

Analysis of the creative and cultural sector in the City of Ryde

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Contents page

01

Summary of findings

(pages 4-5)

02

Historical trends

(pages 6-10)

03

Forces influencing trends

(pages 11-15)

04

Workers vs residents

(pages 16-18)

05

Journey to work patterns

(pages 19-26)

06

Forecast job needs

(pages 27-28)

01 Summary of findings

Summary of findings

In 2017/18, Cultural and Creative Industries supported 4,400 jobs and generated \$750m in value added.

If it was a 'sector' it would be the tenth largest employer in the City of Ryde, but the 8th largest generator of value added. Cultural and Creative Industries as a whole are under-represented in the City of Ryde compared to Greater Sydney.

However, the share of value added generated by the sector is much larger than its share of jobs, suggesting the City has a higher share of more productive industries.

In contrast to industries, the share of local jobs in Cultural and Creative Occupations is slightly higher than the Greater Sydney average. This suggests there are more 'embedded creatives' working in diverse industries.

Cable Broadcasting is by far the largest Cultural and Creative industry in the City of Ryde supporting almost 1,200 jobs in 2017/18, over three times the next largest industry. Most of these jobs are within Macquarie Park and connected to Foxtel's headquarters being located there.

Graphic Designers are the largest Cultural and Creative occupation by job numbers in the City of Ryde, but actually under-represented when compared to Greater Sydney. The most over-represented occupations are connected to television/broadcasting (program directors, technical writers, multimedia designer)

02 Importance of sector

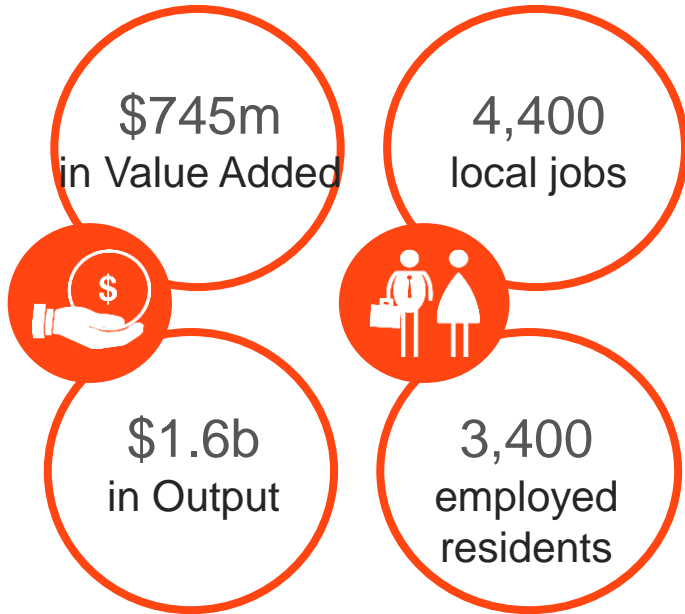
Cultural and Creative Sector in Ryde

Economic Overview – 2017/18

- If Cultural and Creative Industries was a 'sector' it would be the tenth largest employer in the City of Ryde, but the 8th largest generator of value added. The productivity of local workers in the sector would be the 6th highest in 2017/18.

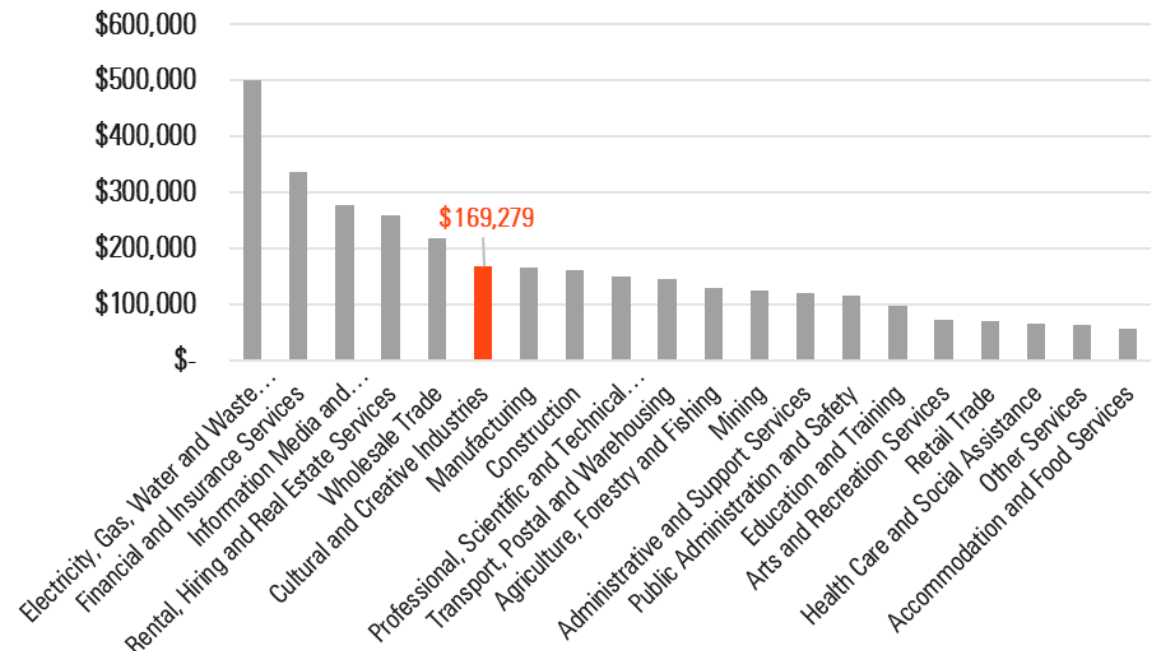
Cultural and Creative Industries

Cultural and Creative Occupations*



Sector Worker Productivities, 2017/18

Value added/Local Jobs



Source: ABS Census of Population and Housing, 2016; NIEIR, 2018

Source: ABS Census of Population and Housing 2016; NIEIR, 2018

*Estimates of value added and output by occupation is not available within NIEIR modelling nor is it widely reported elsewhere

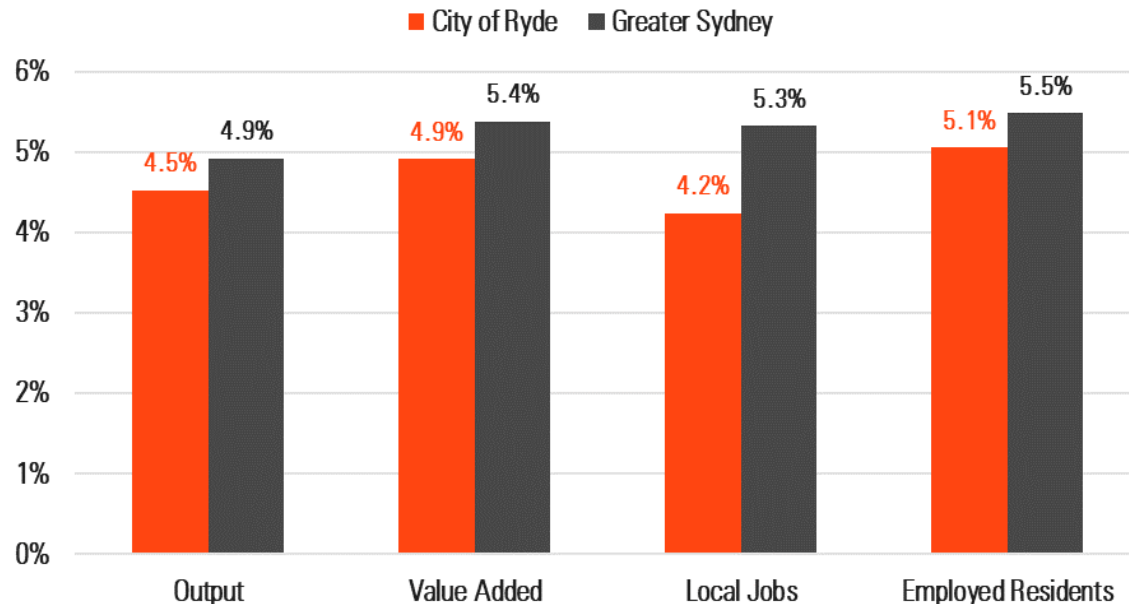
Ryde under-represented in cultural and creative industries, but over-represented in occupations

- Cultural and Creative Industries are under-represented in the City of Ryde compared to Greater Sydney as a whole. However, the share of value added generated by the sector is much larger than its share of jobs, suggesting the City has a higher share of more productive industries.

- In contrast to industries, the share of local jobs in Cultural and Creative Occupations is slightly higher than the Greater Sydney average. This suggests there are more 'embedded creatives' working in diverse industries.¹

Cultural and Creative Industries, 2017/18

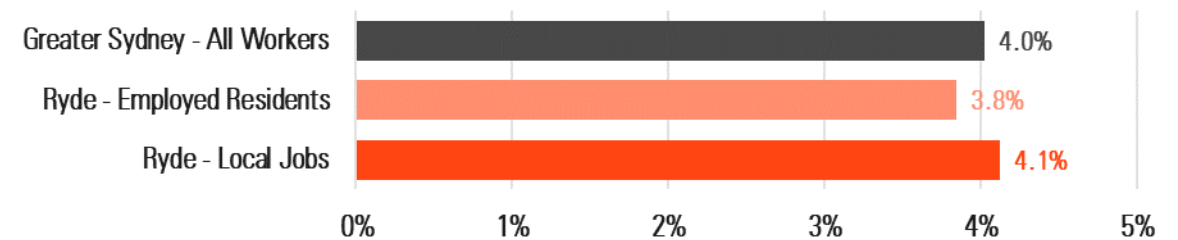
Share of the total economy



Source: ABS Census of Population and Housing, 2016; NIEIR 2018

Cultural and Creative Occupations, 2016

Share of the total economy



Source: ABS Census of Population and Housing, 2016

¹ Embedded creatives refers to people working in creative/cultural roles in non-creative/cultural industries e.g. a graphic designer working in a large retail company.

Cable broadcasting the largest industry by far; Graphic Designer the largest occupation

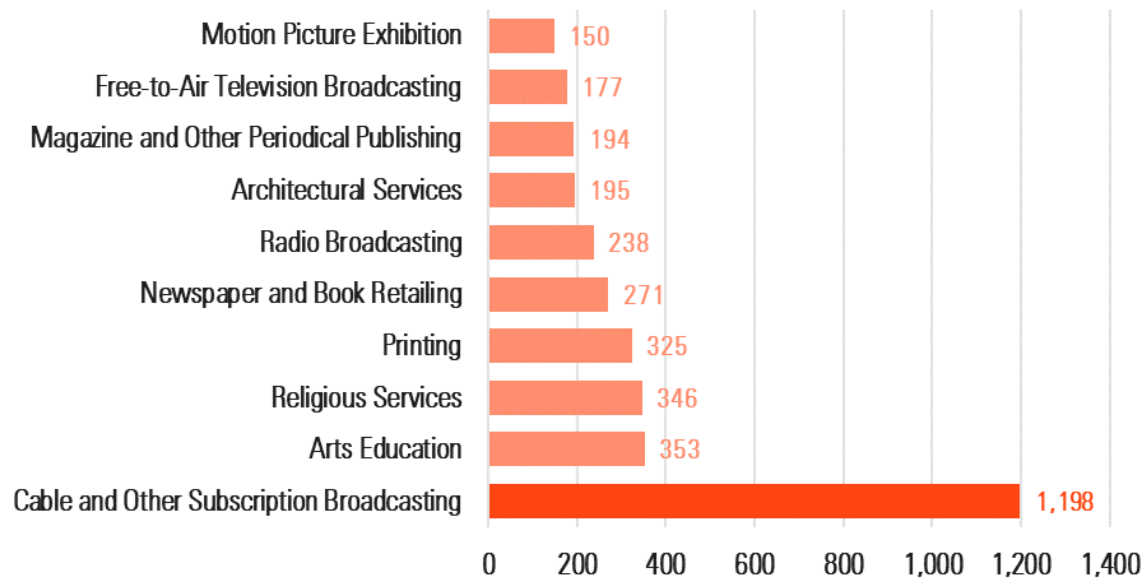


- Cable Broadcasting is by far the largest Cultural and Creative industry in the City of Ryde supporting almost 1,200 jobs in 2017/18, over three times the next largest industry.

- Graphic Designers are the largest Cultural and Creative occupation by job numbers in the City of Ryde with almost 250 local workers occupying this role.

Top Cultural and Creative Industries, City of Ryde, 2017/18

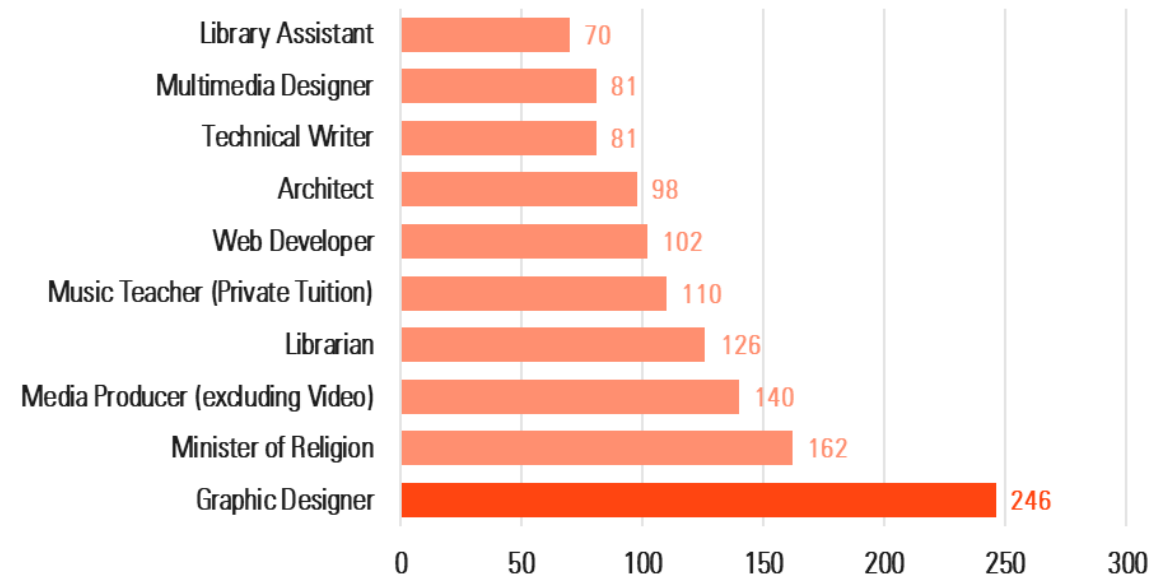
Number of local jobs



Source: ABS Census of Population and Housing, 2016; NIEIR, 2018.

Top Cultural and Creative Occupations, City of Ryde, 2017/18

Number of local jobs



Source: ABS Census of Population and Housing, 2016; NIEIR, 2018.

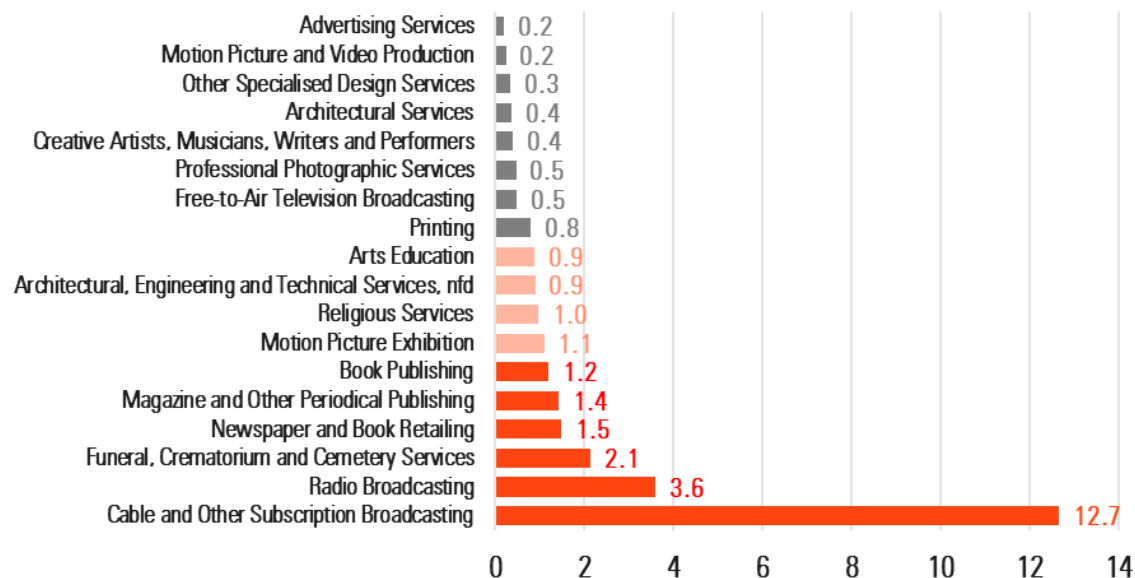
Broadcasting related activities over-represented; Advertising and Architecture under-represented

- Cable Broadcasting share of the City of Ryde's total jobs (1.1%) is 12.7 times the Greater Sydney average. In general, broadcasting and publishing activities are over-represented in Ryde's largest Cultural and Creative Industries (CCI) and advertising, architectural services and creative production/performing activities are under-represented.

- Despite Graphic Designers being the largest Cultural and Creative occupation (CCO) by job numbers in the City of Ryde, this occupation is actually under-represented when compared to the Greater Sydney average. The most over-represented occupations are connected to television/broadcasting (program directors, technical writers, multimedia designer)

Over and Under-represented CCI, City of Ryde, 2017/18

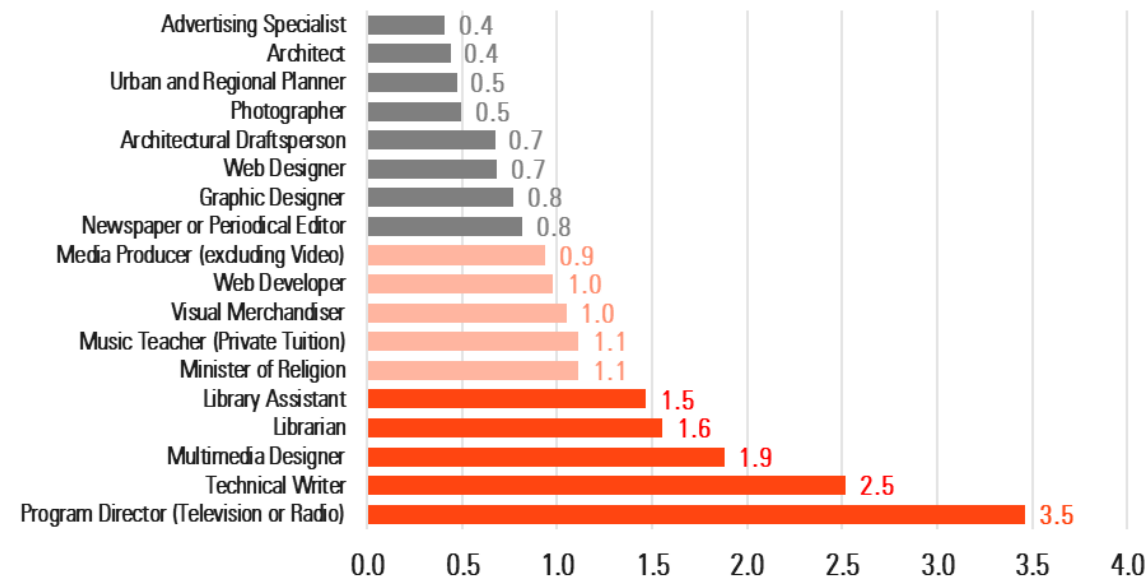
LQ* compared to Greater Sydney; industries with ≥ 50 jobs



Source: ABS Census of Population and Housing, 2016; NIEIR, 2018.

Over and Under-represented CCO, City of Ryde, 2017/18

LQ* compared to Greater Sydney; occupations with ≥ 40 jobs



Source: ABS Census of Population and Housing, 2016; NIEIR, 2018.

03 Recent growth trends

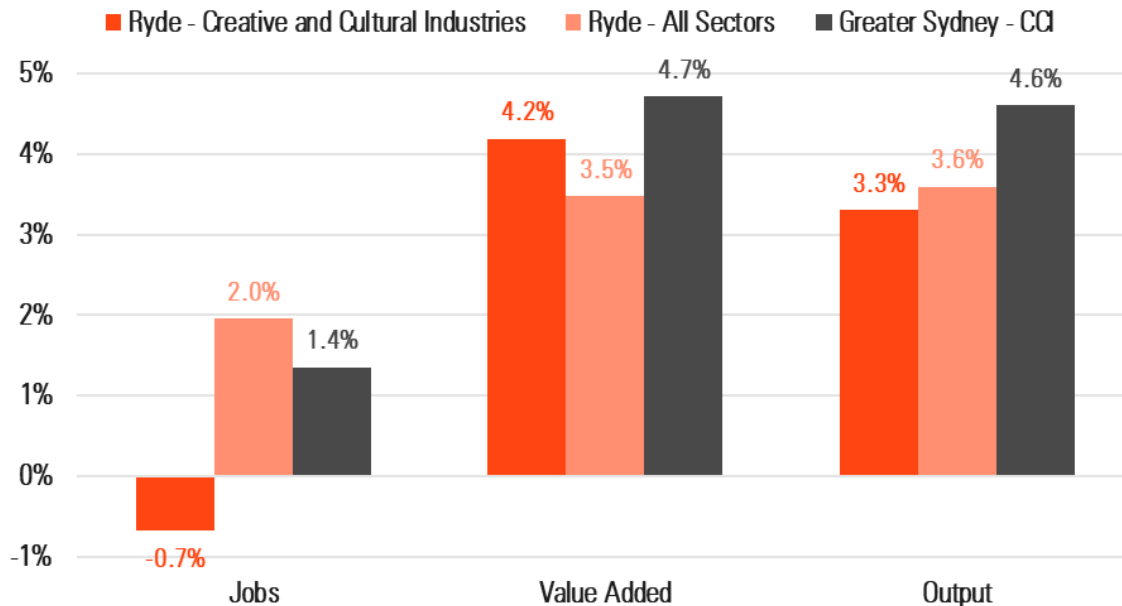
Strong growth in value-added driven by cable broadcasting; however there was jobs decline

- The number of Cultural and Creative Industries jobs in the City of Ryde was estimated to have fallen in the five years between 2012/13 and 2017/18. This contrasts with strong jobs growth in the rest of the economy (2.0% p.a.), and jobs growth in the sector at the larger metropolitan level (1.4%). However, Output and Value Added growth in the sector did increase.

- Jobs growth was split between cultural and creative areas, however value added growth was overwhelming influenced by strong growth in cable broadcasting (linked to Foxtel in Macquarie Park). Magazine publishing grew in contrast to book publishing which declined.

Growth Rates, 2012/13 to 2017/18

Average annual growth



Source: ABS Census of Population and Housing, 2011 and 2016; NIEIR 2018

Top Growth Industries, 2012/13 to 2017/18

Change in job numbers/value added

Top 5 Jobs Growth

Arts Education	205
Architectural Services	116
Cable and Other Subscription Broadcasting	36
Magazine and Other Periodical Publishing	36
Architectural, Engineering and Technical Services, nfd	36

Top 5 Value Added Growth (\$m)

Cable and Other Subscription Broadcasting	\$106
Magazine and Other Periodical Publishing	\$22
Radio Broadcasting	\$21
Architectural Services	\$14
Arts Education	\$8

Source: ABS Census of Population and Housing, 2011 and 2016; NIEIR 2018

Top Decline Industries, 2012/13 to 2017/18

Change in job numbers/value added

Top 5 Jobs Decline

Book Publishing	-172
Advertising Services	-128
Motion Picture and Video Production	-67
Printing	-56
Free-to-Air Television Broadcasting	-54

Top 5 Value Added Decline (\$m)

Book Publishing	-\$23
Advertising Services	-\$15
Printing	-\$5
Motion Picture and Video Production	-\$4
Funeral, Crematorium & Cemetery Services	-\$3

Source: ABS Census of Population and Housing, 2011 and 2016; NIEIR 2018

04 Workforce characteristics

Cultural and Creative industries workers in Ryde

- City of Ryde workers in Cultural and Creative Industries (CCI) are slightly younger than the average worker in the LGA and this may account for their lower median income and full-time employment status. The share of workers who are overseas born is much lower than the City of Ryde average, but on par with the sector at the Greater Sydney level.
- In contrast to CCI workers, those working in Cultural and Creative Occupations (CCO) are more likely to be degree educated and earning higher salaries. Most CCO workers in the City of Ryde are in the Information Media and Telecommunications sector.

	City of Ryde CCI workers	Greater Sydney CCI workers	City of Ryde CCO workers	Greater Sydney CCO workers	City of Ryde all workers
Median age	38	39	39	39	40
Degree educated	52%	51%	63%	60%	53%
Top fields of study	Communication and Media Studies; Business and Management; Accounting	Communication and Media Studies; Architecture and Urban Environment; Graphic and Design Studies	Communication and Media Studies; Graphic and Design Studies; Architecture and Urban Environment	Graphic and Design Studies; Architecture and Urban Environment; Communication and Media Studies	Business and Management; Accounting; Information Technology
Overseas born	37%	37%	38%	36%	51%
Employed F/T	70%	68%	70%	67%	71%
Median income	\$52-65k	\$52-65k	\$65-78k	\$52-65k	\$65-78k

Source: ABS Census of Population and Housing 2016



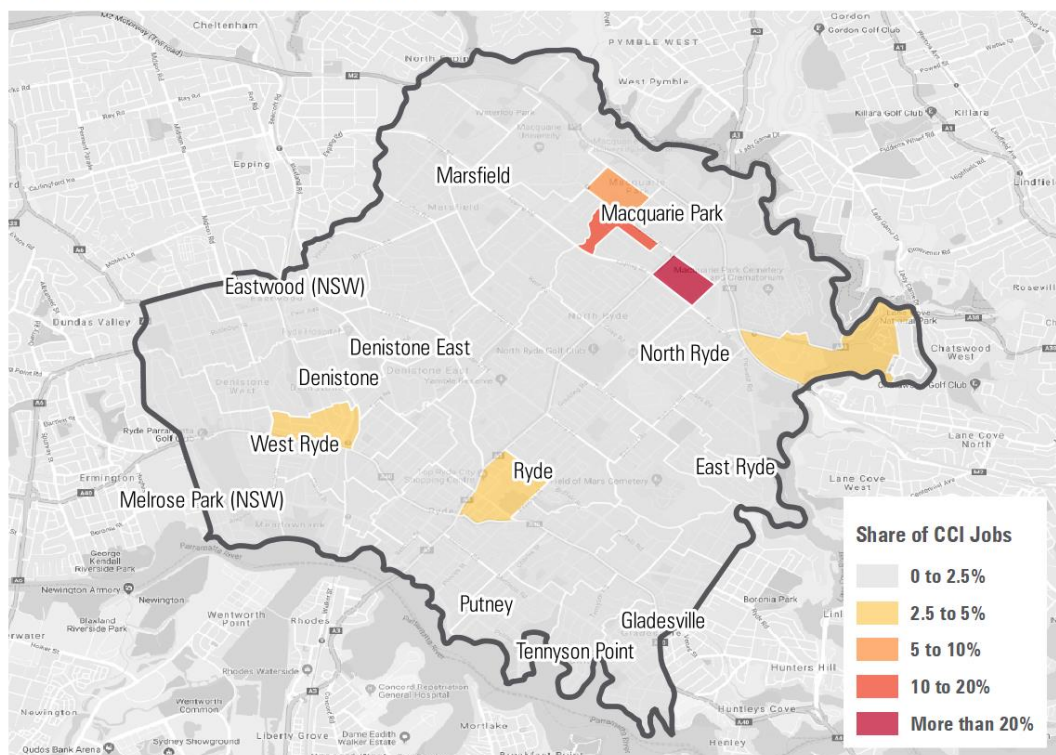
05 Mapping the sector

Location of Cultural and Creative Sector Jobs

- Most Cultural and Creative Industries jobs in the City of Ryde are located in the suburb of Macquarie Park (66%), with other employment hubs (>2.5% of all CCI Jobs) being Ryde, West Ryde and North Ryde.

Cultural and Creative Industries Job Locations

DZN % share of all CCI jobs in City of Ryde

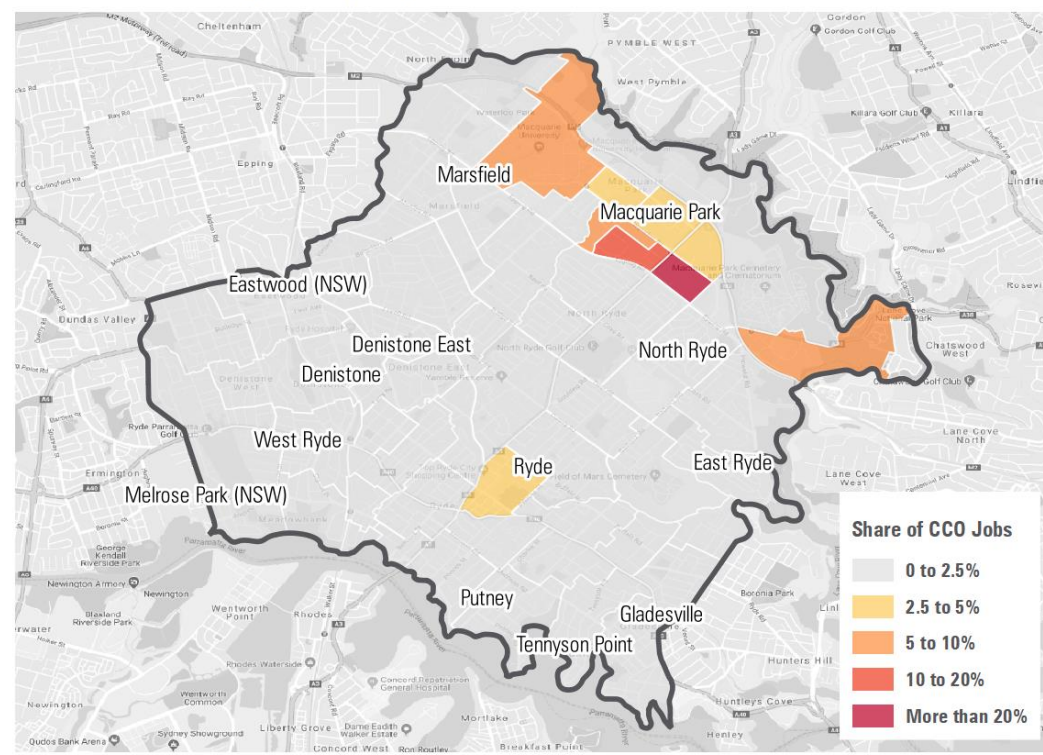


Source: Census of Population and Housing, 2016

- Workers in Cultural and Creative Occupations are also concentrated in Macquarie Park (66% of all CCO workers) but spread across the suburb.

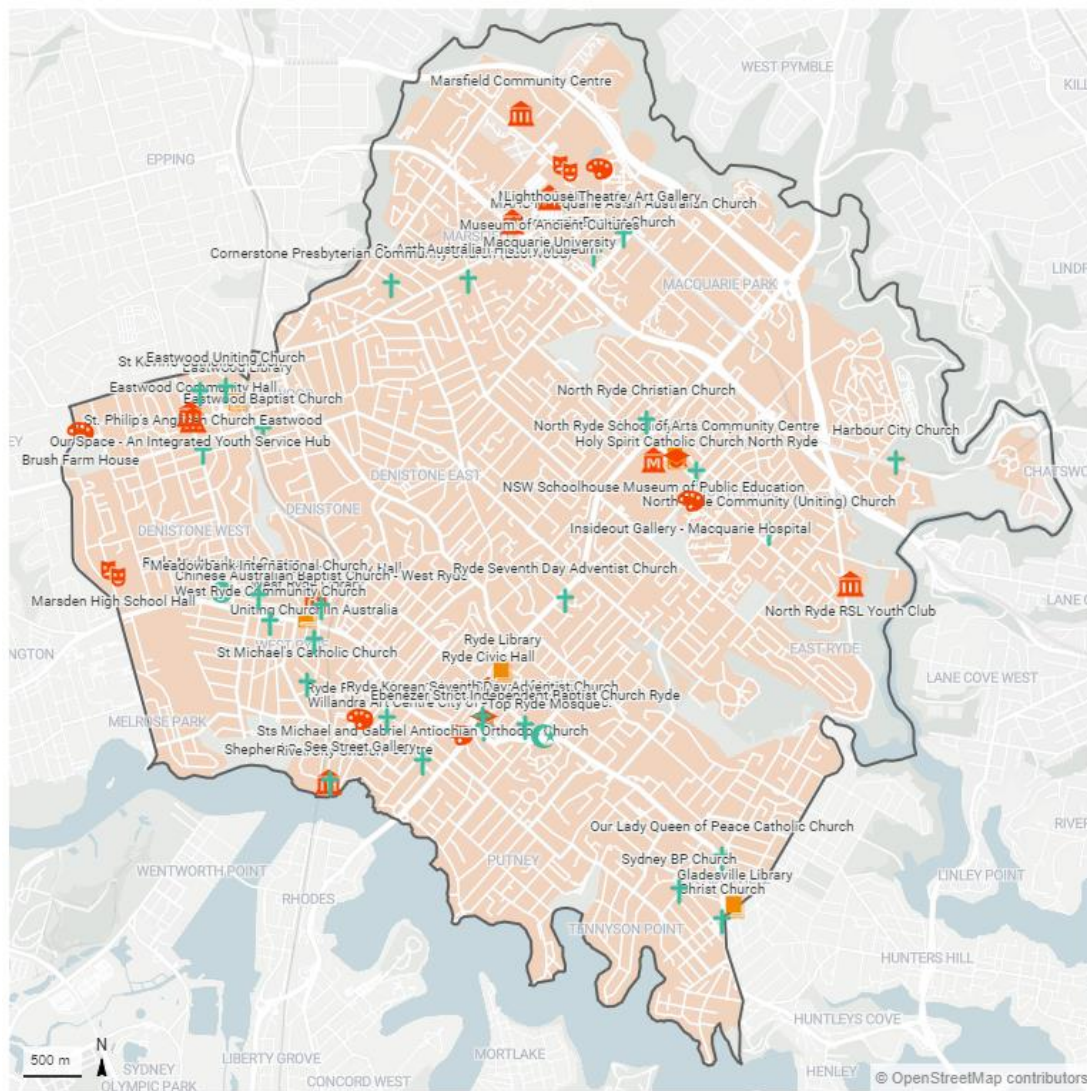
Cultural and Creative Occupations Job Locations

DZN % share of all CCO jobs in City of Ryde

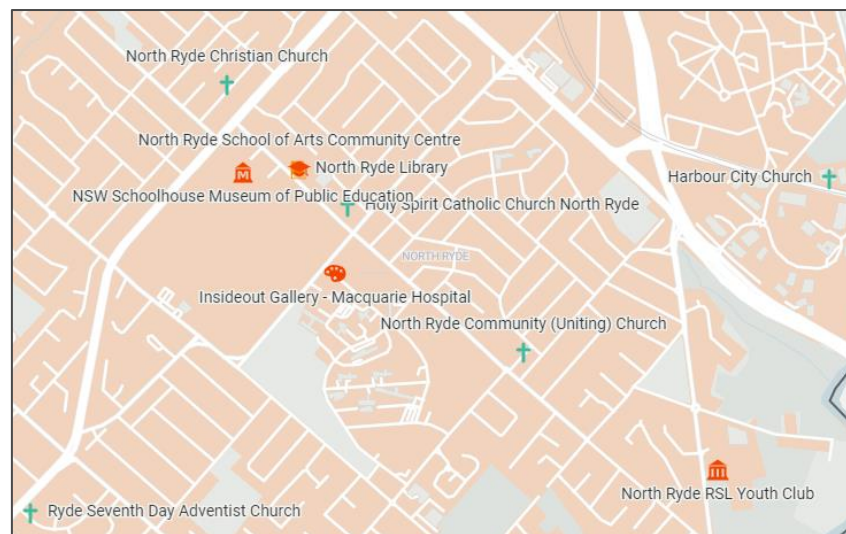
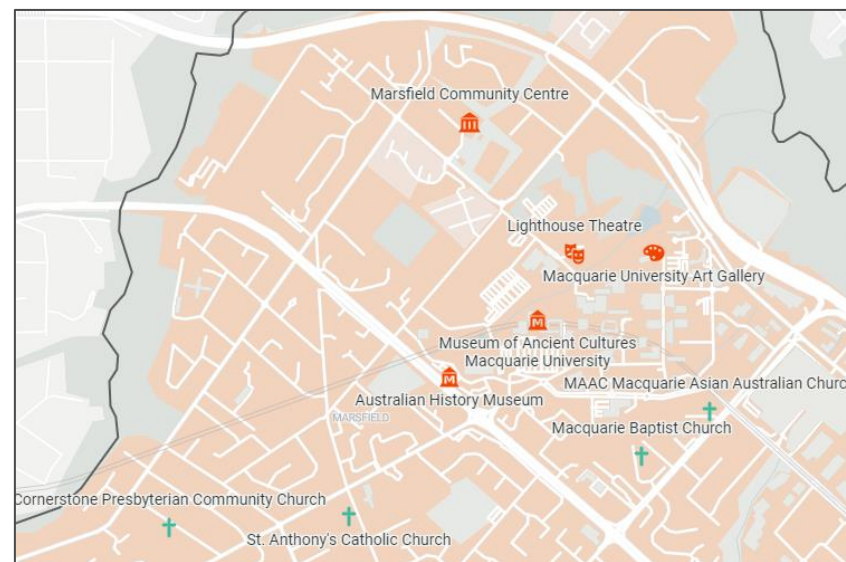


Source: Census of Population and Housing, 2016

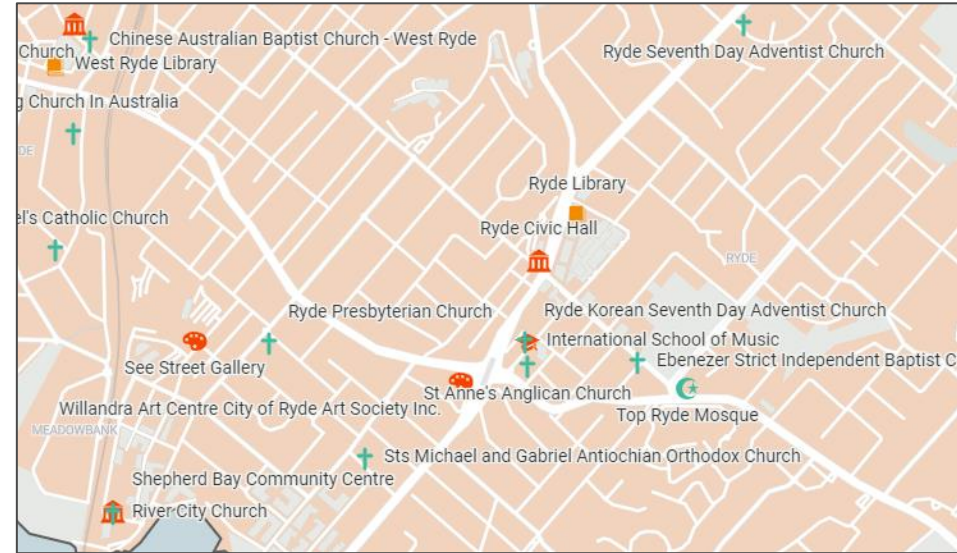
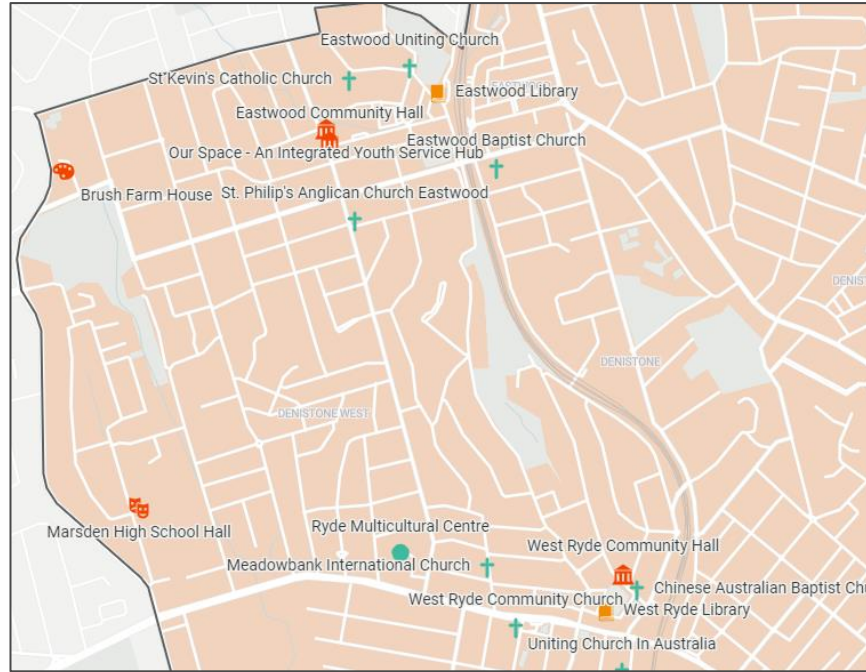
City of Ryde Cultural and Creative Facilities



- Creative Facilities
- Cultural Facilities
- Libraries



City of Ryde Cultural and Creative Facilities



06 Appendix

Data sources

- The data used in this analysis is based on the ABS Census of Population and Housing 2011 and 2016 estimates adjusted using NIEIR (National Economics) small area estimates of employment and economic value.
 - For analysis, .id primarily adopted the classification of industries and occupations used by the ABS in Cat. 6273.0 – Employment in Culture, Australia, 2011 which in turn is based on Cat. 4902.0 – Australia Culture and Leisure Classifications
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