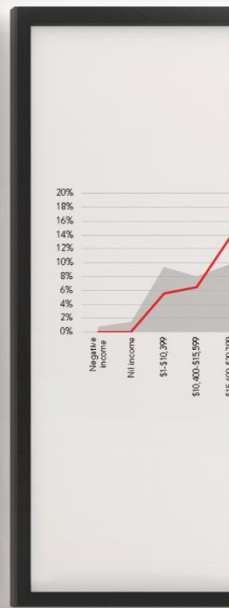
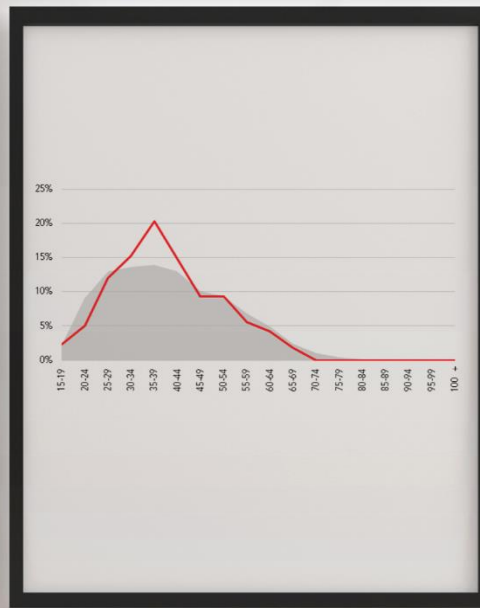
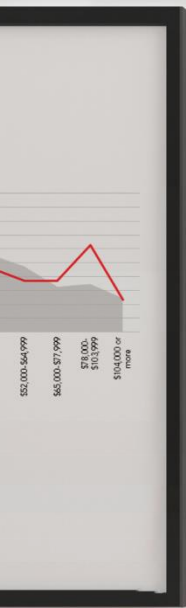


# Economic and Social Value of the Arts and Creative Sector in the City of Maribyrnong

April 2017



Prepared for:  
City of Maribyrnong

Date:  
10 April 2017

# Executive Summary

- The Arts and Creative sector is a valuable part of economies in liveable cities, and Greater Melbourne is no exception. In addition to the intrinsic value, it contributes to economic, social and community development and is a key part of nation-building for our cities and towns.
- Local government has a recognised role in supporting arts and creative activity in the community, especially in inner metropolitan areas such as Maribyrnong.
- This report summarises the economic and social value of the Arts and Creative sector in the City of Maribyrnong.
- There are 1,451 jobs in Maribyrnong's Arts and Creative sector, which is 3.8% of the City's total. The sector's total (direct and indirect) contribution to GRP is \$297.8 million, or 5.4% of the City's GRP; with Council and Victoria University directly contributing around 2% of this (\$2.61 million). This makes the sector Maribyrnong's 7<sup>th</sup> largest by GRP.
- The largest component of activity is in design, which employs 344 people and generates \$63m in GRP.
- There are also other economic benefits that are not easily monetised. They include: the impact on gentrification and urban revitalisation; retail strip renewal; improved visitor brand value; health and wellbeing benefits which reduce public health expenditure; and the economic benefits of clustering.
- Social values include a strong existence value surrounding arts and creative activity in Maribyrnong (existence value is described as the satisfaction derived from 'just knowing it is there'); improved social inclusion and mental wellbeing, particularly for those at risk of isolation, such as the elderly, asylum seekers and refugees; improved perceptions of safety; improved personal, neighbourhood and cultural pride; and fewer anti-social behaviours.
- Analysis of social media data shows that arts and creative activity attracts visitors from throughout the metropolitan area, but particularly the cities of Melbourne, Port Phillip and Stonnington.

Total Jobs  
**1,451**  
(3.8%)

Total GRP  
**\$297.8m**  
(5.4%)

Largest Sector  
**Design**  
(344/\$63M)

Council and VU  
Contribution  
**\$3.45m+**

Contribution GRP  
Impact  
**\$2.61m**  
(+2%)

Supported  
Employment  
**28**



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# 1.0 Introduction

The Arts and Creative sector is part of what makes Greater Melbourne one of the most liveable cities in the world. As well as generating intrinsic value, it contributes to economic, social and community development, enhancing quality of life as it drives the economy. Arts and Creative sector activity has been demonstrated to improve community wellbeing, social capital, the built, and even natural, environments. It is fundamental to creating a sense of place, ensuring community cohesion, designing and implementing street beautification projects, and helping to revitalise buildings; all objectives that fall within the remit of local government. There are few other sectors that can make this claim. This report summarises the economic and social value of the Arts and Creative sector in the City of Maribyrnong, and includes Council's contribution to this important activity.

## 1.1 Creating thriving communities, liveable cities and sustaining a nation through the Arts and Creative sector

The Arts and Creative sector forms part of the knowledge economy. It employs a high proportion of skilled workers, who transform ideas and information into valuable goods and services.

The sector is concentrated in inner metropolitan areas. Here the combination of denser urban living, diversity and character of housing and commercial spaces, public transport and accessibility to tertiary institutions creates the ideal conditions for the sector to thrive.

The range of activities, employment and outputs from the Arts and Creative sector extend across most aspects of our lives: from

events we attend, to clothes and jewellery we wear, houses we live in, books we read, apps we play with, furniture we sit on and music we relax to. It is fundamental to the knowledge economy that underpins Victoria, if not Australia, and it is as important to our general economic and social wellbeing as any major infrastructure or public policy commitment we make.

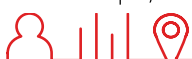
## 1.2 The limitations on quantifying a public good

As with any public good, accurately quantifying the value of the Arts and Creative sector is a challenging task. Firstly, there are intangible benefits such as the existence value of the sector<sup>1</sup> and the merit value of attending a cultural event and 'broadening our horizons'.

Trying to then constraint the measure at a municipal boundary makes it even more difficult (and even more likely that we will

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<sup>1</sup> For example, we are pleased that the State of Victoria owns a Titian painting, even though we may rarely, or never, see it.



underestimate the value due to 'leakage'). There is also a high volume of voluntary participation in the sector; again, something that is difficult to accurately measure<sup>2</sup>.

When we turn to measuring the social value, it becomes harder still.

The result of this is that any measure is likely to be incomplete and an under-estimate. But if undertaken in a straightforward and clear manner, the measure can be used as a benchmark to track change over time and to compare with other places.

### 1.3 The scope of the sector

We have used the Australian Bureau of Statistics Cultural and Creative Sector satellite account categories to define the industry groups of the Arts and Creative sector. These include an extensive list of ANZSIC categories, which can be found on the ABS website.

#### ***Where does culture fit into the Arts and Creative sector?***

Culture is something that happens all around us, regardless of funding, governance or municipal programs. It is in the food we eat, the language we use and the physical spaces we live in.

Without diminishing the importance of any of these factor, for the purposes of this report, we use the term 'cultural activities' which narrows the definition to include those cultural events and offerings that are organised, and not those that are spontaneous or integral to the everyday cultural landscape in Maribyrnong.

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<sup>2</sup> ABS data does not indicate sector-specific volunteer activity (e.g. the volunteer rates in the Arts and Creative sector).



## 2.0 Economic Values

Maribyrnong's Arts and Creative sector is made up of 1,451 jobs (3.8% of the City's total). Its contribution to GRP is \$297.9 million (5.4%), and the Council accounts for 1% of this (\$1.61m), which has been a consistent benchmark for local government contribution to GRP in Greater Melbourne. The sector is Maribyrnong's 7<sup>th</sup> largest by GRP.

### 2.1 An overview of the sector

As Figure 1 shows, there are 1,451 jobs in Maribyrnong's Arts and Creative sector, generating \$297.8 million in GRP.

Council's investment of around \$2.15 million generates \$1.61 million in GRP, which makes up around 1% of the total sectoral value.

This investment directly and indirectly supports some 18 jobs.

As Figure 2 shows, summing direct and indirect contribution, the Arts and Creative sector is Maribyrnong's 7<sup>th</sup> largest by GRP. It contributed nearly \$300m to the City's Gross Regional Product in 2015 and ranks on par with the Education and Training sector (\$373m) and Financial and Insurance Services (\$289m).

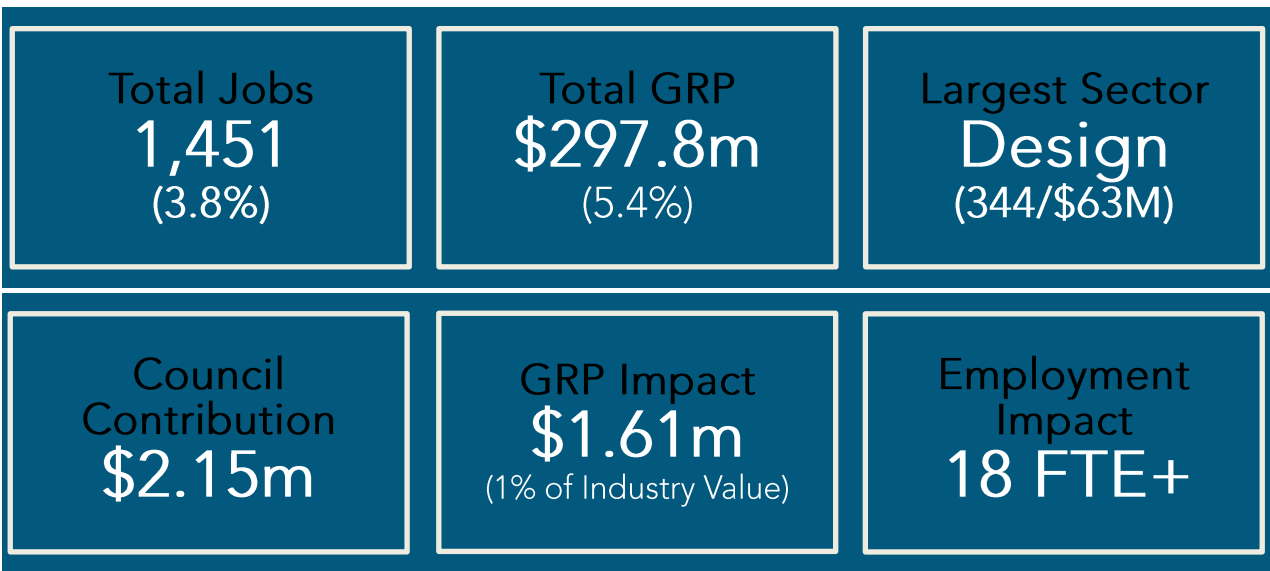


Figure 1: Arts and Creative Sector Headline Indicators  
Source: Geografia, 2017



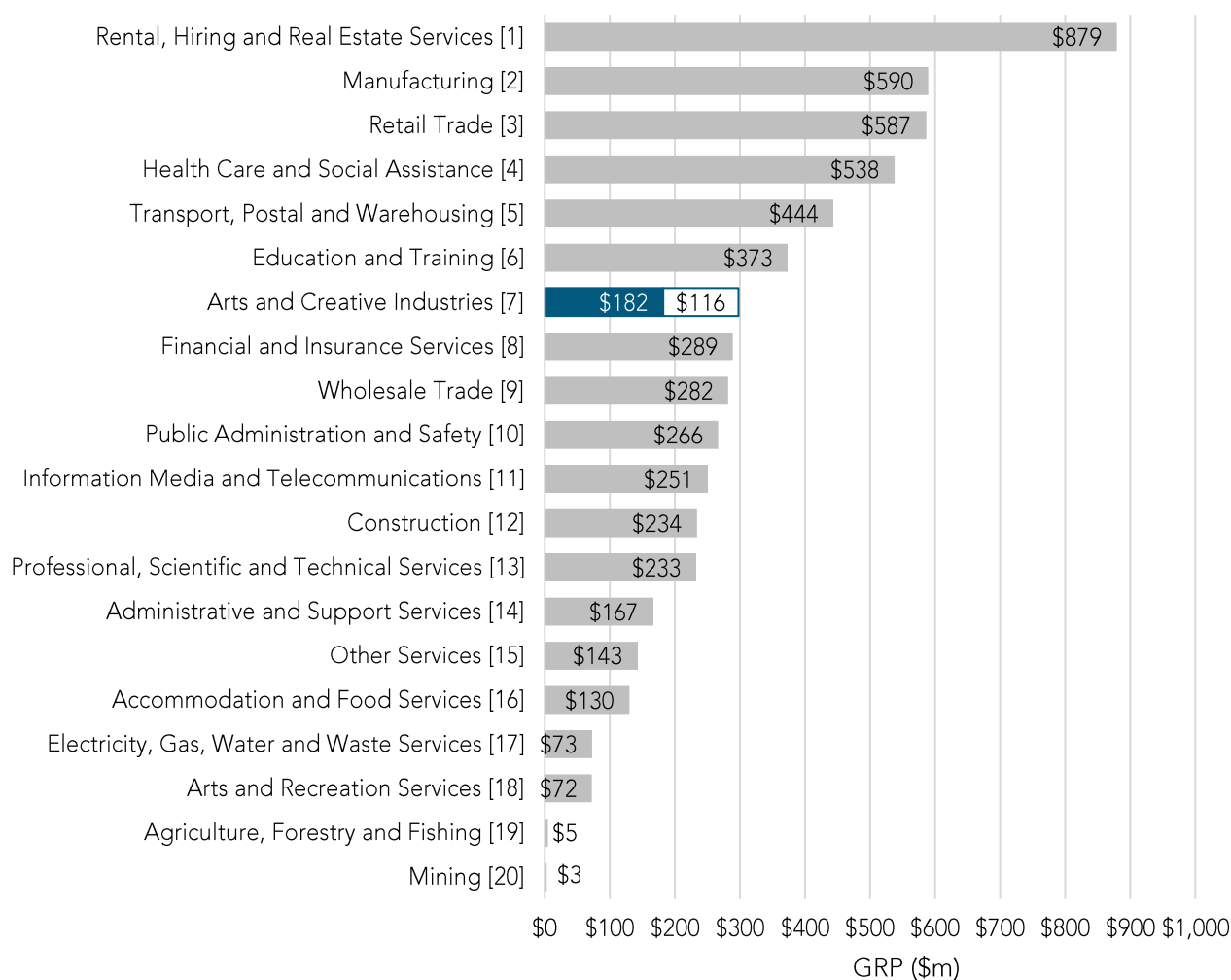


Figure 2: GRP by Industry (Maribyrnong, 2015)

Figure 2 breaks down the direct (in dark blue) and indirect (in white) contribution of the Arts and Creative sector. The Arts and Creative sector covers an amalgam of different sub-sectors and occupations (including but not limited to Arts and Recreation Services). For more detail on the industry definition of Arts and Creative sector, refer to ABS 2008-09 5271 Australian National Accounts: Cultural and Creative Activity Satellite Accounts. Source: Geografia 2017

## 2.2 The workforce

In 2015, there were **1,451 jobs** in the Arts and Creative sector (3.8% of all jobs in Maribyrnong). These stimulated a **further 866 jobs** in the City, for a **total of 2,317 jobs**.

**Design** employs the most people (344), closely followed by **Fashion** (324), then **Literature and Print Media** (211).

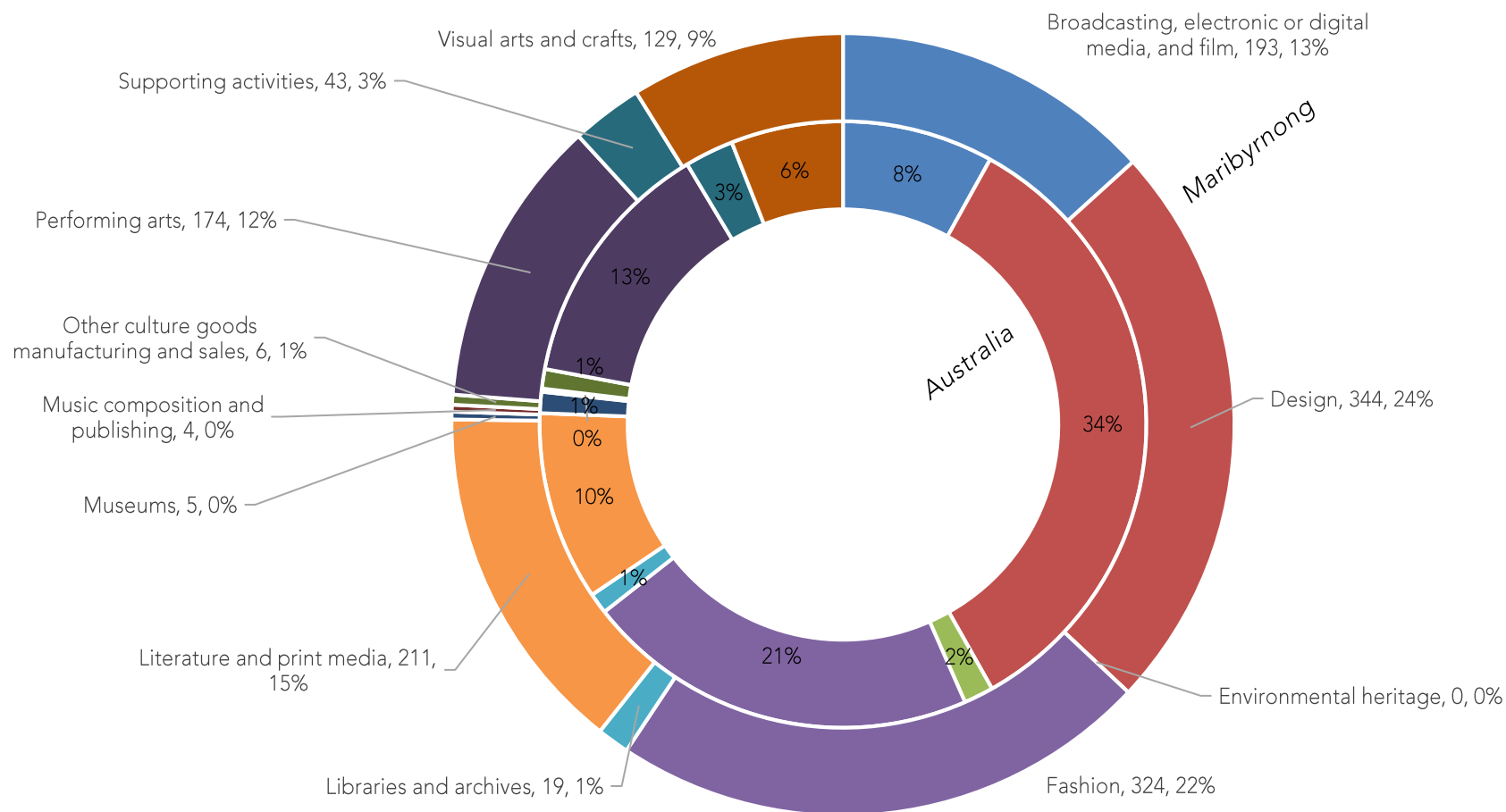
Compared with the rest of Australia<sup>3</sup>, Maribyrnong's employment profile (by industry) is statistically unique due to:

- **Broadcasting, Digital Media and Film**, which accounts for 13% of total employment in Maribyrnong, compared with 8% nationally; and
- **Literature and Print Media**, which accounts for 15% of total employment, compared with 10% at the national level.

<sup>3</sup>  $\chi^2$  tests were used to compare the distribution of employment and GRP by subsector for Maribyrnong and Australia.







**Figure 3: Arts and Creative Subsectors by Employment (Maribyrnong and Australia, 2015)**

Source: ABS 2011 Census and Australian National Accounts 5271 ABS (2008-09), ABS 2011 Place of Work Census, escalated to 2015 using Economy.ID (2016) Place of Work data.



## 2.3 Artist and media professional residents

Within the sector, there are some standout features (Figure 4). The artist and media professional subgroup is particularly interesting.

- Nearly a quarter of artists and media professionals are employed as Journalists and Other Writers (26%), followed by Photographers (17%); and Film, Television, Radio and Stage Directors (14%);
- More than half of those working in the sector are owners of unincorporated businesses. A further 31% are employees, and the remaining 11% are

owner-managers of incorporated enterprises. This is typical of a small business/sole trader dominated sector; and

- While generally similar to the rest of Greater Melbourne, Maribyrnong is unique in the relatively high proportion of photographers.

Also unique to Maribyrnong, is the relatively young age of Maribyrnong's resident artists and media professionals compared with Melbourne's average (Figure 5 shows a high proportion of 25-44 year olds). They are also more likely to be in a higher income bracket than the rest of the metropolitan artist and media professional community (Figure 6).

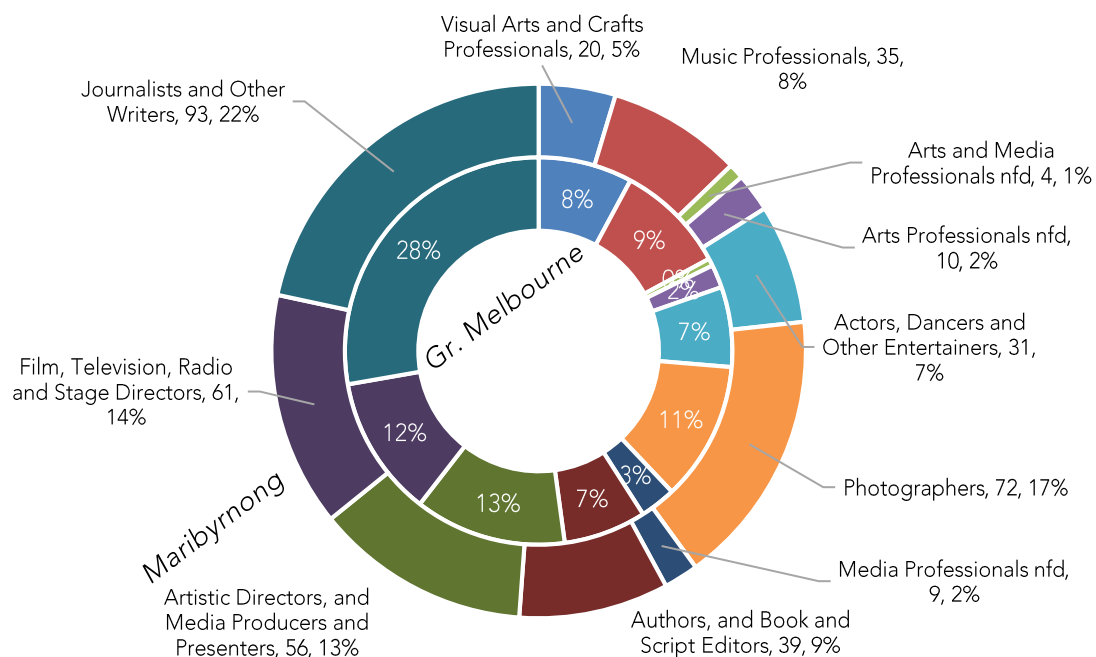


Figure 4: Artist and Media Professionals Profile by Occupation, 2015

Source: ABS 2011 Census and Australian National Accounts 5271 ABS (2008-09), ABS 2011 Place of Work Census, escalated to 2015 using Economy.ID (2016) Place of Work data



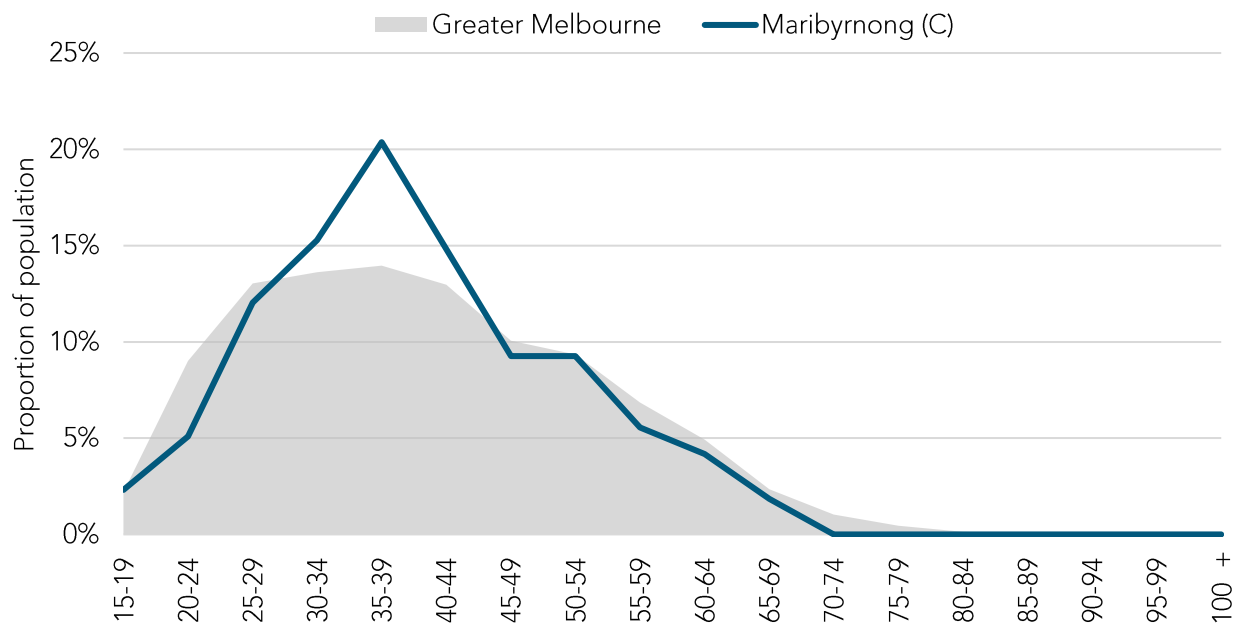


Figure 5: Age Profile of Artists and Media Professional, Maribyrnong 2011  
Source: ABS 2011 Census

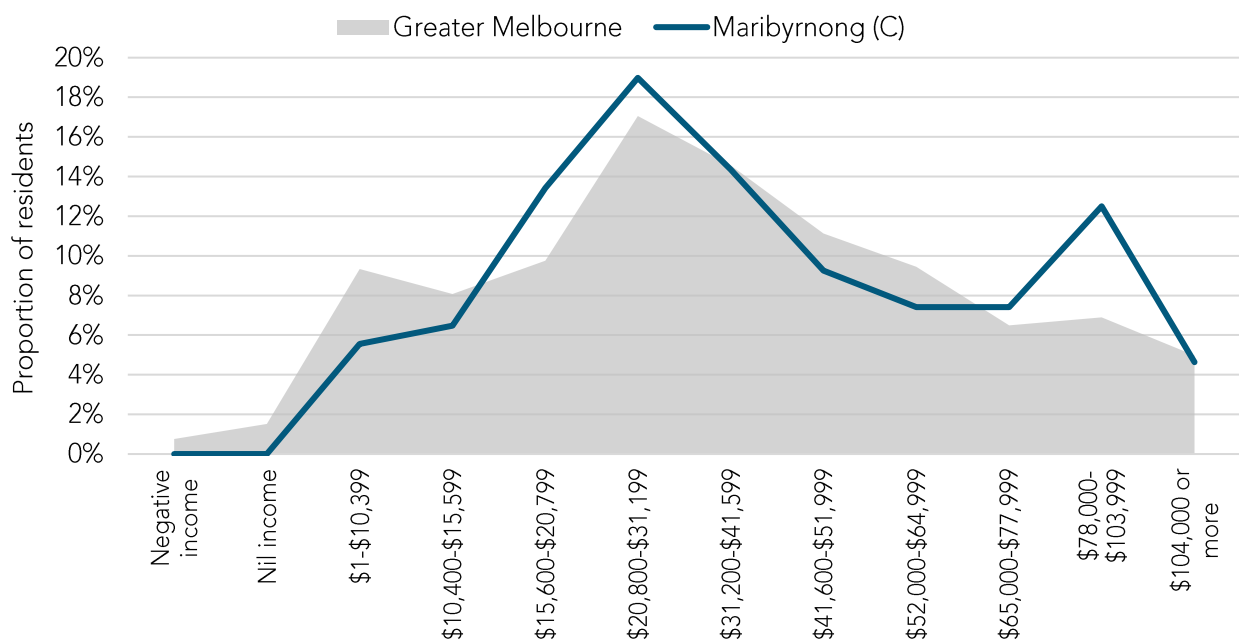


Figure 6: Income Profile of Artists and Media Professionals, Maribyrnong, 2011  
Source: ABS 2011 Census

While a large proportion of people in this subsector work and reside in Maribyrnong (38%), a substantial number commute

elsewhere in the City, particularly to Melbourne CBD, Port Philip and even Geelong (Figure 7).



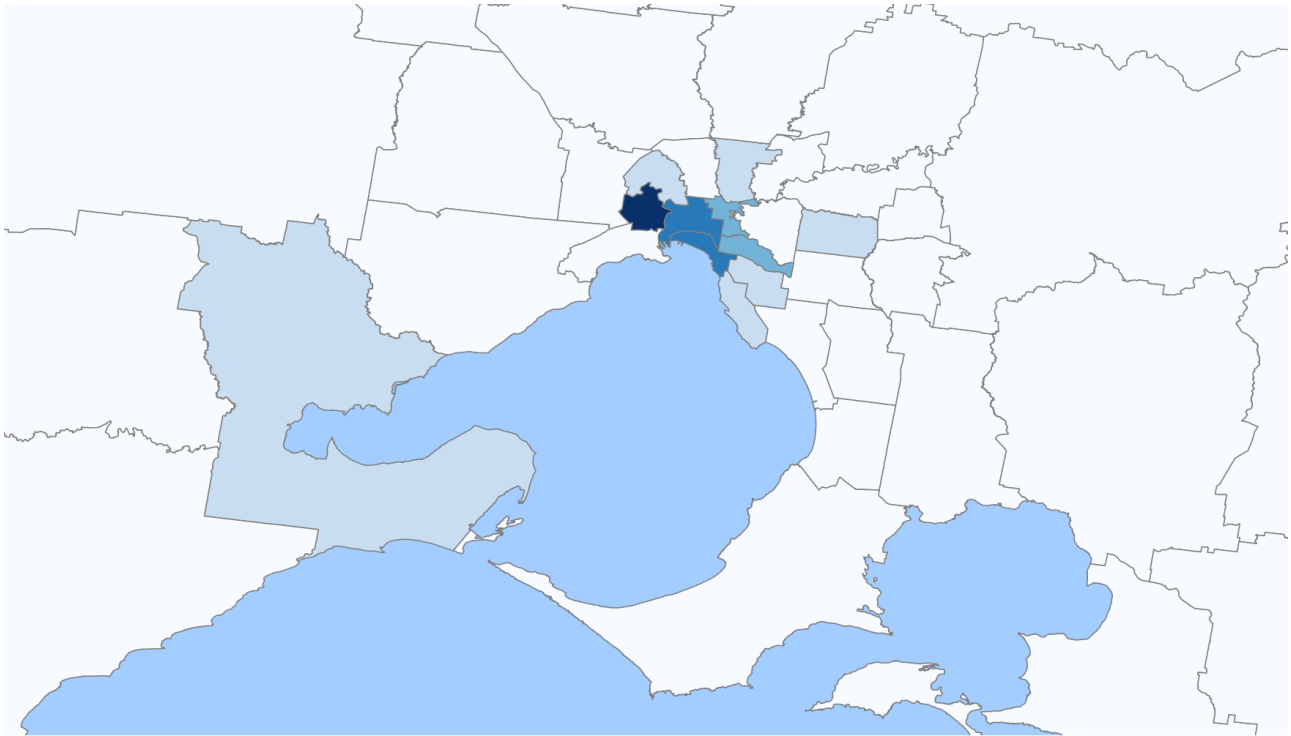


Figure 7: *Maribyrnong Artist and Media Professional Profile Place of Work, 2011*  
Source: ABS 2011 Census

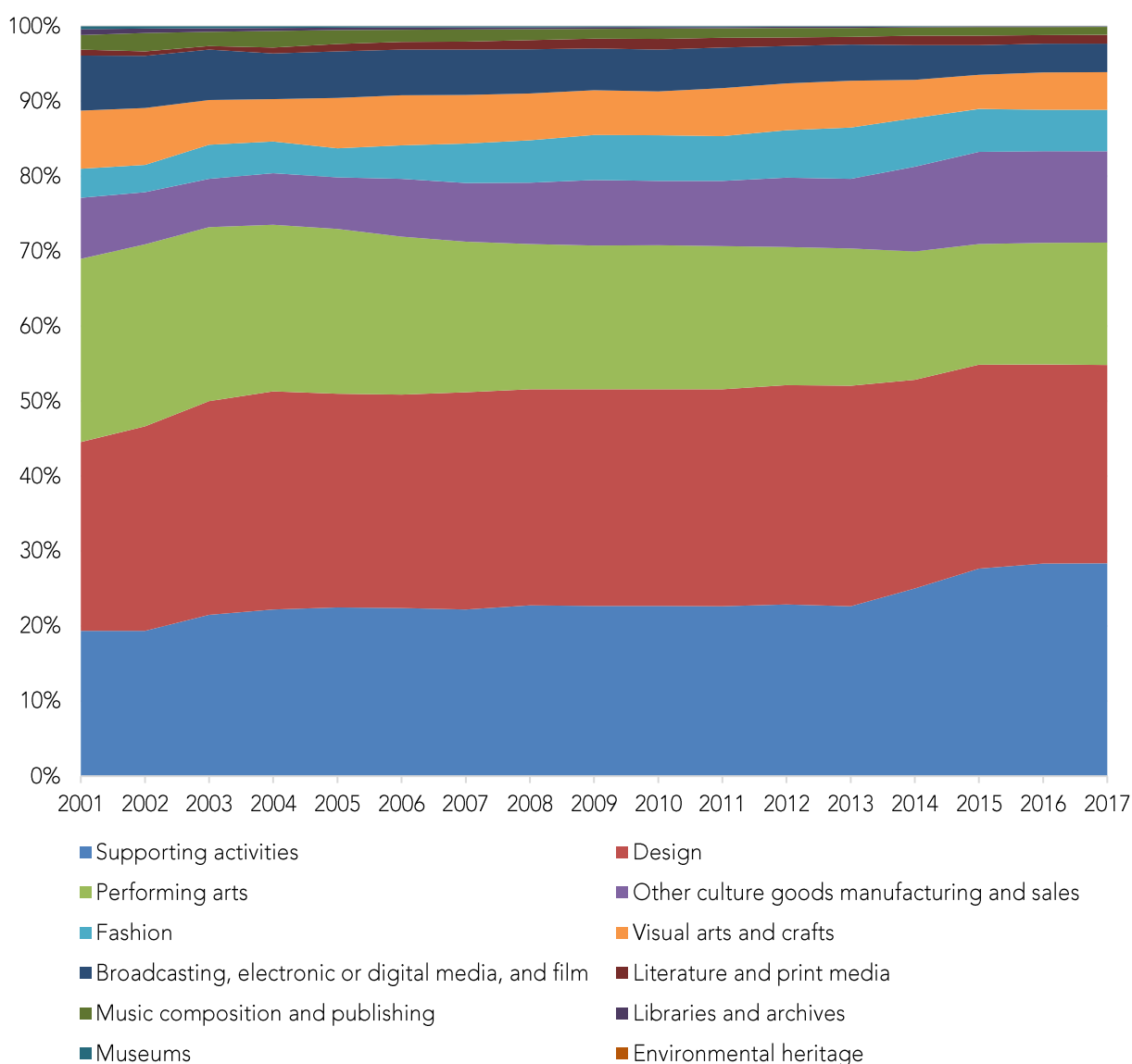
## 2.4 Arts and creative businesses

Figure 8 (on the next page) depicts the changing composition of Arts and Creative businesses by type over the period 2001-2016.

Some features of the larger subsectors:

- Design (the largest subsector by number of businesses in 2016) has retained a consistent presence over the period;
- Although the second largest by share of businesses, Performing Arts has declined; and
- Support Activities and Fashion have emerged as the second and third largest subsectors by business count.





**Figure 8: Arts and Creative Subsector (proportion of total businesses)**

This plots proportion of businesses by subsector over time. Source: Australian Business Register, 2016

## 2.5 Almost \$300m in GRP

The Arts and Creative sector generates at least \$298 million in Gross Regional Product (GRP) in Maribyrnong. This is made up of \$182.8 million in direct and \$116 million in flow-on effects.

This means Arts and Creative sector workers add around 5.4% of value to the economy, making it the 7<sup>th</sup> largest industry by GRP in the City.

Figure 9 shows the breakdown of GRP contribution by subsector, comparing this with the national composition.

### *High productivity sectors*

Figure 10 compares the contribution to employment and to GRP for each subsector. By this measure, Fashion and Design are particularly high productivity sectors.



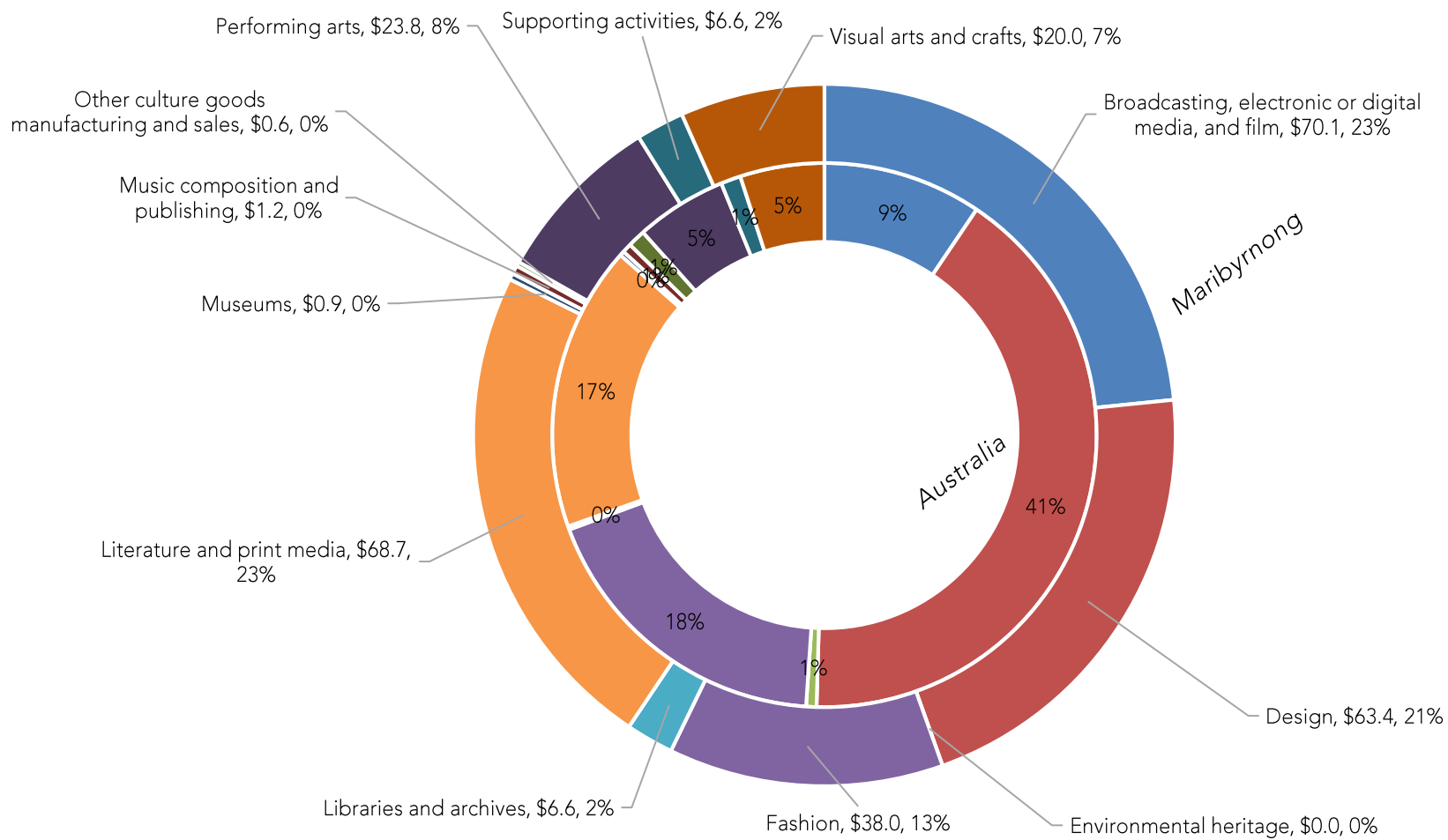
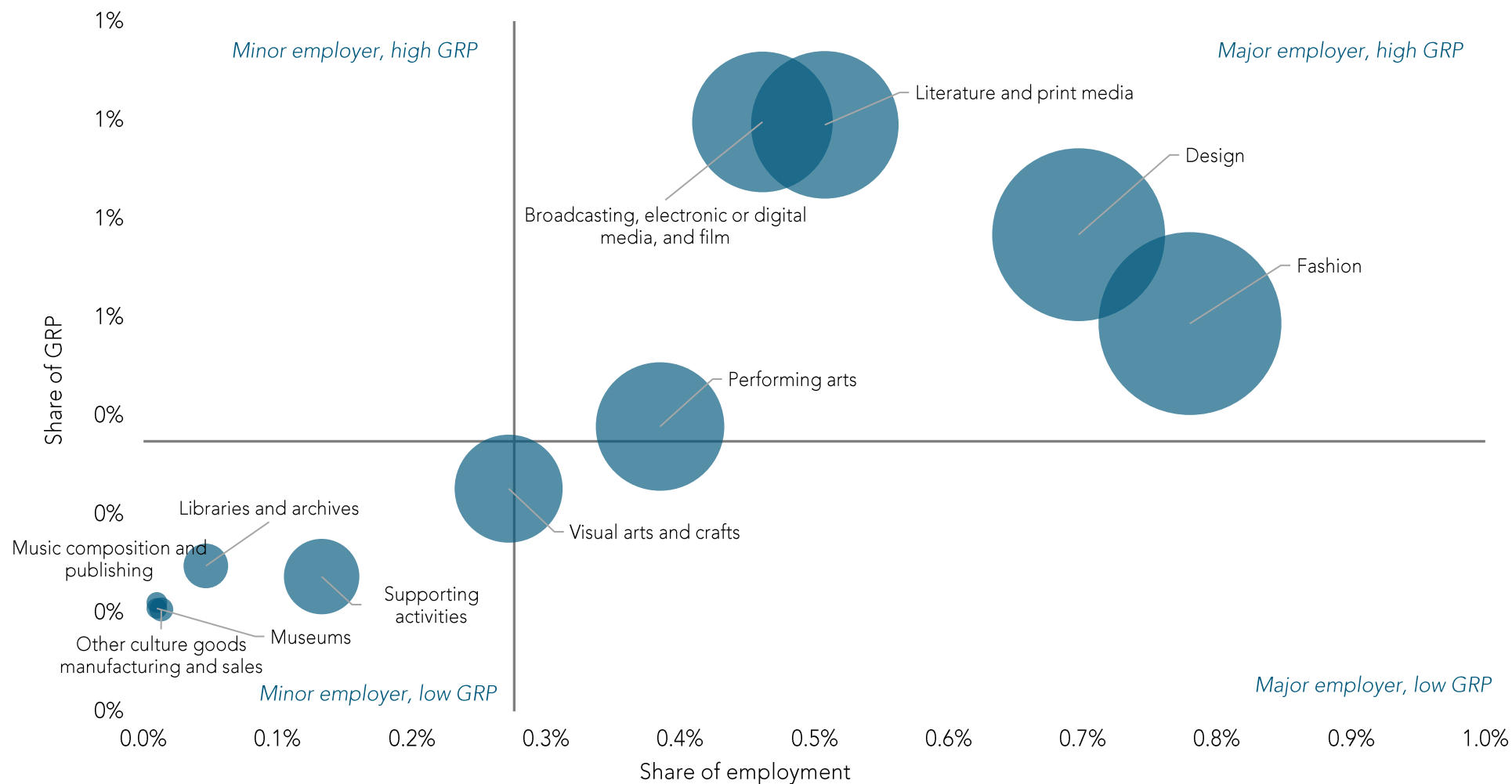


Figure 9: Arts and Creative Sector GRP by Subsector (\$m, 2015)

Source: ABS 2011 Census and Australian National Accounts 5271 ABS (2008-09), ABS 2011 Place of Work Census, escalated to 2015 using Economy.ID (2016) Place of Work data





**Figure 10: Arts and Creative Subsector Employment & GRP Comparison**

The quadrants in Figure 10 are plotted at the average values for Maribyrnong. Bubble size represents total employment. Upper left quadrants are high productivity sectors and lower right, are low productivity sectors. Source: Geografia 2017



# 2.6 Council contribution

The Council contribution to the Arts and Creative sector is through three main channels:

1. The provision/ownership and/or management of venues (specifically, the Footscray Community Arts Centre, Living Museum of the West and Big Fish).
2. The operation of various arts initiatives, grants, festival and events.
3. The operation of libraries and community centres.

Total expenditure stimulated by Council investment is \$2.15 million. This conservative estimate does not include induced visitor expenditure by Council-supported festival and events, and induced organisation expenditure by independent entities financially supported by Council.

As Table 1 shows, the Council’s activities and investments generate direct and flow-on jobs (around 18) and GRP (\$1.61 million).

That is to say, for every \$1 spent by Council, at least 75 cents are recouped through flow-on expenditure in other industries in Maribyrnong.

Table 1: Impact of Council Contribution, Maribyrnong

	Economic Value	FTE Job Impact
Direct Economic Impact	\$0.85m	12 jobs
Indirect Economic Impact	\$0.75m	6 jobs
<b>Total Economic Impact</b>	<b>\$1.61m</b>	<b>18 jobs</b>

Source: Geografia, 2017

than, the benefits outlined above. However, without significant primary data collection, they cannot be quantified. They include:

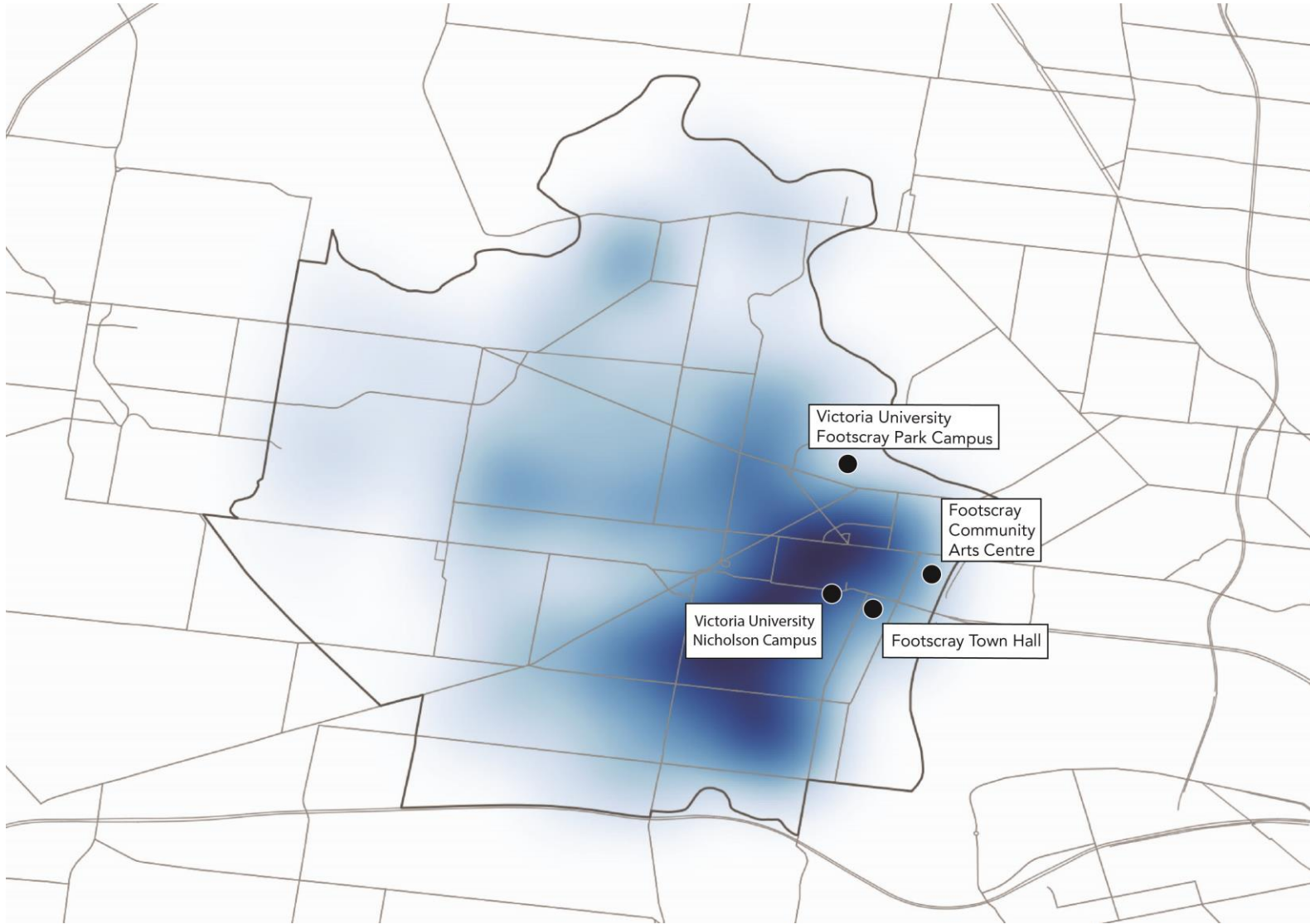
- **Supporting entrepreneurialism and job creation** through providing and marking spaces for locally made products. Braybrook Local initiative is a successful example. It supports personal professional and creative development through sale of artisanal made products and services.
- The **urban revitalisation** of streetscapes, including creative adaptation of heritage or industrial buildings. In turn, this raises the profile and attractiveness of Maribyrnong as a place to visit and live, which improves the capacity to attract and retain a skilled labour pool from which local businesses can draw and visitor who patronise shops and cafés (and not just during events).
- The **economic benefits of health and wellbeing improvements** accruing from participation in artistic and cultural activities.
- **Job transition and retraining benefits** of people who need to transition from declining industries and may do this through arts spaces, business incubators and, most notably, home-based businesses. As Figure 11 shows, while a lot of arts and creative enterprise clustering is around the key facilities, there are clusters in predominantly residential areas.

# 2.7 Other economic benefits

There are several other economic benefits that are likely to be as large as, if not larger







*Figure 11: Arts and Creative Business Clustering, Maribyrnong, 2016*  
Source: Geografia, 2017; ABR 2017



## 3.0 Social Benefits

The social benefits of the Arts and Creative sector are extensive, ranging from the health benefits of increased participation and inclusion, to community pride and skills development. The social returns are visible from a community level, through to families and individuals. Stakeholder discussions highlighted the arts and creative activities that generate (or have the potential to generate), the biggest social returns for Maribyrnong's diverse resident base.

### 3.1 Social benefits flow beyond Maribyrnong

The social benefits of the Arts and Creative sector extend beyond the direct effects of participation in events or activities by visitors and residents and the physical improvements we see (and enjoy) as the creative industries repurpose our ageing building stock. They include:

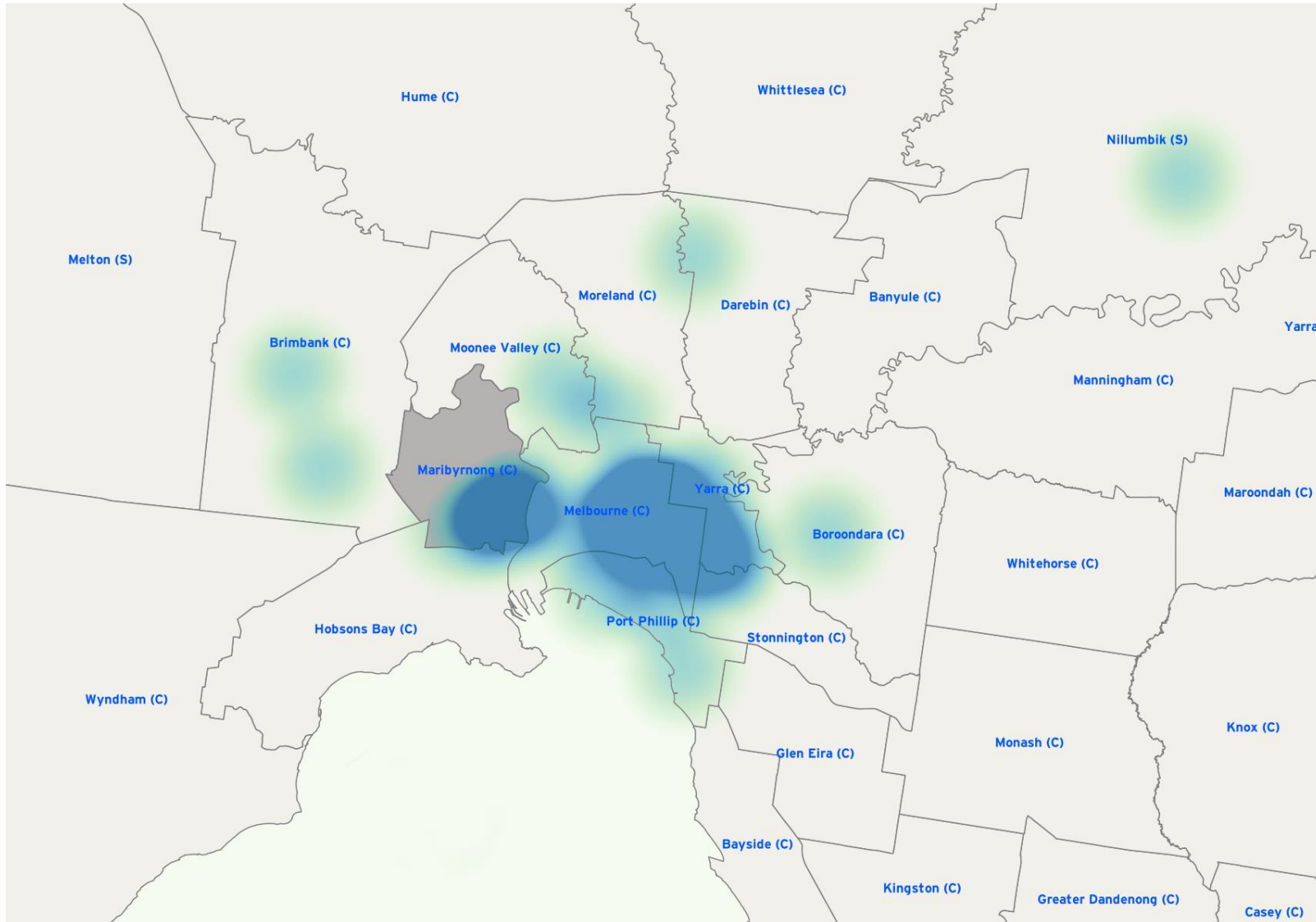
- An affirmation of individual and community identity;
- A means to provide social inclusion and improved mental wellbeing, particularly important for at-risk groups;
- Improved perceptions of safety and neighbourhood pride and revitalisation;
- Reduced anti-social behaviour and crime; and
- The existence value of the sector (i.e. the satisfaction of knowing you live in a community with an animated environment).

As with the economic benefits, these benefits do not stop at the municipal boundary, they extend beyond as neighbours travel to Maribyrnong for events and other cultural and creative experiences.

Although it is difficult to measure this, we can use social media data to identify the minimum geographical range of place of residence of visitors to Maribyrnong events.

Figure 12 uses Twitter data to map the place of residence of visitors (who use social media) to Maribyrnong arts and cultural events between August 2016 and February 2017. As it is not a comprehensive documentation of *all visitors*, it can be interpreted as a minimum extent. There are particularly strong concentrations of visitors from the cities of Melbourne, Port Phillip, Yarra and Stonnington: all areas with a high proportion of festival attendees.





*Figure 12: Place of Residence of Maribyrnong Festival Attendees*

This uses using Twitter data from August 2016-February 2017 to plot the inferred place of residence for festival attendees. Source: Geografia, 2017



## 3.2 What works best?

In documenting the social benefits, stakeholders were invited to participate in exercises to, amongst other things, identify the aspects of Maribyrnong's Arts and Creative sector which are currently (or potentially) delivering the greatest social benefits to the City. A summary of the key findings is provided in **Error! Reference source not found..**

The 'optimum' arts and creative activities share some common traits:

- They are largely organised rather than spontaneous or individually driven;
- They are designed not only to appeal as entertainment to a broad cross-section of the community, but to send messages of acceptance and recognition beyond the municipal boundaries; and
- Enhancing Maribyrnong's reputation as a diverse, open and accepting community came through as a key objective.

**Table 2: Summary of Stakeholder Engagement**

	Social returns
StreetWORKS!	<ul style="list-style-type: none"> <li>• Actively engages a broad cross section of the community</li> <li>• Increased pride and perception of safety</li> <li>• Provides artistic identity to disenfranchised</li> <li>• Community feel sense of shared commitment</li> </ul>
Wominjeka Festival	<ul style="list-style-type: none"> <li>• National recognition as festival of significance means increased pride and sense of belonging for ATSI people</li> <li>• Acceptance through education of other parts of community – that art is important to everyone's culture</li> <li>• Community and artistic pride</li> </ul>
Made in Braybrook	<ul style="list-style-type: none"> <li>• Connects people and values their endeavour</li> <li>• Direct income provides confidence and sense of achievement</li> <li>• Increased skills, pride and esteem</li> </ul>
Footscray Community Arts Centre	<ul style="list-style-type: none"> <li>• Open space for everyone is inclusive and broad reaching</li> <li>• Empowers individuals to push themselves</li> <li>• A flagship to expand local talent and ideas to other organisations</li> </ul>
Footscray Precinct Redevelopment	<ul style="list-style-type: none"> <li>• Increased learning through integration and collaboration</li> </ul>
Lunar New Year	<ul style="list-style-type: none"> <li>• Better connections between Council and community</li> <li>• Social cohesion through breaking down barriers</li> </ul>
Public Art	<ul style="list-style-type: none"> <li>• Can address issues such as gender inequality</li> <li>• Reclaims safe spaces for the public domain</li> </ul>



### 3.3 Reaching out to at-risk or excluded communities

The Arts and Creative sector can bridge the gap for residents at-risk of isolation and social exclusion. This is important in places like Maribyrnong, where many long-term, now ageing residents may feel 'crowded out' by new residents and young families as well as the business/services that cater to the needs.

The sector (and especially arts) also plays an important role in improving social inclusion for **Indigenous Australians** and **refugees**.

#### *The importance of civic associations*

Arts and cultural associations can increase the probability that these at-risk groups will participate in a range of local activities. In the workshop for this study, several examples of this were cited, including:

- Historical societies for the **elderly**;
- Music events and festivals featuring **artists** and **refugees**; and
- Cultural festivals that appeal to multiple **generations of ethnic minorities**.

Arts and cultural events and organisations also assist with the integration of asylum seekers. Social and grassroots activities, supported by larger programs (such as Refugee Week), directly mitigate personal and community trauma experienced by refugees and asylum seekers.

Stakeholder engagement revealed how curation of their artwork provides often disenfranchised parts of the artistic community with a real artistic identity.

### *Social cohesion in multicultural Maribyrnong*

More than one third of Maribyrnong's residents are from a non-English speaking background. The role of Arts and the Creative sector in bringing these groups together is critical.

Events and open spaces (particularly Footscray Community Arts Centre) allow for broad participation from all parts of the community and open up more possibilities for different groups to interact with one another. This improves social cohesion and can reduce the ghettoization of Maribyrnong's communities.

### 3.4 Revitalising neighbourhood, and cultural pride

The most obvious physical manifestation of the social benefits of the Arts and Creative sector is in the revitalisation of neighbourhoods and retail strips as the latent energy of different cultural groups is activated. As streetscapes become more active and attractive, residents and visitors 'visually consume' this, directly benefiting from the experience and contributing to greater civic and cultural pride.

These places and activities create opportunities for improving both intergenerational and intercultural mixing.

#### *The value of events*

Maribyrnong is replete with events that are an important platform for social development. There is the well-known Indigenous Wominjeka Festival. The Festival improves the sense of belonging for ATSI peoples, especially as it has national recognition as a festival of significance.



Outside of this, there are also many Vietnamese and African civic groups that organise festivals such as the Quang Minh Tet Festival, the Albanian Festival, the Ethiopian New Year Festival and the Lantern Festival.

Made in Braybrook is an opportunity for showcasing locally products made, connecting people and improving community pride.

### 3.5 Reducing anti-social behaviour and promoting the perception of safety

The inverse correlation between arts and creative activities and anti-social behaviour is widely researched (and acknowledged), the assumption being that these activities provide an avenue for self-expression and a greater level of exposure to community and role models<sup>4</sup>. Consequently, there are many programs designed to leverage from this.

For example, StreetWORKS! reduces incidents of graffiti and, more generally, street art helps to revitalise of derelict spaces and, subsequently, increase perceptions of safety. As the perception, and reality, of safety improves, Maribyrnong becomes a more desirable place to visit and live.

### 3.6 Job opportunities and self-fulfilment for the individual

As well as community group benefits, arts and creative activities (particularly grass roots activities) also provide avenues for fulfilling individual aspirations, helping to improve self-esteem and self-confidence, overall

strengthening of sense of identify and individual self-actualisation<sup>5</sup>.

In addition, this engagement can often include an income stream for the participant. While most of this type of benefit goes to professional artists, there are examples of non-professional participants benefiting (and, increasingly, platforms in which they can do this, such as Etsy).

Made in Braybrook is a particularly good example of a local program that allows people with talent to present (and sell) it to public.

### 3.7 The value that comes from knowing it's there

Many residents may never directly participate in arts and creative activities. However, they are still likely to place an existence value on it<sup>6</sup>. This is the utility derived from simply knowing a resource exists. It is often applied to natural and environmental resources, but is also equally applicable to arts and creative activities.

Obviously, this existence value soon flows-on into the more tangible value as the municipality gains and retains its reputation as an interesting place to live, work and visit.

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<sup>4</sup> National Cultural Forum, 2010.

<sup>5</sup> Third Sector Research Centre, 2011

<sup>6</sup> A 2008 survey conducted by (the then) Arts Victoria found that 95% of Victorians positively support the existence value of arts.



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## 5.0 Appendix 1 Economic and Social Research Method

### Estimating the economic value of arts and creative industries

To estimate GRP and employment, we used an Input Output model methodology, applying ABS 2011 Census data, escalated to 2015, using the City's ANZSIC 1 Digit Place of Work data hosted on its economy ID profile.

### Estimating the economic value of Council's and Victoria University Contribution

Council's contribution is specifically defined as the value of expenditure on arts and creative activities including:

- The savings in rent for delivery of peppercorn leases to independent art and cultural venues;
- Grants to artists and arts initiatives; and
- Council organised and supported festival and events.

### Social research method

Consultation and social research with the City of Maribyrnong's key staff members were the primary means for collecting qualitative data about the impact of the creative and arts activities in the municipality. The specific activities that informed the social impact assessment included a two-hour structured workshop with 11 participants. The group discussed the profile of arts consumers and constituents likely to be affected by arts and creative activities; outlined the social benefits from existing arts activities; and the potential drawbacks from a hypothetical loss of arts activities.

