craft Group, Pappinbarra Craft Group, Hasting District Photographic Society, Port Macquarie Arts Society Inc, Hastings Creative Embroiderers, Hastings Quilters, Friends of the Gallery Inc., Wauchope Embroiderers Guild of NSW
Greater Taree Council	Taree Arts Council, Biripi Art Group
Great Lakes Council	Great Lakes Arts Network (GLAN) Network, Great Lakes Spinners and Weavers, Seaside Heritage Quilters Guild, Bulahdelah Quilters, Myall Community Art & Craft Centre

* Source: Arts Mid North Coast 2008

1.7.2 Regional governance

The peak arts body within the Mid North Coast is Arts Mid North Coast which is funded by Regional Arts NSW and each of the seven local government areas which make up the region. Arts Mid North Coast employs a full time Regional Arts Development Officer and as of November 2008 a Regional Aboriginal Cultural Development Officer.

There are several regional organisations which include the Mid North Coast Writers and ScreenLinks. Regional organisations were not identified for other components of the Industry.

1.7.3 State governance

At a state level, creative industries are governed by the NSW Department of the Arts, Sport and Recreation. State relevant cultural planning tools include:

Arts NSW Strategic Plan 2007-2011

- Cultural Planning Guidelines for Local Government
- Cultural Accord 3 2006-2008 with Local Government and Shires Associations of NSW
- NSW Youth Action Plan
- Review of Theatre for Young People In Australia

The primary State Plan (2008) goal for the arts and culture is:

“Priority E8: More people using parks, sporting and recreational facilities and participating in the arts and cultural activity.
Target: Increase visitation and participation in the arts and cultural activity by 10 per cent by 2016 (to be measured by ABS surveys)” Source: Arts NSW website 2008.

A full list of governing bodies within the state of NSW can be found at attachment two.

1.7.4 Federal governance

At a Federal level creative industries are governed by the Federal Government Department of Communications, Information Technology and the Arts. A list of Federal arts governing bodies can be found at attachment three.

Chapter 2
Benchmarking creative industries in the Mid North Coast

Data and methodologies provided by QUT show creative industries within the Mid North Coast to equate to a value of $80,866,000

2.1 Summary of mapping activity

The research project mapped creative industries throughout the Mid North Coast with the following key discoveries:

- Creative Industries directly employ 1765 people across the Mid North Coast.
- The value of Creative industries in the Mid North Coast is estimated to equate to $80.6 Mil. (2006)

2.2 Economic contributions

2.2.1 Contribution to economy

The Creative Industries National Mapping Project conducted by the Australian Centre for Excellence for creative industries and innovation (CCI) collated Australian Business register (ABR) and Census data between 2004 and 2007.

The project identified "155,000 GST registered creative enterprises" and "253,000 creative enterprises without GST Registration" Australia wide.

Creative industries have previously been studied and reported on as 'the arts' or 'cultural and recreational services'. 2006 Census data grouped creative industries with the cultural and recreational services definition which includes services beyond the scope of creative industries.

There is minimal publicly available economic data which groups creative industries. This research has utilised a combination of 2006 Census data, CCI data and desk research to develop this chapter.

Peter Higgs, Senior Research Fellow of CCI and manager of the Creative Economy mapping program recommends the most accurate way of assessing the economic impact across the creative industries economy in the MNC is by using the creative employment proportion of total workforce annual earnings.

Data and methodologies provided by QUT show creative industries within the Mid North Coast to equate to a value of **$80,866,000.**

This amount is significantly less than the 2008 SGS Hastings mapping project which indicated creative industry contributions within Port Macquarie Hastings LGA were $92 million. However, this data has not taken into account any multiplier effects which would naturally inflate this figure.

ABS data (in Regional Development Board, Mid North Coast Regional Economic Profile, 2008) estimates the 'Cultural and Recreational Services sector contributed an estimated $130.9million (1.2%) to the Mid North Coast Gross Regional Product in 2005-06'.

The ATO Summary of Company Tax for 2003/04 indicates that there were 6,620 tax liable businesses in the Cultural and Recreation Services in Australia generating $9.65 billion in net business income.

2.2.2 Export and import

Austrade's website notes an increase in demand for Australian creative industries product, particularly 'music, publishing, film, indigenous art and decorative arts'.

In 2005-06 Austrade supported companies completed '459 export deals totalling $301,000,000'

2.2.3 Industry growth

The Mid North Coast regional Economic Profile (2008) indicated 'the sectors (Cultural and Recreational Services) economic contribution has grown at approximately 5.8% per annum since 2002-03'.

2.2.4 Employment

The time-line series of Occupation by Industry from 1996 to 2006 indicates that employment in the **Arts and Recreation Services** sector (a sub sector of Creative Industries) has increased by 39% since 1996 to 1355 people.

This increase is above the general increase in employment levels over the same time of 22% to 102,873 jobs and is above the median rate of increase for employment sectors did not experience a fall in the number of people employment over the same time period. (ABS 2006 Timeline Series Industry of Employment)

Table 2.1 Employment in Cultural and Recreation services in the Mid North Coast

	MNC	NSW
Arts & Recreation services employment	1,355	39,574
Total employment	102,873	2,909,440
% total employment	1.3%	1.3%

Source: 2006 Census data Industry of Employment by Occupation (Usual Place of Residence)

DSRD reports Cultural and creative industries are:

- "the fastest growing source of employment over the past 10 years, increasing at a rate of 74% higher than the average for all industries."
- NSW is home to 38% of Australia's creative workforce, and Creative Occupations account for 6.3% of the State's total workforce.
- There is strong growth in NSW employment in Creative Digital Industries. In the past 10 years to 2006–07, employment in Creative Digital Industries has grown at an average of 2.7 per cent per annum, compared with the all industry average of 1.8 per cent per annum.

Table 2.2 creative industries Employment MNC and NSW using ABS Census data (2006)

	MNC	NSW	% of state
Writing, publishing and Print Media	371	18,614	2%
Architecture, Visual Arts and Design	382	19024	2%
Advertising, Graphic Design and Marketing	158	11625	1%
Film, Television and Entertainment software	186	13969	1%
Performing arts	148	5761	3%
Music composition and production	6	1603	0%
Creative Product manufacturing	350	16797	2%
Heritage and cultural services	106	7317	1%

Source: 2006 Census data using MNC creative industries report classifications

Figure 2.1 Breakdown of creative industries employment by Industry group using 2006 Census data

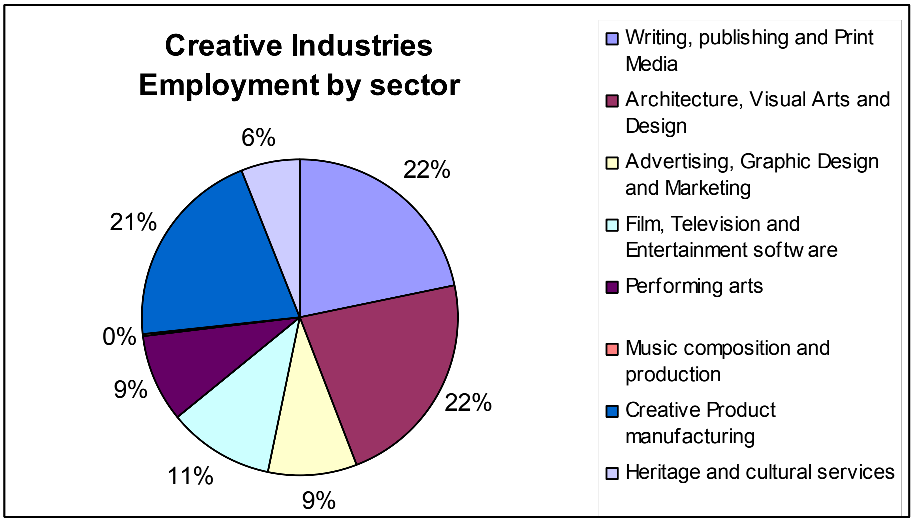


Table 2.3 Employment in creative industries in the Mid North Coast*

	TOTAL	Coffs Harbour	Bellingen	Nambucca	Kempsey	Hastings	Greater Taree	Great Lakes
Writing, publishing and print media	371	117	19	21	29	106	50	29
Architecture, Visual Arts and Design	382	113	33	25	21	114	45	31
Advertising, Graphic Design and marketing	158	43	3	0	9	68	13	22
Film, Television, Entertainment software	186	59	12	3	9	48	37	18
Performing arts	148	43	18	6	14	32	25	10
Music composition and production	6	0	3	0	0	0	0	3
Creative product manufacturing	408	116	18	22	57	109	54	32
Heritage and cultural services	106	23	6	3	10	27	14	23
TOTAL	1765	514	112	80	149	504	238	168

Source: 2006 ABS Census data

The ARC Centre of Excellence for creative industries and Innovation (2007) report 437,000 people were employed in creative industries across Australia in 2001 (5% Australian workforce). This employment generated almost $21 billion (salaries and wages).

2.3 Social contributions

Creative industries make many social contributions to the MNC which aid both the social and physical well being of people throughout the region.

Every town within the LGA has some form of public art which has been developed as a community based project. In the Nambucca Valley there are a series of works by artist Guy Crosley which tie together as a creative tourist trail.

Beyond Empathy is a not for profit organisation that works in the community, arts and cultural development sector.

Beyond Empathy projects use a variety of arts genres to enable people to connect and communicate with community, peers, Elders and workers in a safe and friendly creative environment.

The projects have remarkable health and social impacts. In Moree NSW Beyond Empathy conducted a project with Aboriginal young mums, Elders and midwives where the mums had plaster casts made of their pregnant bellies which were then painted by Elders.

As the midwives worked with the young women to make the casts pregnancy and other health issues were discussed and the women were able to build supportive networks with agencies in the community.

The women who participated in the project were reported to have spent longer than average breast feeding their babies and the birth weights of their babies (on average) were higher that other mothers who did not participate in the project. 'Mubali' was awarded one of the state's highest Baxter Health Awards for Consumer Participation.

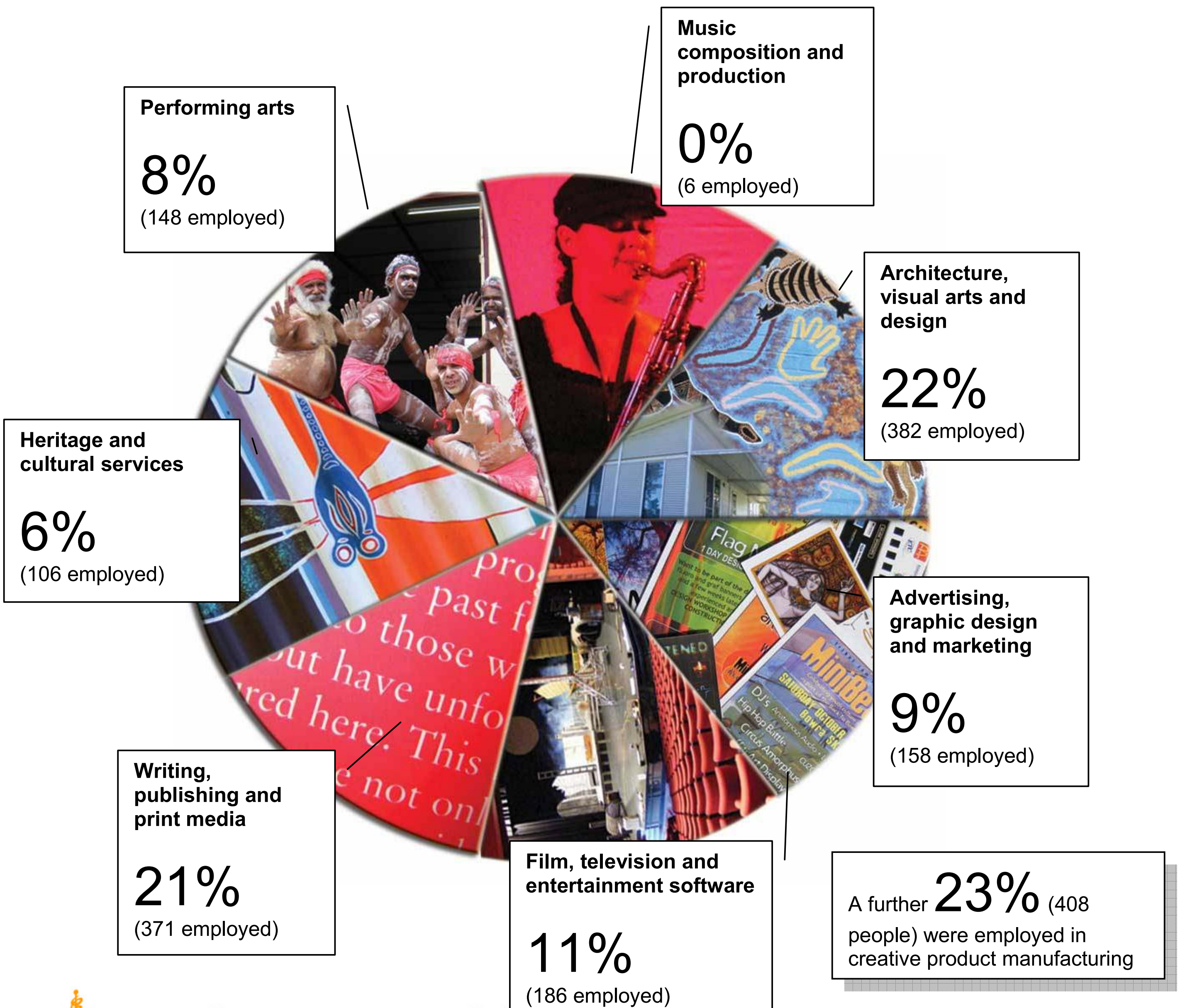
Beyond Empathy is currently working in Bowraville in the Nambucca Valley.

Community developed public art can serve as a tourist attraction. This is evident in the Nambucca Valley and Hawks Nest.

Chapter 3
about creative industry segments

The following information was informed through a region wide survey (noted in Chapter 7, Methodology) of 203 industry participants, ABS Census data and additional desk research which is noted within the references section of this document.

Figure 2.1 Creative industries employment by sector in the Mid North Coast (ABS 2006 Census data)



3.1 Industry segments in summary

Advertising, graphic design and marketing

Key data
* This segment employs 158 people in the MNC
* Employment is concentrated within the Port Macquarie Hastings LGA
* NSW employs 40% of people who work within this sector in Australia

Occupations addressed within this segment
Employees of this sector are Marketing and advertising professionals, marketing specialist, advertising specialist, copywriter, desktop publishing operators. (ARC Creative Economy Fact Sheet 2007)

3.1.1 Advertising, graphic design and marketing

Survey findings

- 6.1% (12) of the businesses surveyed throughout the project identified with the advertising, graphic design and marketing sector.
- Of those businesses most (91.7%) said they had no involvement with creative industry networks nor associations.
- 62.5% of the businesses surveyed operated as sole traders.
- The Internet was seen as an essential component of business operations.

Mid North Coast data
Figure 3.2 geographic spread of advertising, graphic design and marketing services employment in the Mid North Coast utilising 2006 Census data

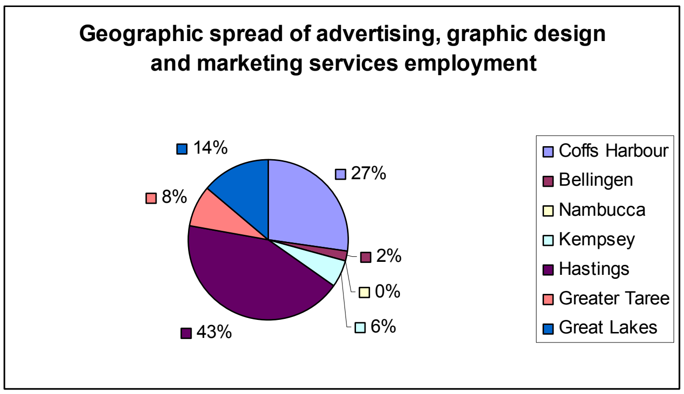


Table 3.1 Number of people employed by LGA for creative industries Advertising, Graphic Design and marketing segment (2006 ABS data)

LGA	Employed	LGA	Employed
Coffs Harbour	43	Bellingen	3
Nambucca	0	Kempsey	9
Hastings	68	Greater Taree	13
Great Lakes	22		

Outside the region
In 2007 The ARC Centre of Excellence for creative industries and Innovation (CCI) reported 14,885 registered businesses within this segment in Australia. 40% of these businesses were based in NSW. The report indicated sector growth of 5.6% between 2001 and 2006.

3.1.2 Film, television and entertainment software

Film, television & entertainment software

Key data
* This segment employs 186 people throughout the region
* 42% are employed within 'free to air television broadcasting'

ScreenLinks manager Christina Hyde says the definition 'film and television' is outdated in the industry which is now referred to primarily as 'screen industries'.

Screen industries in the Mid North Coast clearly benefit through the support of ScreenLinks, a NSW Screen Industry Office (which caters to screen industries in the MNC LGA's of Coffs Harbour, Bellingen and Nambucca).

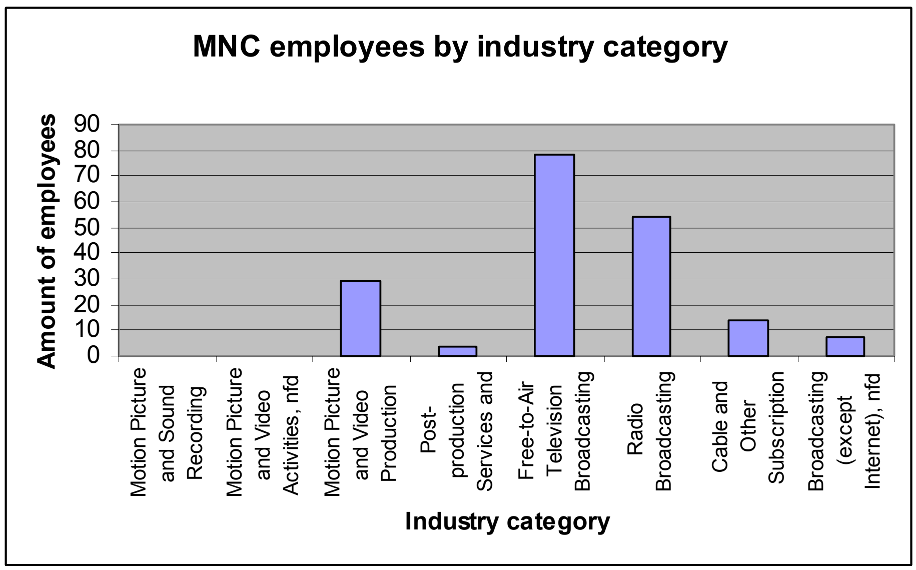
As a dedicated industry body, ScreenLinks has the capacity to both develop the industry and attract business development opportunities.

Survey findings
5.6% of survey respondents identified with the film, television and entertainment software segment.

The impact of software development and interactive content is greatly underestimated in this research due to the way in which the Industry segments have been defined. This is discussed further in Chapter 7, Methodology.

Mid North Coast data
ABS (2006) Census data counts identified 186 employees within the Mid North Coast.

Figure 3.3 Breakdown of employees by industry in the Mid North Coast within segment (2006 Census Data)



ScreenLinks online database consists of the following counts of MNC members:

Table 3.2 ScreenLinks industry database count

LGA	Count	LGA	Count
Coffs Harbour	27	Nambucca	4
Bellingen	17	Kempsey	2
Hastings	7	Taree	4

Outside the region
The ARC Centre for Excellence for creative industries and Innovation (Creative industries)'s 2007 Economic Information sheet identifies "62,000 businesses in the Software Development and Interactive Content Industry Segment". 41% of these businesses are based in NSW.

3.1.3 Architecture, visual arts and design

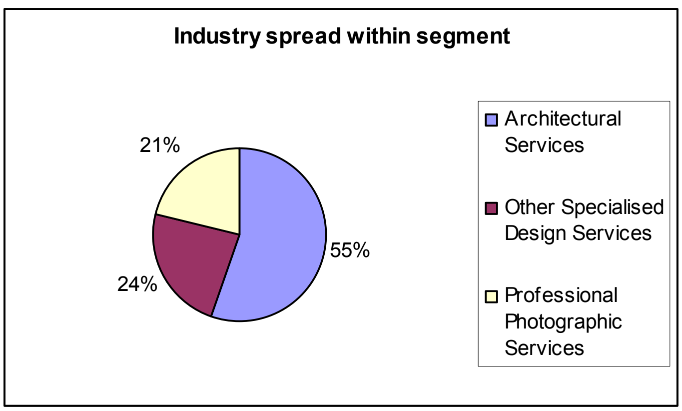
Survey findings

- 30.8% (61) of businesses surveyed throughout the project Identified as the Architecture, visual arts and design segment.
- 63% of these businesses stated some involvement in creative industries networks or associations.
- 48.8% of these businesses operated as a sole trader and a further 16.3% as a privately owned company.
- Importance of the internet to business was less important for this segment with only 32% of responses rating it as an essential tool for business and skill development.

The visual arts component of this segment is primarily included within the performing arts creative industry segment due to differences in 2006 ANZSIC industry groupings. Therefore there is a lack of industry data for visual artists within data reported for this segment utilising 2006 Census data.

Mid North Coast data

Figure 3.4 ABS Census data (2006) Employment by ANZSIC code throughout Mid North Coast by industry of employment



Outside the region

Architecture, visual arts and design

Key data

* This segment employs 382 people within the region
* 55% of employees represented by this segment are architects

Occupations addressed within this segment

Employees of this sector are Architects and landscape architects; architect; landscape architect; naval architect; urban and regional planners; artists and related professionals; visual arts and crafts professionals; painter (visual arts); sculptor; potter or ceramic artist; visual arts and crafts professionals nec; photographers; designers and illustrators; fashion designer; graphic designer; industrial designer; interior designer; illustrator; conservator; museum or gallery curator; architectural associate; museum or gallery technician; jewellers or related tradesperson; jeweller; apprentice jeweller; photographer's assistant

(ARC Creative Economy Fact Sheet

Music composition and production

Limitations: When analysed utilising 2006 ANZSIC codes, employment data within this segment is represented within categories which also relate to 'performing arts' and are therefore reported within this segment.

Performing arts

Key data
* 148 people employed within the region
* 2006 ANZSIC codes grouped to define this segment are 'creative artists, musicians, writers and performers and creative and performing arts

3.1.4 Music composition and production

Survey findings
7.1% (14) of survey responses generated from businesses within this segment. All of these respondents identified as multi-faceted businesses which included recording, record label, graphic design; music and mentoring; audio and lighting; composition, engineering, production, song writing, arrangement; choir director; manufacturer and repair of musical instruments; musician

Mid North Coast data
Data for this industry segment is not easily accessible in the Mid North Coast. 2006 Census data recorded only six employees within this category throughout the entire region.

It is assumed the main reasons for this data shortage are the cash-in-hand and volunteer nature of this segment in the region and also limitations presented by the industry segment definition.

A Yellow Pages search locates eleven recording studios throughout the region.

Outside the region
In 2001 Music composition was estimated as having worth of US$40 billion worldwide (2001,Howkins).

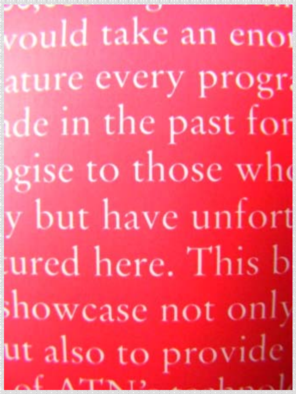
Creative industries data records the Music and performing arts segment as making up 7% of Australia's creative workforce.

3.1.5 Performing arts

Survey findings
- Performing arts constituted 16.7% of survey responses.
- There are limited opportunities in education for the performing arts sector throughout the region.
- Professional venues were also identified as an issue as is affordable performance space.

Mid North Coast data
In the Mid North Coast there are 148 Performing arts industry Employees. As with other industry segments, these employees are concentrated in Coffs Harbour and Port Macquarie (43 and 32 employees respectfully).

Outside the region
(2001,Howkins) estimated the worldwide value of this sector to reach $US213.7 billion



Writing, publishing and print media

Key data
* This segment employs 371 people within the region
* Outside of the larger LGA's there is a large representation of this segment in Greater Taree LGA

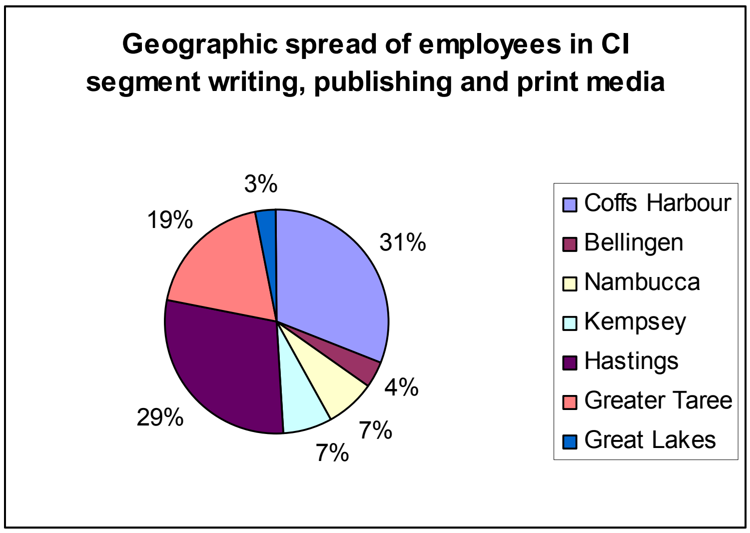
3.1.6 Writing, publishing and print media

Survey findings

- 6.6% (13) survey responses generated from businesses within this segment

Mid North Coast data
21% of the region's creative industries employees work within this sector (ABS Census data 2006).

Figure 3.5 Geographic spread of employees in creative industries segment writing, publishing and print media



Employment within this segment equates to 1.6% of employment in this sector in NSW.

Outside the region
2001 Census data analysed by CCI (2007) indicates 80,686 people are employed within this sector Australia wide (37% of these employees are from NSW).

3.1.7 Heritage and cultural services

7.6% (15) responses generated from this segment in primary research. People who identified with this segment were involved in community development, arts in health, festival management and tourism.

There are many volunteers within this industry segment who have not been accounted for in this research

3.1.8 Others

19.7% of survey respondents indicated they fit within the ‘other’ Category. This is largely due to a misunderstanding of the scope of each category or that the respondent had multiple creative industries interests and occupations which the survey was unable to collate. The ‘others’ are outlined at attachment four.

3.2 Industry clusters

While there is little evidence of clusters in the Mid North Coast possible clusters of the screen industries segment exist in the Bellingen and Coffs Harbour area

First defined in 1990 by Michael Porter clusters are "geographic concentrations of interconnected companies, specialized suppliers, service providers, and associated institutions in a particular field that are present in a nation or region" (Harvard Business School, 2008).

The benefits of clusters as described in the 2002 Federal Government 'creative industries Cluster Study' lie in opportunities to collaborate in the provision of information and resource demand and also the likelihood of the development of innovative processes due to vigorous competition.

The development of clusters can also aid the industry to:

- Gain leverage in purchasing resources and lobbying for new infrastructure
- Attract skilled staff to the area
- Attract opportunities for education and staff development
- Provide information to policy makers and lobby for policy change
- Contribute information to key players in export markets

Cluster development is a commonly used tool to which brings together industry by breaking down common barriers such as difficulties in accessing skilled staff, adequate resources, reaching consumer markets. The 2002 'creative industries Cluster study' discovered 'little evidence of clustering' though it considered it to be beneficial for creative industries in terms of 'addressing barriers and market failures in the industry'.

Hartley (2002) recognised cluster development as an important tool for creative industries who usually work on a project basis and form teams around individual projects.

While there is little evidence of clusters in the Mid North Coast possible clusters of the screen industries segment exist in the Bellingen and Coffs Harbour area. A possible explanation may be a lack of leadership and driving force across creative industries in the region, particularly as most segments identified do not have peak regional bodies.

Screen industries have clear lead over other segments of the industry in having a designated coordinator and industry association (ScreenLinks) which has driven the development of clusters, development and networking opportunities and new business development.

3.3 Markets and employment

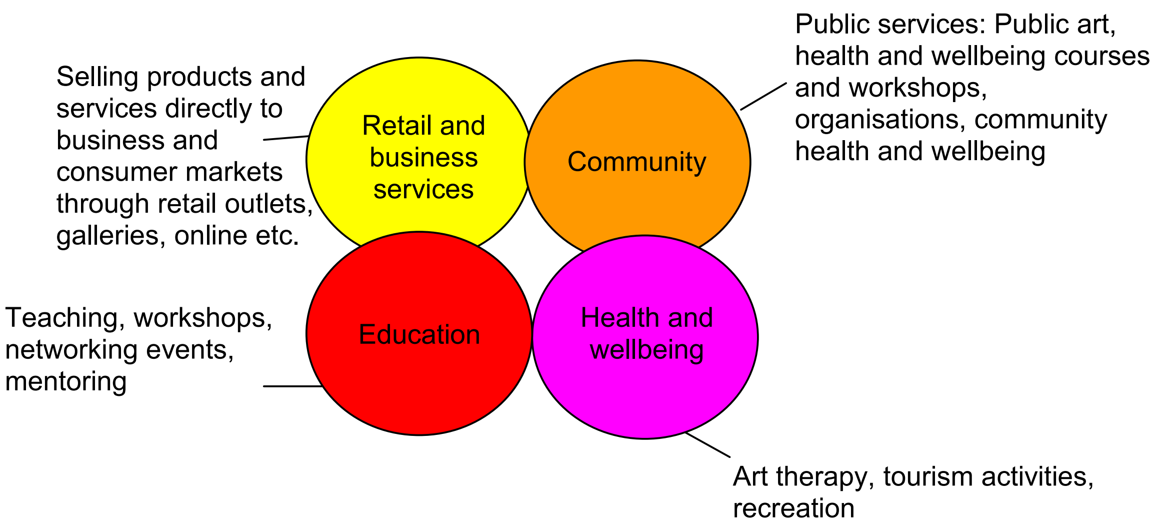
3.3.1 Reaching the marketplace

The ways in which creative industries access business and consumer markets are diverse. Anecdotal information collected throughout the project highlighted the diversity of skills utilised by many creative industries business owners to survive.

Creative industry business owners will often expand the service and product ranges offered by their businesses to serve a variety of markets. Similarly, the business owner may also become an employee to earn money to maintain the business interest.

The following figure highlights ways in which a creative industry business owner may adapt the delivery of their products and services to reach new markets.

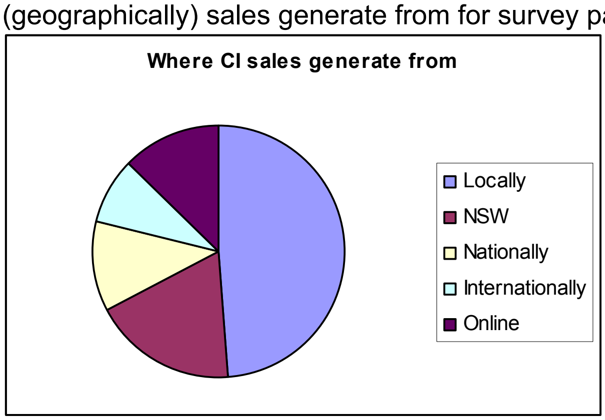
Figure 3.6 Product and service delivery



3.3.2 Location of sales

Primary research indicated most product sales generated within the region.

Figure 3.7 MNC creative industries Research Project, survey 2008 where (geographically) sales generate from for survey participants



Focus groups conducted throughout the project indicated the following distribution networks for creative industries products.

Table 3.3 MNC creative industries Research Project focus group data analysing distribution networks

Retail and community venues	Galleries, other retail stores, home studio trails (handmade booklets), library
Special events	festivals and events, Markets, readings
Performance venues	Theatres, ticket sales
Education	Workshops
Marketing activities	open days, demonstrations

3.3.3 Export markets

Austrade (2008) notes opportunities in key priority markets in Asia which include Taiwan, Hong Kong, Singapore and China. There are also established opportunities in the US and West Europe. Key export opportunities Austrade recognises are in Australian produced music, publishing, film, indigenous art and decorative arts.

The (2009) NSW Department of State and Regional Development report 'creative industry insights' states " Creative industry sectors are overwhelmingly domestically focused with exports typically comprising of around 2-3% of total revenue" The report indicates 90% of all 'electronic games revenue and 25% of book sales revenue is generated by export markets.

Chapter 4
Industry responses

4.1 About the survey

A survey was distributed between August and November 2008 both online and as a hard copy. The survey solicited **203** responses from a broad cross section of creative industries. Full data tables are included at attachment four.

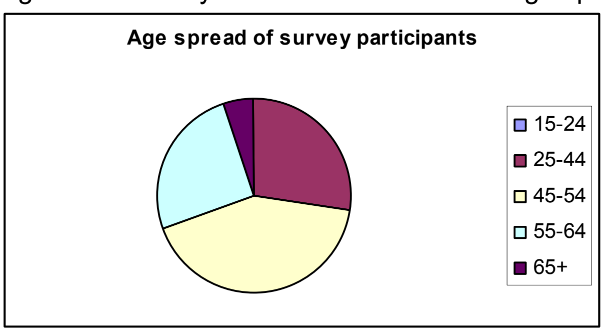
Most surveys were conducted online, only 22 were received as hard copies.

4.2 Survey information

4.2.1 Respondent information

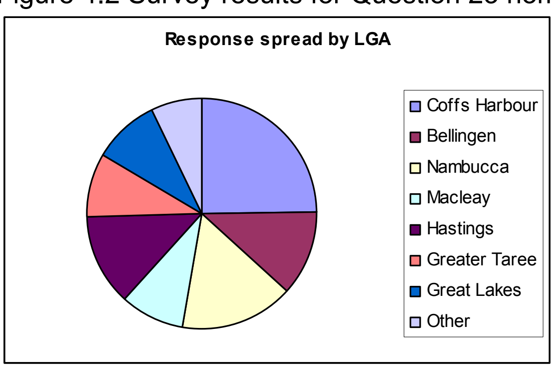
- 24% of survey respondents indicated they had moved to the region within the past five years (Qu 8)
- 60% of respondents were female (Qu. 20)
- 2.4% (3) survey respondents identified as being an aboriginal or Torres Strait Islander .

Figure 4.1 Survey results for Question 21 Age spread of survey respondents*



*60% of survey respondents answered this question

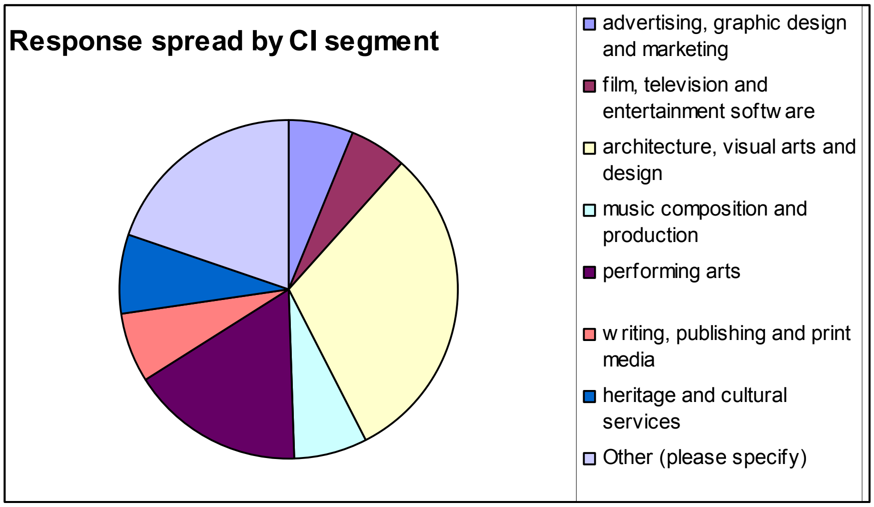
Figure 4.2 Survey results for Question 23 home postcode summarised by LGA*



*61% of survey respondents answered this question

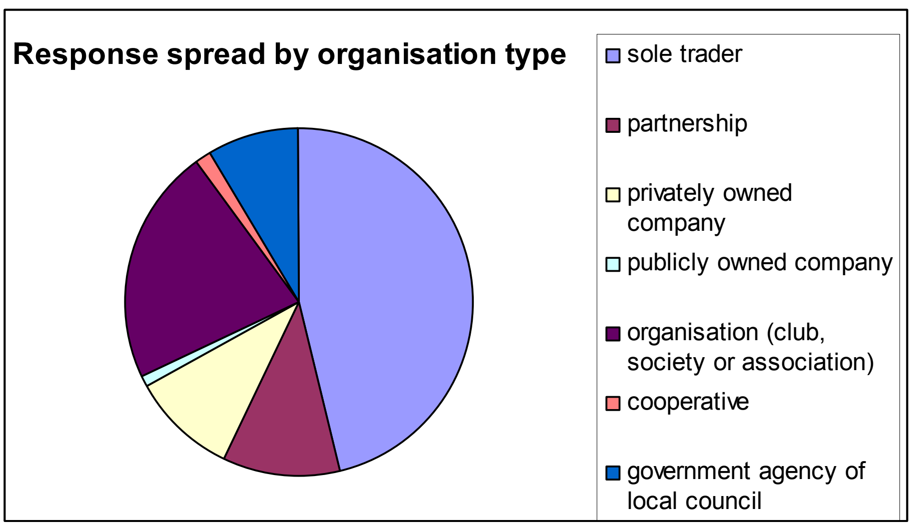
4.2.2 Business structure

Figure 4.3 Survey results for Question 1, description of involvement in creative industries*



* 98% of survey respondents answered this question

Figure 4.4 Survey results from Question 10. legal structure of businesses*



* 64% of survey respondents answered this question

- 42% of those who responded to question 13 have been operating their business for five years or less. A further 22% have been operating for 6-10 years, 21% for 11-20 years and 14% for 21 yrs or more. Most of the responses indicating twenty years or more are government or non government entities and organisations.

4.2.3 Purchasing supplies and materials

Table 4.1 Survey results from Question 14 where are supplies and materials purchased from?*

Locally	74.2%
Within the state (where?)	55.3%
Interstate (where?)	32.6%
overseas (where?)	27.3%

* 65% of survey respondents answered this question

- Many of the products purchased outside of the region are being sourced from capital cities within Australia
- Imports are purchased from Asia, USA, Europe, Indonesia and New Zealand
- 49.6% of respondents to Qu 16 (61% of survey respondents) are outsourcing some component of their services for production processes. The most commonly mentioned area of outsourcing is printing followed by graphic design based services.

4.2.4 Sales

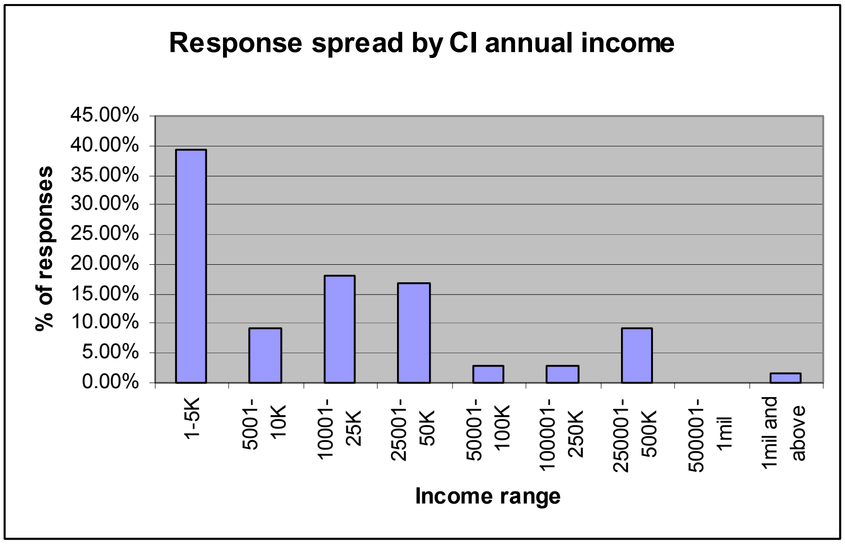
- 42.6% of Qu 12 respondents (69% of survey responses) use the internet for sales
- The average amount of business customers for survey respondents (Qu 18 answered by 55% of survey respondents) is 45% and the average amount of individual customers is 70%.

Table 4.2 Survey results from Question 18 where products or services are being purchased from*

Where sale is generated from	% of respondents selling in this location
Locally (including tourists/visitors to the region)	90.6%
NSW	34.2%
Nationally	21.4%
Internationally	15.4%
Online	24.9%

* 58% of survey respondents answered this question

Figure 4.5 Survey results from Question 33 gross annual income*



* 33% of survey respondents answered this question

4.2.5 Identified business development needs

Table 4.3 Survey results for Question 24 how industry skills were learned*

How were your skills learned?	% of respondents
at work	38.0%
with a mentor	33.9%
self taught	68.6%
in school or tertiary studies	52.9%

* 60% of survey respondents answered this question

- Of the 58 responses to Qu 24 'what level of studies' did you complete, respondents have provided the following information:

Table 4.4 Survey Question 24 count of responses

What level of studies have you completed?	Amount of responses	% of total responses
Certificate/trade	31	53%
Undergraduate	18	31%
postgraduate	7	12%
workshop	2	3%

- On a scale of 1-10 where 10 is most important 42% of respondents rated the internet's importance to their business at 10 (Qu 11). 12% rated the importance of the Internet at 1.
- 80.9% of the respondents (Qu 12, 141 responses) use the internet for research, 76.6% for networking, 66.7% for marketing, and 42.6% for sales. Other internet uses include online learning, paying bills, administration, work activities, purchasing, recruitment and proofing.
- 39% of Question 5 respondents (183 respondents) considered FUNDING to be the primary need for creative industries to develop and grow in following years. 19% believed networking opportunities were the second most important need and a further 19% saw access to training as the third highest priority.

4.3 Focus groups

Five forums were held throughout the region in Coffs Harbour, Kempsey, Taree, Forster and Hawks Nest. The groups provided the following data (a full account of data is available at attachments three).

4.3.1 Key industry strengths

Table 4.5

Category	Themes
Visual Arts Prizes	Significant art prize
Sales	Festivals and events, can compete on global scale, known areas particularly on tourism paths, cafes and restaurants
Partnerships	Stronger links govt & cross industry
Participants	Diversity, level of participation, sharing knowledge, networking, aboriginal artists, passion, sea changers, retiree population (committees)
Area	Low cost of living, nature, heritage, great locations, inspiring landscapes
Infrastructure	Supportive people in galleries
Governance	Supporting committees, strong groups
Industry	entrepreneurship

4.3.2 Key industry weaknesses

Table 4.6

Category	Themes
Education	Lack of opportunity in some genres, limited levels of tertiary training
Infrastructure	Calendar of events, internet connection, easy to fall through networks, venues, high cost of rental space, conservatorium, lack of knowledge of facilities
Funding	Sustainability
People and strategies	Aging volunteers, burnout, no strategic plan lack of cohesion between geographic areas, lack of coordination, few opportunities for youth, consistency
Customers	Limited by geography, low socio-economic base, parochialism, resistance to attending cultural events
Industry acknowledgement	By local government, limited cross industry links, awareness, lack of promotion, competitive mentality, access, not connected, no central point of coordination

4.3.3 Key industry opportunities

Table 4.7

Category	Themes
Marketing and promotion	Growth, arts column in local media
Infrastructure	Centres for art development
Customers	Global marketplace via web, young family markets, recreational arts, tourism, cultural shift
Collaboration	Collectives and clusters, collaborative funding efforts, collective marketing, industry trails, information and resources, networking
Support	Online support, bridging finance, staff

4.3.4 Key industry threats

Table 4.8

Category	Themes
Financial costs	Marketing costs
People	Burnout, the complainers, dropout, succession planning, parochialism, skills dying out
Policy and funding	Red tape, funding running out, insurance

4.3.5 How do customers access your products and services?

Table 4.9

Retail and community venues	Galleries, other retail stores, home studio trails (handmade booklets), library
Special events	festivals and events, Markets, readings
Performance venues	Theatres, ticket sales
Education	workshops
Marketing activities	open days, demonstrations

4.3.6 What is on your creative industries wish list?

Table 4.10

Funding	facilitate funding, seed funding
Infrastructure	writers centre, arts hub, increased cultural infrastructure, incubators/business development spaces, conservatorium, federal funding workshops in local halls, enhancement of resources, using empty retail space
Networking	facilitate Who's there
Industry development	a revised mindset, training for volunteers, greater tertiary access across university and TAFE and online, New ides for publicity, bureaucracy who work on common sense rather than the letter of the law, increased amount of cultural development workers, Strong and active networks, collective support, linking diverse industries, skills resource register, partnerships with organisations in Brisbane/Sydney, physical resources register, partnerships with employment agencies and strategies, communication

Chapter 5
Recognising key challenges

5.1 Overview

The research project identified several key challenges to the future development of creative industries within the Mid North Coast. These barriers related to:

- Infrastructure
- Industry recognition
- Collaboration
- Lack of participation
- Marketing
- Customer access

Table 5.1 Summary of key challenges facing creative industries in the Mid North Coast:

5.1 Industry recognition	5.1.1 Support for creative industry recognition 5.1.2 Information networks 5.1.3 Industry reference group
5.2 Infrastructure	5.2.1 Affordable space 5.2.2 Access to online services
5.3 Collaboration	5.3.1 Marketing 5.3.2 Resource sharing 5.3.3 Information sharing
5.4 Lack of formal participation by key groups: A. Indigenous people B. Young people	5.4.1 Lack of opportunity to develop at a professional level 5.4.2 Awareness of entry points and network
5.5 Marketing	5.5.1 Product development opportunities 5.5.2 Challenges in reaching (and identifying) customers 5.5.3 Promoting products outside of the region 5.5.4 Cash economy
5.6 Education	5.6.1 Opportunities in education

5.1 Industry recognition

Traditionally, creative enterprise has been grouped into industry definitions such as 'Cultural and Recreational services' or 'Cultural Industries'.

These definitions can lead to connotations of struggling artists, industries that are a by-product of tourism and not for profit organsations which rely heavily on volunteer contributions.

The creative industry definition combines commercial and purely creative enterprise. Primary research identified some creative industries businesses within the region whose turnover was in excess of $1million through to business whose turnover was no more than $5,000 per annum.

Beyond levels of income the ethos driving commercial and creative business can be so different synergies between the various components of the defined industry potentially difficult to draw.

However, the reasons for developing an understanding of and support for a creative industry group is simple - a successful industry group will ultimately enable opportunities for cluster development, collaboration, improved infrastructure and industry growth through funding and investment and therefore employment and business income.

5.1.1 Support for creative industry recognition

creative industries tend to work in 'silos' rather than collaborating across the industry (horizontal collaboration).

The idea of joining as an industry can be jarring for more creative industry participants who prefer to make their products for the products or 'arts' sake rather than a commercial commodity.

The lack of collaboration across the industry contributes to many economic leakages as work is outsourced and supplies are purchased outside of the region.

Deciding whose responsibility it is to drive the development of a 'Creative Industry' is as important as the notion of developing one.

Local government support for creative industries is often limited as councils tend to higher priority areas. Jurisdiction over creative and cultural businesses in local government often lies within different departments. Community or cultural service units usually manage cultural or creative portfolios while business or Economic Development manages the commercial end.

Dividing creative industries in this manner provides little opportunity for creative enterprise to grow as it is managed more as a community service than a business entity.

Few Councils on the Mid North Coast have staff who are dedicated to creative or cultural industries and shire cultural plans are often outdated.

Strategies to aid the recognition of creative industries are discussed in Chapter 6.

5.1.2 Information networks

Information networks are important catalysts for change within the industry. Formal networks which bridge the various sectors of creative industries do not currently exist and must be developed to enhance industry recognition and opportunities for collaboration.

The strongest regional information portal for arts and cultural organisations is Arts Mid North Coast which was clearly recognised as a 'driving force' of creative industries in primary research conducted in this project.

However, there are still gaps in the accessibility of this information across the industry. Research participants reported difficulties in knowing where to start in linking to networks.

On a local government level Councils are the most logical distributor of information to creative industries. While Coffs Harbour, Port Macquarie Hastings and Great Lakes councils (who have dedicated cultural development workers) distribute information to mailing lists smaller councils do not have the same capacity. For these councils creative industries are promoted mainly through tourism mechanisms. While this promotes the functions of creative industries it does little to consolidate and promote the industry.

The many cultural organisations and associations throughout the region also provide some form of information portal.

This information is usually provided to members only and can be arduous for the organisation to collect, collate and distribute.

5.1.3 Industry reference group

As previously mentioned there is currently no regional organisation whose role it is to advocate for the collective creative industries across the Mid North Coast.

Such a group would maintain an economic focus and worked towards industry recognition, growth, cluster development and skill development.

The group would include stakeholders who represent the industry, its associations, government and business and be representative of all sectors of creative industries across the Mid North Coast.

5.2 Infrastructure

5.2.1 Affordable space

Affordable space is a key concern for creative industries in the Mid North Coast. While much of the industry lends itself to home business operation, the high cost of commercial rent limits accessibility to customers and, more importantly reduces the visibility of creative industries.

The issue of affordable space includes commercial, production and performance space. For artists and groups who require space to produce, rehearse or meet the lack of affordable space is critical.

Even community operated facilities are unaffordable for some components of the industry. The greater problem with community facilities (such as halls) is that they are designed to be multipurpose centres so it takes more time to setup and pack up props, tools and equipment.

5.2.2 Access to online services

The lack of cost-effective high speed internet access across the region inhibits access to worldwide markets. Members of creative industries use the Internet for sales, research, marketing and networking.

Access to high speed internet services are also imperative for screen industries, designers and graphic designers who transfer large files to clients and collaborators online.

NSW Business Chamber’s regional President David Edgerley said on the organisation’s website last year:

“One of our really big issues is getting fast broadband to all businesses in the region,” “Businesses in this region with access to fast broadband can compete against business in Sydney. Without access though, there is not a level playing field and regional businesses are disadvantaged.”

Improved high speed internet access would also enhance connectivity of creative industries as opportunities in online education and networking are improved.

While the issue of accessible high speed internet services may not be resolved across the region immediately, the implementation of accessible service hubs could ease this issue in the short term (6.1.1).

5.3 Collaboration

There is little evidence of collaboration across creative industries in the Mid North Coast. To some extent this is where the community based end of the industry can be said to have a lead over established professionals.

Industry hobbyists, volunteers, amateurs (and like minded professionals) group together in organisations and associations developed as non profit entities to promote the development of ‘the arts’ or ‘arts practice’.

Some of the arts organisations within the region promote genre specific art forms, while others (such as arts councils) promote multi-faceted genres. In any case it is within these groups that most collaboration takes place.

However, with income sources for these groups deriving from government funding or similar small pools of audiences the organisations often demonstrate a competitive approach which is ultimately unhealthy for the overall industry.

Within these groups the (anecdotal) incidence of volunteer ‘burnout’ is also high and there is the additional concern of ageing volunteers with fewer young people ‘learning the ropes’ to sustain the organisations into the future.

Current coordinator Christina Hyde says ScreenLinks has assisted screen industries to participate in collaboration which has assisted the incidence of successful bidding.

5.3.1 Marketing

Product marketing is often an expensive exercise which is well beyond the reach of most individual artists.

Collaborative marketing shares not only the cost but also aids the development of the overall industry as customers are exposed to clusters of creative industries business making the area/region seem a ‘creative precinct’ worth visiting, shopping and experiencing.

The MNC Regional Development Board funded ‘Hand Made’ project was a successful booklet series that comprised of one professionally presented booklet per local government area.

Unfortunately the booklets, as any print based collateral became redundant as participating artists moved, closed or changed contact details.

More recently Kempsey and Nambucca Shires have collaborated to produce a print based arts guide which unfortunately face the same fate.

There are few current collaborative online portals for creative industries on the Mid North Coast. The primary site is the online portal of Arts Mid North Coast.

5.3.2 Resources

Resources can also be costly and in some cases prohibitive to the implementation of creative industries activities. Resource sharing either through informal or a cooperative basis is practical.

Throughout the region there are organisations which own assets such as staging, shade, props and computers. These are often under utilised or in some cases unused. Closer links between creative industries can facilitate the sharing of these resources.

Purchasing of resources is another area where collaboration can create leverage.

The incidence of similar organisations applying for funding to purchase similar resources is ongoing and could be reduced through collaboration.

5.4 Lack of participation by demographic groups: Indigenous people and young people

A: Aboriginal people

Table 5.2 Census data 2006, Mid North Coast: Number of Indigenous people (Aboriginal and Torres Strait Islander)

LGA	Amount of people	% of total population
Coffs Harbour	2309	3.6
Bellingen	319	2.6
Nambucca	1026	5.7
Kempsey	2540	9.3
Port Macquarie Hastings	1767	2.6
Greater Taree	1928	4.3
Great Lakes	1003	3.1
TOTAL	**10892**	**4%**

While there are several established Aboriginal artists and arts groups throughout the region, there is a demand for authentic cultural creative industries product which is not currently being met.

Arts Mid North Coast recently employed a Regional Aboriginal Cultural Development Officer, Alison Page whose role will be to develop Aboriginal arts product throughout the region.

Aboriginal arts organisations and business do exist throughout the Mid North Coast, particularly in Forster and Kempsey. There are also emerging groups in the Nambucca Valley.

These groups, like many components of creative industries require a broad range of industry based support from product development and technical skills through to business and marketing skills.

B: Youth

Table 5.3
Census data 2006, Mid North Coast: Number of people aged 15-24

LGA	Amount of people	% of total population
Coffs Harbour	8049	12.4%
Bellingen	1212	9.8%
Nambucca	1780	9.9%
Kempsey	2876	10.5%
Port Macquarie Hastings	6975	10.2%
Greater Taree	4981	11%
Great Lakes	2868	8.8%
TOTAL	**28741**	

Young people experience similar isolation in opportunities in creative industries.

Opportunities that do exist present either within the school system, in extra-curricula school activities or, less likely through mentoring or private tuition.

Outside of school based activities young people are more likely to experience creative industries at a community level through school holiday activities or other youth based programs where art is the by product, not the focus.

With limited access to rigorous training and work experience there is little incentive for young people to enter and strive in creative industries at a young age. Rather, they are often steered away towards ‘real jobs’ by well intended parents and educators.

The young people who show enough talent to be perceived as having potential to ‘make it’ in a creative pursuit are ultimately forced to leave the area to further their education or gain professional experience.

5.4.1 Lack of opportunity to develop at a professional level

The process for these minority groups of moving to professional status in creative industries on the Mid North Coast for these minority groups is difficult across all industry segments.

Screen industries are most likely to have the ability to nurture new talent in the region as the industry presents a ‘popular’ image and the industry has a peak coordinating body ‘ScreenLinks’ making it more accessible.

Music can be studied at a conservatorium level in Coffs Harbour, however the catchment for this institution is limited in the MNC. There are moves to establish a ‘Mid North Coast Conservatorium’ however these plans are still under development.

The small business nature of creative industries makes opportunities in mentoring and work experience difficult to coordinate. It is difficult for small business owners (particularly for businesses which are owner operated) to find the time to take on people to mentor. It is also difficult for careers advisors to find the time to engage small business owners.

5.4.2 Awareness of entry points and network

As mentioned at 5.1.2 gaining initial access to information hubs can prove difficult.

As young people are (stereotypically) more adept at using online social networking technologies such as ‘Myspace’ and

'Facebook' and at online search tools such as Google there, in theory would be little difficulty in locating appropriate organisations and businesses to network with.

Unfortunately many of local arts based organisations do not have websites and if they are their information is often out of date or is simply not appealing, particularly to young people.

Internet access is still a luxury not affordable nor accessible in parts of the region. In some cases, the same can be said for mobile phone access.

5.5 Marketing

5.5.1 Product development opportunities

What defines quality product in creative industries is largely in the eye of the consumer, however as an emerging industry with such a high number of amateur and hobbyist participants opportunities for ongoing product development present an ongoing need.

Creative participants in creative industries are often forced to wear many hats in the search for income from a limited pool of customers.

For example an independent film maker may teach film making or edit other people's films for a living. A painter may also do graphic design.

This can dilute the level of skill in the region as people juggle between survival and mastery of a given pursuit.

Another issue directly affecting quality product is the lack of opportunity for technical critique. It is important to separate technical critique from general product critique as the latter is very subjective and will ultimately be conducted through sales (or lack thereof).

There are few opportunities for artists to gain productive critique as they are developing works either at amateur or an established level.

Ongoing product development opportunities where creative industries participants have access to reliable technical critique and recommendations for pathways to product development would be beneficial in assisting the move from amateur to professional levels.

5.5.2 Challenges in reaching (and identifying) potential customers

Business processes, particularly marketing can seem crude to some creative industries participants particularly at the more creative end of the spectrum.

Typically the process of marketing a product involves the identification of target markets. This process is often confronting for people who work in creative processes producing works for creative, not commercial value.

However, it is also a stark reality of the marketing process, without a demand and means for exchange sales don't take place.

Many creative industries businesses, particularly those in visual arts seek out tourist trails to establish café/gallery type businesses.

Field studies of the region found tourist targeted creative industries facilities were often poorly promoted and difficult to locate. The geographic distance between facilities often made visiting more than a few establishments within a day difficult.

For the tourist it is difficult, if not impossible to stop at each and every gallery so the proprietor is left to rely on chance stops or potentially expensive marketing through visitors information centres and accommodation houses.

The potential of the Internet as an online sales tool is appealing but again there is a mass of information (and competitors) that customers must trawl through to reach a given site unless the site is specifically targeted and marketed directly to a group that it is likely to appeal to.

There is much that must be done to educate the mainstream population about the value of creative product and how cheap imports attack the industry. However, we are living in turbulent financial times and the product range of the regions discount stores indicates mass produced creative industries imports are selling.

5.5.3 Promoting products outside the region

While Austrade (2008) highlights the increased opportunity for creative industries in the export market, it also notes the high cost of exporting to established markets such as the US and West Europe.

Getting started in exporting is a difficult process with few mechanisms for support.

Understanding the complexities of promotion can be a difficult process for any business owner.

Advertising is expensive and there are thousands of opportunities for businesses to choose from. Without an adequate budget to spend it is unlikely any form of advertising will have a large impact for an individual business.

There are many opportunities to exhibit the creative industries fare of the MNC outside of the region at galleries, tradeshows, exhibitions, performance events and online.

Unfortunately the lack of collaborative approach in both the management and execution of creative industries in the region impairs these opportunities as people and small groups are left to self promote.

Promotion of the region's creative industries product could also occur through a branding exercise where individual creative industries entities utilise a logo / swing tags / strap line to jointly promote the region's creative industries wares.

5.5.4 Cash economy

The greatest difficulty presented by "cash-in-hand" jobs is that it misrepresents and underestimates creative industries, rendering true economic analysis impossible.

While the cash economy is used as a way to illegally escape both tax and Centrelink obligations it also comes about because people simply do not know about nor understand what is required of them as a business owner.

5.6 Education

Opportunities may manifest in a range of courses and workshops from industry specific 'mastery' courses through to more pragmatic workshops or courses in best practice, quality management or assessing market demand.

> TAFE North Coast Institute (through Coffs Harbour Education Campus) are currently undertaking a pilot project in the process of facilitating the Recognition of Prior Learning process for visual artists. The aim of this is that it creates a platform for artists to study at a higher level.

5.6.1 Opportunities in education

The peak training body for creative industries in the Mid North Coast is currently TAFE North Coast Institute which primarily offers creative industries courses on campus and through outreach.

Outreach courses play an important role in taking education 'to the people' who may otherwise never consider studying from subject matter that they have to travel to access.

With the bulk of visual arts, music production and screen industries courses being offered at Coffs Harbour Education Campus and to a lesser extent Kempsey, Port Macquarie and Forster travel is an issue for many would be students who live outside of these areas.

With potential travel times exceeding one hour each way the catchment of potential students is reduced.

Outside of TAFE NSW few courses are offered in creative industries. Many registered training organisations (RTO's) cover business basics, small business or basic web design but they rarely cater to the nuances of creative industries.

This could explain difficulties faced in getting creative industry participants to attend business based courses even though anecdotal demand for these courses is high.

Regional Arts NSW ran a series of workshops over a four year period throughout the region which targeted community and creative industries. The one day workshops were mostly poorly attended by creative industries even though the demand for business planning marketing, funding and sponsorship appeared to be high.

The lack of available opportunities in creative industries specific education is exacerbated by the lack of Federal funding available for courses not deemed to build employment capacity.

Outside of accredited training there are also limited opportunities in general interest or leisure courses. Once the domain of community education these courses are now difficult to source particularly in smaller towns in the region. This limits the industry's ability to provide a 'taste' of a creative skill or occupation.

Even private tuition can be difficult to obtain, one workshop participant expressed difficulty in engaging a drama teacher even though demand was high.

In commercial aspects of creative industries there are also training gaps. The project found no opportunities in architecture training. Units have been developed through the TAFE Plus commercial model but there may not be current capacity to deliver them in this region.

There were also limited opportunities in performing arts, marketing and advertising and writing.

Chapter 6
Development opportunities

Table 6.1 Summary of development opportunities

6.1 Enhancing the amount of affordable space	6.1.1 Utilising community halls 6.1.2 Utilising empty retail space
6.2 Establishment of industry wide mentoring opportunities	6.2.2 Mentor database and matching service (self) e.g. women's mentoring 6.2.3 Visiting mentors 6.2.4 Exchange program
6.3 Enhanced opportunities for product exposure	6.3.1 Tourist Trails 6.3.2 Art Bank 6.3.3 Public art
6.4 Enhance opportunities in education	6.4.1 Professional development workshops 6.4.2 Opportunities to participate at a higher level 6.4.3 General interest courses
6.5 Improving industry awareness and visibility	6.5.1 Developing an industry advisory group 6.5.2 Industry branding 6.5.3 enhancing networking opportunities

Table 6.2 How development opportunities address issues

Identified issue	**Potential strategy**
5.1 Infrastructure	6.1
5.2 Industry recognition	6.2, 6.3, 6.5
5.3 Collaboration	6.2, 6.4
5.4 Lack of formal participation * Young people * Aboriginal people	6.2, 6.5
5.5 Marketing	6.3, 6.4

6.1 Enhancing the amount of affordable space

6.1.1 creative industries precincts

A key recommendation of this report makes is that each local government area (LGA) is funded to develop at least one facility (such as a community hall) to become a 'creative industries precinct'.

NSW creative industry insights (2009) recommends unused public space is utilised for creative industries.

Affordable space to practice, perform, work, exhibit and meet was seen as an issue across the region.

Simultaneously, there are many public halls within the community which are under-utilised and in many cases in a state of disrepair.

Once a pinnacle of social networking, the affordability of cars and development of road systems have long since decreased the need for community halls. Still imbedded in the tradition of many communities Councils retain the deeds of community halls even though many are derelict and in severe need of repair.

Public Halls present a quagmire for Councils who cannot afford to maintain them, nor maintain the levels of administration and insurance required to keep buildings in operation. Yet the community criticism involved in selling off public assets is loud and heated.

The nature of the creative industries precinct would aid the development of creative industries clusters as the facilities are tailored to the needs of each LGA and the needs of its creative industries businesses.

Transforming a hall to a creative industries Precinct would require (in some cases minimal), procurement of assets for product development, capital works, branding and committee development (halls would ideally be a sub-committee of Council).

In the best case scenario creative industries Precincts would be equipped with fast Broadband connection and a paid coordinator who also has the skills to develop recognition and participation of creative industries within the LGA.

The coordinator would also work with other creative precincts throughout the region thus strengthening industry connections throughout the Mid North Coast.

The development of creative industries Precincts would be a more purposeful activity than throwing public money at a never ending source of need.

The creative industries Precincts would be a focal point for creative industries within each LGA, a place where locals and tourists could access creative industries products and experience the culture of the area. creative industries Precincts throughout the MNC could be easily linked creating a tourist trail.

creative industries Precincts could be developed to provide access to high speed internet connections as well as a bank of computers offering opportunities for creative industries businesses to compete on a national and global scale.

The creative industries Precincts could also serve as a business model for other community halls within the LGA. Halls would become a place to gain business advice and network.

In the LGA's of Coffs Harbour and Port Macquarie other facilities such as the Coffs Harbour Education Campus or the Glasshouse (in Port Macquarie) may be more practical locations for creative industries precincts. These facilities could act as hubs for the development of creative industries and the other creative industries precincts throughout the MNC.

Implementation ideas

The project could be driven by a creative industries advisory committee (6.2.1) or at local government level.

A possible approach at a local government level would be to call for local hall committees to bid for 'creative industries Precinct' status. The bid would require strong support from creative industries as well as the basis for a workable business model.

Key benefits

- Creative industries recognition and branding
- Promote development of industry clusters
- Development of tourist trails
- Utilising halls as business acceleration centres
- creative industries (and subsequent tourism) marketing hub from each LGA
- Hub for development of local hall business planning
- Driver for industry recognition, workshops, development and training
- A portal for access to reliable internet connection

6.1.2 Utilising empty retail space

Many of the highest quality visual arts products made in the region are sold and exhibited elsewhere. These products potentially plays a major role in inspiring, motivating and setting benchmarks for creative industries participants particularly young people.

While larger regional galleries have the capacity to showcase higher quality work these galleries are less accessible to the whole region which suffers greatly from the distances between its hubs.

Each LGA has empty retail space which, with the assistance of local real estate agents and the economic / business development officer of each LGA could be utilised to exhibit quality creative industries products.

The displays could carry branding throughout the region with the aim of developing a dialogue around creative industries such as: "Mid North Coast creative industries Showcase".

The artists who would be showcased in the displays are most likely those who do not require exposure locally for the sake of sales as they have existing successful distribution networks within or outside of the area.

Therefore to make this concept a reality the artists would need to be handpicked and personally contacted. This could be the role of the creative industries precinct coordinator (6.1.1).

This project is greatly open to personal bias and therefore a category would be developed around the selection process including level of sales, level of and status of exhibitions, duration in industry and general artist recognition.

Exhibitions would be rotated on a regular basis with the aim of avoiding damage and deterioration to artworks and displays.

Displays would include all levels of visual arts including work by architects (plans and models) and designers.

The project has great capacity to brighten up and therefore improve the value of dull vacant commercial space enhancing the economic benefits not only for the property owner but for the community as a whole.

Implementation ideas

Because insurance is an obvious issue, a blanket insurance policy would be required. A possible scenario would be a central body may purchase the artworks in an 'Art Bank' type of arrangement (http://www.artbank.gov.au) (6.3.2) then each LGA could borrow or hire the collection on a rotating basis as a touring exhibition.

Alternatively the artists could be encouraged to seize the project as a marketing opportunity to promote their works on a fee for service basis. The combined fees would include insurance and marketing collateral (for example a map or tour guide).

Key benefits

- Utilising otherwise empty retail space
- Improve economic value of empty retail property
- Enhance economic value of retail throughout LGA
- Showcase quality regionally produced products
- Inspire local artists
- Promote area as creative industries savvy region
- Promote individual artists to new markets

6.2 Establishment of industry wide mentoring opportunities

6.2.1 Mentor database and matching service

While there is anecdotal demand for mentors, there are few opportunities for people in the industry (or who want to be in the industry) to link with mentors. Similarly there are few opportunities for mentors to identify themselves as being willing and available.

University of the Third Age (U3A) has what is essentially a mentor model which works well, addressing the training needs of over 50's by using volunteer teachers (or mentors).

In Tea Gardens and Hawkes nest the U3A model is so popular in arts education students are turned away as demand well exceeds supply.

A similar service being offered to anyone on either a group or one-to-one basis would also have great value in sharing not only technical skills but also knowledge of the industry and creative industries business.

Mentoring is a logical move for the industry with many of its employees and employers aging.

While many of the businesses do not lend themselves to succession planning as their product is based around the creative skills of the individual owner those skills are still an important commodity which should be passed on to future generations.

Management of mentoring programs do not necessarily have to be labour or resource intensive. An online mentoring program called 'The Australian Women's Mentoring Network' provides a national mentor search service that links mentors with mentees.

Once linked the service allows the individuals to define their preferred method and regularity of contact.

A similar site could be hosted via the popular Arts Mid North Coast website or through an education creative industries portal (mentioned as a possibility at 5.1.2.

Mentoring programs could also be managed through the creative industries Precinct's mentioned at 6.1.1

The Mid North Coast town of Bowraville is currently trialling the development and execution of a mentoring database for the town as part of a Department of State and Regional Development and Nambucca Shire Council tourism project.

After the initial database is collated it will be managed by a community based organisation which will maintain the database and provide information to public. A copy of the skills audit form can be found at attachment 5.

Implementation

- Source appropriate communication mechanism and data storage website / organisation
- Undertake a creative industries skills audit to source the mentors (attachment 5)
- Promote mentoring program

Benefits

- Building industry knowledge in technical and business skills
- Developing a collaborative culture
- Promoting creative industries as an industry
- Aid the development of succession planning
- Provide training where formal training opportunities do not exist

6.2.2 Visiting mentors

An option already trialled by some creative industries organisations within the region is that of visiting mentors – inviting experts from outside of the area to share knowledge and skills with local industry representatives.

Visiting mentors would conduct information sessions and workshops to address the expressed information needs of the region's creative industries businesses.

These programs may also manifest as 'artist in residence' programs.

Mentors from outside the region bring a 'fresh flavour' and new ideas to the area, inspiring local people with concepts for the future.

There is no reason mentors could not exist within the commercial end of creative industries as professional development opportunities (for example, fashion buyers from large department stores advising fashion designers).

Implementation
After the real training needs of the local industry are assessed (possibly through the aforementioned skills audit 6.2.2) the driving organisation would develop relationships directly with artists, with arts organisations and arts businesses outside of the region.

Benefits

- Learning from external sources
- Collaboration
- Developing new ideas for product and creative business development
- Networking

6.2.3 Exchange program

For young people experience of other creative industries practice is imperative in developing a style as well as commercial realities.

An exchange program may manifest in young people gaining access to residencies / tours or even work experience in other geographic areas.

Implementation
An exchange program could be self funded. The program would simply provide the links with external areas to formalise the program.

Alternatively, grants and funding could be sourced to develop and implement the program.

Benefits

- Experience other markets first hand
- Exposure to new ideas
- Linking with other areas stimulating future collaboration
- Providing opportunities for young people in creative industries

6.3 Enhanced opportunities for product exposure

6.3.1 Tourist trails

Mid North Coast NSW Tourism Manager Belinda Novicky says while tourists use the internet to seek out destination information before they travel they also ask for information once they arrive at the destination from either the Visitors Information Centre or the accommodation provider.

Stronger linkages between creative industries business and tourist entities are essential both to promote creative industries business and also to feed the industry information about demand for products and services.

These linkages can be driven from a tourism level as creative industries business is targeted for tourism membership and inclusion in visitor guides and online.

Rather than focusing efforts on producing printed material which quickly dates the industry may consider an online tour guide of the region's creative industries which includes suggested itineraries that focus on festivals and events / or creative industries genres and activities.

Tourism data shows that while creative industries are not primarily a driver for people to visit a region, they are something that people will seek out as an activity once they arrive.

The need for hard copy brochures still remains. A collective industry approach to marketing featuring more than one creative industries business is a much more cost effective way to advertise (and less overwhelming for the end user).

creative industries could work with tourism bodies to fund the exercise and focus on quality in design rather than the print process. A good design would lend itself to photocopying and therefore cost saving.

Implementation
A push from Mid North Cost NSW Tourism throughout their constituency (each LGA within the region contributes to funding the entity) to recruit creative industries for inclusion in tourism marketing could start this process. The push would recommend that local tourism organisations target creative industries for:

- membership
- to educate the businesses about how to list on tourism websites
- to create collate local creative industries itineraries
- to feed information about opportunities in tourism to creative industries

Benefits

- Stronger linkages between creative and tourism industries
- Greater capacity for creative industries to deliver relevant product to tourists
- Cost saving in utilising existing resources to promote creative industries
- Cost saving in producing online rather than print resources

6.3.2 Art Bank
The federal government's Artbank was established in the 1980's and is now managed by the Department of Environment, water, Heritage and the Arts.

Art bank primarily supports emerging artists. The project offers businesses and consumers the opportunity to rent artworks.

There is potential to develop a similar model within the Mid North Coast as a cooperative or business model.

The Mid North Coast's version of Artbank could potentially be coordinated from the arts precincts mentioned at 6.1.1. and ultimately act as an ongoing source of revenue for these entities.

Benefits

- Providing cost effective opportunities for businesses and consumers to access art
- Increasing overall access to art
- Promoting the region's artists

6.3.3 Public art

Public art is limited throughout the region. Towns such as Hawks Nest have promoted their sculpture work as a tourist attraction even basing a festival around the works.

Aside of the town beautification and community building aspects of public art, these works also stand as a source of inspiration for creative industries participants and evidence that creative industries exist within the area.

Public art manifests in many forms, most often in the Mid North Coast as community created murals or mosaics.

These projects do not always need to be expensive and could incorporate a broad variety of partnerships as they are developed.

6.4 Enhance opportunities in education

Over the past five years the training environment has become very competitive as many new training organisations have entered the region.

There are large gaps in the delivery of education to creative industries across the board. This is driven both by the extensive setup costs required to develop training facilities, particularly in areas such as digital technologies and design.

Across the region there appear to be no opportunities to study in the architectural field and opportunities in performing arts are also limited.

Other relatively untapped opportunities in education lie in the employment sector. Identifying as a part of creative industries has traditionally been difficult for a person who is receiving income support of any kind as this has not been recognised as a viable option to move away from income support.

creative industries are not recognised within national skills shortages and this filters down to lack of opportunities for people to develop creative industries skills while in this system.

However, there are opportunities for 'Job Network' members to develop opportunities in education which promote small business skills and industry recognition and development to assist these people to move away from income support.

Such support may lie in the development of short or long term courses or even partnering with other organisations and programs such as the New Enterprise Incentive Scheme (NEIS) to develop 'creative industries business accelerators' such as that mentioned at 6.1.1.

6.4.1 Professional development workshops

One-off or weekend workshops which focus on the development of particular technical skills.

Professional development workshops may also encompass business based skills which, anecdotally are in demand by creative industries.

These workshops could engage industry experts who may be from the region to share their craft or business experiences with students.

6.4.2 Opportunities to participate at a higher level

Digital technologies reduce the need for critical mass of students in one geographic location.

There is scope to deliver a broad range of opportunities throughout the region to students who would otherwise not access learning due to geographic distance.

While opportunities in distance learning are needed across the board, these technologies have particular implications for learning at a higher skill level where there will always be less demand.

This technology could be utilised on a number of levels which exceed traditional distance education.

These courses could be delivered under commercial models and may seek funding through an industry development strategy.

Students would form learning groups which would span large geographic areas (not necessarily only in the Mid North Coast) and would ideally link to mentors and partners who would could provide some form of work experience.

For younger learners this system may attach to the school system as part of the curriculum or extra-curricular option.

Technologies utilised may include:
* Video conferencing technology in schools and TAFE campuses to connect students in classes and lectures. Classes wouldn't necessarily be delivered from TAFE, they could be a University lecture, a conference presenter or industry expert
* Utilising online learning systems where a teacher from an external point can provide tutorials and support

* Use of social networking media such as blogs, Wiki's, FaceBook and MySpace to enhance both networking opportunities and information sharing abilities in a highly cost effective environment.

6.4.3 General interest courses
As training organisations have been forced by Federal funding policy to become more employment driven the role of providing education in short creative courses has diminished to the point where in smaller areas there are few opportunities to gain tuition in creative industries.

Students studying at a general interest level gain an understanding of technical skills involved within the creative industries pursuit which in turn strengthens respect for creative industries workers and enhances value of the industry.

For some general interest course participants this is a 'taste test' of what skills lie within this field and they may go on to work professionally or enrol in accredited courses.

6.5 Improving industry awareness and visibility

6.5.1 Developing an industry advisory group
To steer the implementation of creative industries strategies the development of an industry advisory group which represented all sectors of creative industries would be essential.

The industry advisory group would be instrumental in developing opportunities for creative industries in infrastructure development, networking, skill development, marketing and business development.

Bringing together representatives across the industry, particularly between commercial and creative industry components would enhance links and therefore opportunities for collaboration and increased employment opportunities across the industry.

As previously mentioned the Industry advisory group would play a major role in the implementation of creative industries projects such as the potential development of the creative industries Precinct project mentioned at 6.1.1

6.5.2 Industry branding
As part of enhancing industry awareness, creative industries businesses could be encouraged to label their product, and where possible services (in advertising, invoicing) with a strap line similar to "made in the Mid North Coast" or "This business supports Mid North Coast creative industries".

The industry could develop a logo which accompanies marketing materials developed as an industry whole or for individual businesses.

This would assist the recognition of creative industries both within the creative industries sector and for clients outside of the sector.

6.5.3 Enhancing networking opportunities
5.3.3 Information sharing
An accessible portal for people to share information is essential.

Rather than focus on promoting activities and products the portal needs to focus on opportunities, training, resource sharing and knowledge sharing.

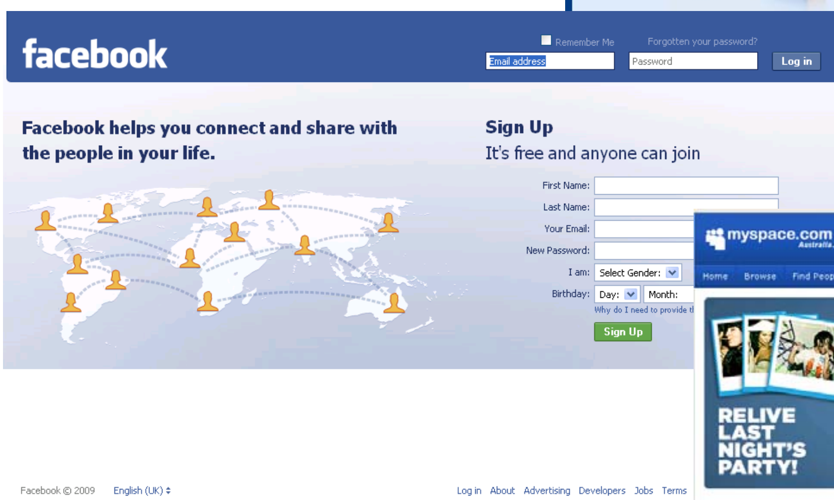
It is not only this functional information which is important for the industry. This portal would also be the ideal mechanism for capturing and promoting the technical skills of creative industries workers who could engage through written, video or even interactive tutorials.

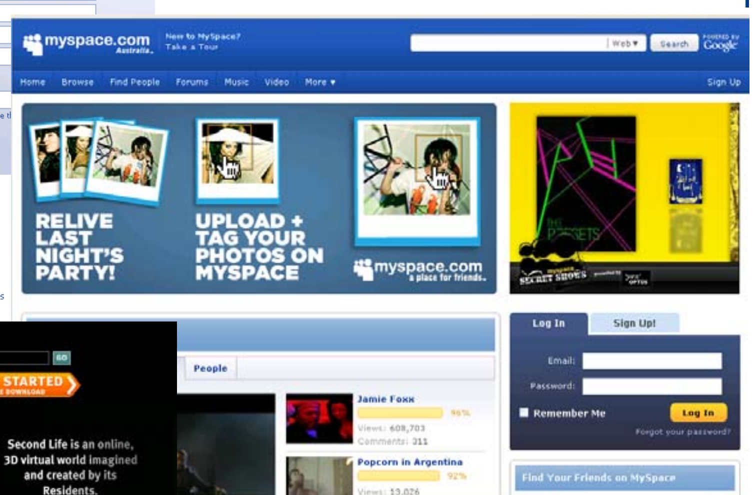
There is great scope for information portals to be driven by educational institutions.

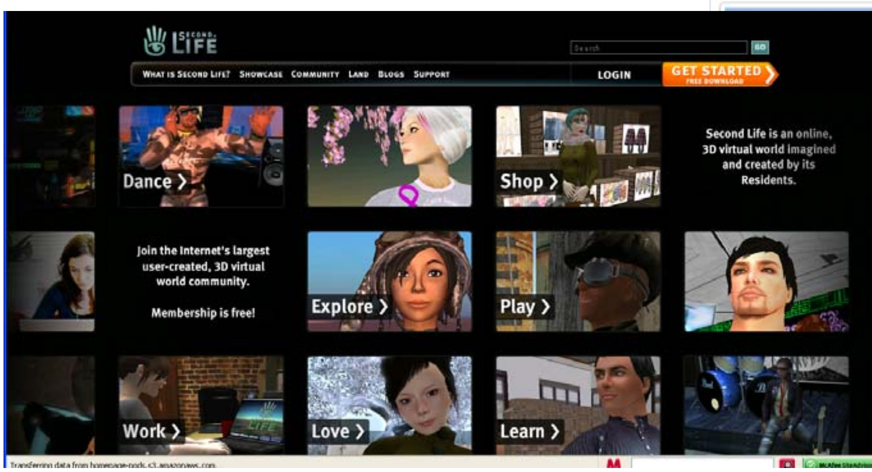
Most larger education entities already have extensive information portals and supporting staff both administrative and teaching.

Creating a user friendly creative industries portal which allows contributions by community, industry, teachers and academics which is publicly promoted and accessible would serve both creative industries and the education entity.

The portal would promote a broad variety of academic and employment based information and may be developed using social networking media such as ‘facebook’, Myspace, Plaxo Pulse, or even groups (such as those offered by ‘Yahoo’).







Chapter 7
Methodology

7.1 Defining creative industries

The methodologies in the mapping exercise draw from those utilised by Higgs, Cunningham and Pagan (2007) in mapping Australia's Creative Economy. This model draws upon the work of the UK's Department of Culture, Media and Sport which was released in 1998.

The mapping exercise utilises 2001 and 2006 Census data, and 2006 Australian Business Register (ABR) data.

This research project discovered data commissioned outside of State and Federal Government was closely guarded and either through 'commercial confidences' or sheer lack of desire to collaborate the project was unable to gain or publish some data.

This problem is no doubt exacerbated by the newness of the definition 'creative industries' to the Mid North Coast, if not Australia. ABS Census data still defines most creative occupations as part of Cultural and Recreational Services.

Finding consistent methodologies in measuring economic activity across any industry was another difficulty faced throughout the project. Much of the industry economic data analysed was did not disclose methodologies.

7.1.1 creative industries models

The notion of creative industries was first taken seriously in the UK in 1997 with the implementation of the creative industries taskforce. This taskforce set to investigate the issues facing the industry and make recommendations for change.

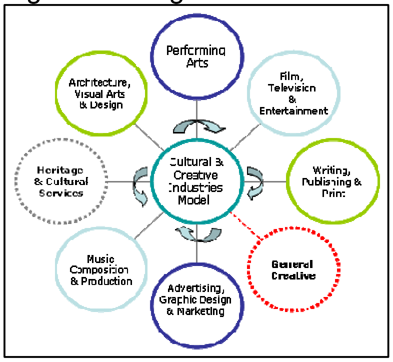
The United Kingdom's Department for Culture, Media and Sport (DCMS) define creative industries as define creative industries as:

" those industries which have their origin in individual creativity, skill and talent and which have a potential for wealth and job creation through the generation and exploitation of intellectual property. This includes advertising, architecture, the art and antiques market, crafts, design, designer fashion, film and video, interactive leisure software, music, the performing arts, publishing, software and computer services, television and radio."

The Queensland creative industries Strategy defines creative industries as those industries that are focussed on linking creativity with commercial markets: these industries use creativity as their source of value, generating ideas into new intellectual property (IP) and then using and commercialising that IP in innovative ways - often through industry inter-action on a project-by-project basis.

The Australian Bureau of Statistics (ABS) explores creative industries as part of Cultural and Recreational Industries.

SGS Model
The research project adapted creative industries definitions which were used by SGS Group in consultation with Hastings Council as recommended in the research brief.
Figure 7.1 Segment Model of the Mid North Coast creative industries (SGS 2006)



(it has been assumed the word ‘software’ was intended to be included within the “Film, Television and Entertainment” category) making the category Film, Television and Entertainment Software.

Using these definitions the following ANZSIC codes were identified.

Table 7.1 ANZSIC codes utilised in report

	Writing, publishing and Print Media
5413	Book Publishing
5521	Music Publishing
5411	Newspaper Publishing
5412	Magazine and Other Periodical Publishing
5419	Other Publishing (except Software, Music and Internet)
	Publishing (except Internet and Music Publishing), nfd
	Architecture, Visual Arts and Design
6921	Architectural Services
6924	Other Specialised Design Services
6991	Professional Photographic Services
	Advertising, Graphic Design and Marketing
6940	Advertising Services
	Film, Television and Entertainment software
	Motion Picture and Sound Recording Activities, nfd
	Motion Picture and Video Activities, nfd
5511	Motion Picture and Video Production
5514	Post-production Services and Other Motion Picture and Video Activities
5621	Free-to-Air Television Broadcasting
5610	Radio Broadcasting
5622	Cable and Other Subscription Broadcasting
	Broadcasting (except Internet), nfd
	Computer System Design and Related Services
	Performing arts
9002	Creative Artists, Musicians, Writers and Performers
	Creative and Performing Arts Activities, nfd
5522	**Music composition and production**

1620	Music and Other Sound Recording Activities
	Reproduction of Recorded Media
	Sound Recording and Music Publishing, nfd
2622	**Creative Product manufacturing**
1351	Ceramic Product Manufacturing, nfd
1333	Clothing Manufacturing
2610	Cut and Sewn Textile Product Manufacturing
2591	Glass and Glass product manufacturing
2029	Jewellery and Silverware Manufacturing
2511	Other Ceramic Product Manufacturing
	Wooden Furniture and Upholstered Seat Manufacturing
8910	**Heritage and cultural services**
9001	Museum Operation
9001	Performing Arts Operation
	Arts and Recreation Services, nfd
	Libraries and Archives

Source: 2006 ANZSIC industry classifications Australian Bureau of Statistics

This definition however appears to be somewhat outdated particularly in addressing the rise of new technologies.

In hindsight industry definitions would better suit those defined by The Australian Research Council of Excellence for creative industries and Innovation's (creative industries) which are:

1. Music and performing arts
2. Film, television and radio
3. Advertising and marketing
4. Software development and interactive content
5. Writing, publishing and print media
6. Architecture, visual arts and design

Definitions which address the inclusion of interactive content, or screen industries are imperative. The Cultural Ministers Council (2008) identifies 36% of the creative workforce are employed in the software development and Interactive Content Industry segment.

In its creative industries Fact Sheets, ARC defines creative industries segments (utilising 2001 ANZSIC data groupings) as follows (for further information about the face sheets visit) https://wiki.cci.edu.au/display/NMP/Australia%27s+Creative+Economy+Information+Sheets :

Table 7.2 CCI industry fact sheet summaries

Segment	Industry of employment	Occupation of employment
Music and performing arts	Recorded media manufacturing and publishing, music and theatre productions, services to the arts undefined, sound recording studios, performing arts venues, services to the arts nec	Stage manager; musicians and related professionals; singer; instrumental musician; composer; musicians and related professionals nec; actors, dancers and related professionals; actor; dancer or choreographer; media presenters; performing arts support worker; sound technician; lighting technician; production assistant (theatre), make up artist; performing arts support workers nec

Table 7.2 ctd.

Segment	Industry of employment	Occupation of employment
Film, television and radio	Motion picture, radio and television services, film and video services undefined, film and video production, radio and television services undefined, radio services, television services	Media producers and artistic directors; media producer; artistic director; television journalist; radio journalist; authors and related professionals; script editor; 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 (radio or television); technical director; film, television, radio and stage directors; music director; media presenter; radio presenter; television presenter; broadcast transmitter operator; production assistant (film, television or radio)
Advertising and marketing	Advertising services	Marketing and advertising professionals, marketing specialist, advertising specialist, copywriter, desktop publishing operators
Writing publishing and print media	Services to printing, publishing undefined, newspaper printing and publishing, other periodical publishing, book and other publishing, libraries, museums and the arts undefined, libraries	Librarians; librarian; archivist; journalists and related professionals; editor; print journalist; technical writer; journalist and related professions nec; authors and related professionals; author; book editor; library technicians; library assistant; proof reader
Software development and interactive content	Computer consultancy services	Systems designer; software designer; applications analyst programmer; systems programmer
Architecture, visual arts and design	Jewellery and silverware manufacturing, architectural services, commercial art and display services, museums, arts undefined, creative arts	Architects and landscape architects; architect; landscape architect; naval architect; urban and regional planners; artists and related professionals; visual arts and crafts professionals; painter (visual arts); sculptor; potter or ceramic artist; visual arts and crafts professionals nec; photographers; designers and illustrators; fashion designer; graphic designer; industrial designer; interior designer; illustrator; conservator; museum or gallery curator; architectural associate; museum or gallery technician; jewellers or related tradesperson; jeweller; apprentice jeweller; photographer's assistant

7.1.2 Data sources
A full list of data sources is cited in the references section (9.1)

7.2 Project tasks
The project conducted a range of activities which included:

7.2.1 A photographic survey
The photographic survey was formally documented twenty five different cultural enterprises or activities throughout the Mid North Coast and informally documented many other sites. Sites documented throughout the survey spanned Coffs Harbour to the Hawks Nest.

7.2.2 A survey delivered both online and as a hard copy
The online survey used the Survey Monkey data analysis and collection tool. 900 printed surveys were distributed throughout the Mid North Coast through site visits, peak creative industries bodies and known distribution channels. The survey was promoted by phoning over 60 creative industries business found through the Yellow Pages and electronically through creative industries networks.

The survey generated 203 responses, only 22 of these were collected as a hard copy, the remaining were completed online. The online survey tool utilised was Survey Monkey (Professional edition).

7.2.3 A series of focus groups
Focus groups were held in Kempsey, Hawks Nest, Forster, Taree and Coffs Harbour. The focus groups were attended by 48 people in total.

7.2.4 Telephone and e-mail interviews
Twelve interviews were conducted with creative industries businesses throughout the project through telephone, e-mail and in person discussion.

7.2.5 Council interviews
Each local council cultural development officer or person responsible for the cultural portfolio was interviewed at least once through the project. These people assisted the development of networks, distribution of information and identification of local business and projects.

7.2.6 Public submissions
Only one formal submission was taken.

7.2.7 Desk research
Extensive desk research was undertaken, mainly through use of the Internet. All research is cited at 9.1 References.

7.3 Research limitations and difficulties
One of the greatest project challenges was reaching the broad range and scope of businesses identified under the survey brief. Entities were confused about their capacity to contribute to the project, particularly those entities at the top end of the financial spectrum such as architects and media organisations.

The project budget did not allow for the purchase of data and therefore publicly available data limited the economic analysis conducted.

There were also issues in information sharing both from existing industry groups and local government who claimed certain information to be commercial confidential.

Craft also plays a major contributing role to the economy of creative industries in the region and as such should also be recognised within the identified categories.

The initial survey brief omitted the word 'software' in the segment which was defined in the brief as 'Film, Television and Entertainment'.

The project was marketed throughout the Mid North Coast in seven local government areas including Coffs Harbour, Bellingen, Nambucca Heads, Macleay, Hastings, Taree, and Great Lakes. Geographically this ranges from Woolgoolga to the North and Hawks Nest in the South.

While the survey was promoted to individuals and organisations who held an ABN, the focus groups were open to anyone involved in creative industries.

While the project set out to research the impact of volunteering and hobbyists within creative industries stakeholders rejected this stream. It is thought significant contributions are made to creative industries by volunteers and volunteer organisations from the provision of goods and services through to purchase of materials and supplies

7.4 Further research recommendations

7.4.1 Skills audit

A skills audit was mentioned at 6.2.2 . This would assist the development of a mentor base and also play a role in conducting a training needs analysis for the industry.

7.4.2 Economic analysis

A specific economic study of the region's creative industries is required to further understanding of the true economic value of creative industries to the area.

7.4.3 Impacts of volunteering and hobbyists

The true value of contributions made by volunteers and hobbyists to creative industries in the MNC is unknown. Given the relatively high unemployment and retirement rates within the region these contributions are thought to be considerable.

7.4.4 Refining creative industries sector definitions

It is recommended creative industries sector definitions are moved in line with creative industries Research for further research projects.

8.1 Abbreviations

ANZSIC	Australia and New Zealand Standard Industrial Classification
ARC	Australian Research Council
CCI	(Centre for) creative industries and Innovation
DSRD	Department of State and Regional Development
ENA	Evolve Network Australia
LGA	Local Government Area
MNC	Mid North Coast
NSW	New South Wales

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Attachments

Attachment one MNC Census population data table

LGA	Total Population	Population aged 25-54
Coffs Harbour	64910	32908
Bellingen	12416	6428
Nambucca	17897	8721
Kempsey	27387	13990
Port Hastings	68430	33278
Taree	45145	22375
Great Lakes	32766	15537
TOTAL	**268951**	**133237**

Attachment two State governance

Table 1.3 Key arts organisations and peak bodies within the state of NSW*:

Organisation	Web
Peak bodies	
NSW Government Department of the arts, sport and recreation (Arts NSW)	www.arts.nsw.gov.au/
Regional Arts NSW (funded by Arts NSW and the Federal Government	www.regionalartsnsw.com.au
Historic Houses Trust of NSW	www.hht.net.au
NSW Film and Television Office	www.fto.nsw.gov.au
Music NSW	www.musicnsw.com
Community Cultural Development NSW	www.ccdnsw.org
Ausdance (NSW)	www.ausdancensw.com.au
Australian National Choral Association (NSW)	www.ancansw.org
Band Association of NSW	www.bandnsw.com
Festivals Australia	www.dcita.gov.au/arts_culture/arts/festivals_australia
History Council of NSW	www.historycouncilnsw.org.au
Local Government and Shires Association of NSW	www.lgsa.org.au
Museums and Galleries NSW	www.mgnsw.org.au
NSW Heritage Office	www.heritage.nsw.gov.au
Poets' Union	www.poetsunion.com
Key organizations	
Society of Women Writers NSW	www.womenwritersnsw.org
Art Gallery of NSW	
Museum of Applied Arts And Sciences (Powerhouse Museum)	www.powerhousemuseum.com
Australian Museum	www.austmus.gov.au
State Library of NSW	www.sl.nsw.gov.au
Sydney Opera House	www.sydneyoperahouse.com
Accessible Arts	www.aarts.net.au
Arts on Tour	www.artsontour.com.au
Arts Training NSW	www.artstrainingnsw.com.au
Boomalli Aboriginal artists' Co-Op	www.boomalli.org.au
Children's Book Council of Australia (NSW)	www.cbc.org.au/nsw
Copyright Agency Limited	www.copyright.com.au
Metro screen	www.metroscreen.com.au
Object, Australian Centre for Craft and Design	www.object.com.au
Interpreting and Translation Services	www.crc.nsw.gov.au
Professional Historians' Association (NSW)	www.phansw.org.au
Fellowship of Australian Writers NSW	www.fawnsw.org.au

* This list utilised information from Arts NSW website

Attachment three Federal governance

Table 1.4 Key arts organisations and peak bodies within the Federal level*

Organisation	**Web**
Peak bodies	
Department of Communications, Information Technology and the Arts	www.dcita.gov.au/arts
Australia Council	www.ozco.gov.au
APRA	www.apra-amcos.com.au
AMCOS	www.apra-amcos.com.au
National Association for the Visual Arts (NAVA)	ww.visualarts.net.au
Australian copyright Council	www.copyright.org.au
Australian Film Commission	www.afc.gov.au
Australian Society of Authors	www.asauthors.org
Media, Entertainment and Arts Alliance (MEAA)	www.alliance.org.au
Orchestras Australia	www.toan.com.au
Key organisations	
Arts Law Centre of Australia	www.artslaw.com.au
Artspace	www.artspace.org.au
Australian Business Arts Foundation	www.abaf.org.au
Australian Centre for Photography	www.acp.au.com
Australian Centre for Public History	www.publichistory.uts.edu.au
The Australian Music Centre	www.amcoz.com.au
Australian Writer Guild	www.awg.com.au
New Music Network	www.newmusicnetwork.com.au
Performance Space	www.performancespace.com.au
Playwriting Australia	www.performinglines.org.au
Public Lending right Scheme	www.dcita.gov.au/arts_culture/arts/lending_rights
Royal Australian Historical Society	www.rahs.org.au
Playing Australia	www.dcita.gov.au/arts_culture/arts/playing_australia
Musica Viva Australia	www.mva.org.au

* This list was developed from Arts NSW website

Attachment Four full data sets, Chapter 3 industry responses

Table 3.1 Survey results for Question 21 Age spread of survey respondents*

15-24	0.0%
25-44	27.6%
45-54	41.5%
55-64	26.0%
65+	4.9%

*60% of survey respondents answered this question

Table 3.2 Survey results for Question 23 home postcode summarised by LGA*

LGA	Amt responses	% of responses
Coffs Harbour	31	25%
Bellingen	15	12%
Nambucca	20	16%
Macleay	11	9%
Hastings	16	13%
Greater Taree	11	9%
Great Lakes	12	10%
Other	9	7%

*61% of survey respondents answered this question

Table 3.3 Survey results for Question 1, description of involvement in creative industries*

advertising, graphic design and marketing	6.1%
film, television and entertainment software	5.6%
architecture, visual arts and design	30.8%
music composition and production	7.1%
performing arts	16.7%
writing, publishing and print media	6.6%
heritage and cultural services	7.6%
Other (please specify)	19.7%

* 98% of survey respondents answered this question

Table 3.4 Survey results from Question 10. legal structure of businesses*

sole trader	46.2%
partnership	10.8%
privately owned company	10.0%
publicly owned company	0.8%
organisation (club, society or association)	22.3%
cooperative	1.5%
government agency of local council	8.5%

* 64% of survey respondents answered this question

Table 3.5 Survey results from Question 14 where are supplies and materials purchased from?*

Locally	74.2%
Within the state (where?)	55.3%
Interstate (where?)	32.6%
overseas (where?)	27.3%

* 65% of survey respondents answered this question

Table 3.6 Survey results from Question 18 where products or services are being purchased from*

Where sale is generated from	% of respondents selling in this location
Locally (including tourists/visitors to the region)	90.6%
NSW	34.2%
Nationally	21.4%
Internationally	15.4%
Online	23.9%

* 58% of survey respondents answered this question

Table 3.7 Survey results from Question 33 gross annual income*

Gross annual sales range	**% of respondents**
1-5K	39.4%
5001-10K	9.1%
10001-25K	18.2%
25001-50K	16.7%
50001-100K	3.0%
100001-250K	3.0%
250001-500K	9.1%
500001-1mil	0.0%
1mil and above	1.5%

* 33% of survey respondents answered this question

Table 3.8 Survey results for Question 24 how industry skills were learned*

How were your skills learned?	**% of respondents**
at work	38.0%
with a mentor	33.9%
self taught	68.6%
in school or tertiary studies	52.9%

* 60% of survey respondents answered this question

Table 3.9

What level of studies have you completed?	**Amount of responses**	**% of total responses**
Certificate/trade	31	53%
Undergraduate	18	31%
postgraduate	7	12%
workshop	2	3%

Attachment five SWOT Analysis

The following SWOT analysis was conducted at each of the five creative industries Forums which were held throughout October in Coffs Harbour, Kempsey, Forster, Taree and Hawks Nest.

Strengths

Coffs Harbour:
Significant art prizes, festivals and events for point of sale, stronger linkages being developed (tourism, economic development), support DSRD etc, diversity, inclusive, high level of participation, sharing knowledge, very competitive creative people, networking that leads to specific information, importance (or understanding of) is growing, social and educational impact, “arts immigration”, easier to survive on a low income in MNC, acceptance of strong group working, growing recognition, embracing new technologies, innovative, proactive people in galleries, draws attention to the region, more recognition, economic impacts, broadband, can compete on a global scale, sustaining traditional crafts

Kempsey
Visual arts, reputation (Gladstone, Bellingen), self sufficient and innovative, nature of artists (not mainstream); heritage (indigenous and unique heritage); country music, high percentage of creative people

Forster
Great Lakes Arts Network (GLAN), Success of drama groups, diversity of industries, hidden jewels, great locations, inspiring landscapes, good aboriginal art output, long term successful artists, “ideapreneurs”, individuals who push – have passion, move forward, low rent (domestic and commercial), cafes and restaurants make display available “Boxfish” venue, empty shops – available space, art section of TAFE creative industries and exhibitions well attended, sea changers, can live outside of Sydney and access Sydney / Overseas work

Taree
Entertainment centre, Taree crafts centre owns cottage, art gallery to display, arts retreat/gallery (and workshop facilities), groups skilled in stage performance, talent (music), teachers (drama/music), retiree population, largest regional eisteddfod (4000+ entries), events, independence, entrepreneurship, accessibility, access to publicity, inter-community cooperation(regional events), healthy competition, environment (outdoor events), winery events, school focus drama and art

Hawks Nest
Community cohesiveness, riverside art walk, active arts community, annual exhibitions (U3A, school, Grange, Fame), visitors in holidays, large potential audience, galleries, strong groups, arts centre exists and has space, existing bus tourist on the way to Bulahdelah, natural environment, beautiful area to paint, theatre group, older community

Weaknesses

Coffs Harbour

Education: lack of opportunity in some genres (performing and screen arts), "cannibalism" no clear calendar across the board, funding, sustainability (losing people as worldwide focus has developed), experiential tourism not yet embraced, lack of uninterrupted service (internet and mobile coverage), lack of suitable infrastructure, low socio-economic base (local customers limited), so spread out – easy to fall through networks, costs to local government, difficult to fund alone, lack of acknowledgement from local government, make up of elected members, difference in LGA strategies, writers centres (hub), capacity to plan, size of council, aging volunteers, established organisations lose focus, where are marketing dollars ? Artists unable to source (don't know how to), lack of cohesion across geographic areas and art genres, well resourced industry bodies, no strategic plan, limited tertiary training, limited cross industry links, artists not doing something for themselves

Kempsey

Finances, awareness, distance, promotion (lack of), region is growing and changing (e.g. Port Macquarie redefine identity Glasshouse opportunity, lack of venues, lack of resources, high cost of rental spaces, police / local "speak", parochialism, mindset, infrastructure owners (shops etc), craft art focus, galleries, parochial in display content, lack of support for range, no cooperative spirit, competition mentality

Taree

Coordination, parochialism, funding (start and grow), council commitment, lack of networking opportunity, lack of interest, tiredness, resistance to attending cultural events, lack of understanding of "drawcard" of event, no one to talk to to help (craft-a-thon as example), burnout, isolation, new people (events), professional coordinators, links with council, access to arts

Forster

Conservatorium in Coffs Harbour or Newcastle have to leave region for opportunity, no support particularly in smaller communities, few people to support and help, exhausted volunteers, council funding capacity (staff to drive), Taree artist building: not promoted nor inviting, no music teachers at advanced standard in certain instruments, somewhere to display and promote, how to find teachers?, not connected (people), person to facilitate and coordinate, lack of skills or confidence to use technology, funds to help get things set up particularly online, time to keep up to date with technology, signage (Nabiac Hway bypass no signs), asked to perform for free

Hawks Nest

Lack of opportunities for youth, no arts council, no mutual meeting point, not enough for youth to do, geographical isolation, youth not engaged in arts, lots of small spaces (venues) not coordinated centrally, lack of forums, housing affordability, older community, insurance, rental costs, no central point, where does the local fit in ? (identity), knowledge of facilities, consistency of audiences, rely on visitors, being all things to all people, roads, day only activities, disjointed groups, council engaging with areas, perception of visitors distance, lack of marketing outside of the town, seasonal

Opportunities

Coffs Harbour

Growth through better approaches to marketing and promotion, engage local government, product development, enter global marketplace via web, better customer engagement pre and post sale via web, emulate other successful arts events (e.g. sculpture by the sea), cultural noding – artists collectives and clustering eg OBF, development of industry associations and forums, funding if apply as a larger group, collective marketing, move from individual product design to manufacture, showcase creative products in metro areas, better involve tourists, creative industry trails walk or drive, links to advertising, network of vision impaired artists, need to generate enthusiasm for collective working by creative individuals, " if you build it they will come", arts organisations to share current spaces with others, cross-marketing of events by arts groups, public art options within the community, touring our local productions/exhibitions within the region, eco-art –

Opportunities ctd.

uniqueness of the art (handmade, local, ecological footprint), "education" process of parents (to have knowledge of benefits, what is available, the importance of the creative industries to child development, "parent pack", online (networking, educational, Arts Hub model, directory, professional peak body, clustering, high profile "ambassadors" reside in region (use name, participation in marketing on the ground), funding (Feds RDA, MNC regional economic profile), LGA consistency / uniformity events etc/Das, marketing of talent/resources in region, peak professional body, recreational arts – tourism, marketing through media, recognised hubs and satellites for selected industries, better utilisation of entities such as Arts MNC as hub, the name "creative industries' is broader, marketing of hubs and satellites through tourism/businesses, dropout and burnout, collective sponsorship, 'back end' collaboration (administration etc)

Kempsey

Cross industry promotion, (tourism) brochures in shops, Maritime Museum in Kempsey, competitions with funding, cross marketing, Gallery in Slim Dusty Centre, Wuttuma Keeping place, open day, pool marketing resource to bring arts and friends together, artist in residence, access to funding, art centre building near river, MORE MORE MORE public sculptures (e.g. Walcha), skills (and pooling skills), market diversity, connecting information and resources, writers festival, camp creative, TAFE collaboration, piggybacking, weekend workshops, partnerships an art media section, bus tourism

Taree

Mid North Coast "Idol" school children, business person portrait including information regarding business or sportsperson, local council events coordinator, "tag along events" get together to promote events or tours, consultancy – professional help and online support, column in local media, collaborative marketing, increasing awareness, cultural shift/values green/health, arts group/committee, planning as a community, skills and resource audit to create a network, recognition, central place, tuition, makers market, performance, socialisation between artists: networking, makers market, sport, grow 'critical mass' awareness campaign, "Handmade pledge", "Manning Made" handmade in Mid North Coast branding

Forster

Council insurance covers hall use to be inclusive in bookings, mentor program and networks, seed capital (private funds as a loan for start ups), what's on website / brochure, education bridging finance, conservatorium, access to support, cultural plan (council), promote within other industries (eg Timbertown wood turners promoted by a builder), "public art in city spaces" (Melbourne example linked with map for tourist walk), Newcastle – facebook group 'renew Newcastle' artists to put things in window, grants officer (2 days/week grants program, 2 days support orgs with applications, 1 day workshops & skills), empty spaces in shops, chambers of commerce involved, support for online technology (in public space such as library), signage "what's on", sea changers to mentor, investing in Council owned halls to meet current community needs e.g. North Arm Cove Arts Annex

Hawks Nest

A multipurpose centre (including access for teenagers), to enhance collaboration for all ages, brainstorming and networking session, money to employ someone to drive projects, functions and event promoted in Sydney, new gateway to Tea Gardens, extend capacity of Council office in Tea Gardens, promoting as "Myall Coast" rather than individual towns, skills audit, pursue funds for town tourism/marketing/networking coordinator, international visitors to see National parks, arts sub-committee of Chamber of Commerce, long term: multi-purpose arts centre, coordinator, bus visitors, Myall river festival, migration rate, collaboration, festivals, schools, reputation as arts community, using centre as a work space (Art Centre), workshops, entities coming to Tea Gardens or funding travel, piggybacking meetings and events networking business visitors

Threats

Undermining artistic integrity through business processes, The complainers, burnout, dropout (e.g. handmade on the Macleay booklet), parochialism, council, nature of development, cost of marketing, insurance, red tape, succession plans, Sport, significant funding, skills dying out, cheap imports, red tape, regional organisations, Area is a secret, migration rate, local business service, insurance, seasons, information overload, aged community running organisations, lack of funding, insurance requiring things such as fencing sculptures on art walk

Attachment seven Survey responses to Industry Definition ‘others’

All types of production services for live performance
Online and Radio documentary production
Web design and coordination of a literary event
working with mixed media when painting
music performance, audio & lighting production, entertainment services
Tourism Management
Local Government - facilitation
aged care
Public art & events
creative embroidery (needle painting)
Collaboration and advocacy
Ceramics, photography, digital imaging and Warm Glass
Im involved with music with radio and promotions with same along with writing publishing & print media with my freelancing
Education
film tv and writing publishing. fix survey to allow multi answers
visual & performance arts, training community cultural
Education across all creative industries
Education
Secondary Music education, community performances
Working Committee - Proposed Adopt an Artist Program
VALUE ADDING WOOL AND MOHAIR
Gallery + Teaching Artisan skills
visual arts/painting
warm glass, visual
Sculpture
Cultural Development
Website development, advertising, marketing and graphic design
General Enquiries on Arts
General Enquires
fashion and textile design
DVD Video Animations - Partner Mick Parker....I am a Community Developer and Project Manager and have worked within the creative industries Programs both in funding and in training in new media with Family and Community Services and the Indigenous body for funding purposes MIMI with Bea Ballangarry
Tourism
Creative combination of visual arts, sculptural art, youth art, showcase & promote amateur performance, advocating to enhance cultural community and heritage as a business and volunteer in community group
business services
creativity in connection to the earth
Both visual and performing arts
handmade products (crafts)
textile crafts
Crafts

Attachment eight, Bowraville skills survey

Bowraville Skills Survey

Do you work, volunteer or live in Bowraville ? We'd love to know more about you and find out ways that we can better connect you with the community. Please complete the following survey and return to Bowraville Theatre or to PO Box 323 Bowraville 2449 by **FRIDAY 19 DECEMBER.**

For more information about the Bowraville Collaborative Marketing project please contact the coordinator Kerry Grace on 6564 8843 or e-mail kgrace@evolvenetwork.com.au.

Your name:______________________________ **Home Postcode**: _____________

Phone: ______________________________ **E-mail**: ____________________________

How old are you? ☐15-24 ☐25-44 ☐45-54 ☐55-64 ☐65+

1. Do you have any children at home ? YES / NO
If yes, what are their ages? ____

2. What is your current work situation?
☐ retired ☐ working part time ☐working full time ☐looking for work ☐ studying

3. What are your hobbies? ____

4. Would you teach / mentor someone in these skills ? _________________________

5. Do you have any experience or interest in any of the following? Please ✓ if you are looking for work, would like to learn or would like to teach in the following skill areas

Skill	I'm looking for work in this area	I would like to learn more about this	I would like to teach/mentor this
e.g. administration	✓		✓
Crafts			
Gardening			
Event management			
Marketing			
Business planning			
Public art			
Performance			
Graphic design			
Web design			
Streetscape design			
Storytelling			
Tour Guiding			
Promoting			
Tourism			
Ushering			
Grant writing			
Audio engineering			
Staging			
Projection			
Curating			
Wood working			
Computers			
Administration			

Attachment nine focus group participants

Kempsey 14 October 2008

Dave Jones	Yarrahapinni Gallery
Sue Paterick	
Katherine Yarnold	Slim Dusty Foundation
Lynn Ducat	Macleay Options
Michelle Fisher	Macleay Options
Scott Jackson	Scott Jackson Artworks
Julie Shea	Wonderland Framing and Art
Elizabeth Kent	Stuarts Point Players
Kay Morrison	Stuarts Point Players
Gabi Brie	Kempsey Library / writers group
Beris Derwent	Kempsey TAFE
Nikala Sim	

Hawks Nest 23 October 2008

Chez Rands
Leigh Allen
Anne Stuart
Julianne Gosper
Shona Hunter Howarth
Ivy Stevenson

Forster 24 October 2008

Chloe Beevers	Great Lakes Council
Greg Smith	Forster Film Festival
Helen Smith	
Athena Manoleras	Artist

Taree 24 October 2008

Don Macinni	Taree Artists inc
Kevin Williams	
Elise Wynyard	Independent art therapist
Rob Stephens	Kantabile CMNC Conservatorium of music
Jennifer Schubert	Independent artist
Sue Sutherland	Artist / art therapist
Zeila Hoard	Taree Craft Centre
Judith Tetley	Taree Craft Centre
Jo Fischer	Midcoast Youth Career Services
Christine & Peter Calabria	Artisans Retreat
Peter Lyne	Focus Magazine / Manning Valley Chamber of Commerce
Milce Collins	Taree City Festival
Jen Nichols	Artist

Coffs Harbour 30 October 2008

Carol Hellmers	Coffs Harbour Regional Conservatorium
Christiaan Dolislanger	
Liz Keen	
Rod Howard	
Penelope Lairy	Image and word works
Sharna St Leon	Jetty Theatre
Kerrie Bowtell	TAFE Outreach coordinator
Christina Hyde	ScreenLinks
Malcolm McLeod	Coffs Harbour City Council
Sam	Arts MNC
Peter Wilson	Bellingen Council
Richard Holloway	Arts MNC